

CEDAR CREST, INC.

A Dynamic Community for Senior Adults

Marion Wozniak, President/CEO

1702 S. River Road

Janesville, WI 53546

Cedar Crest is a spiritually-based, not-for-profit organization that builds and sustains a dynamic community where senior adults at all levels of independence and health may achieve a high quality of life. Established in 1963, Cedar Crest is in partnership with the Wisconsin Conference of United Methodist Church and consists of a 20-member volunteer board of directors that guides its ministry. About 195 full- and part-time employees help fulfill the mission of Cedar Crest. Cedar Crest provides senior adults with physical, social, psychological, and spiritual needs that contribute to their health, independence, happiness, and security.

Nestled on 75 scenic acres of naturally-wooded grounds adjacent to the Rock River, Cedar Crest offers a full range of living accommodations including 81 independent-living apartments with RCAC services available, 18 condominium units, 56 assisted-living suites (Community-Based Residential Facility), which includes a 12-bed memory care residence, and 95 skilled nursing facility beds.

Living in a friendly and supportive environment, residents enjoy the camaraderie of peers who are both their neighbors and fellow members of Cedar Crest's social community. Maintenance-free living, transportation to and from community events as well as personal appointments and shopping, underground parking, restaurant-style dining, and a fully-equipped woodworking shop add to the carefree lifestyle at Cedar Crest.

The beautiful surroundings of Cedar Crest offer outdoor enthusiasts a wonderful variety of options for activity including gardening, and bicycling or walking along the scenic paths adjacent to the river. The Plaza amenities area, covering more than 8,000 square feet, is the ideal location for the wide range of recreational and social opportunities offered to this group of active senior adults. The Plaza includes a multimedia room, wellness center, a country store offering snacks and sundries, activity room for arts and crafts, fitness center, beauty salon, business center, and solarium.

Highlights of 2004 and Plans for 2005

The Cedar Crest community enjoyed another exciting year in 2004. We continue to focus our time and talents on strengthening our financial position, enhancing the quality of resident services, updating our technology, and planning for the future. Staff development continues to be one priority of our community. Therefore, we continue to offer significant leadership and staff development programming designed to increase the quality of resident care and services, lower staff turnover, enhance productivity, and develop a greater sense of community.

Construction was completed on the 24-hour dementia-specific care unit earlier this year. The memory-care residence features 12 individualized, private rooms with private baths and is designed for the exclusive care of persons with Alzheimer's disease or other memory-loss issues. The residence is licensed by the state of Wisconsin as a Community-Based Residential Facility (CBRF). Cedar Crest Memory Care Residence offers thoughtfully planned daily programs and activities that provide socialization and structure, while helping residents feel a sense of independence and value. Residents are encouraged to participate in individual and group programs designed to assist them to reach their full potential.

Later this year, work will begin on the next phase of the master plan, the construction of a new apartment building adjacent to the existing independent living building. When completed, this

project will add 30 two-bedroom, two-bath apartment homes to the Cedar Crest community.

Plans continue for the renovation of existing independent-living apartments including the conversion of numerous smaller units into spacious, updated two-bedroom apartments, along with remodeling and updating of the common areas.

With these renovations underway, Cedar Crest continues its long-term capital improvement assessment, identifying future needs for major maintenance and replacement of existing equipment and buildings. This planning will allow the community to continue to provide for the needs of current and future residents.

EVERGREEN RETIREMENT COMMUNITY

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David A. Green, President/CEO

**Mary Weber, Chair, Evergreen Retirement Community, Inc./Evergreen Foundation, Inc.
Board of Trustees**

Introductory Comments

Evergreen Retirement Community, a Continuing Care Retirement Community (CCRC) located in the Fox Valley, is in its 38th year of operation. This ministry, on behalf of the Wisconsin Conference of the United Methodist Church, is guided by an 18-member volunteer Board of Trustees and staffed by 264 full and part-time employees (205 full-time equivalents). Evergreen has been accredited by the United Methodist Association of Health and Welfare Ministries as an EAGLE (Educational Assessment Guidelines Leading toward Excellence) facility since 1987. Evergreen participated in the self-assessment process during 2002 and received its fourth consecutive EA-GLE accreditation for 2003-2008 on April 25, 2003.

Evergreen offers seven different living options which include 44 cooperative residences; 22 individual homes; 48 studio, one and two bedroom independent apartments; 10 one-bedroom assisted living apartments (Residential Care Apartment Complex - RCAC); 20 congregate assisted living private rooms (Community-Based Residential Facility - CBRF); 20 congregate assisted living private rooms for persons experiencing the symptoms of Alzheimer's disease and related dementia (CBRF); and a 108-resident Medicare certified skilled nursing facility. The average occupancy in 2004 was 272.9 residents or 92 % of capacity.

