



OAKWOOD

Outlook

News from Oakwood Lutheran Senior Ministries

FALL 2020





Compassion

Oakwood's staff care deeply about the people they serve and the people that they work with on a daily basis. Residents develop strong friendships quickly and this community of caring individuals pull together through partnerships, volunteerism and charity to help one another.



People Thrive Here



OAKWOOD Outlook

News from Oakwood Lutheran Senior Ministries

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Prairie Ridge Campus Celebrates 20 Years!

2000

After years of planning, Oakwood Village East celebrates the opening of its first building, Pioneer Prairie. Oakwood Village East was created in part to meet the needs of Oakwood's supporting congregations on Madison's east side and eastern Dane County, whose members were not interested in moving to the west side of Madison.

The site was located on an 18-acre parcel of farmland near the new American Family Insurance headquarters, and was selected because of the anticipated growth of Madison and Sun Prairie.



2008

The Oakwood Village East Health and Rehabilitation Center opens. The 42-bed skilled nursing facility completes the continuum of care on the campus.



2001

In September, Oakwood Village East celebrates the opening of Settlers Ridge, the Community Center, Oakwood Seasons assisted living (40 suites), Oakwood Knoll memory care (20 suites), and the Tree of Life Chapel. Construction on a planned skilled nursing facility was put on hold due to economic turmoil stemming from 9/11.



2006

Oakwood Seasons is converted from a 40-bed assisted living program to a 20-suite assisted living program, and Oakwood Meadows (20 suites) was created to serve as an "advanced" assisted living program for seniors with higher care needs.

This past August marked the 20th anniversary of the opening of Oakwood Village Prairie Ridge. We thank residents—both the “pioneers” and all who have called Prairie Ridge “home” since—as well as our staff, for making Prairie Ridge a wonderful place to live and work.

Like the neighborhood around it, the campus has continued to grow and evolve over the past 20 years. Here are just a few of many noteworthy campus milestones:

Photo credit: Peter McCullough



2017

Construction begins on a redevelopment of the Prairie Ridge campus, including 71 new apartment homes, 33 new assisted living apartments, and an updated Community Center. The projects position the campus to better serve the next generation of Oakwood residents by adding a campus bistro, expanding and upgrading the Tree of Life Chapel, improving fitness opportunities, and adding a resident classroom.



2020

The Rise assisted living opens, offering one-bedroom assisted living apartments at Oakwood for the first time.

2011

Oakwood renames Oakwood Village West “Oakwood Village University Woods,” and Oakwood Village East “Oakwood Village Prairie Ridge.” The change in campus names allows Oakwood to differentiate and market its two campuses on the basis of their features and personality, instead of focusing simply on their physical locations.



OAKWOOD
— 70 YEARS OF —
SERVING MADISON

2018

Oakwood celebrates 70 years of service.

2019

The Grasslands, 71 apartment homes located in three five-story towers above heated underground parking, opens. The majority of new residents join the community over the course of the summer.

PEACE OF MIND IN ASSISTED LIVING

Overcoming Reluctance Provides Big Benefits

“There were a lot of reasons I didn’t want to move to assisted living,” shares Betty St. John. She had lived in her apartment home since Prairie Ridge opened in 2000 before moving to assisted living earlier this year.

“I didn’t like the idea of not having a kitchen. I didn’t want to give up a lot of my furniture. Mostly, the thought of it was just overwhelming. I didn’t want to deal with it.”

But slowly, Betty began to recognize that staying in her apartment wasn’t best for her. She grew tired of scheduling help in her apartment—or relying upon her kids to do it. Betty knew her family would feel better if she was in a more supportive setting.

“By the time I did what I felt like I needed to do, I didn’t have the energy to do anything else,” shares Betty. “Meals were becoming a big problem for me. After I finished preparing a meal, I was too tired to eat it. Once I ate, I was too tired to clean up. The dining room was a long walk. It was discouraging.”

One of the most common reasons people choose Oakwood is that it offers one of the few true “continuum of care” — apartments, assisted living, memory care, and rehab — in the Madison area.

Residents appreciate the peace of mind that comes with priority access to additional services. They’ve done their homework and positioned themselves for the future should they need health care services. Many consider a move to Oakwood a gift to their children, who worry less about mom or dad knowing support is available if it is needed.

So why, then, are so many residents reluctant to make a move to assisted living when it becomes apparent they could benefit from more help?

Barbara Lawton, whose mother Helen Smith moved to Tabor Oaks assisted living on the University Woods campus earlier this year, says her mom expressed serious reservations about making a move.

“I had observed that she struggled to get clothes out of the washing machine, and she clearly was unsteady and unsafe when changing clothes,” explains Barbara. “Managing food for meals and medicine seemed to be overwhelming. With the help of the pharmacy, we could quickly react to the latter, but we had to recognize it would take more help to be sure she ate well. And as that was becoming clear to her children and we worked to find help for her, her physician made it clear that a few hours a day weren’t going to be adequate to make her safe.”



“My family is relieved. They don’t have to worry about me. I’ve enjoyed my move and I think it’s been a gift to them.”

– BETTY ST. JOHN



“For us, the move meant Mother’s daily life now was freed of the tension of trying to manage meeting her basic needs.”

– BARBARA LAWTON

“It’s about companionship. It’s about knowing that someone is there to help, if you need it. It’s about peace of mind.”

– SHERRI JO ST. JOHN

And how did her mom feel about a transition to assisted living?

“At first she refused to consider the idea.....even at 95, it made her feel old.”

From Overwhelmed to Relieved

As health issues begin to limit residents' ability to enjoy opportunities previously available to them, the interaction and services offered in assisted living or memory care can open up a new world. Residents often benefit from being a part of an assisted living community, as opposed to hiring individuals to provide support for them in their apartment home.

“We could tell that mom was getting lonely. She was not leaving her apartment as much and not visiting with others like she had in the past,” explains Betty's daughter Sherri Jo St. John. “We knew she wasn't eating well, but when we asked her about it she said she just 'didn't feel like eating' or 'wasn't hungry.' That just created a downward spiral and she started calling for more and more help.”

Since moving to assisted living early this year, “mom is more relaxed and can enjoy more things” says Betty's daughter, Sherri Jo St. John. “She seems to have gotten some purpose back in her life and socializes more.”

“For us, the move meant Mother's daily life was now freed of the tension of trying to manage meeting her basic needs,” shares Barbara. “She no longer feels inadequate and under pressure to accomplish things that had become too much. Now she has time to read and engage in extensive correspondence, to reach out to friends old and new. The move eliminated the guilt and frustration inherent in coping with the rhythm of aging.”

Peace of Mind for You and Your Family

Staff availability around-the-clock, assistance with dressing and bathing, medication management, and meals are just a few of the basic services that come in the assisted living setting. Each resident, as well as their family, tends to appreciate different aspects of staff support, depending upon their needs and concerns.

“Oh, for sure knowing that there is someone watching her, or being available at a moment's notice to help her in any way that she needs,” responds Sherri Jo, when asked what she believes is the biggest benefit of her mother's move to assisted living. “I know it has been an adjustment for her to ask for help, but I think we have finally convinced her that the staff is there for her and they want to know what's happening so they can help.”

