

History of the Lodge

Sept. 20, 1965 October 30, 2001

In 1961, the Rev. Walter Witt of the Community Church of Sun City (later named United Church of Sun City), held a series of meetings with the Rev. Reinhold Klein of the Retirement Housing Foundation of California to determine if there were a need for a retirement community with a health care center in Sun City. They found that the need did exist.

Rev. Witt continued to meet with a few people at the Church. They formed groups of volunteers who met with other interested people in their own homes to generate more interest in the retirement community concept. In July, 1962, the first meeting of Sun Val Corporation was held with its new officers: Rev. Witt, President; Blaine Ferguson, Vice President; Reg Sturdy, Treasurer; and Gil Ross, Secretary.

The Board of Directors consisted of two classes of members. Six Class A Board members also were members of the United Church of Sun City. The five remaining Class B Board members came from the Sun City community at large

During the next year, 1963, the Board members met with Del Webb Corporation officials to obtain a site for the buildings. The original plan was to seek 20 acres that could include a hospital for Sun City residents as well as the retirement community and health care center.

The search and negotiations were involved and time-consuming.

During the same time, the Board created by-laws, developed publicity and engaged a Tucson architectural firm. The Retirement Housing Foundation and United Church representatives continued to work with the Board of Directors.

In order to help finance equipment purchases, a Sun Valley Lodge Life Membership campaign was begun. 700 Sun City residents joined the Lodge with financial support of \$70,000. This Life Membership is to last throughout the lifetime of the Lodge.

The former Coulter Cotton Gin site, just south of Grand Avenue on 103rd Avenue, was chosen as the right place to build the Lodge. The eight-acre parcel could not include a hospital. There was one major concern. The cotton gin's large cement slab was the subject of a major disagreement. Who was responsible for removing the slab? Finally, the Board members agreed that they would see to the slab's removal. The Tucson architectural firm declared bankruptcy, and Mardian Construction Company of Phoenix was hired to build the center.

The Board submitted a mortgage insurance application in the amount of \$1,250,900 to the Federal Housing Administration in October, 1963. This was the estimated figure to build and to furnish the retirement center. The forty-year mortgage at 5.75% interest was held by Wayne County Retirement Fund and Advance Mortgage, with monthly payments of \$6,115.66. Title to the land was conveyed to United Church for \$63,000 and then to Sun Valley Lodge for \$100,000.

Three years of preliminary work culminated in groundbreaking ceremonies on April 7, 1964.

Through spring, 1964, the Rev. Everett Luther, administrator of The Beatitudes in Phoenix, acted as advisor and administrator of Sun Valley Lodge. However, overall administration, planning and construction were under a

contract with the Retirement Housing Foundation of California. Rev. Klein continued to meet with the Board at its monthly meetings.

March through June, 1965, was highlighted with several major events. Flo Merman formed the Auxiliary, and by the end of that period, 80 people had been recruited. Tom Austin was appointed administrator in June, and the Rev. Donald Donnenworth was appointed chaplain (remaining until retirement in 1975). By the end of June, 16 admission applications were received and 101 Sun City and Youngtown residents were \$100 members of the Lodge. Memberships increased through the years to more than 2,000 in 1969. The membership list was so long in 1980 that the membership campaign was ended.

On September 1, 1965, the Lodge opened with 18 residents. Another 18 residents were admitted during the next month.

Virginia Sylvis was hired as secretary to the administrator in January, 1966. She would be involved with the Lodge for another 20 years. After retirement, she continued to serve in active volunteer leadership capacities as a Gold Lady and as a member of the Board of Directors.

On April 24, 1966, Sun Valley Lodge was formally dedicated.

In June, Tom Austin resigned and the Rev. Fred Loase succeeded him for only three months. Richard Kaysen became administrator and remained in that post for five years.

The Lodge's first attempt at a formal fund raising campaign was launched in November with a paid professional fund raiser from the Retirement Housing Foundation of California. The professional was a stranger to the community, so Sun City residents were not familiar with the individual or a formal fund raising campaign. The effort expenses almost matched the gross income, so the campaign was considered a failure. The \$500-a-month contract with the Retirement Housing Foundation was canceled.

In 1968, Virginia Sylvis moved into the newly created assistant administrator position. For the remainder of that year and 1969, income rarely met expenses. Many vendors threatened to stop deliveries. Herb Martin, a member of the Board of Directors, took the financial statements to the Sun City Community Fund in 1969 with a plea for support. His successful presentation provided the necessary income to help with the deficit.

At the same time, the board decided to convert the empty Inn-Living studio apartments in A and B wings into a Sheltered Care center. The vacant laundry room became the nurses' station. These decisions were made, because the needs of Sun City residents had changed in the three years since the Lodge was opened. By the first of 1969, the Lodge was fully occupied and a waiting list was begun.

A new retirement lifestyle was added in 1970 with the building of the first Garden Apartments. The Lodge fulfilled an additional need with these spacious two-bedroom, fully independent apartments. Three buildings with four apartments each were built on the east side of the Lodge property.

The rental agreement was unusual for Sun City. A one-time rental fee was charged at the beginning of the agreement. This sum was prorated over a period of eight years, and if the residents chose to move before the eight-year period was completed, a portion of the up-front fee was returned. If the residents continued to live in the apartment after the eight-year period, there were no more rental fees imposed. A modest monthly maintenance fee was the only fee to continue after the eight-year period.

Richard Kaysen resigned and Richard Brown became administrator in 1971. Two small, but significant, changes were made. The nurses were allowed to wear pants suits. For them, this was a dramatic change from the starched white sterile uniforms that were a decades-old tradition. Another old term was removed when the "Infirmery" was changed to "Skilled Nursing" with 24-hour skilled nursing care.

When Richard Brown resigned in 1973, Virginia Sylvis was appointed administrator. The Board had been trying to reduce Lodge operating expenses for years. The study culminated in 1973 when the Lodge entered into a purchasing agreement with The Beatitudes. This cooperative agreement did not make an appreciable difference in Lodge expenses, because the Beatitudes purchasing policies conflicted with those of the Lodge. The agreement was ended with mutual consent. No significant savings had been made.

Lodge transportation also played an important role in 1973. Throughout the years, Lodge staff members had driven residents to and from their appointments. Everyone realized that the Lodge needed some sort of official transportation. With media coverage and word of mouth, a transportation campaign was begun. At the end of the campaign, the fund was below the amount needed to buy a vehicle. A neighbor asked how much was needed to meet the campaign goal. His \$1,200 completed the funding effort. A contest was held to name the Plymouth Voyager station wagon, and the appropriate ribbons and bows covered the vehicle when it was officially named "The Roadrunner."

Building and health care codes changed in 1974, which required the installation of sprinklers throughout the Health Care Center.

The Rev. Donald Donneworth retired in 1975, and Rev. Earl Allen succeeded him as chaplain.

During the same year, an exciting new building program began. This extensive change, designed to be completed in two phases, took three years to complete. The first phase involved the expansion of the main dining room and lounge and the addition of a chapel and crafts room. During construction, a temporary wooden wall was erected to keep dust and noise to a minimum. There were the traditional peepholes that allowed residents to "supervise" all construction phases. At Christmastime, a huge tree was painted on the wall, which added a festive atmosphere to the building process. The fund raising campaign goal for this phase was exceeded by \$16,000!

Phase two involved expansion of the dining room, nurses' station, isolation room, bathing room for wheel chair residents and storage space in the Skilled Nursing area. The room for the wheel chair bathing, including the plumbing, was finished; however there were no funds for the expensive Century Tub. Staff and resident optimism prevailed, and the new tub was installed soon after construction was completed.

All members of the Sun Valley Lodge community were proud that financing for both construction phases came from contributions without the assistance of a paid fund raising professional. These two achievements were dedicated with a celebration on October 10, 1977.

By the end of 1977, three new buildings containing twelve Garden Apartments were built. Two buildings were south of the original Garden Apartments. The third building was completed on the southern perimeter to the west of the other apartments. The construction was paid for by the residents moving into the apartments.

The small dining room in the sheltered care area was expanded in 1978. Linen room was replaced and a paint storage building was constructed. Construction was completed in 1979 with a new lounge and patio for the sheltered care residents.

An important tradition continued at the Lodge. All construction was completed without any increase in resident fees. These fees were maintained at rates as low as possible, because there was a perception that the incomes of people moving from Phase I were moderate. Lodge wages and benefits reflected the modest fees.

In the mid 1980's, the Board of Directors saw the need to bring resident fees to a comparative scale in the community, and employee wages increased to compare with other retirement communities in the area. Employee benefits were added with the Lodge participating in the cost. Health care, life and dental insurance, retirement annuity and credit union were included. Construction projects included an addition to the Gold Chest (gift shop) and Thrift Shop expansion. In 1983, the Rev. Edward Nelson became the Lodge chaplain.

In 1986, Virginia Sylvis announced her retirement as administrator after 18 years of dedicated service to the Lodge. Jim Hilty was appointed administrator to follow her. The board at Royal Oaks asked Virginia to be the temporary executive administrator for six months. Her tenure ended four years later and she joined the Lodge board of directors that year.

In 1994, new Board member Richard Ferguson organized an *Ad Hoc* Committee of local volunteer leaders to evaluate the Lodge, its role in the health care field and to recommend changes that would move the Lodge into the next century. The carefully studied plans were presented at the committee's final meeting in June. The Board of Directors moved on these extensive recommendations to build and to enhance the Lodge and its position in the community. In January, 1998, Richard Ferguson (then Board President) compiled a thorough outline of the Committee's recommendations and the progress the Lodge had made to accomplish these goals. The vast majority of the work had been accomplished to achieve the goals with only a few tasks left to complete.

The year 1995 saw major changes. The Thrift Shop was moved to an expanded building north of the main buildings on Coggins Drive. The Health Care Center renovation including covering cement block with wall board, painting and wallpapering, new floor tile, draperies, cubicle curtains, new hallway hand rails, new resident chairs and a new whirlpool bath. The bathrooms in A- and B-Wings were renovated, and the studio apartments in B-Wing were remodeled as one-bedroom apartments. Tile floors were replaced with carpeting.

The major renovation in 1995 and 1996 included a new main entrance with an expanded lobby and new administration offices along with a multi-story storage building. This renovation included the Health Care Center lobby expansion and new offices, an expanded activities area and a new physical therapy department. This major project, funded by a bequest and other special gifts, came to \$700,000.

Computerization was phased in over a number of years. The first computer was assigned to the accounting office in 1988 and was upgraded in 1991 with a new unit. This same year, a computer and Med-Com software were installed in the medical records department. In 1994, the accounting department computers were upgraded to include two units with software. In order to maintain adequate support, computer changes will be made in 1998 to include software for Medicare and managed care billings.

In the fall of 1996, the Board of Directors inaugurated a new resource development department that included annual, capital and deferred giving as well as public relations, community outreach, advertising and volunteer development. A resource development professional was hired to implement the program. The Auxiliary donated \$2,500 to provide computer back up for the Resource Development activities.

At the same time, the residents, volunteers, staff and board held an informal fund raising drive to replace the aging Lodge vehicles. It began when a volunteer driver commented that the wheelchair van was in the repair shop too often to be reliable transportation. A resident who overheard the comment brought in the first check toward the "Van Drive." More residents, volunteers, staff and board members added their gifts to the fund. In January, the Auxiliary board voted to add another \$12,000 to the fund. By spring, 1997, the informal drive provided the Lodge with three new vehicles: a fifteen- passenger Ford Econoline van with a wheelchair lift, an eight-passenger GMC Safari van and a small Chevrolet pick-up truck.

In the spring of 1997, Jim Hilty, Lodge administrator since 1986, announced that he would retire at the end of the year. The Board of Directors began the search for a successor. In September, Richard Ferguson, board president, announced that Raymond C. McKisson would become executive director of the Lodge effective January 1, 1998. McKisson, a life-long resident of the Valley, brought 15 years of health care experience with him to the Lodge. He joined the staff on November 15 in order to work with Jim Hilty during the period of transition. In January, 1998, he began his duties as the Lodge's first executive director.

Plans to upgrade the Health Care Center computer system evolved in 1997. The new networking system, to be in place by spring, 1998, includes software that allows six terminals to enter data on resident's physiological, psychological, and sociological status. The State Department of Health mandated this reporting system.

Sales in the Thrift Shop continued to increase at a rapid rate, and the contributions of clothing, accessories and durable goods grew at the same pace. In the fall of 1997, Auxiliary president Helene Pfeifer and Thrift Shop manager Dorothy Mills asked the Auxiliary members to expand the Thrift Shop to meet the growing demand. The Lodge's Board of Directors approved the expansion plan, and work began. The Auxiliary's monetary contribution to the project was \$26,000, which the total cost of the expansion. The Grand Re-opening Ceremony, complete with Auxiliary and Board members, with special guests from the Northwest Valley Chamber of Commerce and a number of residents and staff members was on February 27, 1998. On that date, all financial obligations to the Thrift Shop expansion had been met.

Major plans for creating an endowment began to take shape in the fall of 1997. A Sun City resident made a gift of \$30,000 to the Lodge to begin the endowment. His Will included an additional \$500,000 to be added to the initial gift. The Board of Directors agreed to place the initial gift with the Arizona Community Foundation, an Arizona repository for endowments with a high national reputation. Plans were made to increase this endowment through the years in order to add annual income to the Lodge budget. Discussions with Foundation representatives continued through the end of December. The board president and executive director signed the agreement with the Arizona Community Foundation on February 3, 1998. Later that month, the actual endowment fund was created with a transfer of the \$30,000 gift plus interest on the original gift.

The aging physical plant was another main focus for the Board of Directors in 1997. Arizona Public Service Company made an assessment of the current plant and made suggestions for involving three architectural firms in the initial bidding process. A bequest of \$200,000 was set aside for initial funding of a major renovation of the entire property. Renovation priorities were set with the emergency communications system and the heating/cooling system as the first projects to complete. After thorough interviews with three prestigious architectural firms with long histories of health care building, The Orcutt/Winslow Partnership was selected to put together a master plan for the renovation. The initial process of creating the master plan for the renovation began in February, 1998.

That summer, the Board of Directors set aside approximately \$700,000 from a reserve fund the Lodge had for capital replacement expenditures. The capital campaign goal was set at \$2.4 million. Jerry Svendsen, publisher of *Sun Life Magazine*, became chairman of the corporate capital campaign. Jerry, who came to Sun City in 1961 as a member of the Del Webb team, was familiar with the Lodge in its formative stages. He continued his close association with people who lived at the Lodge and was involved in a wide variety of Lodge activities. He was the right choice for this challenging campaign.

On November 17, 1998, Dick Ferguson, Board president, announced the capital campaign at a reception in the Lodge Rose Garden.

All constituencies of the Sun Valley Lodge family joined in making the campaign a success. At the beginning, United Church of Sun City sent a \$2,000 gift to help with the renovation. They pledged another \$12,000 for the remainder of 1999. Ethel and Harold Worley gave \$10,000 toward the dining room renovation. Grace Ursch joined them with another \$5,000. Another anonymous donor gave \$10,000 as a one-to-one challenge to other individuals. That challenge was met within two months. Helen L. Foss wanted to see the atrium renovated, so she gave \$50,000. The Auxiliary came up with another \$30,000 to complete the project. Later in the year, Helen Foss provided another \$350,000 for the renovation in her estate. Dorothy and Ernest Brittain left \$250,000 of their estate for the renovation. The Soroptimists joined the Auxiliary to place canopies at the two main entrances. Gerard Brauer never liked the old two-pipe heating and cooling system. He restricted his \$700,000 gift to the new four-pipe system. Edith Mounts, a long-time Lodge resident knew about the major renovation plans. When she died in 1999, she left \$1,100,000 to the Lodge specifically for the renovation.

Throughout 1999, a great number of gifts, both small and large, were added to the renovation fund to meet and exceed the campaign goal.

Work began on the dining room, atrium and breezeways in the late summer of 1999. The results were awesome. For the 34th annual holiday open house on the first Sunday in December, 100 poinsettia plants filled the new planters in the Syklight Lounge (the name selected for the atrium by a resident vote). The new dining room pantry was adorned with original artwork called *trompe l'oeuil*. The breezeways were enclosed for the first time, protecting residents from the elements.

The four-pipe heating and cooling system was the next project under way with a completion date of April 30, 2000. The five public restrooms also were included in the project. Another important project concerning resident comfort was the satellite kitchen for the health care center. Food could be served onto plates in the health care center dining room instead of being transported on trays from the main kitchen. Residents could smell the food before and while it was being served, which stimulated their appetites.

There were personnel changes in 1999. Marian Bell, who had been an important Lodge mainstay for nearly 25 years, decided to retire in the spring. Ray McKisson, the Lodge Executive Director who had been consulting at Royal Oaks, was offered a position there. Terry Thompson was the right selection to steer the Lodge into the new century. Terry had been at the Lodge for nearly 13 years in a number of capacities, so she was intimately familiar with the philosophy guiding the Lodge, its residents and its staff. There was only one minor drawback. Terry was not licensed by the State of Arizona to manage a health care center. Virginia Sylvis solved that minor problem in an instant.

