

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 scenic acres of naturally-wooded grounds adjacent to the Rock River, Cedar Crest offers a full range of living accommodations including 78 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 full calendar of social events and activities 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, country store offering snacks and sundries, activity room for arts and crafts, fitness center, beauty salon, business center, and solarium.

Highlights of 2005 and Plans for 2006

The Cedar Crest community enjoyed another exciting year in 2005. Cedar Crest Memory Care Residence, a 24-hour dementia-specific care unit, opened in early 2005. The memory-care residence features 12 individualized, private rooms with private baths and is designed for the exclusive care of persons with early-stage Alzheimer's disease or other memory-loss issues. The residence is licensed by the state of Wisconsin as a Community-Based Residential Facility (CBRF).

Thoughtfully planned daily programs and activities provide socialization and structure and help 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.

Last year, we began the planning stage of the next phase of the master plan, the construction of a new apartment building adjacent to the existing independent living building. This project will add 30 one and two-bedroom apartment homes to the Cedar Crest

community. Remodeling and updating of the common areas will also take place. We expect to break ground on the new construction portion of the project in mid-2006.

In addition, plans continue for the renovation of existing independent-living apartments including the conversion of smaller units into spacious, updated two-bedroom apartments.

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.

We also continue to focus our time and talents on strengthening our financial position, working on programming that embodies resident directed 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.

EVERGREEN RETIREMENT COMMUNITY

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Introductory Comments

Evergreen Retirement Community, a Continuing Care Retirement Community (CCRC) located in the Fox Valley, is in its 39th 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 Directors and staffed by 268 full and part-time employees (204 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 in April 2003 received its fourth consecutive EAGLE accreditation for 2003-2008.

Evergreen offers eight living options:

- 44 cooperative residences
- 22 individual ranch-style homes
- 48 studio, one and two bedroom independent apartments
- 10 one-bedroom assisted living apartments (Residential Care Apartment Complex - RCAC)
- 20 assisted living private rooms (Community-Based Residential Facility - CBRF)
- 20 assisted living private rooms (CBRF) with 24-hour staffing, newly opened in March of 2005
- 20 assisted living private rooms for those with symptoms of Alzheimer's disease and other dementia (CBRF)
- 108-resident Medicare certified skilled nursing facility

An average of 260 of 290 units or 90% of the total number of units were occupied during 2005.

Total cash and investments at the end of 2005 was \$6,493,000. Of this total, \$196,000 was held by Evergreen Retirement Community and \$6,297,000 by Evergreen Foundation. In addition, Evergreen was the sole beneficiary of the earnings from a trust in the amount of \$1,432,000 (Howard Rowland Trust).

2005 Strategic Programs and Related Accomplishments

- a) Develop facilities and programs to increase Medicare A & B market share.
The opening of Garden Heights (24-hour staffed CBRF) allowed for more Medicare A residents to be admitted to the Health Center. The number of hospitals admitting to Evergreen increased to 10. Medicare B revenue increased by 29% in 2005 over 2004.
- b) Develop process to quantify and manage our benevolence liability.
Work has begun with two companies to develop the process for quantifying benevolent liability.
- c) Develop a marketing strategy that includes an emphasis on Wellness.
In 2005, approximately 55% of residents used the fitness and aquatic facilities that opened in July of the previous year.
- d) Develop new ways to communicate organization-related information to employees.
Kaizen will be used in 2006 to implement the Ceridian Self-Service Program web-based technology.
- e) Conduct Kaizen to improve efficiency of health center resident documentation and flow of information.
Through Kaizen, 111 processes and forms were reviewed resulting in 75 forms revised and 20 forms eliminated. The budget for office supply and printed forms was reduced by approximately \$6,000.
- f) Expand leadership education programs to increase abilities of existing leaders and develop leadership potential of all staff.
Nine leadership educational sessions were held in 2005.

2005 Additional Highlights

1. Garden Heights, a CBRF with 20 private accommodations and 24-hour staffing, opened in March 2005.
2. Evergreen Health Center received a deficiency-free State Survey in June 2005. The Health Center includes Manor View, Creekview North and Creekview South.
3. After 29 years as Evergreen President and CEO, David Green retired in July 2005. He then accepted the position of Chair of the Health and Welfare Ministries Committee of the Wisconsin Conference of the UMC. A high point in his career occurred in November when he received the 2005 Award of Honor from the American Association of Homes and Services for the Aging (AAHSA) at its national conference in San Antonio, Texas. This is the highest award given by AAHSA and is presented in recognition of contributions to advance the field of services to the aging.