“Having meals cooked for her has also been very helpful,” explains Sherri Jo. “I know that she is eating better and that makes her feel better. If she skips a meal, I know the staff will still make sure she eats something, and there is always something around to snack on. I am also much more comfortable knowing she is getting help bathing. She used to do it all by herself and I was always uneasy about that. I feel better knowing she is being watched so she does not fall.”

According to Sherri Jo, while the family certainly wanted Betty to move to assisted living, they did not want to make this decision for her.

“It was so very important that this decision was hers. We had input, but it was ultimately up to her. We are very fortunate that mom can still make her



own decisions. Yes, we help and monitor or 'suggest', but ultimately she rules.”

At the end of the day, “I know that all family members are much more relaxed because mom is being looked after and cared for so well,” says Sherri Jo.

Barbara cites a number of reasons why she appreciates her mother living at Tabor Oaks.

“Having help should you need it, reliable delivery of meds and meals, help with showers and getting dressed, laundry handled — just being as safe as possible, in the hands of a well-trained and led staff, and having her health status regularly monitored,” are all reassuring to Barbara and her family.

“We also arranged for the very reasonably-priced service of a daily session with a personal trainer at Oakwood, guaranteeing a longer one-on-one time with someone entirely focused on her, but also ensuring physical strength as much as possible.”

“Mother had the great foresight to have 5 children to tend to her in her dotage,” explains Barbara. “But even with that crew, there wasn’t one of us that had the capacity to provide her a truly safe place to live when

she needed more care. Her move means our visits and calls are focused on remembering together, laughing and storytelling, catching up — and not dominated by quizzing her about her needs or driven by concerns we feel helpless to address well.”

Overcoming “Sticker Shock”

While the cost of assisted living and memory care can initially cause sticker shock, there comes a point when a move to assisted living or memory care helps preserve resources as well. It is cost-effective to hire services in your apartment home to a point but, as hours and services increase, the financial and health benefits of a move to a higher level of care becomes more clear; particularly at Oakwood where all meals and services are included in the daily rate. Cost savings become especially apparent if the resident has a long term care insurance policy – taking advantage of this policy can save residents thousands of dollars each year.

Barbara indicated that cost was one of the reasons her mother objected to moving to assisted living, even after it seemed apparent it would be beneficial.

“Her move means our visits and calls are focused on remembering together, laughing and storytelling, catching up — and not dominated by quizzing her about her needs or driven by concerns we feel helpless to address well.”

– BARBARA LAWTON

“She was worried that it was expensive and she would spend down her savings before she died,” shares Barbara. “When I did the math and showed her what it would cost to hire someone on an hourly basis to provide as much care as the doctor wanted her to have, she saw that this was a reasonable move to make.”

It’s About Quality of Life

A conversation with someone who has just moved to an apartment home at Oakwood often leads them to revealing two common truths; acknowledgement that they probably put off a move to Oakwood too long because they felt they were “not ready,” and then the realization, “I wish I would have done this sooner.”

A similar scenario tends to play out when it comes to a move to assisted living.

“Don’t wait,” advises Sherri Jo to those who are struggling with living independently. “You can still be involved at Oakwood when living in assisted living. Assisted living should be about quality of life! Any service you need is available for you to use or take advantage of. Staff is there to help you. It’s about

companionship. It’s about knowing that someone is there to help, if you need it. It’s about peace of mind.”

“Just do it, now,” agrees Barbara. “The doctor pushed us — even in some sense shamed us — into recognizing the dangers mom faced daily while living on her own. We made arrangements to see available rooms in Tabor the following day, and Mother was moved in within 10 days. A sense of profound relief and peace await you.”

And what about advice from Betty, who had to make the adjustment from her apartment home to assisted living?

“At a certain point, you might just have to rely on someone else for help,” she explains. “Don’t wait too long. You’ve got more life in you if you just get a bit of help and some care. I’m less anxious and less worried now. My family is relieved. They don’t have to worry about me. I’ve enjoyed my move and I think it’s been a gift to them.” 🌱

Meet Oakwood's Social Work Team

Providing Resources and Support to Oakwood's Residents and Their Families

Oakwood is proud to serve residents in many different ways. One department that isn't always as visible as others, but serves as an invaluable resource for residents throughout Oakwood, is the Social Services department. With three social workers on each campus, the professionals are accessible to residents and families for support and in times of change. Members of their team serve all care levels of the two campuses.

"We want people to know we're really here to be a resource for them," shares Carrie Beggan, Director of Social Services at University Woods.

When residents are trying to navigate and understand the intricacies of Medicare, Medicaid, home health, or advance directives, the social services team is onsite to help. Residents and families exploring the Health and Wellness services provided in Oakwood's apartment homes can work with a social worker to understand what their options are.

In assisted living, memory care, and skilled nursing, social workers are a key part of residents' health care team. They are involved in care conferences, and are a primary point of contact for families as they check in on their loved one.

In non-COVID times, support groups are a valuable

way that social workers serve residents. Parkinson's support groups, as well as Alzheimer's/Dementia Caregiver support groups are popular on both campuses.

"I just didn't see myself doing anything other than a kind of helping profession," shares Carrie. "Oakwood has been a great place for me to help others."

A recent change to how the department is structured ensures apartment home social workers follow apartment home residents if they have a short-term rehabilitation stay in one of Oakwood's skilled nursing facilities.

"That change, for consistency and continuity of care, is for the residents' benefit. It's nice for them to continue seeing that familiar face," says Carrie. 🌱

*"Oakwood has been
a great place for me
to help others."*

– CARRIE BEGGAN

*Director of Social Services,
University Woods*



“We are all taking extra steps to make someone feel comfortable in their temporary or long-term new setting.”

PRAIRIE RIDGE

RENAE PINGEL, MSW, Social Services Manager

Employed at Oakwood: 6 years

What do you like about working at Oakwood?

I love the senior population – I love to hear their stories, where they have been, their life experiences...but most of all I want to help them to thrive the best way they possibly can. I want residents and families to know there are people who value them and their life experiences and to know that, as social workers, our number one priority is to be their advocate.

How do you help Oakwood residents and their families?

I am an advocate for them. I provide resources and alternative living options, as needed, and I am here to help them navigate the short-term rehab experience. I help residents in all areas of the Oakwood community learn how to take advantage of all the resources the community has to offer, so that they can best be served in the place they call home.

How has your role changed during COVID times?

Residents, and often their families, need more support and assistance navigating their “temporary new normal.” It takes more time and energy for all involved; staff, residents and families. We are all taking extra steps to make someone feel comfortable in their temporary or long-term new setting. Because of this, my daily role has another layer added to it. Taking care of myself and the overall mental health of the residents I serve is top priority at this time.



*“I love making a difference
in someone’s life.”*

KIMBERLY FISKE, MSW, CAPSW, Independent Living Social Worker
Employed at Oakwood: 16 months

What advantages do residents have as part of the continuum?

Residents have peace of mind by being part of a continuum. If the need for a higher level of care arises, they don’t have far to move.

What do you like about working with seniors?

I enjoy hearing resident’s stories and their history. I have heard some fascinating stories since working here. I also love making a difference in someone’s life. The residents here are so appreciative of our time and assistance.

How has your role changed during COVID times?

With visitor restrictions in place, I have been helping provide the emotional support that residents need during this time. I’ve been reaching out to do one-on-one visits with residents who are feeling alone or isolated. Keeping residents safe by educating and reminding them about wearing masks and social distancing has also become an important task.