Virginia telephoned the State Department of Health to ask for her health care license to be reinstated temporarily so that she would be the Lodge's licensed official. Her original license was the second license issued in the state. The request for a temporary license was granted immediately.

Virginia assisted Terry Thompson on a daily basis at the Lodge until Terry was able to take and pass the state and national health care licensing exam in October. The six-month practical experience period with a professional preceptor was waived since Terry had years of practical experience. Terry received her license in December.

On September 30, 1999, the Lodge's lobby was named "Virginia C. Sylvis Lobby" for the many years of selfless energy Virginia gave to the Lodge.

Dick Ferguson resigned as president of the Board of Directors in October, 1999. Blaine L. Donaldson, a retired health care center executive from Iowa, accepted the task of being president. The Board asked the staff to study the feasibility of adding assisted living to the Lodge's continuum of care. This study was to last more than a year with no real answer as to its implementation.

The renovation continued. The four-pipe system installation was more difficult than the contractors had originally thought, so the project moved into July, 2000, before it was completed. Even then, problems with the new system had to be solved. This aspect of the renovation came to more than \$660,000.

The fire marshal explained that since some modernization was being done to the Lodge, more must be completed by the end of 2001 in order for the Lodge to meet current health care standards. The major undertaking would be the overhaul of the sprinkler and smoke detector system in the health care center and the addition of this modern system throughout the Lodge. Adding sprinklers to public areas where there was no space between the roof and ceiling would be a challenge. Esthetics was a major concern. A contract for \$327,000 was made with Roadrunner Fire and Safety Company to deal with these challenges.

At the same time, the fire marshal stated that a certain percentage of the Inn-living Apartments must comply with the Americans with Disabilities Act. The percentage of renovations came to five apartments. This meant that the bathrooms must be made larger. One apartment in F-Wing was the first to have this major face-lift.

Blaine Donaldson agreed to be the Board president again for 2000-2001.

September 20 marked the 35th anniversary of Sun Valley Lodge. More than 200 people helped to celebrate this landmark occasion. The benefactors of the Renovation 2000 were honored for their gifts with plaques in the main lobby.

In late September, Terry Thompson resigned as executive director effective November 10 in order to spend more time with her family. The Board of Directors interviewed Michael L. Fahey to continue in this position. Fahey, who was a highly respected Arizona health care administrator, accepted the position and began serving on October 30.

Care crunch

COMPETITION: High number of facilities in area raises stakes

JEANNE WINOGRAD
DAILY NEWS-SUN

Mary Phipps may be one of the best marketing assets The Woodmark has. A resident at the assisted-living residence in Sun City, Phipps enjoys letting prospective residents tour her apartment.

"I love my apartment," said Phipps, who is mother to Connie Brown, executive director of the Peoria Chamber of Commerce. The chamber meets at The Woodmark each month for business networking.

Such soft-sell marketing is

increasingly important to independent- and assisted-living facilities in the Northwest Valley as their numbers and the competition between them increase. Many facilities are using traditional sales tactics as well, such as incentives for referrals, advertising, follow-up calls and tracking prospective residents, also called 'leads.'

An increase in the number and types of living facilities have opened up many more options for prospective residents.

Because prices and conditions can vary, people looking for a more structured living environment with companionship and possible in-home assistance may want to evaluate what their long-term health insurance policies will cover.

See Residents offer, A4



JOY LAMBERT/DAILY NEWS-SUN

Marketing worker Pat Horton, front, and Manager Vicki Schroeder of the Madison at Sun City West show marketing materials, above, that focus on the assisted-living facility's special programs Tuesday. A couple, right, eats lunch at the dining room Tuesday at the Woodmark in Sun City.



STEVE CHERNEK/DAILY NEWS-SUN

OVER

From A1

Advance comparison shopping may ultimately save money and inconvenience.

Independent-living residences are apartments for people who are still getting around on their own. Assisted-living residences offer increasing levels of care for people who need more help with day-to-day living. Skilled-nursing residences — known in the past as nursing homes provide round-the-clock, more intensive care. Assisted- and skilled-nursing residences are licensed and regulated by the state, but independent-living facilities are not.

"The level of assistance we provide is up to the tenant," said Pat Horton, marketing director for The Madison in Sun City West, an independent-living apartment building. The facility, like many in the Northwest Valley, offers shared amenities such as food services and planned activities.

While most independent-living facilities refer residents

to home healthcare agencies when residents need more assistance with day-to-day living activities, The Madison also features a Sun Health Personal Care Services office on-site, along with a list of other home healthcare providers. Sun Health currently has an on-site presence in four independent-living facilities.

"We don't have specific expansion plans, but we're hopeful," said Jan Pinter, director of Sun Health Personal Care Services.

Assisted-living residences are feeling the pinch of competition.

"Our biggest competitors are independent retirement communities," said Linda Vigil, marketing and sales director with The Woodmark.

The distinct marketing advantage independent-living facilities have is incentive-based promotions by residents.

"Our residents get referral fees," said Vicki Schroeder, a manager at The Madison. "Residents are the world's greatest marketing tool."

The 15-year-old Madison

is 96 percent full.

At Casa del Rio in Peoria, residents receive a credit toward their rent if they refer someone who decides to move in.

The Villages at Sun City Grand in Surprise offers independent-living residents \$100 for the first referral, \$250 for the second, and a whole month's rent for the third referral.

"We provide a fee of 50 percent of a month's free rent to a locator or realtor," added Sharon Rees, activity director for The Villages.

Other perks also are offered to lure residents, such as at The Woodmark where Vigil offers potential assisted-living residents a review of their long-term healthcare insurance policies to be certain the facility is covered by their plan before they move in.

"Many people are getting long-term care policies that pay for assisted-living services," Vigil said. "We keep people out of emergency situations. In independent living facilities, (a tenant's emergency) can become more of a

crisis with a 911 call. Here, they don't realize we're monitoring them on a 24-hour basis behind the scenes."

Vigil said The Woodmark is less than two years old and is doing well at 40 percent full.

"We're doing a little better than the (assisted-living) market," said Vigil. "We have signed with a couple of placement agencies we carefully reviewed. We also offer special promotions such as a meal here, but we do not offer money on an ongoing basis. It's called body-brokering. It's distasteful."

While some might find "body brokering" distasteful, it is legal for independent-living residences. Assisted-living facilities, however, are prohibited from the practice.

"Independent-living facilities are not regulated, so they don't have any rules on providing checks or other incentives for referrals," said Mary Wiley, assistant director for the assurance and licensure division of Arizona Department of Health Services. "We don't regulate them."

Daily News-Sun • Monday, Sept. 18, 2000

Sun Valley Lodge marks 35th year

HAYLEY RINGLE
DAILY NEWS-SUN

Sun Valley Lodge, Sun City's first independent living center, will celebrate its 35th anniversary Wednesday on the exact day it opened 35 years ago.

"It's a wonderful home," said 101-year-old Caroline Rodebaugh, a 15-year resident of Sun Valley Lodge.

Rodebaugh, who has lived in Sun City since 1965, religiously continues her chair exercises five days a week and has memorized her bingo cards since her eyesight has weakened.

In celebration of the anniversary, the lodge at 12415 N. 103rd Ave., just south of Grand Avenue, has been undergoing a \$2.9 million renovation since last year. The project includes a modernized heating and cooling system, a new lounge, enclosed breezeways, a patio, roof restoration, a satellite kitchen, automatic elec-

IF YOU GO

- **WHAT:** Sun Valley Lodge's 35th anniversary party
 - **WHEN:** 3:30 to 4:30 p.m. Wednesday
 - **WHERE:** Sun Valley Lodge, 12415 N. 103rd Ave. in Sun City
- For more information, call 933-0137.

doors and canopies at the main entrance and the Health Care Center. The entire renovation will not be completed until the end of the year.

The unused atrium was changed to the Skylight Lounge (a name voted on by residents), which is now a general purpose room, said Jim Green, director of resource development for Sun Valley Lodge.

The dining area has been remodeled and includes original artwork by resident Ann Beck.

The 100-yard breezeway was enclosed between the lobby and kitchen to the rest of the lodge because residents complained of the heat in the summer and the cold in the winter.

A rose garden was added and includes 411 rose bushes and a roof was put on the patio.

A modernized four-pipe heating and cooling system was added to provide heating and cooling in different areas of the lodge at the same time, Green said.

A satellite kitchen was added in another part of the lodge to warm and serve food in the room.

"The food intake has increased measurably because the smell of food (in the room) has increased appetites," Green said.

The next step in the renovation process includes adding smoke detectors and a sprinkler system.

"Residents have been very involved in what has been done," Green said, while showing drawings the architects made from residents' suggestions.

Sun Valley Lodge was built under the direction of Dan Mardian from 1963 to 1965, after the Rev. Walter Witt gathered a group

of his church members to discuss the concept. The land was obtained by Del Webb in 1963 at 103rd Avenue and Coggins Drive. The site had previously been the Coulter Cotton Gin.

"When the lodge was built there was nothing around here," Green said. "The people in Sun City needed a place to recuperate," after hospitalization.

He said 28 percent of people who come to the lodge to recuperate go back home.

A Residents Assistance Fund, which began 32 years ago, is available for residents who have outlived their money.

"This fund is made possible by the people who live in Sun City," said Green, who added that about \$17,000 a month is dispersed to residents. "They have help if they need it."

The 35th anniversary celebration is open to the public. Don McCune, local chiropractor who is active in community events,



Virginia Sylvis stands in the lobby bearing her name.

will provide music. George Handy, vice president of the Sun Valley Lodge board of directors will be among speakers, along with Herman Orcutt, the founding partner of the Orcutt/Winslow Partnership Architects. Virginia Sylvis, a board member who has worked for the lodge for 20 years and for whom the lobby is named, will provide remembrances of the past 35 years. Terry Thompson, executive director of Sun Valley Lodge, will introduce the benefactors. A reception will follow.

Harold and Ethel Worley have lived at Sun Valley Lodge for six

years, and are the second generation to live there. Harold's mother lived at the lodge.

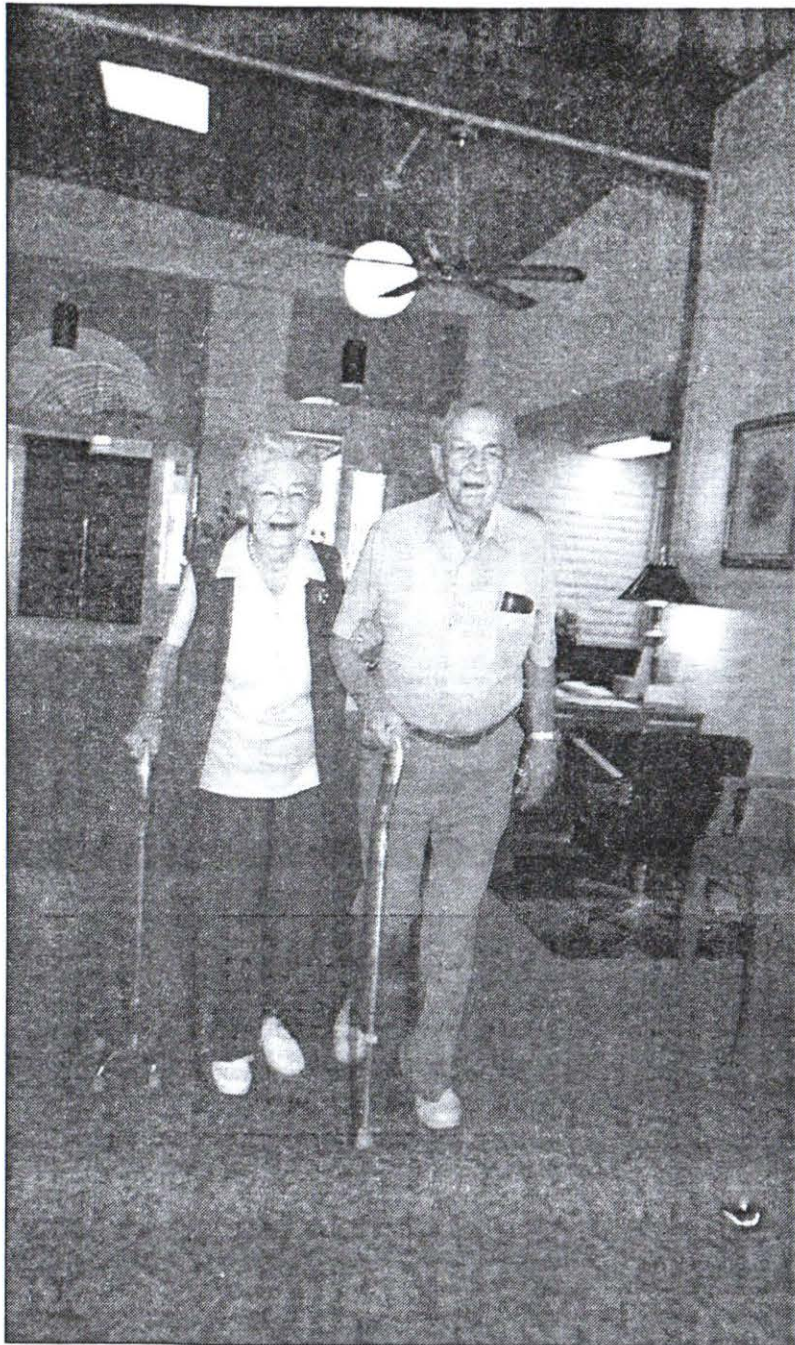
"I needed a home because I wasn't able to keep house anymore," said Harold, who has lived in Sun City since 1965 with his wife.

His wife, Ethel, added, "We thought this was the place to go to."

For more information, call 933-0137.

Hayley Ringle can be reached by e-mail at hringle@aztrib.com or by calling 876-2519.

OVER



MOLLIE J. HOPPES/DAILY NEWS-SUN

Ethel and Harold Worley walk through the Sun Valley Lodge lobby. They are second-generation residents of Sun City's first retirement center.



MOLLIE J. HOPPES/DAILY NEWS-SUN

Carolyn Rodebaugh, who is 101 years old, has lived at Sun Valley Lodge for the last 15 years.

Tuesday, Aug. 24, 1999 Daily News-Sun, Sun City

Care centers operator reports financial difficulties

By BRUCE ELLISON
DAILY NEWS-SUN

Sun Healthcare Group of Albuquerque, N.M., which operates three care centers in the Sun City area, has reported a second-quarter loss of \$589 million, and said it may have to file for protection in bankruptcy court.

That filing, should it happen, likely won't affect patients.

Sun Healthcare is the parent company of Westview Care Center and SunRise Care Center (formerly the Carillons), both in Sun City, and the Sun-Bridge assisted living residence in Sun City West.

All told, it operates some 385 inpatient facilities in the United States with a total of 43,300 beds.

Sun Healthcare of Albuquerque should not be confused with Sun Health Corp. of Sun City, which operates Boswell and Del E. Webb hospitals.

The Albuquerque company has been in financial difficulties for months, ever since the federal government changed the way it reimburses nursing homes for Medicare patients, and for the expenses of treating them with various therapies.

The company said Friday in a filing with the Securities and Exchange Commission that if creditors demand full payment "or if the company makes a determination that it would not be able to fund its operations outside bankruptcy, the company will commence as Chapter 11 bankruptcy."

Under that filing, a company is given relief from payment of existing debts and allowed to continue operating while it formulates a plan to get back on its feet.

Such a filing should not affect the patients, since the company would continue to operate all its facilities.

Since October 1998, Sun Healthcare has reported losses of \$1.4 billion, much of it from the write-down of the value of its facilities because of the new Medicare reimbursement levels.

It also has eliminated more than 10,000 jobs, and missed making scheduled payments on its debts.

As the company has shrunk, so have its revenues. In the second quarter, they slid 20 percent to \$601 million from the year-ago \$752 million.

Losses were more than many analysts expected, The Associated Press reported.

"Unless Sun can get a pretty serious restructuring of its obligations to outsiders, Sun will probably go bankrupt," said Robert Mains, an analyst with Advest, a New York securities firm.

The company has 11 care centers in Arizona.

Alzheimer's center set to open

Layout emphasizes active living, comfort

By MARY L. CRIDER
Staff writer

The new \$2.5 million, 36-bed Sun Health Residence for Alzheimer's Care will open officially on Valentine's Day.

Patient admission, at the rate of two a week to minimize stress and confusion for the new residents and staff, will begin Feb. 17.

Members of the press were allowed a peek Monday into the sprawling facility at 12750 Plaza del Rio Blvd., Peoria, that will serve over the next four years as a demonstration model to fill a care gap between adult care homes and skilled nursing care institutions for patients with dementia.

The care center is a product of an Alzheimer's disease treatment bill enacted by the Arizona Legislature in 1994. The residence is one of 10 that will serve as models to establish a subclass of licensure, regulations and guidelines for such alternative treatment facilities.