Total cash and investments at the end of 2004 was \$7,800,000. Of this total, \$187,000 was held by Evergreen Retirement Community and \$7,613,000 by Evergreen Foundation. In addition, Evergreen was the sole beneficiary of the earnings from a trust in the amount of \$1,347,000 (Howard Rowland Trust).

Highlights and Accomplishments in 2004 and Plans for 2005

1. The 2004 Strategic Programs and related accomplishments are as follows:
 - a. Complete construction and move into Creekview South and Creekview Center
 - Construction was completed in July 2004. Creekview South is a 44 resident skilled care facility utilizing the household/neighborhood design originated by Evergreen in Creekview North, a 36 resident demonstration project opened in

1997. Creekview South incorporates many improvements learned from our six years' experience with Creekview North.
- Creekview Center, also opened in July 2004, includes two different temperature therapeutic pools, a group exercise room, an exercise equipment room, a therapy area, and a café.
- b. Integrate Creekview Center into a comprehensive Wellness program
- Programming for the aquatic and fitness facilities allows residents from all living options to benefit from classes that include cardiovascular aerobic class in the pools, Ai-Chi (water based form of Tai-Chi), and balance classes, to name a few. The Oshkosh Senior Center partnered with Evergreen to offer use of the pools to its members.
 - The Arthritis Foundation-sponsored Joints in Motion class has 12 independent resident participants. The focus of the class is range of motion, joint flexibility, and strength development to relieve swelling and stiffness in the joints.
 - The Creekview Café offers opportunities for informal dining and socializing. The Creekview South Neighborhood Place features a fireplace, piano, information center, game area, children's play area, access to a covered patio and a courtyard. Residents use this space for socialization, visitation, and group activities. Display cases in adjacent areas are used by the Oshkosh Public Museum.
 - The Wellness Team continues to work on the development of programs that support the seven dimensions of Wellness: social, spiritual, emotional, vocational, intellectual, physical and environment.
- c. Plan and implement Garden Heights assisted living option:
- Evergreen continued the remodeling of independent apartments, ranch-style homes, and condo-style homes. A fourth assisted living area for persons requiring more assistance was completed in March 2005.
- d. Expand quality initiative by focusing resources on improving efficiency of our core processes
- Three week-long Kaizen rapid improvement project teams identified: 1) billable and non-billable resident care supplies and services, improved the billing process, and established par levels on all units for resident care supplies; 2) proposed new formats for rate sheets to identify Evergreen's amenities and prices; 3) revised and streamlined forms to increase billing accuracy.
 - Operational policies and procedures rewritten with greater clarity to better protect resident rights were categorized through a special computer program.
- e. Expand scope of the Nursing Ambassador Program to increase our ability to recruit and retain qualified professionals:
- A new and improved nurse extern program based on Benner's Model of Learning from Novice to Expert was initiated as the first step in the development of the new internal recruitment program for nurses
- f. Replace existing business and clinical software and implement other technologies to improve organizational efficiencies:
- The new Evergreen automated policy system was the last milestone of a nine-year improvement project
2. The Evergreen Foundation, Inc. received \$516,929 in contributions during 2004. Combined with return on investments, a total of \$450,000 was transferred from the Evergreen Foundation to Evergreen Retirement Community to help meet the Care Assurance need in 2004 which was \$1,150,000. Financial assistance was received by 69 residents (an average daily census of 49) who had insufficient funds to pay the full cost of their care.