“We were once able to sit face-to-face to discuss concerns, and now we communicate on the phone or via electronic meeting platforms.”

JESSICA JAKAB-MATHYS, CSW, Health and Rehab Center Social Worker
Employed at Oakwood: 1 year

How do you help patients and families?

I help patients with their transition to the Health and Rehabilitation Center (HRC) for short-term rehab following a medical change in condition. During a patient’s stay, I arrange care conferences and discharge planning meetings with the patient and their family, along with the HRC interdisciplinary team.

I assist in the coordination of care following the rehab stay, with services such as skilled home health services and the acquisition of durable medical equipment. I also assist patients and their families with navigating resources in the community, such as Lifeline and Meals on Wheels.

How has your role changed during COVID times?

The way we communicate with families has changed. We were once able to sit face-to-face to discuss concerns, and now we communicate on the phone or via electronic meeting platforms.

What advantages do residents have as part of a continuum?

Being part of a continuum of care is beneficial for residents that may be coming to the HRC for rehab, but might have already been thinking about making a living arrangement change for safety and well-being. While in rehab, we are able to coordinate meetings with other departments so residents can receive the information they need regarding other levels of care to decide if it’s the right time for them to receive more support.



*“I enjoy coming in
and working with great
people every day.”*

UNIVERSITY WOODS

CARRIE BEGGAN, MSW, APSW, Director of Social Services

Employed at Oakwood: 9 years

What do you like about working at Oakwood?

The residents! I also really enjoy the team here. I enjoy coming in and working with great people every day.

What advantages do residents have as part of the continuum?

There are so many advantages. One I see is when couples have different needs – they can visit and be together, it isn't a strain or stress on the caregiving partner, and they are able to enjoy their time together.

How has your role changed during COVID times?

We don't go into suites or apartment homes as much as we did before. I'm doing a lot more one-on-ones, counseling and supporting residents due to visitor restrictions. I help coordinate visits via Zoom, and try to help with email and phone conversations.



“I am so thankful I am able to be on campus for residents during these difficult times.”

MEGAN BOLLIG, MSW, Independent Living Social Worker

Employed at Oakwood: 2 years

How do you help Oakwood residents and their families?

My main role is supporting and providing resources to residents and their families through every part of their journey here. One of my main responsibilities is educating residents and families about the Oakwood continuum and assisting with transitions to higher levels of care, as well as helping navigate difficult conversations and decisions.

What advantages do residents have as part of the continuum?

Residents have the reassurance of knowing that no matter what stage of life they are in, Oakwood will be there to support them.

How has your role changed during COVID times?

I am so thankful I am able to be on campus for residents during these difficult times. COVID-19 has changed my role in many ways, but the most significant change is how I have become a key connection between residents and their families, and being there for residents when their families cannot physically be present. I help with coordination of family Zoom calls, telehealth visits and so much more.



“I enjoy being able to hear stories and experiences from residents’ lives.”

MARIE VAN BEEK, CSW, Assisted Living and Memory Care Social Worker
Employed at Oakwood: 1.5 years

What do you like about working at Oakwood?

I enjoy being able to hear stories and experiences from residents’ lives and working with our team to support residents.

What advantage(s) do you see residents having by being a part of the continuum?

Advantages include the familiarity and knowledge that the many Oakwood team members bring to the table. Many have worked in different levels of care throughout the years and have worked with residents through various transitions in their care. We can provide support and resources through our teams of resident assistants, nurses and social workers, and work together to provide the best possible care throughout the continuum.

How has your role changed during COVID times?

Everyone’s roles have changed. I’ve been more involved with the move process, and have been communicating even more with families. I have been working with our team to help residents remain connected with their families over the phone or video chat due to visiting restrictions.

THE OAKWOOD PHARMACY

Customized Support at the Ready

The Oakwood Pharmacy proudly serves residents and employees on both campuses.

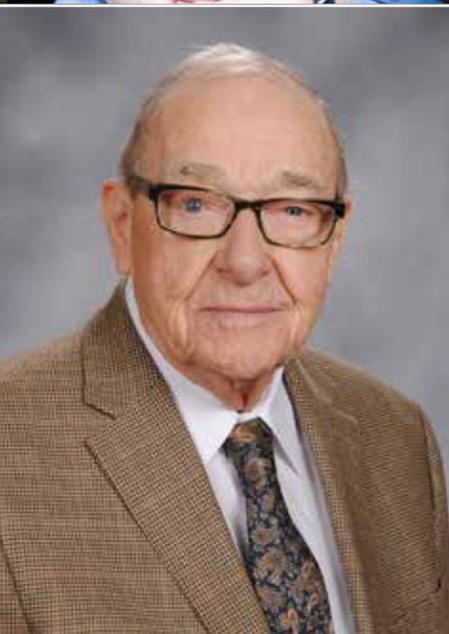
Below, two residents share their experience with the pharmacy.



DAVID BOHLMAN Prairie Ridge resident since 2010

I have been an Oakwood resident and an Oakwood Pharmacy customer for 10 years. I switched to the Oakwood Pharmacy when I moved because of the convenience and the free delivery option. These conveniences are why I'm still a customer today, and I appreciate that they're ready with advice if I have questions.

A few years ago, I developed a bad cough that wouldn't go away. My doctor called in a rush prescription that day, but it was after the pharmacy's normal operating hours. The pharmacy had it on-hand, filled the prescription and had a courier bring it out to me the same night. It gives me peace of mind knowing that they will deliver in the evening or in special circumstances, if needed.



JAMES HOSKINS University Woods resident since 2002

I've been using the Oakwood Pharmacy since I moved in. After hearing about its advantages it was a no-brainer. With call-in prescription requests, same-day delivery at no cost, and competitive pricing, the decision was easy. Of huge value to me are the prescription reviews that are available at my request. My experience has just been excellent.

The flu shot program is top-notch. I receive a two-page analysis of what's available and their recommendations for other vaccines. It is well-explained in terms that we can all understand and empowers us to make informed decisions about our own health care. With the Oakwood Pharmacy, I feel like I am part of a family with great support.

If you are an Oakwood resident or staff member, you should be taking advantage of the convenience and knowledge that comes with using the Oakwood Pharmacy! Transferring your prescriptions is easy.

Call (608) 230-4217 or email pharmacy@oakwoodvillage.net to learn more.



ADVENTUROUS LIFE

Leads to an Active Retirement



“I just love doing this,” says Wally Brinkmann with a beaming smile, “I hope to be doing it for a long time.” The 83-year old Prairie Ridge resident is masterfully making her way across the water atop her paddleboard.

Born in Berlin, Waltraud “Wally” Brinkmann has lived an adventure-filled life. Her adventures began when she was flown to a children’s camp for undernourished children in 1948.

“They had doctors and nurses going through the schools, examining every child and giving them a number between one and five, with one being overweight, and five being very thin. I was given a four,” she says. Her mother was contacted and asked if it would be okay for her to go to the children’s camp in West Germany.



“I had always wanted to move into a place like this while I was still able to enjoy it. I told myself ‘the time is now.’”

“My mother said sure, and I always loved to travel; actually, I spent a lot of time away from my parents when I was young.”