The concept of a residence that would provide a homelike atmosphere, chance to socialize and participate in activities, and the freedom not allowed in a heavily regulated skilled nursing setting was introduced to Arizona in 1992.

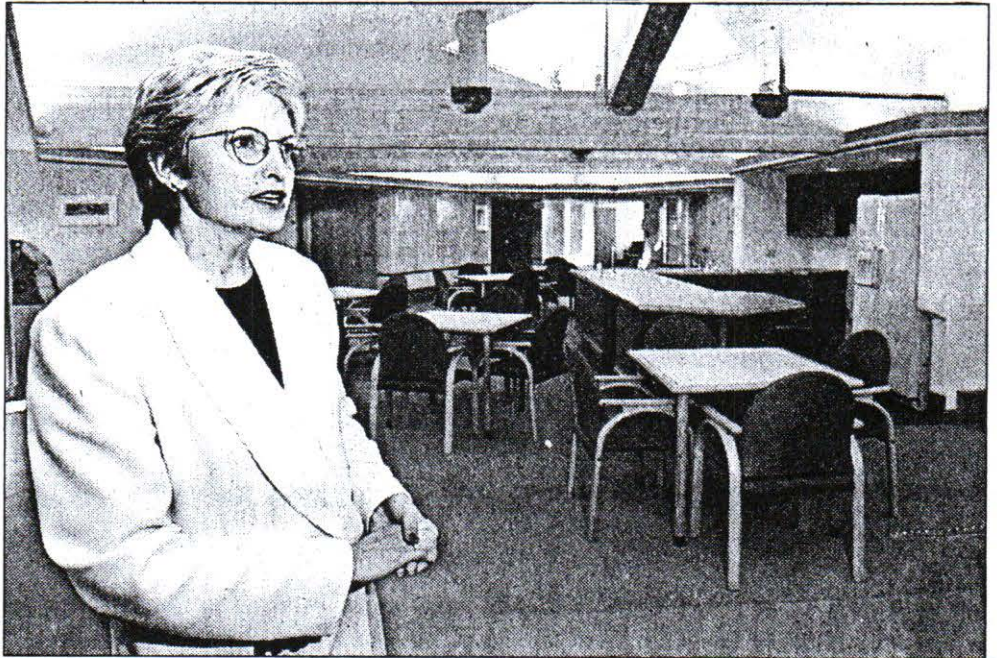
The residence is designed to be an activity-oriented model. Everything, from dressing, feeding and bathing oneself to higher social functioning, is considered to be an activity, Director Connie Metzger said.

Designed in three barrier-free pods with 12 beds each for high-, mid- and low-functioning residents, the center permits safe movement inside and outside. Rather than using drugs to control such behaviors as wandering and agitation, the walking tracks that loop from inside to the fenced courtyard gardens outside encourage residents to move

about, channeling their behavior into healthy activity.

Inside common areas are designed to promote maintenance of physical skills and independence. Residents may help prepare meals in the kitchen area, launder their own clothing and the like. While common areas provide opportunities for needed socialization, patients are provided privacy in their bedrooms. The open, airy design of the facility allows staff to see their charges at all times.

The design of the residence is



Rick D'Elia/Daily News-Sun

Genny Rose, executive vice president of Sun Health Extended Care Services, points out some of the amenities of the common area available to residents of the new \$2.5 million, 36-bed Sun Health Residence for Alzheimer's Care in Peoria.

"We know this population won't get better, but we believe in this environment we can hopefully slow down the deterioration — and we hope to prove that out over time."

— Genny Rose, executive vice president
of Sun Health Extended Care Services

planned to therapeutically address the behaviors of the cognitively impaired, including: disorientation, inability to recognize potential hazards, reduced physical skills, ongoing need for supportive cues, limited attention span, wandering and a need for independence.

Whatever they'd do in their own homes, they can do here, said Genny Rose, executive vice president of Sun Health Extended Care Services.

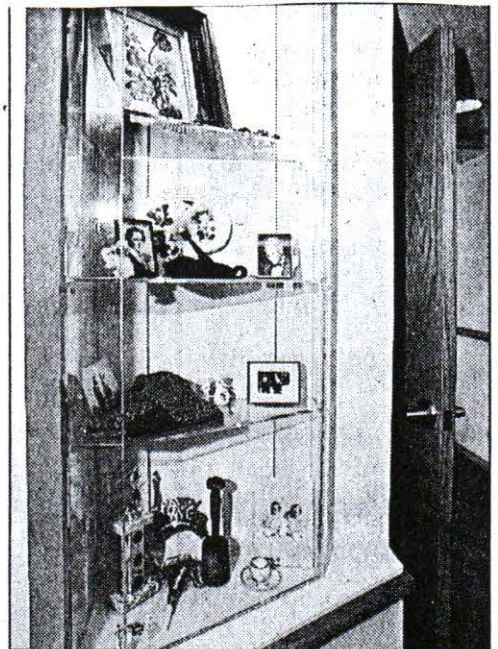
"The theme is freedom," Rose said. "We once had a patient, a former housekeeper. All she wanted to

do was to dust the railings. But in a skilled nursing setting this is not allowed. It is viewed as a violation of their rights to allow them to perform many of the activities they are used to.

"We know this population won't get better, but we believe in this environment we can hopefully slow down the deterioration — and we hope to prove that out over time," Rose said.

The residence will be staffed by trained caregivers, including 61 volunteers, who will be overseen by Metzger.

Staff members will provide quarterly reports to the demonstration project oversight committee set up by the Legislature. Staffers also will be compiling their own data to track the effectiveness of the facility's care innovations.



Display cases featuring mementos from the residents' lives are set in the wall near their doors to help them remember where they live in the care center.

Wednesday, Aug. 14, 1996 Daily News-Sun, Sun City, Ariz.

3 prepare center for good times

Sun Health hires staffers for activities

By JEANNIE JOHNSON
Staff writer

SUN CITY — Ask for Kathy, Kathy or Cathy and you're likely to find fun at Sun Health Care Center.

Kathy Heiman, Kathy Klose and Cathy Capps are the new trio leading all the activities at the center. Heiman is the activities director with the other two serving as her assistants.

It's their job to find out what the residents like, Heiman said.

"What I think is important, and what the residents think is important, might not be the same thing," she said. "We are here for them. Whatever the residents are into — even if it's sitting around talking about farming — it may not be my thing, but if they like it, great."

And it's going to take a bit of time to figure out what it is that goes over big with their clientele. All three are new to the Sun Health Care Center.

Heiman comes to Sun City from Colorado Springs where she was managing an assisted-living community. Her husband, a nursing home administrator, took a job in Mesa and the family moved to Arizona.

The prospect of taking over the activities program is exciting for the long-term care veteran. Although she fell into the field by accident, she's been hooked ever since.

"I always was in the food and beverage business," she said. "But then my husband moved me to this small town in South Dakota, and there was no opportunity to work in food and beverage. I went to work in a nursing home there, and I loved it. I think it was meant to be."

"The residents are so neat. Working with them really gets in your blood. I thought I would do it until I could get back into food and beverage, but I never went back."

This is Klose's first job in a long-

educational videos, movies, ice cream socials and Bible studies are some of the favorites of the residents, Heiman said.

Although they haven't initiated any new programs in the few weeks they've been on board, the two women have been researching possibilities for the future.

"I'm finding that a lot of the senses — hearing, smell, touch — fade as the residents age," Klose said. "I've been going to the library in my off hours looking for different ways to stimulate their senses. I've read about all kinds of music and activities where they have to get involved. If someone is performing, they just sit there and listen, but I'm looking for things that will stimulate them physically and mentally."



Mollie J. Hoppes/Daily News-Sun

Kathy Heiman, left, and Kathy Klose are two of the three women to join Sun Health Care Center's activities staff.

term care facility, but it isn't her first time working with seniors.

"My mother was involved in care centers," she said. "I came from a family of five kids, and we all did volunteer work in the facilities."

Capp currently is out of commis-

One such program has been donated by the Sun Health Auxiliary volunteers. The BiFolkal program has 16 different core topics that combine a variety of music, visual and participation activities for the seniors.

For example, one topic is games. Klose has developed a skit on how the board game Monopoly got started which is followed by a slide show about all the various games and their histories.

Another favorite activity is Grandparent's Day, Heiman said. This is a monthly event where the children at the Sun Health Child Development Center come to visit the residents and do an inter-generational activity.

sion and on medical leave. Heiman and Klose are looking forward to return.

In the meantime, they are getting their feet wet by continuing some of the programs initiated by their predecessors. Music programs

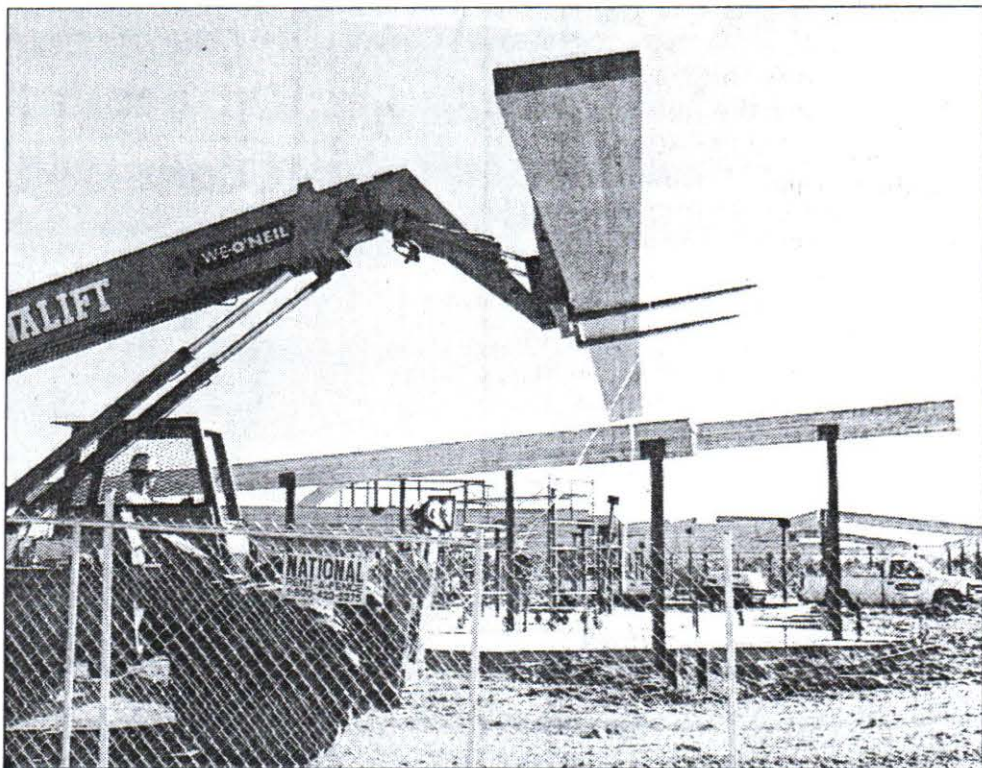
Catholic Masses and Protestant services are offered every Tuesday and will continue, as will the weekly Bible study.

"We have a lot of people who are very strong in their faith," Klose said. "I think it's what helps many of them get through the days."

Heiman said she may be giving a lot of herself to the residents through the activities, but they are giving back to her.

"They've taught me a lot of patience," she said. "Basically, I'm an impatient person, but they've taught me how important it is to take the time to smell the roses."

Family experience inspires director



Steve Chernek/Daily News-Sun

Debbie Tietjen, right, has been named director of the new Sun Health Residence for Alzheimer's Care, which is under construction on the Plaza del Rio Medical Campus, photo above, in Peoria.

Center to serve residents' social, emotional needs

By JEANNIE JOHNSON
Staff writer

Debbie Tietjen takes her job personally.

The new director of the Sun Health Residence for Alzheimer's Care honoring Mr. and Mrs. Robert J. Hoover understands what it means to have a loved one with the insidious disease. Her mother was diagnosed with Alzheimer's in December.

"I was managing an assisted living community in Medford, Ore., when she was diagnosed," Tietjen said. "I decided that what I could do for strangers, I wanted to do for my own mother."

Tietjen and her husband packed up their belongings and moved to Arizona five months ago to be closer to her parents in Sun City West. Her husband found work in marketing and sales for a local company almost immediately.

While looking through the newspaper one day, Tietjen saw an advertisement for a director of a new Alzheimer's residence.

"I am so excited about this job," she said. "It is everything I have worked for all my life."

Her interest in geriatrics began in college when she was studying psychology and social work. After graduating, she went into managing geriatric facilities.

"I've always had a great affinity for seniors," she said. "I've always felt like I could learn a lot from them, and I've always felt I could do a lot for them. It's been a love affair both ways."

Tietjen has several goals for the new residence, which is a social model rather than a medical model. It will focus on the social, mental and emotional needs of the residents rather than their medical needs.

"One of the things that is going to be so wonderful about the Sun Health Alzheimer's Residence program is that it provides a home for these people where they don't have to be in a skilled care center," she said. "They're going to be living in a

OVER

community where we can still utilize their talents. We'll be doing all kinds of different activities where they can use these talents and not just while away their time. These people aren't physically ill. They're still very active. They can still explore and enjoy life."

The building is being designed by Taliesin Architects, the architecture company started by Frank Lloyd Wright. It will have three pods which will separate the residents by their level of functioning.

The residence will accommodate 36 people. The grounds will include

gardens and a walking path. A fence, covered with plants, will keep the area secure to prevent wandering.

In addition to providing a secure home for its residents, Tietjen also is looking forward to a chance to educate the public on Alzheimer's disease.

"I think Alzheimer's disease is very misunderstood," she said. "People forget where their keys are or can't remember a date, and they automatically think they have a fear response. Alzheimer's doesn't work that way. It's a gradual disease."



Steve Cherek/Daily News-Sun

Palmeras complex work begins

Heritage project scheduled to open in '96 12-2-95

By JEANNIE JOHNSON
Staff writer

SUN CITY — Four years ago Ellis Danner put his bucks down and signed on the dotted line.

He was moving into The Heritage Palmeras. At least that's what he thought.

A series of setbacks put The Ryerson Company project at 101st and Palmeras avenues on the back burner for nearly six years. Friday's groundbreaking ceremony for the 182-unit complex got the project under way.

"While this is a big day, it will be a really big day when Irene and I move our furniture into apartment 209," he said in a speech before the shovels scooped the dirt.

The project is expected to be ready for residents within a year.

Denny Ryerson, president of The Ryerson Company, said a fluctuating real-estate market threw the project into limbo. It wasn't until he met Thomas Motherway, president of McDonnell Douglas Realty Company, that the project leapt back to life. McDonnell Douglas owns the project.

"I met Tom in California, and we

started talking about what we did for a living," Ryerson said. "I told him about The Heritage Palmeras project, and he sent some people from his company out to look at the site and what we had planned. Tom thought it was a good opportunity for their company, and we seemed to complement one another."

Designing the project and the services to be made available was a cooperative effort between Ryerson and the future tenants. A think tank was established which helped determine the needs of the older retiree, Danner said.

"I look at this as my second retirement," he said. "I've enjoyed the 22 years I've lived in Sun City, but now I'm ready for something different. There comes a time in our life when we want more leisure and less responsibility."

To meet those needs, members of the think tank wanted property for rent — not to own. Danner said they also wanted a secure building made of concrete and steel — not wood framing. A lot of space isn't a real priority for these seniors, but food service and housekeeping are a must.

"I may have been retired for 22 years, but Irene hasn't been able to retire yet," he said. "She's still working in food service and housekeeping. Now she gets to retire."

Lee Peterson, president and chief executive officer for Sun Health, was a guest speaker at the groundbreaking ceremony.

"As I was driving to this occasion, I was thinking about how the resident's health-care needs change," he said. "We are always looking for creative solutions to these problems. We are pleased to announce that Sun Health will provide assisted-living services at The Heritage Palmeras."

Many activities will be made available to the residents as well as continued access to the Recreation Centers of Sun City, Ryerson said.

"We're working out a final agreement with the recreation centers right now," he said. "Even though our residents don't use the facilities as much, it's important to them to have them available and be able to participate."

*The Ryerson Company
&
McDonnell Douglas
Realty Company*

*cordially invite you to attend the
Groundbreaking
for
The Heritage Palmeras
in Sun City*

*Friday, December First
Nineteen Hundred and Ninety Five
at Ten O'clock in the morning
at
10101 Palmeras Drive
Sun City, Arizona*

Residents celebrate life in Sun City care center

By ROSA De SIMONE
Daily News-Sun staff

Ruth and Bryas Shikles remember Dec. 1, 1983, like yesterday.

On a pitch-dark morning, they moved into their new home at Royal Oak Life Care Center.

The Shikles were the first residents of the retirement center and on this, Royal Oaks' 10th anniversary, they join their neighbors in "A Celebration of Life."