3. The Leave a Legacy Guild was reestablished and special recognition given to the 21 members who had informed Evergreen that they had remembered Evergreen in their wills or through other planned gifts. In addition to placing their names on a special plaque, they were honored in October 2004 at the Annual World of Thanks Recognition Event.
4. Evergreen's special 35th Anniversary Appeal, with a goal of \$1.5 million for the Creekview South and Creekview Center projects plus the Care Assurance Fund, ended with a total surpassing \$2 million.
5. Two board members along with two residents and several staff attended the Annual Convention and Exposition of the American Association of Homes and Services for the Aging (AAHSA) in Nashville. All attendees find this national educational meeting beneficial in understanding national trends in long-term care.
6. Evergreen residents hold membership in many local, state, and national, organizations. Some include the Gideons, Mercy Auxiliary, Wisconsin P.E.O. Sisterhood, and Retired Teachers.
7. The "Forever Fit at Evergreen" five-year research project developed by Evergreen staff and UWO faculty to evaluate the impact of exercise and other wellness programs has approximately 30 resident participants to date. Additional resident involvement from all living options is being encouraged.
8. University of Wisconsin Oshkosh College of Business students reviewed Evergreen's organizational systems for compliance with the Malcolm Baldrige National Quality Award criteria as Evergreen prepares to participate in the Wisconsin Forward Award program.
9. Evergreen's annual employee turnover in 2004 was 13.5% compared to 16.4% in 2003. The national average for the nursing home industry is 45%.
10. Staff members received assistance from the Center for Community Partnerships to help design our new web site.
11. Evergreen initiated an intergenerational program that pairs one resident with one or two children from the Davis Child Care Center housed at Evergreen for biweekly activities from January through May.
12. Residents participated in a new Better Balance Class designed to improve leg strength, flexibility, balance, coordination; to increase safety awareness; and to provide fall prevention tips.
13. The Residents Council "Getting-to-Know-Evergreen" Committee makes personal visits to new independent residents to answer their questions about day-to-day activities at Evergreen.
14. The EvTv Productions Committee of the Residents Council acquired a new equipment room to facilitate the production and presentation on the in-house channel of programs for the residents.
15. More than 200 volunteers age 10-15 associated with the national Pathfinders group helped for a week during the summer with various resident activities such as taking residents on walks and assisting with laundry, cleaning and outdoor projects.
16. A new Circle of Service Volunteer Awards program implemented in January tracks volunteer service hours to enable proper recognition of annual and cumulative volunteer time.

17. Evergreen hosted a celebration honoring deceased poet/composer Borghild Jacobson whose husband Harvey is an Evergreen Village resident. The concert was attended by more than 200 guests.
18. Staff and board members from the following facilities were among those who visited Evergreen to gain information about our innovative approaches: Riverview Manor, Wisconsin Rapids, WI; Hebrew Rehabilitation Center for the Aged of Boston; Lutheran Homes of Fond du Lac; Cedar Crest Retirement Living, Janesville, WI; Mohican Nation, Stockbridge Munsee Band; Vetter Health Services, Inc., Omaha, NE.
19. As an expression of appreciation, the third annual "World of Thanks" event brought together donors; volunteers; Board members; Residents Council members; staff celebrating one, five, ten, fifteen, and twenty year service anniversaries; and staff receiving a "Living Continuous Quality Improvement (CQI) at Evergreen" award.

(Report prepared by Carol C. Staszkievicz, Community Resources Director)

HARBOR HOUSE CRISIS SHELTER

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A homeless shelter for single women and families.

Harbor House Crisis Shelter's mission is to provide safe, hospitable shelter for single women and families with legal custody of minor children. The shelter continues to be the only one of its kind in Douglas County. HHCS continues to be blessed and to be a blessing to those we serve.

HHCS has been able to provide shelter for 187 persons. Since opening in January 2001, we have served 525 persons.

Some Highlights from 2004 are:

- We acquired grant monies to increase our staff. Our staff is an Executive Director, Case Worker/Volunteer Coordinator, Case Worker/Asst. Grant Writer, a House Manager and an Assistant Volunteer.
- We have been blessed with receiving numerous large and small grants. These grants pay for staffing, supplies, operational and programming expenses. We continue to strive for ways to improve the program for guests through expansion and revision.
- All bills have been paid in full for 2004.
- We have attended fairs/events to publicize HHCS. We have participated in the Mariner Mall Housing Fair; United Way Kick-off; Week of Caring; Wisconsin Annual Conference; Women's Expo at the DECC; a quarterly display at the Mariner Mall; and various other community events.
- We have been blessed by having work teams help at the Shelter. The work teams completed many projects: building shelving units for garage (16), organizing garage, finish painting projects (ceilings and kitchen cabinets), sorted all donations, and landscaping.

- Began Case Work Program based on the University of Wisconsin's Extension Office's "Rent Smart."
- Every person who is a guest at the shelter receives a Contemporary English Version of the Bible. We distribute adult and children's versions.
- We hosted an Appreciation Banquet to honor our hardworking and dedicated volunteers.
- Worked with various community organizations to advocate for the homeless and impoverished regarding housing, food and health care issues.
- We joined the Health and Welfare Committee of the Wisconsin Conference of The United Methodist Church. HHCS designed and received approval to be a covenant partner with the Wisconsin Conference of The United Methodist Church at Annual Conference. We will begin to receive apportionment funds in 2005, and have already received Golden Cross funds for 2004.
- HHCS became a covenant ministry with all the Twin Port United Methodist Church.