When the Berlin Blockade was over, they started to fly all the children back to their homes. Wally was one of 20 children who were deemed not to have gained enough weight, so, instead of flying back to Berlin, she and the others were flown to another camp. By the time she returned home, she’d been gone for about a year.

Finding Opportunity

Because of the effects of the war, there wasn’t much opportunity in Berlin. Wally’s family had relatives on her mother’s side in Canada, so she decided she would go to live with them for a while and improve her English. She’d had about eight years of English in

school, but, as she describes it, it was more translating than conversational.

“It was clear by the 1950s, that English was going to be the dominant language, and my opportunity to do something with my life would be improved by knowing English,” she says.

Her initial plan was to be in Canada for a few years, improve her English, and then return to Europe. Once in Canada, her first job was at a hunting and fishing camp in the Dryden area of Ontario, where her aunt was a cook.

“We were on an island, and a lot of people came from Chicago. I learned to work with Native Americans as the guides,” says Wally.

From there, she made her way to Saskatoon, Saskatchewan, where she had more relatives. She became the accountant for a convenience store there.

Next up, she went to Calgary where she got a job more or less because of a case of mistaken identity. She applied to be an accountant in another branch of the convenience store she worked at in Saskatoon, and “from my name, they assumed I was a man. They had done the background check and even spoke with my landlady, and it never came up that I was a woman,” Wally shares with a laugh. “So, I get to the interview and they see I’m a woman. They had done too much work at that point, so I got the job.”

Continuing Education

A few years later, she became interested in attending university. At that time, universities often didn’t recognize degrees from foreign countries, so she would have to repeat grade 12 in order to apply. Not deterred by this, she says of the experience, “I thought

‘well, it’s a bit of a pain, but at the same time, it will help improve my English.’”

After completing grade 12, she got into the University of Calgary, where she developed an interest in geography. In her climatology course, she was invited by her professor to collaborate on a research project on the Chinook wind in the Rocky Mountains.

Her work on this project led to her Master’s thesis. While pursuing her Master’s in Climatology, Wally received a scholarship from the University of Colorado at Boulder, where she continued studying wind patterns.

Wally received her Ph.D. at Boulder, and was offered a job at the University of Wisconsin-Madison. “I was teaching in my field, physical environment, with an emphasis on climatology, climate change, and global warming.” Her research was on the effect of climate change variations on the water levels of the Great Lakes.

An Active Retirement

At the University of Wisconsin, she eventually became chair of her department, and was the first woman in the department. After nearly 30 years there, she retired.

“As retirement was nearing, I thought, what am I going to do with my time?” recalls Wally. She decided she wanted to do something new so she took classes at Madison College, and eventually joined Madison Bead Society and also bought a sewing machine.

“I really like the creativity of jewelry-making and sewing. I like putting colors together – I never realized how important that was for me.”

Following retirement she also joined the Sierra Club, the Audubon Society, and was on the board of

organizations related to the outdoors. In other words, she didn’t take retirement as an opportunity to slow down.

While living in Canada, Wally became a Canadian citizen, and had been working in the United States on a green card.

“I realized that because I don’t have any relatives here, eventually I would move into a senior community like Oakwood. And if I was in the position of having someone care for me, I wouldn’t be able to renew my Canadian passport and I would become an illegal alien. So, I decided I might as well become a US citizen.”

So, in her late 70s, Wally finally became a United States citizen.

Citizenship inspired her to become more involved in local politics, and she joined the League of Women Voters of Wisconsin (analyzing bills and speaking at legislative hearings) and joined the League of Women Voters of Dane County (observing county committee meetings and helped start a local group at Oakwood).

Thriving at Oakwood

Knowing a place like Oakwood was in her future, Wally conducted a survey of Madison-area communities. Deciding Prairie Ridge was where she wanted to be, she applied to be on the waiting list about 10 years ago.

When Prairie Ridge was starting its redevelopment in 2017, Wally received an invitation to learn about the plans for the campus.

“I had always wanted to move into a place like this while I was still able to enjoy it. I told myself ‘the time is now.’”

After poring over the information and floorplans, she knew exactly which apartment she wanted. When she got her call to see if she wanted to reserve an apartment in the new buildings, she was delighted to be able to reserve the specific apartment she had her eyes on.

“It’s everything I ever wanted! There’s nothing I don’t have – I mean it’s absolutely fabulous,” Wally says of her top floor apartment. “I still sometimes wake up and say, ‘this must be a dream’ – and I’ve been here for over a year!”

Most of Wally’s creative energy is now spent in her “sewing room” where she is surrounded by four sewing machines. She even has a line of women’s tops that are sold in Door County and at shows in the Madison area.

The pandemic this year inspired Wally and other Prairie Ridge residents to make face masks. A group of about 30 women worked together to create almost 500 masks using donated fabric. The masks were available to residents and employees (before employees were required to wear surgical masks).

Her work with the various organizations she is involved with, in addition to her creative pursuits, is more than enough to keep the average retiree busy. But it’s not enough for Wally. She travels to Mexico and Hawaii every winter and, about six years ago, she observed someone paddleboarding while in Hawaii.

“I thought it would be a great physical challenge, so I went and rented a board. The first hour I was in the water about five times, much to the amusement of the people near me,” she says. “I fell in love with it, and I now have two paddleboards – one regular one and one inflatable one.” She has also been kayaking for 25 years and owns her own kayak, as well.

“As retirement was nearing, I thought, what am I going to do with my time?”

She is committed to staying active and keeping her body strong. In addition to her watersports, Wally enjoys biking, walking, running and strength training.

“On days when the weather isn’t good, I run from the basement up the staircase to the fifth floor. I have a suspension trainer and do pushups using the handrail.”

Wally demonstrated strong drive and determination to overcome barriers she came upon in her personal and professional life, and it would seem those same qualities are helping her defy conventional ideas about aging. When asked if there’s anything she can’t do, she modestly responds with a smile, “I have good genes, I think.” 🌱

BOARD MEMBER PROFILE

Jon Enslin

When Jon Enslin was born in Milwaukee in 1938, doctors said he wouldn't survive. Nothing could have been farther from the truth. Despite his prognosis, not only did he survive, but he thrived in his life of service and ministry.

Growing up in Wauwatosa, Jon studied at the Wisconsin Conservatory of Music while in high school. He was planning to become a concert pianist, when he suddenly felt a call to become a minister. As Jon says, "that changed everything."

During his studies at Northwestern Theological Seminary in Minneapolis, Jon had an opportunity to intern at an historic church in St. Thomas, Virgin Islands. He describes his educational experience there as powerful and meaningful, in large part due to the Virgin Islands' long history of slavery.

"Most members of the church were Black," Jon says, "And that was a wonderful experience for a kid from Wauwatosa where my relationships with African Americans just involved riding the bus in Milwaukee back and forth to the conservatory."

It was in St. Thomas that Jon met Cris, his wife of 56 years, who was there for a Lutheran work camp.

After seminary, Jon began a mission congregation in Waukesha, Wisconsin. While at his last parish, St. Stephen's in Monona, the bishop of the South-Central Wisconsin Synod of the Evangelical Lutheran Church in America (ELCA) asked him to become his assistant.

Jon was later elected bishop, and served for ten years.

Following that leadership role, he became interim head of the ELCA Department for Ecumenical Affairs in Chicago, while continuing to live in the Madison area.