"It's the best thing we ever did in our lives," Ruth said.

The Shikles moved from St. Louis to Sun City in 1974. In the early '80s they were approached by their pastor, Davis Illingworth of Faith Presbyterian Church, about a new retirement center he was helping to develop in Sun City.

"He was our pastor for years," Ruth said. "So we put all of our trust in him and we knew he wouldn't steer us wrong."

And he didn't, they said.

The Shikles live in a "garden home," a small residence with a lawn and small patio. Their monthly payments entitle them to cleaning and maintenance services, and their only other monthly bill is for the telephone.

Living at Royal Oaks guarantees them security for life, they said.

"When we decided to move here my health wasn't too good; I've had high blood pressure all my life," Ruth said. "I just knew I wasn't going to live long and I wanted Bryas to be taken care of after I passed on."

Well, a decade later Ruth is still here to enjoy the endless activities available at Royal Oaks, including a dance to-night kicking off the year-long anniversary festivities.

When thinking of Royal Oaks, "friendliness of the people" is the first thing that comes to Ruth's mind, while Bryas thinks of "security."

The Shikles were part of a handful of people who moved in right after Royal Oaks' opening in 1983.

"Imagine eight people in that great big dining room?" Ruth said, laughing aloud at the memory.

Like the Shikles, Genevieve Fassler credits herself with making a smart decision when she came to Royal Oaks Feb. 1, 1984.

Fassler had been living in a house in Sun City since 1969. But after her husband died in 1981 she said it was time she thought of her future care — and Royal Oaks fit what she had in mind.

"I knew I was to be taken care of for the rest of my life," Fassler said. "I never wanted my kids to take care of me."

Life at Royal Oaks is like "resort living," a true celebration of life, she said.

"When I told my children I was moving here, they said, 'Mom, you're not ready to go into a nursing home.' But that's not the case; this is not a nursing home."



Stephen Cherek/Daily News-Sun

Genevieve Fassler stands in the atrium at Royal Oaks, the care center where she has lived for 10 years.

OVER

Royal Oaks marks 10th year

By ROSA De SIMONE
Daily News-Sun staff

SUN CITY — Ten years ago, Roe Walker pitched an idea to a fellow Sun Citian that ultimately scored a home run for the duo and the community.

Walker and Davis Illingworth, founding pastor of Faith Presbyterian Church, were out of state attending a baseball game when out of the blue Walker threw out his proposition:

"Our church should give some leadership in Sun City to building a nice retirement center."

That's how the idea for Royal Oaks Life Care Center was born.

And 1993 marks "A Celebration of Life," a year-long commemoration of the center's 10th anniversary, as well as a time for Walker and Illingworth to reflect on the bases they reached during development and the eventual slide into home.

"A lot of our families were actually moving (out of Sun City) to get into a life care center just like this one," Illingworth said, sitting in an office at Royal Oaks.

Illingworth had been involved in establishing five retirement centers out of state and, with his experience and Walker's "attitude," the project of building a multi-million-dollar center with no capital began.

To get to first base, Walker and Illingworth had to convince Del Webb Corp. executive John Meeker to sell them 33 acres at 99th Avenue and Royal Oak Drive for \$1.5 million — Meeker was asking \$4 million.

Although it was a "hard sale," the two appealed to Meeker by showing him that a need for the center existed.

"We told him that we had people willing to do the job Del Webb should have done a long time ago," Walker said.

Illingworth has lived in Sun City since 1972 and Walker moved here in 1977.

"We had our minds and our hearts set on this location," Illingworth recalled.

Although the project began with members of Faith Presbyterian Church in mind, the two decided to open the project to the entire community.

See Founders' dedication, A5

Founders' dedication continues

—From A1

"In those days there wasn't another one like us," Walker said.

The support they received was immense, Walker remembered, crediting Illingworth's ability to persuade Sun Citians that the project would succeed.

Illingworth said he had an ethereal feeling that Walker would make Royal Oaks a reality.

"I told the congregation, 'Roe is the man that God has called to do this,'" Illingworth said.

It was that appeal, along with Walker's and Illingworth's pitches for contributions, that persuaded Sun Citians to loan them \$1.2 million, interest free.

Each donor was guaranteed a place at Royal Oaks upon completion, they said.

With the money needed to strike a deal for the land in pocket, construction of Royal Oaks began in 1982.

A year later, 100 garden homes, 249 apartments, a 100-bed health care center and a large dining room were complete.

Sale of \$36.5 million in bonds, at 12 percent interest, financed the project — of which \$30 million has already been repaid, they said.

The first residents of Royal Oaks moved in Dec. 1, 1983.

For Walker and Illingworth, the quest had been accomplished: "We wanted it to be the nicest, finest retirement home of its kind — anywhere," Walker said.

A decade later, Walker can boast that the center maintains that brand-new quality.

All is spick-and-span — right down to the boiler room, Walker said.

"We want Royal Oaks to be better at the end of the month than it was at the beginning of the month," he said.

"We wanted people who came here to feel that it was home and that they would be taken care of for life," Il-

lingworth said: "We're a non-profit agency — we need to give our people the best care possible."

With that in mind, Walker started an endowment which guarantees that any resident who falls on hard times will not be thrown into the street.

The endowment is at \$1.3 million, but Walker predicts it will rise to \$5 million before long.

The Roe Walker Center was also started recently in Royal Oaks to provide residents who need limited supervision a place to find help and entertainment during weekdays.

Aside from security, residents are attracted to Royal Oaks because of the sense of family and community there, Walker and Illingworth said.

"If you want to be alone, you lock your door. But if you don't, all you have to do is walk down the hall and there's a friend," Illingworth said.

Both men are quick to explain that it was not their work alone that made Royal Oaks successful, but also that of staffers, resident volunteers and the all-volunteer board of trustees, of which Walker is president.

"I always said, 'A burden for one can be heavy, but light on

many': I believe in the committee system," Walker said.

"None of us has ever received compensation (for our work) — it was all done on a volunteer basis," he said.

The waiting list to enter to Royal Oaks numbers 600.

"Tender loving care — that's our best advertising," Walker said. "We've never had a vacancy."

Illingworth and Walker continue to play integral roles in the operation of Royal Oaks.

Illingworth will soon be moving into the center.

"I always felt that this was the best way to go — that's why I was instrumental in building six of these," he said. "I believe in it enough to move in here."

And Walker will be overseeing a new project there — construction of a chapel in memory of his wife, Mildred.

The chapel and expansion of the care center should begin in April.

"I always felt that if we were straightforward and did it the right way — keep it nice inside and out, have a dedicated board and hire qualified staff — I didn't see why there wouldn't be green lights ahead," Walker said.

Faith in retirement

Care centers offer personal/spiritual touch

By Dan Shearer
Staff writer

For Nellie and Ray Zimmer, the decision was easy.

After decades in full-time Christian ministry, the couple wanted to retire to a place where the fellowship was rich and it was natural to be open about one's faith.

Lena Mead, on the other hand, said it wasn't religion that drew her to her retirement center. But the 82-year-old admits the Christian atmosphere and spacious chapel did catch her eye.

And Warren Feldtmann, 88, said the same crowd of friendly Christians that drew him to Good Shepherd Retirement Apartments nine years ago keeps him happy today.

Like thousands who retire each year, Mead, Feldtmann and the Zimmers chose centers that offer independent living in a community setting.

What sets them apart is that they chose centers with religious ties.

"At this age group of clientele, religion and their spiritual lives are very much their whole life, and for them, it's only a natural that that lifestyle continue and they have their spiritual needs met," said Allan Tramel, administrator at Good Shepherd.

After they'd looked at several retirement centers, the laid-back atmosphere of Good Shepherd attracted Mead and her sister in 1990.

"That was my main thing that I liked about it," said Mead, originally from Pennsylvania. "A Christian atmosphere, but no pressure."

Good Shepherd, at 103rd and Olive avenues, is affiliated with the American Lutheran Church in America, but most of its residents are not Lutheran, Tramel said.

Bible studies, prayer groups and a chaplain are available to residents, but they are optional.

At Baptist Village, the Zimmers' home in Youngtown, fewer than 40 percent of residents are Southern Baptists. But resident surveys show the Christian tie is a big part of why people choose to live there, said Joe McLeroy, director of operations.

"We believe it's a ministry,"



Michael Chow / Staff photographer
Nellie Zimmer sings along with accordion player Aggie Twist during a birthday party at Baptist Village. Fewer than 40 percent of village residents are Southern Baptists.

"At this age group of clientele, religion and their spiritual lives are very much their whole life, and for them, it's only a natural that that lifestyle continue and they have their spiritual needs met."

Allan Tramel
Administrator
Good Shepherd

said leasing director Lynda Taylor. "We believe in not only giving the best care we can provide at a reasonable price, but we view it as a ministry to these people. And when you view it that way, it's more than a job."

A full-time chaplain and 120 volunteers, many who are residents of Baptist Village, provide help above what most other homes offer, said Sue Young, marketing director.

But when it comes to basic services, secular and religion-affiliated retirement homes are virtually the same, said Guy Mikkelsen, executive director of the Foundation for Senior Living, a program of the Phoenix Catholic Diocese.

Nevertheless, he said, religion-affiliated homes maintain a psy-

chological edge.

"Some people have a certain affinity for a certain place" if they know it's operated by a church, Mikkelsen said. "It gives them a sense of confidence."

But with huge corporations moving into the retirement center business, church-affiliated facilities could be squeezed out.

"Like everything else, money's the bottom line," said Barb Lenards, community services director at Glencroft, a Glendale care center with ties to four denominations. "I think it's more difficult for a church-affiliated center because they don't have as big a backing, they don't have a corporation behind them."

Tramel agreed. Non-profit centers are increasingly finding themselves on the financial edge because they can't dip into corporate coffers, he said.

For Mead, the long search for a place to retire ended when she walked through Good Shepherd's door and, she said, felt a peace. And the chapel across the way offers special comfort, she said.

"I have learned to love this place," she said. "I have always thought, with my sister being older, that if she'd pass away I'd be on the next plane to Pennsylvania. But I have changed my mind now. This is my home now, and I'm going to spend my days here."

Baptist Village marks 15 years

By IAN MITCHELL
Daily News-Sun staff

Seventeen years ago, Truman Cook didn't want to help establish Baptist Village.

"I had a contracting business and was doing land development. I was even a golf car distributor. I had a real estate business," Cook said. "I didn't need to get involved in anything else."

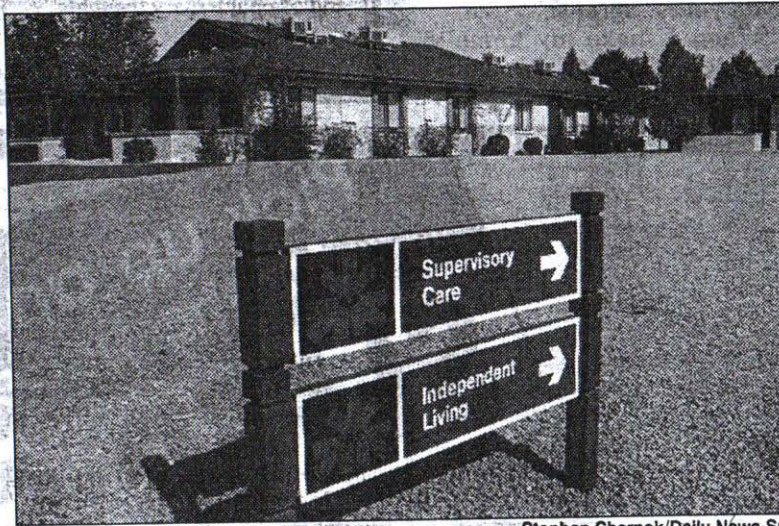
But Gene Bert, then pastor of Sun City Baptist Church, asked Cook to pray about it.

"I didn't really want to become involved," Cook said, "but then after promising I'd pray about it, I knew I had to get in on it."

"It" is Baptist Village, a retirement center at 11527 W. Peoria Ave., that celebrated its 15th anniversary Friday.

Reluctant founder Cook is chairman of the board of Arizona Baptist Retirement Centers, which runs Baptist Village centers in Youngtown, Sun Ridge at 12221 W. Bell Road in Surprise and Northeast Phoenix.

The retirement centers are affiliated with the Arizona Southern Baptist Church, but



Stephen Chernek/Daily News-Sun

Baptist Village in Youngtown celebrated its 15th anniversary Friday.

accepts residents of all faiths.

ABRC celebrated the 15th anniversary of the groundbreaking for Youngtown Baptist Village last week.

"Seventeen years ago it was a dream. There was nothing there, except the firm conviction that there was a need for it," Cook said.

"We've pursued it through the years and the Lord has blessed it and at this point we're caring for over 400

people." ABRC President David Jakes said Baptist Village will soon be caring for more people as the retirement center adds an Alzheimer's care unit. Jakes said he hoped the new care unit would open by June 30.

Last week's anniversary dinner had a fund-raising goal of \$100,000 for the new Alzheimer's unit. But ABRC almost doubled its goal, raising more than \$193,000

in pledges, Jakes said.

Jakes said ABRC has expanded in the three years he has been with the organization. Baptist Village in Youngtown has added 16 apartments, and centers in Sun Ridge and Northeast Phoenix have opened in the last year.

"Of course, we're looking at other opportunities," he said. "We want to duplicate what we're doing."

Sites in Tempe and Mesa are being evaluated and locations elsewhere in the state are also under consideration, Jakes said.

One of 15 original founders of ABRC, Cook said he isn't sorry he got involved.

"I don't have any regrets for anything that I've done for that ministry," Cook said. "Every time I go over and see the people living there in safety and security and see the people well cared for, I'm very proud of what the Lord has accomplished in Youngtown and the other campuses.

"And I'm persuaded that He wants to use us to expand the ministry."

(OVER)



David Jakes, Arizona Baptist Retirement Centers president, visits Leone Brown, a resident of Baptist Village in

Youngtown. Jakes manages Baptist centers in Youngtown, Surprise and Northeast Phoenix.

Center pleases Marriott

By MIKE GARRETT
Daily News-Sun staff

SUN CITY — The newest local retirement and care center did not have to worry about growing pains in its first year of operation.

That's because Sun City Brighton Gardens is backed by a company with assets reaching \$8 billion. It's one of four assisted living facilities Marriott Corp. built last year.

J.W. Marriott Jr., president and chairman of Marriott Corp., visited Brighton Gardens at 17225 Boswell Blvd., Thursday to see if his investment in the assisted living concept is on track.

Marriott's top executive toured the 128-unit center and talked to residents and staff.

"I didn't hear any com-



Stephen Cherek/Daily News-Sun

J.W. Marriott Jr., right, president and chief executive officer of the Marriott Corp., greets Alice Burns, a resident at Marriott's Brighton Gardens care center, while Mark Monaco, the center's general manager, listens Thursday.

plaints," Marriott said. "It's meeting all of our expectations. I think the Marriott name gives us a dimension that some of the other communities don't have. It's affiliated with a large company noted for its hospitality."

What he heard in his tour, he said, was that residents liked

the food, the caring staff and the center's residential decor.

"The residents were thrilled to have Mr. Marriott here because it showed that we care about them right up to the very top of the corporation," said Marriott Senior Living Services General

See Marriott chief, A5

OVER

Marriott chief tours Sun City care center

—From A1

Manager Paul E. Johnson. "They all came out to tell us how they felt and they wanted to meet him and tell him about their experiences."

Marriott said the quality of the food is especially important. "Like our hotels, we put a lot of time and effort into making sure that our food is good."

"Marriott Corp. has made a commitment to this business and we're able to stick with this facility as it goes up, especially the first year when it's bump and grind," Johnson said. "Some people don't have the financial wherewithal to weather the first 18 months to two years it takes to fill a facility like this."

Johnson said the key to any success Sun City Brighton Gardens enjoys is customer satisfaction and resident referrals.

"Good news travels fast and bad news travels faster," Marriott said.

Brighton Gardens offers assisted living, personal care and skilled and intermediate nursing care.

Current occupancy rates reflect good news, Johnson said.

"We are full in our skilled nursing area, close to full in the personal care section and we are about three-quarters full in our supervisory care. We're moving right along."

While the 63-year-old corporation has a proven hospitality

track record, it has to prove itself in the health-care field, Johnson said.

"We've made a real commitment to health care and hired a strong support staff. We have to provide a high level of service because that's what people have come to expect from us."

Marriott said Brighton Gardens is virtually a mirror image of its Scottsdale center in terms of fill-up rates and corporate expectations. He said the new Houston Brighton Gardens is doing the best (the other is in Virginia Beach, Va.) because of its huge market area and lack of real competition.

Construction will start soon on a fifth Brighton Gardens in Port St. Lucie, Fla., he said. "My goal is to have 100 Brighton Gardens (nationwide) by the year 2000."

The Sun City Brighton Gardens is also expanding its marketing area, said General Manager Mark Monaco.

"We've always had an expanded marketplace and not limited ourselves to Sun City. We also want to consider north Glendale, north Phoenix and portions of Peoria."