4. Ken Arneson, Resident Services Director since 1998, was named Evergreen's new President and CEO effective May 1, 2005.
5. The Evergreen Directors Team changed its name to the Evergreen Executive Team. Members are President and CEO Ken Arneson, Vice-President of Finance and Information Services John Krueger, Vice-President of Quality and Organization Development Traci Raether, and Vice-President of Community Relations and Foundation Advancement Carol Staszkiwicz.
6. The Evergreen Wellness Team received a copyright on its Wellness Model that included the definition and the seven dimensions of wellness. This holistic program was in development for two years and encourages residents, families and staff to "live wellness daily."
7. The Way To Go Team studied the layout of our buildings and worked with professional advisors to formally name the three areas of the main Evergreen building. The team then developed and placed signage throughout the buildings to help with way-finding.
8. A new Marketing Team was formed specifically to address the growing need for additional marketing as new competitors have been opening facilities in the area. Members are the VP of Community Relations and Foundation Advancement, Marketing Coordinator, Business Relations Coordinator, Residency Coordinator and Event Resources Coordinator. New marketing investments included a television ad campaign and the furnishing of an Evergreen Village home as a model home.
9. A "Coffee House" was formed by the Residents Writer's Group to provide the opportunity to share their reading of poetry, stories and other writings at special gatherings in Creekview Cafe.
10. Dr. Abhilash Desai, new resident psychologist for Evergreen, visited Evergreen monthly. He also presented "Mental Health Navigator," a monthly educational series for staff members.
11. A University of Wisconsin Oshkosh research project by Dr. Susan McFadden was conducted with Evergreen residents and students from Davis Child Care Center. Results showed that the youngsters in the Davis satellite classroom at Evergreen who interacted daily with Evergreen residents reported more positive attitudes toward older adults than those in the traditional daycare setting.
12. Evergreen began partnerships with both the Oshkosh Senior Center and the Learning in Retirement program facilitated by the University of Wisconsin-Oshkosh to offer swimming lessons to members. Aquatic therapy, swim lessons and open swims are all very popular with residents, staff and visitors. There were 1,000 visits to the pools in August, 2005 compared to 250 in August, 2004, one month after the pools first opened.
13. Evergreen continues to promote lifelong learning through our corporate participation in the Learning in Retirement program. Residents are able to attend the presentations at no charge. Evergreen was host to many of the presentations in 2005, including Ai Chi water exercises.
14. Two board members, one resident and four staff members attended the Annual Convention and Exposition of the American Association of Homes and Services for the

Aging (AAHSA) in San Antonio. Evergreen staff gave two presentations at the Convention: “Wellness...Live it Daily!” and “Developing and Executing a Successful Succession Plan.”

15. In 2005, Evergreen began preparation to participate in the Wisconsin Forward Award program.

16. Evergreen’s annual employee turnover in 2005 was 24.6% compared to 13.5% in 2004. The national average for health care and social assistance workers in 2005 was 29.8%.

17. The Evergreen Foundation, Inc. received \$306,500 in contributions during 2005. Combined with return on investments, a total of \$450,000 was transferred from the Evergreen Foundation to Evergreen Retirement Community to help meet the \$1,500,000 Care Assurance need in 2005. Financial assistance was received by 73 residents (an average daily census of 52) who had insufficient funds to pay the full cost of their care.

18. Two members joined The Leave a Legacy Guild in 2005 by informing Evergreen that they had remembered Evergreen in their wills or through other planned gifts.

19. 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.

20. As an expression of appreciation, the fourth annual “World of Thanks” event brought together donors, volunteers, Board members, Residents Council members, and staff celebrating service anniversaries or retirement, and staff receiving the “Living Continuous Quality Improvement (CQI) at Evergreen” award or perfect attendance awards.

21. Residents and staff contributed over \$4,800 to Hurricane Katrina relief through the United Methodist Committee on Relief.