"That was spectacular experience at an exciting and vital time. We accomplished a lot of wonderful things. It was a terrific capstone to my ministry."

In his retirement, Jon served as a part-time chaplain on the Oakwood Village University Woods campus. He and Cris moved to University Woods five years ago.

For the past two years, he has served on the University Woods Apartments Board of Directors. He also volunteers as a board member of the Oakwood Chamber Players Board, and a member of the University Woods Financial Advisory Committee.

"We have very positive feelings about Oakwood and are glad we are here. The staff is so caring, and we love our apartment home and the care and support you find here. One thing somewhat unique to Oakwood is that it is locally-owned and supported by a number of congregations who see this as a ministry. They care about what happens here. It's not managed by some for-profit group in another state far away. Local ownership is a major plus," Jon says.

After he suffered a stroke several years ago, Jon recuperated at Hebron Oaks. Again, he credits the competence of the staff.



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“Oakwood is very well managed. Our CEO, Reg Hislop, is very concerned about fiscal responsibility. I feel good about where we are and where we are going.”

When he’s not focused on Oakwood, Jon loves to connect with his two sons and their families. He spends time at the family cabin in northern Wisconsin, and does the things he never had time to do pre-retirement.

“I love to read. When I was a bishop, reading everything I was supposed to read made me a busy person. Now I get to read all sorts of things I never had time to read.”

At age 82, Jon says when he looks at the life he has, it is unbelievably wonderful.

“If you had laid this out for me as little kid, I couldn’t imagine coming close to the kinds of experiences I have had. I have been truly blessed in my life.” 🍀

STAFF PROFILE

Reg Hislop, Ph.D.

Get to Know Oakwood's Chief Executive Officer

We continue our Q & A with Oakwood's new CEO Reginald "Reg" Hislop, III to understand a bit more about his vision and priorities for Oakwood, and to get to know him personally and professionally.

What were your first impressions of Oakwood?

From the years I spent in Wisconsin heading a similar organization, I knew Oakwood and had been on the University Woods campus many times. I knew (former Chief Executive Officer) Peter Viviani from many trade association functions. I was impressed by the Prairie Ridge campus and how it had grown. University Woods didn't look too much different than I remember. Overall, I was very impressed by the friendliness, openness and warmth of the residents and staff. I was welcomed as if I were a member of a large family that had been gone for quite a while. It was reassuring and comforting.

As you're closing in on your first year with Oakwood, what are you most proud of?

How the organization responded to the pandemic. No one could be prepared for such an event and, in fact, we weren't as well-prepared initially as one would like. That said, the team rallied, gathered resources, focused on residents, safety, care, and supporting each other. We had cases invade us early on but we stayed

focused, delivered great care, helped the majority of our cases recover and ultimately, by late May, we were COVID-free among our residents. Moreover, the virus never spread across or between campuses. Where other organizations saw large-scale outbreaks and unfortunately, concomitant deaths, we did not. That's a real tribute to the quality of the men and women, up and down the ranks, who work for Oakwood.

What are your priorities for Oakwood in 2021?

Wow...too many to list. A few stick out though. Continued strengthening of our operating platform (revenue v. expense) and, thus, stronger operational and financial performance.

Developing a quality improvement culture and pushing the same to our resident care functions such that we improve our quality of care as measured by survey results and quality measures. We have room for improvement here.

Concretizing a plan to address the need to replace Hebron and invest in our infrastructure (systems, mechanicals, grounds, roads, parking, etc.). This will lead us into a longer-look/horizon plan on what to do with the Tower and Tabor Oaks (one needs to come down and ultimately, maybe both...though with Tabor replacement is warranted).



*“I lead like I parent.
My role models were
my father and grandfather.
I guess it’s an internal
compass that
emphasizes coaching
first, accountability
and, always,
unconditional love.”*

– REG HISLOP, PH.D.
Chief Executive Officer

Improving census, particularly at our skilled nursing and assisted living programs at both locations.

Re-imagining and improving food service and dining/catering services across the organization.

What is your approach to leadership?

My kids would call it “Dad”. I lead like I parent. My role models were my father and grandfather. I guess it’s an internal compass that emphasizes coaching first, accountability and, always, unconditional love. I try to be genuine, to care about the folks I work with, to be honest, to have high expectations, to treat failure with forgiveness and to have fun along the way.

Had you been to Madison prior to working for Oakwood?

Many, many times....My cousins went to school at the UW so I spent many weekends in my younger days in Madison. I use to ice fish Lake Mendota (in pursuit of the perch runs). I have many friends in the area.

Are you married? How did you meet your spouse?

I am – my wife is Diane. We celebrated 20 years this summer. We met at work – she worked for me in Milwaukee. We both were single and I guess, together a lot at work. We kind of got along, started to date a little then a lot and then, she said “yes” when I asked

her to marry me (after I got permission from her dad). She was the VP of Resident Care Services at the time.

Diane is a nurse. Today she is considered one of the foremost clinical, forensic and compliance experts in post-acute care in the country. She is a consultant and works with nursing homes, home health companies, hospices, assisted livings, etc., across the country on achieving better clinical outcomes and staying compliant with local and federal regulations. She is also a sought-after expert witness in litigation cases, working exclusively on the defense side in cases of alleged wrongful death or patient harm/neglect. She is a published author (soon, three books) and a frequent national speaker. All told, Diane has 35 plus years of experience as a nurse, nurse executive and consultant.

Do you have children? If so, how many, and where do they live?

Two – both adopted: Cortney and Lucas. Cortney is married and lives with her husband in Greenfield, WI. She is a nurse and serves in the Air Force Reserves. When base-duty calls, she is at Truax so we get to see her frequently. Her husband is a pilot by vocation and a former Air Force electronic warfare expert (drones). They met in the Air Force.

Lucas remains in Wichita, Kansas. He worked for me at my company there. He works in environmental services. Lucas is single. Cort is the older of the two. As of yet, we have no grandchildren.

What TV show/book are you into right now?

I don't watch a lot of TV and when I do, it's usually sports or news. We do like Blue Bloods but aren't committed to it.

For books, I don't read or enjoy fiction – much. I enjoyed reading Harry Potter with the kids, though. My books of choice are historical, biographical or

autobiographical reads. Right now I am reading “Three Days in Moscow” by Brett Baer. The book is about the Reagan/Gorbachev Moscow Summit in 1988. This event is considered the seminal event that led to the end of the Cold War. I remember this time well as I was in my late twenties, mid-way in my doctoral studies. Prior to this book, I recently finished, “On Desperate Ground” which chronicles the Korean War battle at Chosin Reservoir.

What is your favorite place you've ever traveled to?

There's been a bunch. Most inspiring was the Continental Divide. I was there hunting and sat on a rock ridge and watched a series of thunderstorms to our south that ultimately produced 4 rainbows (simultaneous). I fly-fished in the Tongue River canyon in Wyoming and had a female cougar walking the rim on the other side of the canyon, pacing us as we moved along the opposite side in search of cutthroat trout. I loved Gettysburg for its sheer historical significance and reverence. I love Boston for its history (and seafood). I guess today, our favorite is our home in Galena.

What is something people might not know about you?