Monaco said the primary focus has been Sun City because many residents indicated they wanted to stay within the walls close to friends and the recreation centers.

Marriott care center takes 1st residents

By MIKE GARRETT
Daily News-Sun staff

SUN CITY — The first 22 residents have moved into the new Marriott Sun City Brighton Gardens catered living facility at 17225 N. Boswell Blvd.

Brighton Gardens opened its doors last week as Sun City's newest care center on its 3.3-acre site just north of Bell Road and Boswell Boulevard.

The center has 70 supervisory care suites, 40 personal care beds and 30 skilled nursing care beds. The largest suite is a one-bedroom, one-bath with 425 square feet.

Amenities include an arts and crafts room, game room, television and entertainment room, beauty/barber shop, library, store, communal kitchen, secure courtyard and garden with sitting area and a laundry.

The first to move into Brighton Gardens is typical of a Sun City resident whose active lifestyle has turned to passive.

A still spry Bill Rudell, 91, said he had been keeping an eye on the project as a possible destination after the center broke ground in May 1989.

"I watched this place grow up after they started it," said Rudell, who had a three-bedroom house about a mile from the site. "I thought I would retire here if they accepted me," Rudell said. "They haven't chased me out yet in my first five days.

"I can't run so I'm not going to start any fights here," said Rudell, noting a leg problem has led him to use a cane.

"Up until January of this year, I played golf two days a week, shuffleboard two days and pool two days. Up until a couple years ago, I played

golf four times a week and all the other stuff besides," Rudell said. "Then my leg started bothering me and I thought I better lay off and start acting my age."

Rudell vividly recalls the day he moved to Sun City Oct. 10, 1977, "sometime during the day" from his native Pheasanton, N.D., a farming community of about 900. He operated his own farm there, specializing in wheat, barley, oats and milk cows.

He said he reached a point after losing his second wife a couple of years ago where he just couldn't maintain his big house by himself anymore.

"I handled it pretty well for about two years with my yard and housework," Rudell said. "But you naturally get tired of that."

Wanting to stay within Sun City, Rudell said he looked at a number of other centers and put a partial entrance fee down on one. "But I didn't feel it was quite right for me.

"When this one was near ready, I stopped in and got acquainted with the staff. Everybody was real friendly. They didn't have to twist my arm any."

Brighton Gardens retirement counselor Susan Bierner said the move to the center can be a difficult transition for many of the new residents, so the staff tries to make them feel at home and get the activities started as soon as possible.

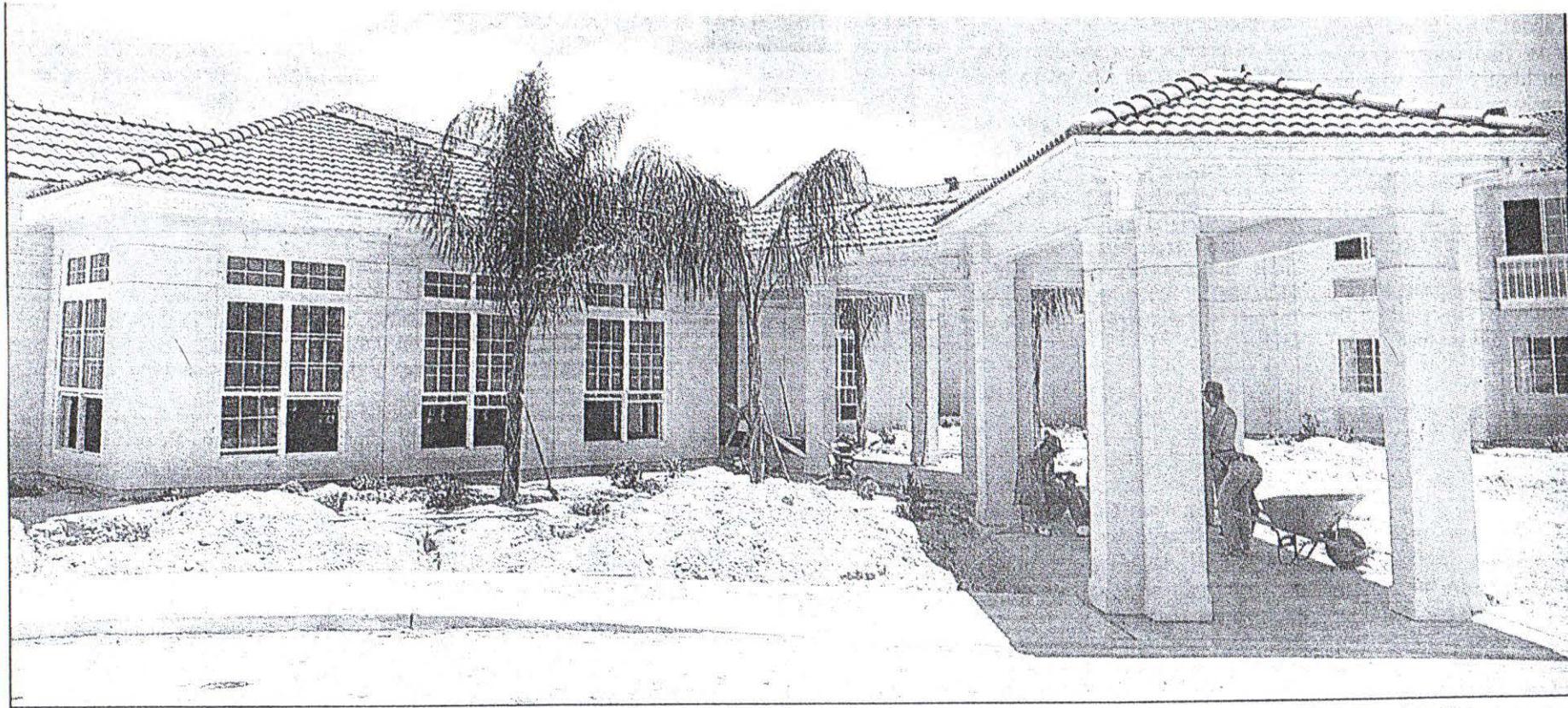
While many industry executives feel the Sun City area has reached the saturation point in congregate care living, Bierner said that Brighton Gardens should still do well, based on early interest.

OVER



Daily News-Sun photo by Mike Garrétt

SWEPT INTO BRIGHTON — The Halloween witch notwithstanding, Bill Rudell says he likes his new home in the catered-living Brighton Gardens. Rudell moved into the center after 13 years of maintaining his own house in Sun City.



David McIntyre / Staff photographer

Marriott Corp. plans to open Brighton Gardens, a 134-resident rental complex for retirees, in October in Sun City.

'Catered living'

Marriott to open retirement centers in Sun City, Scottsdale

By Carolyn Huffman
Special to Community

Sun City

Marriott Corp., a leader in the hotel and resort industry, is branching out into retirement living services, and Sun City is the site of its prototype.

Brighton Gardens, a 134-resident rental complex, is due to open around Oct. 1. Its sister development, Brighton Gardens of Scottsdale, will open a month earlier, said Brian Swinton, vice president for

Marriott's Senior Living Services division.

The complexes combine three types of senior care: supervisory, which provides "hands-off" assistance; personal, in which a licensed care giver provides "hands-on" physical help; and nursing care. Residents choose which amount of care to receive.

"The feel will be a more hospitality, home-oriented feel, as opposed to a medical or institutional feel," Swinton said.

Marriott calls the concept "catered living," Swinton said. Resort-like touches are added, such as a dining room and a nightly "turn-down service," in

which a staff member comes to each apartment to turn down the bed.

"We feel it will be highly non-institutional," Swinton said.

Marriott is placing special emphasis on food quality, he said. "That's a feature we're particularly proud of."

Residents can reserve a "country kitchen" and cook for their visitors or family, he said.

Retirement living, Swinton said, was a "natural extension" of Marriott's hotel services. However, he

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MARRIOTT

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added, "We don't intend to run a hotel."

Marriott already operates 10 retirement communities around the country, he said, but Brighton Gardens is the first of its type.

The company plans to develop 150 such complexes in the next five years. At that point, Swinton said, Marriott would be the largest developer and operator of retirement communities in the country.

Marriott's research division began studying the senior living market in 1986, said Dennis Wag-

ner, national director for the company's Catered Living program.

"We've learned a lot since then," he said. "We spent a lot of time researching into what the elderly wanted."

According to a Marriott survey taken in November 1989, financial stability is of the highest importance to seniors in a retirement community, with about 94 percent of respondents giving it high ratings. Personal security, a caring staff and quality food follow in

importance.

This and other surveys, conducted for Marriott by ICR Survey Research Group, were the basis for planning Brighton Gardens, Swinton said.

The two Arizona units already have some spots reserved. "We're really excited about the response it's received so far," he said.

Wagner said the Sun City complex has a high percentage of single men and couples who have reserved apartments, contrary to research that showed single wid-

ows as the majority of retirement-community dwellers.

Swinton also said staff members for Brighton Gardens will be local residents. "Everyone we are hiring are local people. We think that's vital to a community."

Other features of the complex include housekeeping and linen services, entertainment and social activities, and an emergency call button in each room.

Prices for Brighton Gardens run from \$1,500 per month for supervisory care to \$110 per day for private nursing care.

Marriott center on track for Oct. 1 opening

By MIKE GARRETT
Daily News-Sun staff

SUN CITY — Marriott Corp. is scheduled to formally open its Sun City Brighton Gardens around Oct. 1, a month after opening its first of about 30 planned national Brighton Gardens in Phoenix.

Executives of the company said the first residents may start moving into the center at 17225 N. Boswell Blvd. by mid-September.

Brian Swinton, vice president for product development, sales and marketing for Marriott's senior living services division, and Dennis Wagner, Marriott's national director of catered living, were in Sun City last week to see the progress of construction on Brighton Gardens. The company broke ground for the project last Aug. 1 on the site northwest of Sun Shadow Square shopping center.

Brighton Gardens is a rental community designed for older adults who want private apartment living but need limited supervision or assistance with daily activities. The community will offer assisted living and personal care, as well as intermediate and skilled nursing services.

Brighton Gardens will contain 64 supervisory care residences. A fully licensed nursing facility includes 40 personal care and 30 nursing care beds.

"Our research has shown us that older Americans prefer to have more control over their

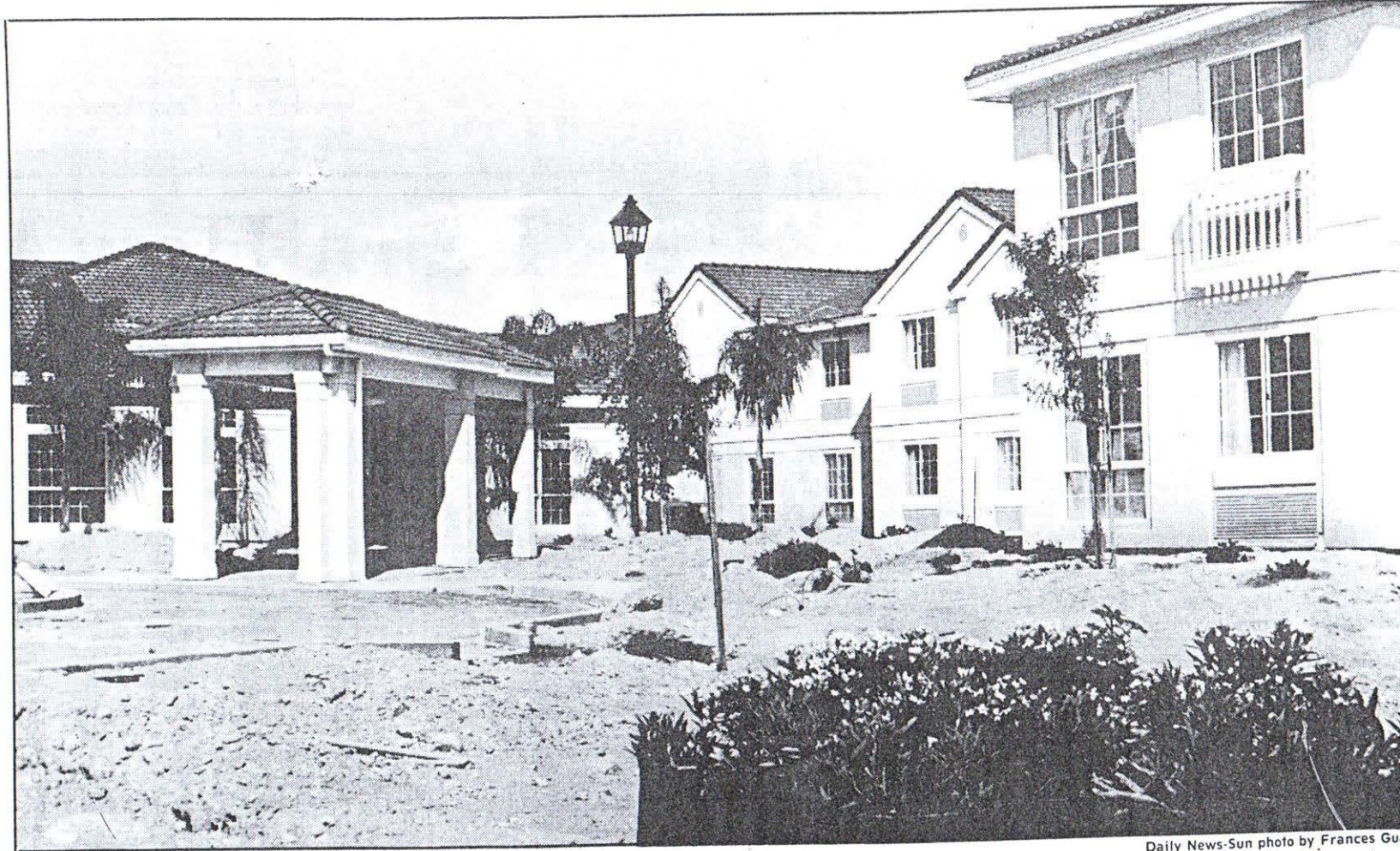
finances and prefer to rent an apartment rather than buy a unit or pay a large entry fee," said F.W. Cash, president of the Marriott Service Group that includes Marriott Senior Living Services. "Renting provides the flexibility of moving if they want to be closer to friends or family."

Swinton said Marriott has taken 18 \$500 rental deposits for the Sun City center. "Our goal before we opened was 20 so we're right where we want to be," Swinton said.

He said Marriott's recently released Seniors' Attitudes Survey conducted between May 11 and June 11 of 1,004 seniors by the ICR Survey Research Group indicates Marriott is on the right track in its commitment to senior living services.

Swinton said Marriott has already made some changes in building design and planning as a result of the survey and the company's marketing and demographic studies in 14 U.S. metropolitan areas.

Wagner said each community's specific needs, cost of living index and saturation level of competing facilities are all weighed before Marriott determines whether to build a congregate care facility. He said that Sun City rentals will cost considerably less than California rental fees because of lower land and construction prices in the Northwest Valley.



Daily News-Sun photo by Frances Gu

GOING UP — The Marriott Corp.'s Brighton Gardens catered-living facility in Sun City will be complete once

Swinton said he's aware that the number of Sun City and Peoria congregate care facilities has probably reached the saturation point.

"We don't think another in-

dependent living center needs to be built in this area but our research showed there is still a market for another rental catered living facility," Swinton said.

landscaping is finished. The center is on Boswell Boulevard north of Bell Road.

"But we are concerned that a couple facilities here are struggling right now," Swinton said. "If they fail, it reflects badly on all of us." He said that the ICR survey showed that a center's

financial stability was the most important aspect (mentioned 95 percent of the respondents) when choosing a congregate care facility, a factor in Marriott's favor.

Business

Daily News-Sun Thursday, July 26, 1990

SuperCare fills need

By MIKE GARRETT
Daily News-Sun staff

SURPRISE — Sun Ridge Retirement Community has introduced SuperCare for the elderly who need some daily assistance but can't afford a nursing home or life care center.

Sun Ridge administrators say SuperCare Program residents pay between \$700 and \$1,000 a month, about half the average cost of nursing home care.

Sun Ridge's SuperCare coordinator is Dorothy Gassensmith, assisted by Dolores Miner and Whitney Murdoch.

Gassensmith said most of SuperCare's 50 residents Miner said another five have said to move in) have come from area nursing and supervisory care homes or assisted-living facilities because they wanted a more independent lifestyle.

"It's kind of a cross between not being as independent as they used to be but not yet needing a nursing home or an assisted-living facility," she said.

To locate potential residents, Gassensmith said Sun Ridge works with mostly Northwest Valley doctors ofices, hospitals, social workers, health agencies and the Veterans Administration. Some Sun City area trust officers, fiduciaries and guardians looking for supervised care for their clients also have responded.

Sun Ridge, 12221 W. Bell Road, has also developed a home-share program for its 102 SuperCare apartments, allowing some residents to share an apartment.