22. Evergreen’s Garden Grove was featured as the Best Creative Garden on the city-wide Tour of Gardens sponsored by Oshkosh’s Paine Art Center and Gardens.

Carol C. Staszkiwicz

Vice President of Community Relations and Foundation Advancement

HARBOR HOUSE CRISIS SHELTERS

A Ministry of Faith United Methodist Church

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Homeless Shelters for Single Women and Families

Harbor House Crisis Shelters’ mission is to provide safe, hospitable shelter for single women and families with legal custody of minor children. HHCS 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.

In 2005 HHCS was able to provide shelter for 281, providing over 6,000 shelter nights, 18,722 meals and 12,415 snacks. Since opening in January 2001, we have served 756 persons.

Some Highlights from 2005 are:

We acquired a new shelter site. HHCS-Site 2 opened February 15, 2005. We received a \$35,000 grant from the WHEDA Foundation to help with the mortgage costs.

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.

We have developed a case plan with seven priorities: increase income; budgeting/credit reports; mental health/AODA referrals; other housing referrals; housing counseling; nutrition/parenting classes; and prevention of further incidences of homelessness.

While HHCS struggled financially in 2005, HHCS was able to end the fiscal year financially sound.

HHCS-Site 1 has an addition, a dining room and a fence installed. HHCS-Site 2 has had a privacy fence installed and shelving for the garage.

We hosted Wildfire and many other work teams. We thank all those that have helped with the building addition and other projects.

We distribute adult and children's Contemporary English Version of the Bible.

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 hosted "Homeless Awareness Week" events with over 150 participants.

HHCS's goals for 2006 are:

- Open Transitional Living Center, providing transitional living for homeless families.
- Provide shelter for 300 persons and transitional living for 20.
- Seek additional funding sources, including, developing a fundraising strategies.
- Further develop strategic plan for the ministries.
- Plan celebration events for our five year anniversary of faithful service to the homeless.

NORTHCOTT NEIGHBORHOOD HOUSE

The past year has been an exciting year for Northcott. We are proud of our accomplishment at the same time that we look forward to ongoing achievements and improvements. As a holistic agency, we include the faith-based approach of caring about the whole person and the whole family.

Our Community Learning Centers at Milwaukee Public Schools are a good example of

the family oriented approach to serving the neighborhood. These eight programs reach out to youth and families to provide academic assistance and positive after-school activities for youth. In addition, these centers involve families in the schools.

We are also excited about starting our third house with the Fresh Start Program. This innovative program involves young adults in building a neighborhood home as they gain training in construction skills and work toward their GED or other educational advancement. This training provides young people with the skills needed in today's economy and skills for jobs that offer family supporting wages. While they are training, participants receive a subsidy to reward their efforts.

In line with our commitment to collaborate with other agencies, we are happy to renew our involvement in the Brighter Futures and Fighting Back community campaigns. As part of Brighter Futures, we are working with adult family members toward their GED, financial literacy, and/or parenting skills. Youth are gaining anger management skills. Families also participate together in educational and recreational activities. With Fighting Back, we are working with young people to train them to avoid alcohol, drugs, and tobacco. We also are working with young people at schools to train them in abstinence skills.

In recent years, Northcott has greatly expanded its services to older citizens with the Commodity Distribution Program. Unfortunately, the Administration has requested this program be cut in order to balance the budget. In the coming year we will be working to maintain this program for older citizens and the food stability it brings. Currently, the commodity program serves 1,000 older adults and families for a year after they leave WIC. In addition, our emergency food pantry serves over 1,000 family members annually with nutritious food supplies for 2-3 days.

As always, the heart of our program is the youth that we serve daily after-school, weekends, and summers and the children in our Head Start Program. The youth educational and recreational programs build skills, increase positive thinking and planning, and encourage positive habits. We must continue to provide our youth and children with the skills and the safe environment that will make them healthy adults that can lead our community in the future.