In 1979, I was drafted by the Minnesota Twins and ended up playing minor league ball in their organization and, subsequently, the Chicago White Sox organization. I played in the Midwest League or as we used to call it, the “dirt circuit” (lots of Iowa and Illinois farm town venues). Only one small detail kept me from getting to the big league level – TALENT. Thank God I listened to my dad and stayed in school!

What was the best part of your summer?

My wife and I bought a new home in Galena, IL. We've had a vacation home there since 2012 and stumbled upon a former Parade of Homes model that, frankly, Diane fell in love with. It's an open-concept ranch, exposed partially on the lower level. It even has a built-in wine cellar in the lower level family room area so I couldn't say "no".

How are Mac and Cheese adjusting to their new home?

Cats are very adaptable and these guys, even more so. Since they joined our family, we have had 6 places where they have lived, either part or full-time. Food, toys, sunbeams and cat treats are all they need.

Do you have any special traditions for the holidays?

Family stuff and, always, an assortment of friends join us. I cook and the meals are very traditional. Thanksgiving is turkey (though I smoke mine) with all the usual trimmings. We usually cut down a Christmas tree with the kids and do "Black Friday (small town version)" in Galena the day after.

My brother-in-law and a group of very close friends and I pheasant hunt the day before Christmas Eve. We have done this for decades now. I'm usually doing last minute shopping on Christmas Eve and then later, its worship time. During Christmas, the day is phone calls and texting with our friends and families all over, interrupted of course by a few gifts to open. Christmas Day dinner is prime rib, twice baked potatoes and veggies (roasted, grilled, etc.). At dinner, our table is open to whomever so we always have "extended" family as part of our celebration. 🌿



DO YOU FOLLOW OAKWOOD VILLAGE ON FACEBOOK?



If not, what are you waiting for? It's a great way to keep up with events, programs, and other news from our two campuses.

Follow us [@OakwoodVillageMadison](#), or go to www.facebook.com/oakwoodvillagemadison and click 'Like'!

Thank You

For Growing Our Oak Legacy Circle!

Oakwood is a better place thanks to the generous support of our donors. One of largest sources of gifts to the Oakwood Foundation is estate gifts, also known as legacy gifts. These vital gifts help the Foundation impact the lives of Oakwood residents.

In 2020, we are asking you to consider joining our Oak Legacy Circle by notifying us you have made a gift to the Oakwood Foundation a part of your estate plan.

Regardless of the size of your legacy gift, you'll help to ensure Oakwood remains a great place for older adults to live and thrive well into the future.

Thanks to the generosity of loyal donors, the Oakwood Foundation will receive a \$1,000 gift for each new member of the Oak Legacy Circle in 2020, up to 20. We've welcomed 11 new members into the circle already this year! Won't you help us reach our goal?

As part of our focus on the Oak Legacy Circle, we asked a few of the people represented on Oakwood Foundation donor walls as members of the Oak Legacy Circle to share their Oakwood story and why they made the choice to support the people of Oakwood with a legacy gift. Here are the stories of three legacy donors.



PEGGY LINDBERG

I learned about Oakwood when I heard of its plan to build Heritage Oaks. I wanted a place with independent living and access to additional care if I needed it. I like how I feel at Oakwood because it has everything a person needs.

I like all the programs. There are so many, from playing cards to programs in the Arts Center.

I give to Oakwood because Oakwood does so much to support us. It's a wonderful organization. I support the work it does here and on the Prairie Ridge campus.

Long term, I feel Oakwood knows where it is going and I think it is the right direction. I put Oakwood in my plans as an investment in the future. I like Oakwood because it is great place to live and meets my expectations. My money is going to a good place, helping the people who live here.



TOM AND CAROL RIVERS

Oakwood has been part of our lives from a very early age. The church where we got married in 1958, St John's Lutheran, was instrumental in the founding of Oakwood Village in 1948. We can vividly recall the people instrumental in Oakwood's early days. Their goal was to take care of aging adults.

We have volunteered through the years in support of that goal. Members of our family, including a granddaughter, chose to work at Oakwood to help deliver a multitude of services for older generations and retirees.

Quite a few years ago, we decided to use Charitable Gift Annuities (CGA) as our legacy gift to Oakwood. It gives us a very favorable and fair rate of return and benefits Oakwood after we've gone. We encourage you to consider a CGA if it is within your financial means and you believe in our mission at Oakwood.



Please consider joining your friends and neighbors as members of the Oak Legacy Circle, and help make a BIG difference at Oakwood for many years to come!

For more information, please contact David Mossner at **(608) 230-4441** or via email at david.mossner@oakwoodvillage.net

MARY MOLSTAD

The opening of Prairie Ridge started to make me think about my own future. I knew some of the first residents and they seemed very happy here. Eventually I took a tour, liked what I saw, and was put on the waiting list. It was several years before I decided to sell my house and move to Oakwood.

I am glad to be living here and enjoy visiting with the many residents who have such interesting stories to tell. I am impressed by their wide array of experiences and accomplishments. Oakwood provides a pleasant, friendly place to live with a caring and helpful staff. I think the continuous care concept is wonderful.

I support Oakwood because of the many wonderful things it does, the home-like atmosphere, the continuous care concept, and the caring and helpful staff in all areas of the campus. Oakwood will be very important in years to come as increasing numbers of people look for good senior housing opportunities.

I chose to give to Oakwood because of the important things it does, like caring for people who run out of money, and because of the friendly, caring and helpful staff in all areas of campus.

The services Oakwood Village provides, like a continuum of care, are a reason its future is important. There will be increasing numbers of people looking for good senior housing opportunities as baby boomers get older and people live longer.

That's the reason I'm including Oakwood in my estate plans. Oakwood has a solid Lutheran church affiliation and a long history of providing good care. I feel they will use my investment wisely. If you are thinking about naming Oakwood as beneficiary of your estate, I encourage you to consider all the good things that Oakwood has to offer, and how your dollars can do the most good.



Honor the Memory of Someone You Care About

At Oakwood, we are here to support one another.

One way you can show your support is to make a memorial gift to the Oakwood Foundation in memory of a spouse, family member, friend, or loved one.

Not only does your gift help Oakwood, but we'll send a note to the family or spouse to let them know a gift was received in memory of their loved one. You are welcome to share your name or remain anonymous, if you prefer.

Gifts of \$1,000 or more are eligible to put their loved one's name on a campus donor recognition wall.

Gifts of any amount are welcome and can be put toward whatever matters most to you — Oakwood's Mission Support Fund, Continuing Care Endowment Fund, or something more specific.

To make a gift in memory of someone you cared about, simply contact Heidi Lauhon at **(608) 230-4285**, heidi.lauhon@oakwoodvillage.net or Dave Mossner at **(608) 230-4441**, dave.mossner@oakwoodvillage.net

Donors Help Oakwood Keep Residents Safe

Responding to an international pandemic was not in the plans for any business when 2020 began. Yet that's exactly what organizations throughout the world have been asked to do this year.

Nowhere was the response more important than at communities like Oakwood, where older adults and those with health conditions qualify as the most vulnerable to the coronavirus. Oakwood acted quickly to keep residents and employees safe, and your donations to the Oakwood Foundation helped.

Following the first most stressful, months of COVID-19 in Wisconsin, Oakwood asked for donor support to acknowledge the additional efforts of our dedicated staff. Donors responded, contributing over \$150,000 in a special employee appreciation campaign. Gifts distributed to employees in June provided a morale boost at a difficult time, and sent a strong message to employees that their extra efforts to keep our community safe are appreciated.