"The affordability of this program has been one of the main motivators in people's decision to come here, besides its independent feeling in a nice location and homelike atmosphere," Gassensmith said.

A nurses station has been

set up in the middle of the SuperCare apartments, which are registered with the Arizona Department of Health Services. The medical supervision is a step further than assisted living, which doesn't have the qualified medical component.

"We have a licensed nurse and nurses aides on staff 24 hours a day to regularly check on residents," Gassensmith said. "As each individual coming into the program has a special need, we can develop a care plan to meet their needs at that level — but still stay within the framework of personal care and lower." Sun Ridge also has an on-site nursing home (The Kiva) for those needing higher care levels.

The SuperCare monthly fee of \$700 to \$1,000 includes all services — supervision and administration of doctor-prescribed medications and medical treatments, health education classes, dressing, grooming and bathing assistance, special diets and monitored meals, monthly family consultation, housekeeping and an activity program.

"What changes in terms of the price is not the services but the accommodations," Gassensmith said. "You can choose a bedroom by yourself, share the bedroom or share a one- or two-bedroom apartment." Plans call for making the individual apartment buildings more modular to accommodate additional bedrooms.

SuperCare allows residents to be more flexible on meal schedules or planning daily activities, said Beverly Burnett, Sun Ridge associate executive director. "We encourage them to function at a level of highest capacity. There's a more regulated atmosphere in a licensed nursing home."

"They're kind of supervised and staff is all around but it's



Daily News-Sun photo by Mike Garrett

MAKING THE ROUNDS — Sun Ridge SuperCare resident Helen Janecke walks the grounds with her "protective poodle" Twiggie. Janecke said she likes the independent feeling she gets from SuperCare but still needs some daily assistance.

not so intrusive that they feel like they're being watched all the time," Gassensmith said.

Burnett said the program is more need-driven than want-driven, especially in its social climate. "We have an activity director who regularly knocks on their doors to make sure residents get involved."

"We have had many examples of people who came into SuperCare who actually got better," said Sharon Rossi, director of sales and marketing.

SuperCare residents falling into that category are Helen Janecke and Eric Olsen.

Janecke's husband recently

died of Alzheimer's and she didn't want to remain in her Sun City house with all of its reminders of her husband.

"They're too busy and I don't want to be a drag," Janecke said.

"I don't need a lot of care. I can do most things myself," she said. "But I do need some help with my shower and as a diabetic I need three healthy meals a day. My daughter told me to do it right, so I'm doing it right."

Janecke said she also is happy she can keep her "very protective" pet poodle Twiggie in the apartment with her for companionship.

Heritage think tank contributes to design

By MIKE GARRETT
Daily News-Sun staff

SUN CITY — Ryerson Co. President Denny Ryerson thought he knew a lot about building rental retirement apartments as the builder of several such projects in the Valley, including the Sun City Ryerson-Heritage.

But it wasn't until his company began planning The Heritage Palmeras Phase II in its zoning stage about 10 months ago that Ryerson and his staff decided some future residents' comments would help the planning.

Ryerson says he has received more than he bargained for. A group of 25 to 30 Sun Cities residents, out of the 80 who have reserved apartments, have gathered seven times over the past several months to participate in "think tank" sessions. The residents are helping plan the 200-unit, 320,000-square-foot Phase II of Heritage Palmeras at 99th Avenue and Palmeras Drive. The next session is scheduled for Nov. 16.

The sessions have given Ryerson and his staff an opportunity to update their "reservists" on the planning.

The reservists in turn have been responsible for several significant design changes in the multi-million-dollar, three-story project. They're even deciding how high the toilets in their bathrooms should be.

"They speak their minds," Ryerson said. "They tell you if they think your ideas are all wet."

Ryerson said he hasn't found the kind of maturity, knowledge and experience anywhere else in

talking to thousands of prospective buyers in his other retirement communities that he has seen in his Sun Cities think tank group. It includes retired Air Force generals, teachers and executives in many career fields.

"I've always felt from a business perspective that you need to pay attention to what your market really wants," Ryerson said. "So many companies just give that lip service."

Ryerson outlined to his chief operating officer Burt Powers what he wanted to do. Powers, who was head of a Pentagon and Congressional debriefing team for several years, began organizing the think tank sessions. He takes the group through a step-by-step process explaining survey questions and exactly what the company's priorities and objectives are.

"I didn't want to have a typical focus group where you bring in a dozen people around the table and give them a questionnaire, ask them what they think and that's it," Ryerson said.

Instead he has had participants such as Dick Curtin, a retired Air Force officer and a Sun City West resident.

Curtin has been one of the more vocal participants. He said he has enjoyed the sessions and the fact he's had a voice in the planning process. He said the meetings have been his first opportunity to have some hand in the design of his future residence.

Powers said the think tank sessions so far have covered the Heritage membership program, lifestyle costs and price struc-

ture, long-term health care insurance costs and options, dining facilities and operations, basic and expanded service issues, design change updates stimulated by reservists, an architectural review, cabinet finishes and features, and vanity, floorcovering and appliance brand preferences.

"The residents have helped actually determine the different levels of long-term care insurance they felt were appropriate," Ryerson said. "They also helped us deal with our entry fee package and how that would work."

Powers said extra exterior storage space has been added as a result of group suggestions.

Ryerson said his company has implemented the group's ideas in almost every case. "We haven't just listened to them as a matter of courtesy."

Each session usually involves filling out a questionnaire.

The Oct. 24 questionnaire asked such questions as what type of doors and windows are preferred leading to the patio or balcony, whether the group members prefer one or two sinks in the master bathroom, which cabinet design, European or traditional, they prefer; which choice of seven brand name appliances they like the best, whether they want carpet or sheet vinyl for the master bathroom floor covering, what kind of bathtub design they would like to see and whether they prefer a standard 16-inch or a tall 19-inch toilet height.

The group members actually sat on the sample toilets for height and seat style preference.

"We're going to that nth de-

OVER



Daily News-Sun photo by Mike Garrett

STANDARD OR TALL — The Ryerson Co. President Denny Ryerson, right, and his chief operating officer, Gen. Burt Powers are offering their future Heritage Palmeras

retirement apartment residents a choice of which size toilet they would like. Members of the Heritage's think-tank sessions will decide through a questionnaire.

gree to make sure our market really does give us that kind of direction," said Ryerson.

A services priority list has also been compiled by the group. Surprisingly, at the top of that list was something that Ryerson said he would never have thought of including in his facility — an expert to handle residents' Medicare and Medicaid forms. That ranked ahead of having an in-house copy machine, guest rooms or a convenience store.

As a result, Ryerson said he

will enlist the aid of Sun City's Serracon to handle the forms.

The only real drawback to the think tank is that design changes over the last 30 to 40 days have delayed the start of Phase II construction by a couple of months. Ryerson said it will now be mid-February to early March before construction begins and he estimates it will take about a year to complete.

He said he didn't think the design changes would add significantly to the overall cost of the project.

"We have to gauge any kind of decisions that come out of this whether they will have a major impact on the overall cost of the building," Ryerson said.

He said most of the changes were refinements that wouldn't affect major cost considerations that might lead to higher rents.

Ryerson said he intends to keep the think tank in place "after we're up and operating and let the residents make their own determination of things they might want to cover."

Care center adds catered living to list of services

SUN CITY — Wooddale Village Retirement Community, 18616 N. 99th Ave., has added catered living for up to 20 people to its independent living and care center.

“We now have a complete facility — independent living, catered living and the care center, each with its own staff,” said Mary O’Neal, Wooddale catered living director.

Wooddale introduced a model of its catered living unit at its grand opening Wednesday by knocking out a wall and remodeling to turn two apartments into one.

Wooddale catered living offers residents a complete package of services, including three meals a day, weekly in-home visits by a registered nurse, medication supervision (ordering, monitoring and reminders), 24-hour staff duty, periodic room checks, weekly laundry, linen service and housekeeping, bathing supervision and scheduled activities and social events.

Its catered living program offers three different floor plans in one- and two-bedroom, which makes it possible to share the unit’s living area with a companion while having a private bedroom.

Campus proves powerful lure

Freedom Plaza is 90% sold

By MIKE GARRETT
News-Sun staff

PEORIA — The campus concept continues to attract people and projects into Plaza del Rio at 9401 W. Thunderbird Road.

Its new seven-story Freedom Plaza lifecare center is more than 90 percent sold, its Casa del Rio retirement apartments have few vacancies, its 128-bed Plaza del Rio Care Center is at least 95 percent occupied and two well-known Sun City doctors' groups will merge their practices into 10,000 square feet of campus space in late September.

Plaza del Rio also is getting ready to break ground on its 25,000-square-foot Thunderbird Professional Center fronting Thunderbird Road. And it has announced plans for an assisted living complex, adult day-care facility and children's development center to be completed next year.

Because of Plaza del Rio's campus concept, partners Sharon Harper and Dr. Harold Gries said they aren't concerned that the project might be going too fast to meet future market demands.

"We've primarily done our development on a need-driven

basis," Gries said. "I don't believe that we really have been speculative in our approach.

"But I certainly have a concern about the future. I think we constantly have to be aware of that and be able to make adjustments to accommodate what the future offers us as best we can and have a strong financial base."

Gries said he felt that banks and savings and loans taking a more cautious approach to lending will actually be an asset to developers like Plaza del Rio.

"I think we need to be much more prudent in our development than we've had in the past because we've had such phenomenal growth in Arizona," Gries said. "I think the difficulty of obtaining financing and the banks' close scrutiny is an excellent way to control uncontrolled development."

Gries and Harper both feel the planned assisted living facility will be successful due to the campus concept — even if it's one of at least three that will be completed in the Sun Cities-Peoria area in the next year.

"We believe that an assisted living facility in this neighborhood will be looked at differently than one independent of a campus approach," Harper said.

"We can fill a good part of it just from the people we have living here now who have asked for an assisted living facility," Gries said.

The 120-unit assisted living

facility, to be called LaVida del Rio, is scheduled to break ground in January 1990. It will be halfway between the Casa del Rio apartments and Freedom Plaza. The architect is the Orcott-Winslow partnership.

Expected to break ground in late September just south of the Plaza del Rio Care Center will be the adult day-care facility. Breaking ground at about the same time and south of the adult facility will be the child development center. The two projects are being developed by Prelude Development Co. of Dallas.

"The adult day-care center will be open to residents in the community who need to have that kind of support, perhaps while their caregiver is working or they need some time to themselves. It won't be for overnight but it provides activities, dining and support on a daily basis."

She said the child development center will be for parents working in the Sun City area to have their children in a day-care environment close to work.

"We think we're going to have a great volunteer base to help with the childcare facility, especially with the children going in and out of all the different campus senior housing projects. They're going to have lots of adopted grandparents.

"We look to continue to meet the needs of the senior American and if we see a need we haven't been able to fill we want to

provide that on our campus," Harper said.

If there is a gap in services Plaza del Rio offers, it's in providing on-campus shopping.

Harper said residents still go into Sun City to do their shopping or on shopping excursions to the large regional malls.

Part of that gap may be filled by the Thunderbird Professional Plaza, which is already 50 percent pre-leased a week before its scheduled groundbreaking.

Developed by Kitchell Development Co. and being constructed by Kitchell Contractors, the project will be a mixture of medical and professional tenants. Its completion is scheduled for February 1990.

Northwest Valley Medical Associates, two groups of internal medicine specialist physicians will merge and relocate into their new Plaza del Rio quarters by the last week of September, says Northwest administrator Carol Copeland.

Northwest is now practicing at 11361 N. 99th Ave., and in the Lakeview Medical Associates building on the Walter O. Boswell Memorial Hospital campus.

"They have in excess of 20,000 patients and that will have a tremendous impact on Plaza del Rio and our medical facilities," Harper said.

By the end of 1989, Harper said the campus will be approaching the 1,000 mark for people either living or working on the campus.

News Sun Aug 18/89

Retirement centers are filling all the gaps

By MIKE GARRETT
Daily News-Sun staff

SUN CITY — Sun Cities area retirement community managers and marketing specialists are concerned that too much of a good thing is leading to an oversaturated market.

Five years ago, retirement centers were few in the Sun Cities. But now there are 15 such facilities in the retirement

communities area.

Several more are on the way, especially of the assisted living variety. The Marriott Corp. broke ground Aug. 1 for its luxury assisted care facility northwest of Bell Road and 99th Avenue.

The Desert Amethyst at 18170 N. 91st Ave., Peoria, will open its assisted living center this fall and Plaza del Rio is adding an

assisted living center next year to its campus south of Thunderbird Road on 94th Drive, Peoria.

The Forum at Desert Harbor, a \$22.3 million luxury rental retirement community, is scheduled for a December opening. That will be the fourth luxury retirement facility to open in Peoria this past year, following The Desert Amethyst rental apartments and the life-

care communities of Sierra Winds, 8723 W. Meadow Drive, Peoria, and Freedom Plaza, on the Plaza del Rio campus.

Most of their managers and marketing directors say the area may not be able to support any more retirement facilities. They say the market needs a few years of playing catch-up if all the present facilities ever hope to reach capacity.

Of the newer centers, only the seven-story Freedom Plaza has sold more than 90 percent of its units. Most of the others report they're about 50 percent of capacity.

Pat Cavitt, general manager of the 220-unit El Dorado Retirement Condominiums at Thunderbird Boulevard and 103rd Avenue, thinks the current market is fast becoming

oversaturated.

"I think a lot of the market studies that have been done to justify these facilities are done at the peak of (Sun City) occupancy in January and February," Cavitt said. "Some of the retirement facility censuses are increased by taking in those people who are only part-time

See Facilities, A6

Facilities eye younger crowd

— From A1

residents. I think they are now focusing on smaller and smaller pieces of the market.

Not only is the market research potentially flawed, it often lags the actual project start-up by several years, she said.

Cavitt said: "If three facilities are doing their market research at the same time and all come up with the same answer — that there is room enough for one more — and all three of them use that information to build three more, you see what you have. And I think some of that has occurred."

She said at the time El Dorado was doing its market research several years ago, it showed a definite need for such a retirement facility. But its researchers were unaware that several other companies were, conducting similar studies.

"It's too bad when that happens but I see no way of stopping it short of the kinds of (state) regulations they have for hospitals building at one time.

"I do think that each facility has its own culture that appeals to a certain market segment," Cavitt said. "Our primary selling point will always be our location and the fact that it is condominiumized and offers people continuing control in their life with the assistance that comes with a facility like this."

"I think eventually the population projections do in fact indicate there is going to be enough people to fill these facilities," Cavitt said. "But it's not going to happen rapidly."

But she doesn't want to paint a bleak picture because changing lifestyle trends point to younger retirees moving into the full-service facilities.

"I think this type of living will appeal to younger and younger people as we get into the group of people who have lived comfortably in higher density areas who perhaps do enjoy having all of those services," Cavitt said.

She said that trend is reflected in recent El Dorado sales. "Our

sales have increased to such a degree that we will be very surprised if it takes longer than a year and a half to fill up."

Beverly Burnett, marketing director for Sun Ridge Retirement Community, 12221 W. Bell Road in Surprise, said the Sun City area people involved in the retirement community business are already taking steps to deal with possible oversaturation.

"One of the positive things happening is that all of the retirement communities are meeting on a regular basis. We're talking about various programs that each of us are doing in hopes that we can fill a stronger base for the communities' needs," Burnett said.

"We all do very competitive things. We try to have new programs and do things that are progressive and not cut-throat. We can still offer a very individual product."

The rental Sun Ridge, for example, is one of the few communities to have an onsite nursing center offering all levels of state licensed care.

Sherri Williams, marketing director of Freedom Plaza, said the situation will have to be watched very closely. Companies who build such facilities and don't cater to the residents' specific needs won't last long in such a competitive market.

Williams said making resident needs the top priority and providing a continuum of services has led to Freedom Plaza and the Casa del Rio rental apartments approaching resident capacity.

"It's got to be a service- and customer-oriented organization," Williams said. "You can't run the communities based on numbers if you don't provide the services and don't have the right attitude."

Sierra Winds marketing director Patrick deHaan said there is always going to be some concern with all the competition.

"But everyone I've talked to in this field seems to think the market is definitely out there, even with new projects coming into it."



Daily News-Sun photo by Stephen Cherek

NEW HOME — Yvonne Kulge, left, new associate executive director of Sierra Winds, and Patrick de Haan, director of public relations, stand at the condominiums' main entrance.

Roe Walker Center

boasts active adults

Center shuns sitter image

By KAREN S. LEONARD
Daily News-Sun staff

SUN CITY — Darlene Billings isn't a baby sitter.

She came to Arizona from Virginia about four years ago to work in adult day care.

Billings got a job as the program director for Royal Oaks' adult day-care center.

Now, she works both as the program director and social worker for the facility's adult day-care center, the Roe Walker Center.

Monday through Friday about 27 people spend an average of seven hours each day within the structured center.

Adult day-care facilities are not places where people are dropped off and left to sit and watch television all day, Billings said.