HHCS has grown a tremendous amount in 2004 through our staff and programs. The need for a safe, hospitable shelter for single women and families continues to be a hurdle for our community. In 2004, HHCS had shelter requests for over 423 persons, of which we were able to shelter only 187. In light of this, HHCS purchased a second shelter site.

HHCS's goals for 2005 are:

- Seek additional funding sources to support HHCS site 1 and 2.
- Continue work with Wildfire! Youth Mission Trips and Volunteer In Mission Teams.
- Participate in the Health and Welfare Committee; Circuit Ministry, the University of Wisconsin-Superior Internship program, The Twin Ports United Methodist Ministries.
- Maintain HHCS Site 1 and expand/revision program as needed.
- Continue to develop Case Work program.

SCHMITT WOODLAND HILLS, INC.

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James B. Olson, Administrator

Introductory Comments

Established in 1964 to serve Richland County and Southwest Wisconsin, Schmitt Woodland Hills is a multi-level retirement community offering 38 independent apartments (RCAC), a 30 bed Community Based Residential Facility (CBRF), 25 bed skilled nursing facility and personal and supportive home services and transportation. There are 15 voluntary members of the Board of Directors, including our District Superintendent and The Health Welfare Committee liaison. The board oversees the operating budget and guides the operation through annual strategic planning and development of goals.

Schmitt Woodland Hills believes in providing older persons with a continuum of quality services which recognizes and encourages their individuality in lifestyle, interest and ability. Our full and part time staff provides family-like support and care to approximately 90 residents and 100 people in their own home. Daily interaction with all residents enhances an already strong feeling of home and community. In addition to staff, dedicated volunteers including are pastors serve residents. There is an open invitation to express one's commitment to ministry through Schmitt Woodland Hills. Each gift, personal talent or skill shared contributes to our Christian environment.

Schmitt Woodland Hills continues to pursue dreams that support our Mission Statement: "Schmitt Woodland Hills and its partners offer a wide range of quality services and facilities through good stewardship and with a Christian philosophy." Our commitment to our mission is affirmed through participation in the Health and Welfare Committee and our "Relationship Agreement." A part time chaplain is an asset to our staff. We strive to make a "Christian Philosophy" real at Schmitt Woodland Hills.

Highlights and Accomplishments in 2004 and Plans for 2005

1. Over \$200,000 was provided as benevolent care. Donations continue to grow in importance as investment earnings languish. Approximately 33 residents receive financial support especially due to Medical Assistance shortfalls. This represents a 50% increase.
2. Our Health Center, a Skilled Nursing Facility, received its 6th consecutive year with a "site free" survey from both State and Federal compliance surveyors. Only 20% of the State's Nursing Homes received a "site free" survey in 2004.
3. Our Community Based Residential Facility (CBRF) Westview was biannually surveyed under the new more stringent HSS 83 rules. We received our third consecutive "site free" survey spanning six years.
4. We are very proud of our staff and their commitment to our ministry. Our staff turnover rate remains below both, State and National averages.
5. Richland became the 5th pilot county in the "State Family Care Program." This presents many opportunities and challenges. We look forward to working the new program to extend our ministry to our clients living at Schmitt Woodland Hills and in the community. Currently over 100 clients are served by Schmitt Woodland Hills in the community.
6. We revisited our Strategic Plan that supports our Mission during 2004. Our challenges became clear given State and Federal budget constraints and inconsistent social policy.
7. Schmitt Woodland Hills reevaluated "Medicare Certification." As a result, we became Medicare certified and can now serve clients who have Medicare covered services.
8. We have "partnered" with "Impact 7 Inc." to build a 19 unit low/moderate income apartments on our site. This project will open up our backyard for us to pursue our dreams.
9. We are experiencing significant cash flow problems but hope thru good stewardship we can sustain quality programs and services.
10. Thru refinancing we will be reinvesting in our facilities to insure their appropriateness and attractiveness to our current customer.

SHEBOYGAN RETIREMENT HOME AND BEACH HEALTH CARE CENTER

The Sheboygan Retirement Home and Beach Health Care Center consists of an 84 bed skilled nursing facility and a 70 bed Community Based Residential Facility. The home is situated in a historic district of central Sheboygan, overlooking Lake Michigan.

The organization is certified for Medicare and Medicaid and is a participant in the Community Options Program.