Several donor-funded initiatives intended to provide innovative new life enrichment programs on campus as well as additional training for employees were put on hold due to restrictions on gatherings and large groups. However, donor gifts to designated funds such as the campus general funds and campus life enrichment funds have provided Oakwood staff with the flexibility to make valuable campus enhancements in response to COVID-19.

For example, as Oakwood has needed to prohibit residents from large gatherings on both campuses,

more programs and services are being broadcast into resident apartment homes via Oakwood's in-house television channel. Donor gifts to the University Woods Life Enrichment Fund have allowed Stephanie Burris, University Woods Life Enrichment Director, to purchase new cameras to enhance the resident experience.

"Having the ability to purchase these new cameras for The Arts Center and the chapel will help us make sure residents are able to see and hear programs as clearly as possible while they stay safe in their apartments," explains Stephanie. "Donors who have contributed to the Life Enrichment Fund made this happen. I'm grateful the fund exists for needs like this."

A challenge for both campuses has been the need to staff the main entrance throughout the day, seven days a week, in order to protect our community by screening all employees for possible signs of COVID-19. New technology can automate the screening process, relieving staff of this additional responsibility they've managed since March. Donor gifts to the Prairie Ridge and University Woods General Funds will help bring this technology to Oakwood.

In these unusual times, it's difficult to predict what adjustments Oakwood will need to make in order to continue keeping our campuses safe. The resources and flexibility the Oakwood Foundation offers our community is exactly what make your gifts so valuable at a time like this. 🌱

“Donors who have contributed to the Life Enrichment Fund made this happen. I’m grateful the fund exists for needs like this.”

– STEPHANIE BURRIS

Life Enrichment Director, University Woods







FUN TAKES FLIGHT

If you've driven down Highway 151 on a warm, breezy day in the last year or so, there's a good chance you've seen one of Ed Grys' magnificent kites! The lifelong kite enthusiast found the Prairie Ridge setting a great fit for kiting, "I can just step out the door and fly," he says.

MOBILITY
THRIVE INVIGORATE
MINDFULNESS
WELLNESS
ENRICHING
FLEXIBILITY **STRENGTH**
ACTIVE AGING
AGILITY REJUVENATE
FITNESS GROWTH BALANCE
ENERGY ELEVATING
STABILITY VIBRANCY **VITALITY**
INDEPENDENCE
INSPIRING
THERAPEUTIC LIVELINESS
UPLIFTING EFFERVESCENCE
DYNAMIC **FUN** REVIVE
RESTORATIVE
HEALTH-ENHANCING

“There are so many talented people here”

– ALEX WAGNER

*Physical Wellness Coordinator,
University Woods*



Vital Words

“What comes to mind when you read those words?” was the question posed to University Woods residents by Physical Wellness Coordinator Alex Wagner and Art Therapist Jennifer Bethel this past summer. These words describing active living and wellness were meant to stoke residents’ creativity and, hopefully, inspire them.

In the last few months, Alex has spent a lot of time in the Vitality Fitness Center at University Woods while working with residents. “There’s nothing on the walls in there,” she observed.

This realization gave her an idea, and she reached out to Jennifer for help. Knowing Oakwood is home to a tremendous amount of creative talent, she wanted resident-created artwork to adorn the walls. “We used the newsletter to share a series of words with residents to inspire ideas for artwork that would enhance the fitness center,” Alex says.

At first, she only heard back from a few residents, which was disappointing. But, “as the deadline approached, I started getting emails from residents, and Jennifer started forwarding me a bunch of submissions.”

Many types of media were submitted, including a quilt, photography, sketches and paintings, with more than 20 submissions coming in. The number exceeded Alex’s expectations – she was initially hoping for 8-10.

As of press time, the new artwork has not been hung in Vitality Fitness Center, but Alex is eager to get the pieces up. She’s impressed with the artwork that was submitted.

“The works I’ve seen so far are just amazing. There are so many talented people here.” 🌱



Pastors in the Pandemic

MINISTERING FOR THE TIMES

Challenging times call for innovative solutions. Just ask Chaplain Martha Nack, who leads the Spiritual Life program at Oakwood Village University Woods. Before the COVID-19 pandemic took hold earlier this year, Chaplain Martha had never conducted a Zoom video conference, or recorded

a sermon and uploaded it to YouTube for viewing. But these days, she's well-versed in creative ways of connecting with people during a pandemic.

Chaplain Martha even trained her mini golden doodle puppy, Arthur, to do pastoral visits with her as a way to connect with residents.

*“We're making our way
through this, and it has
pushed me to try
new things.”*

– CHAPLAIN MARTHA NACK



*“Nobody planned for this,
but we don't let it get the
best of us.”*

– CHAPLAIN WAYNE SHANNON

“People tell me they miss their dogs from childhood. They can tell me about the grief they are feeling about the pandemic. It’s a door opener to those conversations.”

– CHAPLAIN MARTHA NACK



“I call it ‘P-Squared’, or ‘Pastor and Pup,’” Martha says. “Therapy dogs haven’t been coming to visit with residents during the pandemic, so this is extremely useful. People tell me they miss their dogs from childhood. They can tell me about the grief they are feeling about the pandemic. It’s a door-opener to those conversations.”

Martha is one of two chaplains who serve the residents and staff of Oakwood Village. While she ministers to residents of University Woods, Chaplain Wayne Shannon dedicates his time to the Prairie Ridge campus. A Spiritual Life Committee on each campus advises the chaplains as they carry out their ministries based on the needs of residents.

On each campus, ecumenical Christian worship services are held on Sundays and midweek. In addition to leading services, chaplains are available to residents for one-on-one discussions, Bible studies, book studies, educational programs, devotions, and other needs.

Chaplains offer support to residents of all faiths and beliefs through special observances, counseling, educational programs, and by providing a place for prayer. Part of their responsibility is to support staff, as well.

When the pandemic hit, many aspects of the spiritual life program had to be reinvented. Worship services took to the airwaves exclusively. Channel



900 is where residents can find Chaplain Wayne and Chaplain Martha until restrictions on in-person services are lifted.

“We’re making our way through this, and it has pushed me to try new things,” Martha says. “I used to do a lot of devotions around campus, but now I do ‘A Minute with Chaplain Martha’ that residents can watch twice a day. It introduces poetry and spirituality that people can tie into their own faith.”

Chaplain Wayne does something similar for Prairie Ridge residents.

“People want to see me more,” he says. “So I do ‘Time with the Chaplain’ on Mondays and Thursdays on channel 900. I read a Psalm or deliver a message of

some kind to bring people comfort. During COVID, you go with the flow. When we were once again allowed to gather socially-distanced in small groups, I resumed two in-person Bible studies, and I’m always available to residents who want to drop into the office or call me.”

Chaplain Wayne reminds us that he and Chaplain Martha are a presence for, and with, residents as their ministry finds new ways to connect with residents and staff during this time.

“Right now, we have to live in what it is. People are experiencing frustration and isolation, and we all want things to go back to the way they were. Nobody planned for this, but we don’t let it get the best of us.” 🍀

YOUR GIFTS HELP US SERVE THOSE IN NEED

The Continuing Care Endowment Fund Provides Oakwood with Critical Support

The impact of the Continuing Care Endowment Fund continues to grow, and plays an important role in Oakwood's ability to provide charitable care.