Although centers do provide much needed respite for caregivers, participants are not left alone to vegetate while the caregiver is gone.

Holly Bohling agreed. She is the assistant executive director of the Sun Cities Area Interfaith Services Inc., which provides four adult day-care centers within the Sun Cities.

"We're not a baby-sitting center. I want to stress that," Billings said.

People who attend adult day-care centers can be confused, depressed, disabled and socially isolated but they must not require constant supervision.

"These people are very independent. They may be forgetful, but they do take instruction," Billings said.

As a rule of thumb, Bohling said, people who are able to drive themselves around and get out of the home to socialize probably will not benefit from adult day care.

"Our general purpose is to help people live safely and independently in their own home for as long as possible," Bohling



Daily News-Sun photo by Mollie J. Hoppes

SHAPE UP — Royal Oak resident, Margaret Jones enjoys a morning physical activity recently at Roe Walker Center.

said.

Exercise programs are a big part of adult day care, the women said.

Keeping people active and mobile is a goal of adult day care centers.

Billings said they go from active to passive activities. For example, participants start off their days doing stretching exercises and end with relaxation exercises.

On Thursdays, provided the weather is good, Roe Walker participants take a trip and have a cookout. And usually once or twice a week participants play table games that test their memories and motor skills.

"There's a therapeutic reason to do what we do. We don't just play games," Billings said. "We try to project that we are not an institution."

But getting people to come to the day-care centers is usually a problem in the beginning, the women said.

When adults decide to participate, Bohling said, they will only attend once a week. And that isn't enough for any kind of rehabilitation to occur.

What happens, she said, is that these once-a-week participants will put out a lot of effort while they are at the center but isolate themselves and remain

virtually immobile within their homes for the rest of the week.

The key, Billings said, is to get older people into a routine and keep them active and doing things for themselves.

"I think what makes it work is that it's predictable and structured," Billings said. "Most of these people need a daily routine."

Bohling agreed but said you also have to provide a few surprises so participants don't get bored or complacent.

"We try to keep people in dependent because they want to be independent," Billings said.

So participants are required to fend for themselves the same way they would have to at home.

The day-care staff has learned not to pamper participants.

"One of the critical things, that's so hard, is you need to want to help but know when not to help too much," Bohling said.

Interfaith Services charges \$24 a day and the Roe Walker Center \$25. They both provide a hot lunch and numerous activities throughout the day. A nurse is on hand to administer medications. Transportation is available.

Roe Walker information: 933-2807.

Interfaith information: 584-4999. OVER



Daily News-Sun photo by Mollie J. Hoppes

S-T-R-E-T-C-H — Cecil Bigelow starts her morning at the Roe Walker Center in Sun City by doing stretching exercises with

friends. Area day care officials say physical and mental activity helps keep participants sharp.

Wittman Youngtown

Ground broken for apartments to serve retirees

100-unit complex in Sun City plans 3 levels of service

By Holly D. Remy
The Arizona Republic

Marriott Corp. broke ground Tuesday in Sun City for apartments that represent the company's newest venture in the senior-housing market.

The 100-unit complex, to be called Sun City Brighton Gardens, will be on 3.3 acres along Boswell Boulevard just north of Bell Road. It will provide nurses and staff to help bathe and dress residents who need such help.

"We believe there is an overwhelming demand for communities like Brighton Gardens," said F.W. "Butch" Cash, president of the Marriott Service Group.

Cash said that in the next five years, Marriott plans to build 150 Brighton Gardens nationwide, creating housing for 25,000 retirees.

The first of the complexes will be in Virginia Beach, Va.; Bellaire, Texas, near Houston; Scottsdale; and Sun City. All four are expected to open in fall 1990.

Housing for older adults will be a growth market, Cash predicted.

"Today, there are over 31 million Americans over age 65," he said. "By the year 2020, there will be over 50 million Americans over 65."

The company began to consider entering the senior-citizens market about six years ago, said Brian Swinton, Marriott product-development manager.

Marriott operates 12 full-service senior-citizen communities throughout the nation, including the 60-unit

— See **GROUND**, page D

Ground broken for apartments to serve retirees

— **GROUND**, from page A

Cottonwood Village in Cottonwood.

The difference between the existing communities and Brighton Gardens is that Brighton Gardens will offer three levels of service, Swinton said.

"Assisted living" will be for residents who need help with daily activities such as bathing, grooming or taking medicine; "personal care" will provide greater assistance with daily activities; and "nursing care" will be for residents who require a licensed nurse.

The stucco-and-tile-roof complex will include a courtyard, crafts room and communal kitchen and dining room. It will be managed by Marriott.

Rental fees have yet to be set, but they are expected to be \$1,400 to \$1,900 per month, Swinton said.

"That covers everything — three meals a day, personal assistance, recreation, security, everything," he said.

In addition to Senior Living Services, Marriott Service Group business units include food services, airline catering, Roy Rogers fast-food restaurants, family restaurants, travel plazas on 16 turnpike systems and airport operations.

Chain enters retirement market in Sun City

Officials at the Marriott Corp. are hoping success breeds success.

Highly successful in the lodging and food service industry, the corporation has recently branched out and entered the world of retirement living.

And what better place to start than in Sun City, the nation's most popular retirement community.

Last week the corporation broke ground in Sun City on the first of two "catered-living" retirement communities it plans to construct in the Valley of the Sun.

The community, called Brighton Gardens, will be located at 17225 Boswell Boulevard, between Palmeras Avenue and Bell Road.

Marriott plans to build a similar facility in Scottsdale. Work has already begun on a third Brighton Gardens in Virginia.

All three communities are scheduled to open in the fall of 1990.

Brighton Gardens is a low-rise rental community designed for older adults that desire private apartment living but need limited supervision or assistance with daily activities.

The community will contain 60 supervisory care residences and a fully-licensed nursing facility that will include 40 personal care and 20 nursing care beds.

"Brighton Gardens represents



GROUNDBREAKING CEREMONY. On hand to celebrate the construction of Brighton Gardens, a new retirement community to be built in Sun City by the Marriott Corporation, were, from left, Brian Swinton, vice president of product development, sales and marketing for Marriott's; F.W. Cash, president of Marriott Service Group; Joan Brown, administrative assistant to county Supervisor Carole Carpenter; Denny Ryerson, owner of the Heritage Apartments.

a significant step in addressing the critical need for specialized housing for older adults," says F.W. "Butch" Cash, president of Marriott Service Group.

The corporation, owners of the Marriott Hotels and Resorts, Bob's Big Boy Restaurant and Roy Roger's Restaurant, plan to

have six Brighton Gardens under construction by the end of 1989 and a total of 25 under contract by the end of 1990.

Marriott purchased the Sun City site from Denny Ryerson, owner of the Ryerson Heritage of Sun City condominiums.

Mr. Ryerson plans to construct

the Heritage-Palmeras retirement center on Palmeras, next to Brighton Gardens.

Both Brighton Gardens and the Heritage-Palmeras will be located adjacent to the Heritage Apartments, creating what Mr. Ryerson calls, "a campus of

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• CHAIN

From page one

Brighton Gardens will offer three levels of services:

- assisted living, or "supervisory care," for residents who need limited supervision in performing daily activities;
- personal care, which provides greater "hands on" assistance with daily activities;
- intermediate and/or skilled nursing care.

Marriott officials estimate the cost of constructing an entire chain of retirement facilities to reach \$1 billion.

Marriott's financial resources, however, are vast. Last year sales reached \$7.3 billion and the corporation enjoyed a profit of \$223 million.

The firm, says Mr. Cash, was founded 62 years ago by J. Willard and Alice Marriott.

See CHAIN, page 2

State Tuesday, Jan. 20, 1998 Daily News-Sun, Sun City, Ariz.

New retirement communities come to Peoria

By TIM BAXTER
Staff writer

Another retirement community is about to crop up in Peoria, the second to begin construction in the past few months.

Staff at The Forum at Desert Harbor, located near the intersection of Thunderbird Road and 91st Avenue, will break ground Wednesday for Phase II of the assisted-living, 33,100-square-foot facility. Phase I was built in 1989 and offered independent living, supervisory care and healthcare.

Construction on Amethyst Arbor — a \$14.9 million development at Desert Amethyst, 18170 North 91st Ave. — began in December.

The Desert Harbor groundbreaking begins at 11 a.m. Wednesday. The Forum is slated to open in December.

The Forum will contain 50 units, available with kitchenettes and disabled-friendly bathrooms.

The development also boasts an assisted-living dining room providing three

meals a day, a living room for gatherings and a nearby health-care center at The Forum offering full-time licensed nursing service.

Units at The Forum will cost between \$1,950 and \$2,700 a month, including assisted care facilities.

Marriott International, The Forum's parent company, is the largest operator of senior living communities in the United States.

Amethyst Arbor will feature 118 apartments, ranging from 414 to 821 square feet, each with walk-in closets, patios or balconies. Many will also have added architectural features such as bay windows.

Residents will also have access to a shared dining room and health-care assistance; some packages have utilities and housekeeping included.

Units at Amethyst Arbor start at \$1,800 a month.

The community will also have a performing arts center, computer lounge, billiards room and other amenities. It is scheduled to open in the fall.

1990

Life care centers ease retirement

By MIKE GARRETT
Daily News-Sun staff

Retirees who need some help getting along in their retirement years have a lot of choices in the Northwest Valley to meet their lifestyle and financial requirements.

The Sun Cities, Peoria, Glendale and Youngtown support at least 13 congregate care facilities that cater to the specific needs of so-called Phase II retirees — those usually in advanced years who require or desire some assistance with their daily meals and tasks and prefer to have some of their activities planned for them for the rest of their lives.

Only three facilities, Royal Oaks, Freedom Plaza and Sierra Winds, are licensed for true life care. Their residents are guaranteed they will be taken care of the rest of their lives no matter what happens to them physically or financially.

Life care in Arizona means the facility is governed by the state Department of Insurance to provide complete on-site life care facilities.

Retirees should check a facility's financial statements, overall amenities and occupancy history before making a final decision to purchase or rent an apartment or condominium, whether it has on-site health care and an entrance-endowment fee and what its monthly service charges are.

Most of the facilities, especially those completed within the past five years, basically offer the same amenities of 24-hour security and emergency medical alert call systems, dining, paid utilities, transportation, on-site beauty-barber shops, pools and saunas, putting green, library, convenience store, lounge, craft, meeting and recreation-television rooms.

The following are brief descriptions of those 13 congregate care facilities.

The Forum at Desert Harbor, 13840 N. Desert Harbor Drive is the area's newest (and most expensive) facility. It offers 155 apartments on a 10.2-acre lakefront site.

The newly opened Medicare-licensed 57-bed Healthcare Center at The Forum has a designated Alzheimer's wing. Nearby are luxury assisted living suites.

Its featured amenity is a 46-acre lake.

Monthly fees for one person start at \$ 1,715 for a one-bedroom apartment.

Rental fees includes 30 meals per month and all uti-

lities except

The 30 assisted-living suites start at \$1,850.

Wooddale Village, 18616 N. 99th Ave., offers 155 independent retirement apartments, five floor plans, assisted or catered living and 20 Healthcare Centre apartments.

Wooddale's on-site 100-bed Care Centre offers skilled, intermediate and bahaviorial (Alzheimer's) care.

Meals are optional. Lunch is \$75 and dinner \$150 per month.

Wooddale Health Care Centre fees start at \$1,600 a month for a one-bedroom apartment.

Independent apartment fees start at \$685 and for one and two people for a studio apartment.

Wooddale Village does not require an endowment-entrance fee or security deposit. When applying, a non-refundable deposit is required.

Sun Ridge, 12221 W. Bell Road, is a 22-acre mixed-use rental retirement community that includes 30,000 square feet of specialty boutiques, restaurants, a branch of Rio Salado Community College and other service facilities.

Sun Ridge is in the process of an extensive landscaping improvement. Its slogan is "stay for a day or a lifetime," because it offers on-site hotel services at The Lodge plus 363 studio, one-and two-bedroom apartments in The Cliffs and The Springs.

Also onsite are the Ridge Club Restaurant, private clubhouse and recreation center, social services and organized activities.

The Cliffs is for independent living with some apartments that are handicap accessible.

The Springs is a full-service living facility for residents seeking a more catered style of living.

See 13 facilities, Page 4

OVER

Built for retirees

—From Page 4
on their age.

Glencroft rentals start at \$175. Rental application fee is \$25. Security deposit is equivalent to one month's rent. All prices include utilities and use of all facilities.

Monthly charges start at \$418.

Glencroft-North Garden Apartment prices start at \$62,700 with a \$176 monthly service charge for one person.

Freedom Plaza, 13373 N. Plaza del Rio Blvd., Peoria, offers 350 units and seven stories. It also may be the only new congregate care facility whose building mortgage is paid off.

Entrance fees for the six floorplans begin at \$42,500.

Monthly service fees range from \$775 to \$1,660 and include the main meal of the day, all utilities except phone and a number of services.

Freedom Plaza offers refunds on the entrance fee when residents die or move away.

The Plaza del Rio campus also has the Plaza del Rio Care Center and the 150-unit rental Casa del Rio one- and two-bedroom retirement apartments, which offer dining, transportation and housekeeping.

Baptist Village Retirement Community, 11315 W. Peoria Ave. in Youngtown, is

See Facilities, Page 6

Senior living facilities ...

<u>Care facility</u>	<u>Units</u>	<u>Square footage</u>	<u>Costs in \$</u> *For purchase only	<u>Entry fee</u>	<u>Nursing Center</u>
The Forum at Desert Harbor	155	635-1,377	1,715-4,015	No	Yes
Wooddale Village	155	527-1,118	685-1,229	No	Yes
Sun Ridge	363	400-1,000+	435-1,500	No	Yes
Royal Oaks Life Care Center	249	504-1,456	36,000 to 116,600*	Yes	Yes
Glencroft Retirement Community	222		175-418	Yes	Yes
Glencroft (for purchase)	240	702-1,068	42,000-62,700*		
Freedom Plaza	350	564-1,608	42,500-115,000	Yes	Yes
Baptist Village	141	531-915	645-810	No	Yes
Camelot care centers	100	355-1,130	877-1,289	No	Yes
El Dorado	249	625-1,450	69,900-199,900*	Yes	No
The Desert Amethyst	250	760-1,034	1,125-1,370	No	No
Sierra Winds	240	538-1,416	50,500-124,000*	Yes	Yes
The Heritage-Ryerson	101	851-1,700	65,000-189,000*	No	No
The Heritage-Palmeras	192	860-1,531	not established	No	No
Madison House	196	850-1,000	1,595-2,295	No	No
Sun Grove Resort Village	86	505-1,140	675-1,115	No	No

Daily News-Sun graphic by Jennifer Crookes

QUICK LOOK — Graphic compares the 13 Northwest Valley care facilities.

13 nursing homes are in the area

Compiled by News-Sun staff

SUN CITY — The following is an alphabetical list of nursing homes in Sun City, Sun City West, Youngtown and Peoria.

The list includes daily room rates, the forms of payment accepted and the quality rating each home received during its most recent state inspection.

The list also indicates if the facility participates in the Arizona Long Term Care System, a state program that helps needy people who require long term health care.

Finally, the list indicates whether any complaints about the home investigated in the past two years by the state Department of Health Services (DHS) were substantiated.

Camelot Care Center

11301 N. 99th Ave.

Sun City

Phone: 977-8373

Administrator: Jerene Maierle
242 beds

Accepts County, Veteran's Administration, private pay. Hospice/Medicare services available. Alzheimer's and special care units available

ALTCS (Medicaid) participant: yes

Quality rating: Substantially exceeds licensure standards

Costs per day: private, semi-private:

Skilled \$122, \$70

Intermediate \$96, \$59

Personal \$85, \$52

Any complaints substantiated by DHS investigations in the past two years: yes.