In 2002 the organization abandoned efforts to develop a separate campus, in partnership with another not for profit organization. The organization has been engaged in a pre-sale marketing effort in a project now known as Landmark. Land has been procured, a vacation order from the City of Sheboygan regarding the adjacent Niagara Avenue has been obtained and, as of this writing, the Board is analyzing results of the nearly year long marketing effort, reviewing what changes may need to be made to the project and re-positioning things accordingly. Several changes have occurred in the past year including a dramatic increase in building costs along with an uncertain future for property tax exemptions for such an entity throughout the State of Wisconsin.

The home continues to provide a significant amount of charity care in all areas of its operation, providing subsidies to residents in need while also subsidizing shortfalls in the Medical Assistance program. It is estimated that for the current fiscal year the Medicaid shortfalls will exceed \$500,000.

A significant challenge lies ahead with the budget crises being experienced by both the State and Federal governments. Medicaid reimbursement has proven to continue in its downward trend, insufficient to meet costs. Wisconsin Governor Doyle has indicated that up to 25% of Wisconsin nursing home residents may be able to live in other environments. On this day in Washington D.C. Congress is voting on Medicaid budget proposals that call for a 14% cut in expenditures. Needless to say the atmosphere faced by organizations such as this is very unstable and uncertain.

Support from the United Methodist Church is becoming more essential than ever before. Not only monetary but moral and spiritual support as well.

Michael Basch, Executive Director

UNITED METHODIST CHILDREN'S SERVICES OF WISCONSIN, INC.

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Board of Directors President – Rev. John C. Stubbs
Executive Director – Perry G. Huyck

Introductory Comments

Established in 1962, United Methodist Children's Services of Wisconsin, Inc. (UMCS) is an independent, not-for-profit social service agency affiliated with the Wisconsin Conference of The United Methodist Church through a Covenant of Affiliation Statement. Located in the City of Milwaukee, UMCS serves low-income children and families through a sixteen unit transitional living program that provides safe, affordable housing and on-site supportive social services, a family resource center that distributes food and clothing on an emergency basis to needy individuals and families, and a licensed childcare center that serves primarily low-income families participating in the W-2, welfare to work program. UMCS is governed by a fifteen member Board of Directors.

Highlights and Accomplishments in 2004

1. During 2004 UMCS served 13,768 people (19 families with a total of 32 children in its transitional living program, 55 children in its childcare program and 13,662 individuals in its family resource center).
2. UMCS was asked by The Hunger Task Force of Milwaukee to become a distribution site for the Stockbox Program. Coordinated by The Hunger Task Force of Milwaukee, the Stockbox program distributes federal surplus food commodities to income eligible senior citizens, postpartum women, and children no longer eligible to receive WIC (Women, Infants and Children) benefits. UMCS accepted the program and began distribution during September 2004.
3. The community's use of the UMCS Resource Center programming has continued to grow. Last year the program served over 13,600 people with food and clothing on an emergency basis, of which 7,719 were children. The program receives donations of food from the Hunger Task Force of Milwaukee, local United Methodist Churches and other organizations and individuals. During 2004 UMCS distributed over 55 tons of food to individuals living in 31 different zip codes in the greater Milwaukee area. The Stockbox Program (referenced in item #2) was added to the UMCS Resource Center programming in 2004.
4. The Seeds of Faith, Inc. provided a grant of \$30,000 to UMCS, \$20,000 for operating expenses and \$10,000 to support fund development personnel expense.
5. UMCS held its second annual United Methodist Children's Services Day at the Brewers with over 200 in attendance. Everyone had a great time with ideal weather, a great tailgate party, and an almost win by the Brewers. The Brewers donate one half of the ticket price to UMCS. The third annual United Methodist Children's Services Day at the Brewers will be August 10, 2005.
6. In December of 2003 UMCS received a donation of a vacant lot located on the same block as its apartment building. The donation was timely as UMCS was participating in a neighborhood revitalization planning process funded in part by the Annie E. Casey Foundation, Making Connections Initiative. During 2004 UMCS began to transform the lot to a quality green

space with raised planting beds, and vegetable gardens. The City of Milwaukee donated nine trees for the lot. Three UMCS transitional living program families each donated \$500 from a special Making Connections grant they had received after participating in a community leadership training program. Two community organizations donated the funding necessary to purchase wrought iron fencing for the garden lot. Volunteers in Mission and other volunteer groups provided the labor. Additional plantings and installation of the fencing will take place during 2005.

7. UMCS is a member of The United Methodist Association and Project Equality.