Thanks to the continued generosity of donors like you, the Oakwood Foundation was able to provide \$600,000 in budget support to Oakwood's operating companies in 2020.

This support helps the organization offset operating losses incurred while continuing to provide care to residents who have outlived their financial resources and no longer have the ability to pay for services.

Your gifts to the Continuing Care Endowment Fund are valuable and deeply appreciated! This year's \$600,000 contribution represents approximately 25% of the charitable care provided by Oakwood annually, but a \$50,000 increase on the support provided by donors last year. With your help, we can continue to provide Oakwood with the financial resources to continue serving those who need it most.

If you are interested in making a gift to the Continuing Care Endowment Fund, please contact David Mossner, at (608) 230-4441 or via email at david.mossner@oakwoodvillage.net

Donor Support of Oakwood Operations through the Continuing Care Endowment Fund*



*Unreimbursed care and services averages \$2.3M annually

A GIFT THAT PAYS YOU

Charitable Gift Annuities

Donors frequently like the idea of supporting Oakwood with a legacy gift, but don't want to disrupt their estate plan. Sometimes donors are interested in making a significant gift, but count on their cash for regular income.

In both situations, a Charitable Gift Annuity (CGA) might be the answer. A CGA may be attractive if you want guaranteed lifetime payments and rely on investment income, but don't plan to use the cash during your lifetime. CGAs are appealing because donors "lock in" an annual payout rate, providing stability and consistent income regardless of changes to the economy.

A CGA is created when a donor makes a gift to a charity like Oakwood, which invests the money and guarantees lifetime payments to the donor. The charity benefits from the balance of the gift after the donor's death. Because donors who create a CGA intend to leave the remainder of the annuity to benefit the charity, they join the Oakwood Foundation's Oak Legacy Circle.

The gift is eligible for a tax deduction the year it's made and only a percentage of the income is taxed when payments begin. The amount of deduction and length of tax-free income is based on the donor's age at time of the gift.

Current CGA Payout Rates

Single Age	Single Payout Rate	Couple Ages	Couple Payout Rate
65	4.2%	65 – 65	3.8%
70	4.7%	70 – 70	4.2%
75	5.4%	75 – 75	4.6%
80	6.5%	80 – 80	5.4%
85	7.6%	85 – 85	6.5%
90	8.6%	90 – 90	8.2%

CGA payout rates are determined by donor's age when gift is made. Rates effective 7/1/2020, as recommended by American Council on Gift Annuities and used by the Oakwood Foundation.

Please contact David Mossner in the Oakwood Foundation to learn how a Charitable Gift Annuity might work for you at **(608) 230-4441** or via email at david.mossner@oakwoodvillage.net

COME OUT TO PLAY

University Woods Adds New Recreation Center for Residents and Families

“It’s an idea I’ve had for years,” shares Dave Bertsch, Director of Facilities and Property Management at University Woods. In thinking about the spaces on campus that were available for resident use, there were not many that aren’t frequently booked for programming. But a building in the corner of the University Woods campus that formerly held the Resale Shop had been serving as an operational storage space for the last few years. “As much as I didn’t want to give up the storage,” Dave says with a smile, “it made sense to give the space back to residents and make it an amenity.”

In 2019, Dave consulted with Life Enrichment Director Stephanie Burris and Vice President of Campus Operations Julie Holden and submitted a proposal to the Oakwood Foundation to convert the ‘warehouse’ into recreational space.

The new Oakwood Recreation Center contains 2,500 square feet of gym floor, two regulation-size pickleball courts, a regulation-size shuffleboard court, half-court basketball, and nets that can be set up to hold volleyball or badminton matches. The space is large enough that multiple games and activities can take place simultaneously.

“Some residents were surprised to hear that we were including half-court basketball in the plans” says Dave. “They didn’t think it was something that residents would use, but there is a resident who has played every single morning since it opened.”

To use the Recreation Center, residents can reserve time slots through the front desk, but can also use it on a ‘walk-in’ basis if it isn’t reserved. Eventually, the vision is that the space will be available for staff to use as well, though there’s no timeline for that as of yet.

In addition to the court space, there is a locker room that stores equipment needed for activities, along with storage for backpacks or other gear. Once visitor restrictions are lifted, Dave sees the space being something that residents and their families can rent out for events and gatherings, so a kitchenette was included in the floor plan as well.

The conversion of the space was funded entirely through a grant from the Foundation, so it is a space made possible by donors.

The reviews are in and the Recreation Center is a hit! Dave shares, “It’s been really great to hear the positive response from residents; they’re so happy to have this new space.” 🌱



*“It made sense to
give the space back to
residents and make
it an amenity.”*

– DAVE BERTSCH

*Director of Facilities and Property
Management, University Woods*

PAUL & CHARLIE TALK SHOP

*Donations to the Oakwood Foundation
Make New Workshop Possible*

University Woods resident Paul Irwin was excited about his move to Oakwood, but not as excited about the woodshop that awaited him on campus.

“When I toured Oakwood, I was shown the workshop, which was located in the Tower, and I didn’t care much for it. It was cramped with too much stuff in it, and a lot of the tools were out of date,” he says.

In planning for his move, he knew this space wouldn’t suffice and he’d have to figure out something else. After doing some research and realizing that renting commercial space wasn’t feasible, he had another idea.

“I made an appointment with Dave Bertsch (Director of Facilities and Property Management), and talked to him about donating my tools to Oakwood.”

Knowing that a workshop is important to many residents, Dave began a search for a suitable space on campus.

A spot within the P1 level of the Heritage Oaks parking garage was identified. It had been used as a ‘Plan Room’ by Facilities Services – a place to keep blueprints and paper plans for the campus buildings. Dave met with the resident Workshop Committee to propose the move, which the committee supported wholeheartedly. Paul and Dave worked with





“I’ve always been interested in workshops and especially woodworking. I had my own home workshop before I came to Oakwood.”

– CHARLIE BUNGE

committee chair, Charlie Bunge, and the Workshop Committee members to make plans for the space.

Thanks to a grant from the Oakwood Foundation, change was underway. Early in 2020, power grids and circuits were installed in the space to ensure it would have enough power for the incoming tools.

Paul’s donation included not just his tools, but a dust collector as well, and new cabinetry and LED lighting was also installed.

“I’ve always been interested in workshops and especially woodworking. I had my own home workshop before I came to Oakwood,” shares Charlie.

The Workshop officially opened at the end of August, and due to current social distancing guidelines, no

more than two residents can be in the space at a time. It is available for use by all residents, though residents new to the Workshop must first go through a brief orientation and sign a waiver to use the space. Once orientation is completed, residents receive a key code for the door on the Workshop.

Though it has only recently opened, the Workshop has already seen quite a bit of use. Charlie and Paul were enlisted to make some wooden chairs for the Nature Preserve. Previously, the only seating in the preserve was wooden benches without arms, which aren’t the most practical for many residents. “We made a total of five chairs and they’ve been very popular,” Charlie says. 🌱



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2019 Donor Acknowledgement

In each spring issue of Oakwood Outlook, we recognize donors from the previous year. The following names were mistakenly omitted from the previous issue of Outlook. We apologize for this oversight and value each and every one of our generous donors.

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