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 supportive home services and transportation. There are 15

volunteer members of the Board of Directors, including our District Superintendent and The Health and 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 community home. Daily interaction with all residents enhances an already strong feeling of home and community. In addition to staff, dedicated volunteers, including area 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 "U.M. 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 2005 and Plans for 2006

1. Over \$230,000 was provided as benevolent care. Donations continue to grow in importance as investment earnings languish. Approximately 43 residents receive financial support especially due to Medical Assistance shortfalls. This represents continued growth and need to serve those less fortunate.
2. Our Health Center, a Skilled Nursing Facility, received "cite free" survey from State compliance surveyors. Only 10% of the State's Nursing Homes received a "cite free" survey in 2005.
3. Our Community Based Residential Facility (CBRF) Westview was biannually surveyed under the new more stringent HSS 83 rules. We received our third consecutive "cite 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 2006. Our challenges became clear given State and Federal budget constraints and inconsistent social policy.
7. In 2004 we became Medicare certified and continue to serve clients who have Medicare covered services.
8. We have "partnered" with "Impact 7 Inc." to build a 19 unit low/moderate income apartment complex 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 that thru good stewardship we can sustain quality programs and services. We have maintained our status in spite of declining reimbursement.
10. Thru refinancing we have been reinvesting in our facilities to insure their appropriateness and attractiveness to our current customers. Our first effort involved a face lift to the nursing home and CBRF areas. This year our priority will be the apartments and common areas.
11. With great excitement and community involvement we celebrated our 40th Anniversary of ministry in 2005.
12. Thru the help of a "capacity" grant from the Wisconsin United Methodist Foundation we established our Development Department. It is our prayer that through the benevolence of many, we can continue to serve others for many years to come.

SHEBOYGAN RETIREMENT HOME AND BEACH HEALTH CARE CENTER, INC

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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.

2006 will see the construction of Landmark Square. This unique development is the first of it's kind in Wisconsin and very rare throughout the U.S. This Condominium development will eventually be owned by the Condominium Association of Landmark Square, NOT Sheboygan Senior Community. It will have an affiliation agreement and its owners will have priority access to all services at SSC. As of this writing in April, 50% of the units are sold, groundbreaking is anticipated by May 1 and completion by January of 2007. This entity will be a fully taxed development and has received a Tax Incremental Financing incentive from the City of Sheboygan. The project costs are projected to be \$13.5M.

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 near \$600,000

Another significant change is the development of the Beach Rehabilitation Unit. Located within the confines of the Beach Health Center, this unit of 18 all private rooms will provide intensive post surgical and rehabilitation services to a broad spectrum of clients. The unit is nearly complete with expected full occupancy within 3 months.

Future projects for the organization include renovation of the Lighthouse Commons Assisted Living unit and further development and expansion of the Beacon Suites Memory Support unit.

Michael Basch, Executive Director

UNITED METHODIST CHILDREN'S SERVICES OF WISCONSIN, INC.

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Board of Directors President – Karen Tidwall

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 Washington Park Neighborhood of 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 State of Wisconsin 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 2005 UMCS served a total of 21,271 individuals, a 62% increase from 2004. The increase occurred primarily in the Agency's Family Resource Center program. Driven by a dramatic increase in the number of individuals requesting emergency assistance and program expansion to meet the need, UMCS Family Resource Center served 20,327 individuals during 2005, compared to the 13,662 served during 2004. UMCS received a Federal Emergency Management Assistance (FEMA) grant to help meet the need.
2. 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. Beginning in 2004 and continuing during 2005, UMCS began to transform the lot to a quality green space with raised planting beds, and vegetable gardens for use by its childcare center, transitional living program and neighborhood residents. Several small grants combined with the volunteer efforts of a Short Term Volunteers in Mission work camp resulted in the installation of a wrought iron fence and added gardens.
3. In September 2004 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 agreed and began distribution September, 2004. 2005 was the first full year of program operation. Many low-income seniors on small fixed incomes find it impossible to meet their basic housing, food, clothing, and medical expenses. The Stockbox Program distributed 1,807 boxes of surplus food commodities to eligible seniors, women and children during 2005.

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 third annual United Methodist Children's Services Day at the Brewers with over 250 in attendance. With ideal weather, everyone had a great time enjoying the pre-game tailgate party and another almost win by the Brewers. The fourth annual United Methodist Children's Services Day at the Brewers will be on Labor Day, September 4, 2006.
6. UMCS is a member of The United Methodist Association and Project Equality.