Cook Health Care

11527 W. Peoria Ave.

Youngtown

Phone: 933-4683

Administrator: Sonja Jones

128 beds

Accepts County, private pay and Medicare certified patients

ALTCS (Medicaid) participant: yes

Quality Rating: Substantially

exceeds licensure standards

Costs per day: private, semi-private:

Skilled \$90, \$70

Intermediate \$79, \$59

Personal - \$52

Complaints substantiated by DHS investigations in the past two years: no

Del E. Webb Extended Care Center

Del E. Webb Memorial Hospital

14502 W. Meeker Blvd.

Units 5A and 5B

Sun City West, AZ 85375

Phone: 930-4055

Administrator: Cynthia Rogers
55 beds

Accepts Medicare certified and private pay patients

ALTCS (Medicaid) participant: no

Quality rating: new facility, not rated

Costs per day: private, semi-private:

Skilled \$110, \$80

Respite \$130, \$100

Complaints substantiated by DHS investigations in the past two years: no

Good Shepherd Retirement Center

10323 W. Olive Ave.

Peoria

Phone: 974-2555

Administrator: Kathryn Piphon
213 beds

Accepts County and private pay patients

ALTCS (Medicaid) participant: yes

Quality Rating: Substantially exceeds licensure standards

Costs per day: private, semi-private:

Skilled \$90, \$69

Intermediate \$76, \$59

Personal \$54, -

Complaints substantiated by DHS investigations in the past two years: no

Hearthstone of Sun City

13818 N. Thunderbird Road
Sun City

Phone: 977-1325

Administrator: Robin Skelton
120 beds

Accepts private pay and Medicare certified patients

ALTCS (Medicaid) participant: no

Quality rating: Substantially exceeds licensure standards

Costs per day: private, semi-private:

Skilled \$110, \$76

Intermediate \$99, \$60

Personal \$88, \$54

Complaints substantiated by DHS investigations in the past two years: yes

Kiva at Sunridge

12221 W. Bell Road

Surprise

583-9800

Administrator: Paul Friedland

107 beds

Accepts private pay patients only

ALTCS (Medicaid) participant: no

Quality Rating: Exceeds licensure standards

Costs per day: private, semi-private:

Skilled \$82, \$68

Intermediate \$74, \$58

Personal \$57, \$45

Complaints substantiated by DHS investigations in past two years: no

Plaza Del Rio Care Center

13215 N. 94th Drive

Peoria

Phone: 933-7722

Administrator: Gail Chase

128 beds

Accepts private pay patients

ALTCS (Medicaid) participant: yes

Quality rating: Substantially exceeds licensure standards

Costs per day: Private, semi-private:

Skilled \$111, \$68

Intermediate \$95, \$62

OVER

Personal \$85, \$55

Complaints substantiated by DHS investigations in the past two years: no

Royal Oaks Life Care Facility
10015 Royal Oak Road
Sun City
Administrator: Dorothy Lewis
92 beds

Accepts private pay and Medicare certified patients
ALTCS (Medicaid) participant: no

Quality rating: Substantially exceeds licensure standards

Costs per day: Private, semi-private:
Skilled \$78, \$66

Complaints substantiated by DHS investigations in the past two years: no

Sun Grove Care Center
20625 N. Lake Pleasant Drive
Peoria
Phone: 247-5179
Administrator: Margaret Mullan
128 beds

Accepts county, Veteran's Administration, Medicare certified and private pay patients.

ALTCS (Medicaid) participant: yes

Quality rating: Exceeds licensure standards

Costs per day: Private, semi-private:
Skilled \$88.50, \$67.50
Intermediate \$78, \$58.50
Personal \$73.50, \$53.50

Complaints substantiated by DHS investigations in the past two years: no

Sun Health Care Center
10601 W. Santa Fe Drive
Sun City
Phone: 974-7000

Administrator: Genny Rose
128 beds

Accepts private pay and Medicare certified patients

Arizona Long Term Care Sys-

tem (Medicaid) participant: no

Quality Rating: Substantially Exceeds Licensure Standards

Costs per day: Private, semi-private:
Skilled \$100, \$75

Any complaints substantiated by DHS investigations in the past two years: no

Sun Valley Lodge
12415 N. 103rd Ave.
Sun City
Phone: 933-0137
Administrator: James Hilty
114 beds

Accepts private pay patients
ALTCS (Medicaid) participant: no

Quality Rating: Substantially exceeds licensure standards

Costs per day: Private, semi-private:
Skilled -, \$61
Personal \$67.50, \$45

Complaints substantiated by DHS investigations in the past two years: no

Sunwest Nursing Center
14002 Meeker Blvd.
Sun City West
Phone: 584-6161
Administrator: Rosalie Young

120 beds

Accepts county, Medicare certified and private pay patients

ALTCS (Medicaid) participant: yes

Quality rating: Substantially exceeds licensure standards

Costs per day: Private, semi-private:

Skilled \$83, \$60
Intermediate \$68, \$49

Complaints substantiated by DHS investigations in the past two years: no

Wooddale Healthcare Center
9940 W. Union Hills Drive
Sun City
Phone: 933-0022
Administrator: Sherman Rorvig
100 beds

Accepts private pay patients. Independent living apartments and special care units available

ALTCS (Medicaid) participant: no

Costs per day: Private, semi-private:

Skilled \$112, \$73
Intermediate \$98.50, \$61.50
Personal \$89, \$53.25

Complaints substantiated by DHS investigation in the past two years: no

Nursing homes join nutritional program

By SCOTT BONTZ
Staff Writer

SUN CITY—By fall, there will be at least seven local institutions trying to bring together isolated residents by offering cheap lunches, an organizer of the program said.

"We would want more," Merwin Graubart said.

Graubart is chairman of the Sun City Area Community Council's nutrition committee, which is organizing the Happy Nooners Nutritional Program.

The council in June decided to try to help people who are not getting proper nutrition and who do not leave their homes to socialize.

The program was supposed to start in late summer, but Hearthstone of Sun City, a nursing home, "jumped the gun," Graubart said, and

began offering weekly meals and transportation July 10.

Valley View Community Hospital in Youngtown said it would join the program July 29.

Now, Graubart said, five other institutions have committed to the idea.

Four would begin in September:

—Fountain Retirement Hotel, in Youngtown, on Sundays.

—Wooddale Healthcare Centre, a Sun City nursing home, on Mondays.

—Good Shepherd Retirement Center, a Peoria nursing home, on Saturdays.

—Camelot, a Peoria nursing home/apartment complex, on Fridays.

And Beverly Manor Convalescent Center, a Sun City nursing home, is tentatively scheduled to begin Wednesday lunches in October.

Graubart said the council arranged the program so meals are offered seven days a week, although an individual institution will play host only weekly, and only to participants living in the neighborhood.

Hearthstone meals are on Thursdays and Valley View's will be on Tuesdays.

Each facility will offer meals to eight people, Graubart said, for about \$2. Some institutions, such as Hearthstone, are providing transportation for \$1, he said.

Graubart said the problem in starting the nutrition program has not been finding facilities to provide the meals and transportation. It has been more difficult to find participants.

Hearthstone hosted six people the first week and only four the next.

Graubart said the council may have overesti-

mated demand for the service, but he was more sure that isolated residents are unaware of it.

To participate in the Happy Nooners program, Graubart said an individual need satisfy only one of three criteria: to be living alone, to be socially isolated or to not be getting adequate nutrition.

He acknowledged that eating one square meal a week probably would not solve nutritional deficiencies, but he said it would help. And he said the other purpose of the program—socialization—would be accomplished.

"It's a different approach," he said, indicating that the latter goal was more important.

Residents of Sun City, Sun City West and Youngtown who would like to participate in the Happy Nooners program can call Sun City Information and Referral Service at 974-4713.

Little-known Baptist Village offers several levels of care

By MIKE GARRETT
Financial Editor

YOUNGTOWN—With all of the new health care facilities being built throughout the Sun City area, it's difficult to discern which one best fits an elderly retiree's needs.

While most of the modern "retirement centers" and health-care facilities now offer different levels of care at one location, there are still enough variations for an individual to choose the one he or she feels most comfortable with.

Baptist Village, a bit off the beaten path at 11315 W. Peoria Ave. in Youngtown is not one of the best known of the new health-care facilities. But it does appear to have some unique qualities and amenities.

The cottage-style single-level Village is just completing an expansion-renovation project and hopes to add various programs and additional apartments within the next couple of years.

As a non-profit, Christian-based corporation, it also stresses personal care at different levels without concern for the bottom line, according to Dr. James B. Thweatt, vice president and chief operating officer of Arizona Baptist Retirement Centers.

"We basically offer five levels of live-in care," said Thweatt.

"The first is totally independent living—an efficiency, one or two bedroom apartment. In that unit a person is totally independent and can come and go as he pleases. They can contract with us for meals on a daily basis and for maid services.

"The second level is what's called supervisory care or supervised independence, the lowest level of care licensed by the state.

"Basically this is for the person who is independent, but for whatever reason does not wish to or should not live alone. They may be a little forgetful as in relation to taking medication, or they may forget to turn stoves off as they're cooking—things of this nature. But they're ambulatory and are able to take care of their own body functions and cleanliness."

Supervisory care offers a choice of private and semi-private rooms.

"In either of these they are provided with three meals a day, cleaning services, personal laundry, medication supervision and transportation for activities.

"Then we have in the long-term health care, personal care,

intermediate and skilled care."

The higher levels of care are based on a person's ambulatory state and degree of control of bodily functions, state of confusion and medical needs, according to Steve Minniear, administrator of the Cook Health Care (128-bed Baptist Village nursing home).

Thweatt stressed that Baptist Village is a continuing care facility and should not be confused with a life care complex which doesn't offer continual licensed medical care.

The different care levels also offer different payment methods.

Thweatt said independent units are leased on a yearly basis, supervisory care is month-to-month and longterm nursing home care is usually on a day-to-day basis, with exceptions based on a patient's movement through the various levels.

"There is no prepayment required and there is no entry fee of any type.

"We believe that's the difference," said Thweatt. "Instead of paying profits to stockholders, our profits go back into the corporation to allow us to give better care or to increase our knowledge of geriatrics or to better train our employees."

But the whole program and the way it's structured still wouldn't be much different from other multi-level retirement centers without the spiritual, Christian-based atmosphere prevalent at the Village, according to Thweatt and Minniear.

And while they acknowledge not everyone feels the need or wants the spiritual treatment and/or have Christian beliefs forced upon them, they said everyone at least wants Christian care and concern.

"I don't mean to imply that other facilities don't care. I do mean to imply that is the base from which we operate," (as an affiliate of the Arizona Southern Baptist Convention) said Thweatt. "I think in any other full-profit company, that's going to be a by-product. The nurses are there because they want to care for people. But the administrator has the pressure of the bottom line."

Minniear stressed that the majority of Baptist Village residents are of many denominations, not just Southern Baptists.

"The patients should not be able to recognize what denomination the administrators are from the type of care they receive. If we have to remind people that we're Christians then we've failed in our objectives."

"It's important for people to understand that the continuum of care here speaks to the physical needs, emotional needs, social needs and the spiritual needs," said Minniear. "We flip them in order of priority. We really recognize the need to see that all of those aspects of the

personality are dealt with."

He added that Baptist Village takes terminal patients because, "We believe a person should be allowed to die in dignity."

Minniear said Baptist Village is also marketed differently from some of its competition—as a total retirement center and its nursing home, each with its own administrator.

Thweatt said it meets all state codes and requirements and is fully licensed by the state. He said the facility expects to obtain its Medicare survey by June 10 and its Medicare approval shortly thereafter.

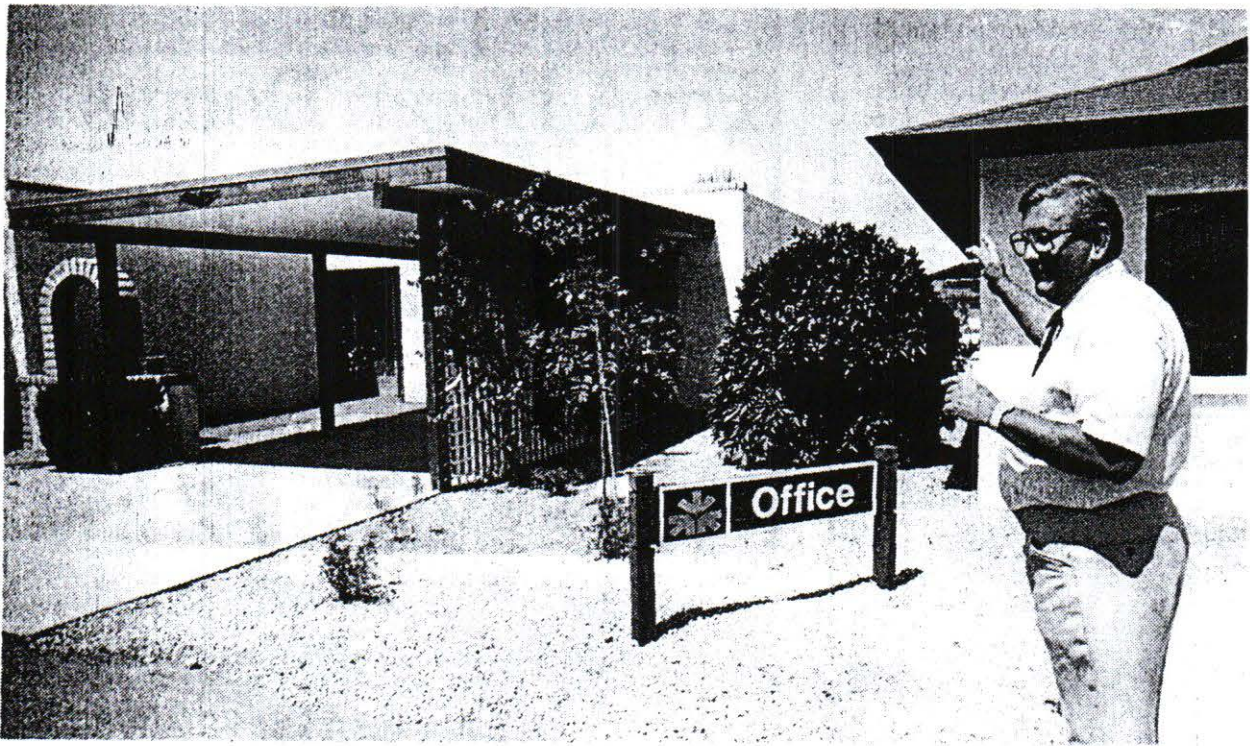
Baptist Village actually opened in 1979 at the old Hines Village site.

"We had a very difficult beginning," said Thweatt. "Basically it's here because some laymen believed that it was a needed ministry. They put up their own money to get it started."

Thweatt said Phase I of the main facility was completed in 1982 and certain improvements have since been added. Phase II will include another 150 apartments on the additional 10 acres of the 20-acre site.

He noted that Phase II plans will continue the village atmosphere but some two and three-story apartments may be necessary due to higher density costs. Apartments are currently in duplex, four and eight-plex modes.

"Within the next two years, we propose to have a visiting nurse program, in-home health care, training for senior adults on how to care for themselves and we want to be a clearing house for people who need information about services provided by the county or the state—where do you go to get those services? OVER.



Jim Thweatt, vice president and chief operating officer of Baptist Village, compares one of the original flat-roofed condominiums at left with a

more recent pitched-roof unit at right. The Village will continue expanding the next two years. (News-Sun photo by Stephen Chernek)

"We want to be involved in the senior adult community, whether they ever use our facility or not."

As a non-profit corporation, Thweatt said Baptist Village can also use any permanent endowments Sun Citizens wish to donate.

"We would certainly accept gifts of land, property, cash, anything as a permanent endowment. We're not asking for gifts of immediacy. But it can be when they're totally through using it, they could come to us. We would be more than happy to meet with their lawyer and explain how it can be done."

Thweatt feels Baptist Village will at least give some of that endowment back to the local community, something the federal government wouldn't do if it obtained a person's estate.

"Our philosophy is in the next 10 years, health care is going to change drastically. And we want to be on the cutting edge of that—not always expecting people to live here but ministering to them in the community as we can," concluded Thweatt.

TUESDAY DEC. 31, 1985 NEWS-SUN E-3

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ARIZONA

News Sun

FRIDAY, APRIL 27, 1984

Work begins at medical site

Site preparations for an extended care facility and ophthalmic surgical center are under way on a 23-acre site west of Boswell Memorial Hospital, Sun Health officials announced today.

The intersection of Thunderbird and Del Webb Boulevards is undergoing temporary roadway construction to allow modification of surface water drainage and ease street flooding that occurs after heavy rains. Water will be redirected to a drainage ditch paralleling Grand Avenue.

Other site work includes grading, roadway construction for ease of access off Thunderbird Boulevard and installation of utilities and sidewalks. Del E. Webb Construction Services Co. is performing the site work.

GROUND WAS broken earlier this week for the Boswell Eye Institute, a 13,500-square-foot, single-story, privately operated outpatient ophthalmic treatment center that will be leased to a group of 14 ophthalmologists on staff at Boswell. Devenney & Associates is the architect.

The eye surgical center is scheduled for completion in 1984 and will feature five operating suites and six treatment rooms as well as recovery and waiting areas. The building will be leased to The Eye Center Partners. Parking will be available for 66 vehicles.

Plans were announced in late 1983 for the 128-bed, 50,000-square-foot extended care facility to be built on 2.75 acres of land south of the Boswell Eye Institute. Construction is scheduled to begin approximately July 1 and be completed nine months later.

PRELIMINARY design for the single-story, stucco-finish facility includes a "star" plan

with seven wings emanating from a central core. Parking will be available for 138 vehicles.

A portion of the beds in the non-profit facility will be Medicare certified. The facility will also have an emphasis on rehabilitation with facilities for providing physical, occupational and speech therapies, activities and social services.

Western Maricopa Residential and Ambulatory Care Facili-

ties, a Sun Health affiliate, will manage the facility.

Adequate land has been set aside at the site for expansion to meet future demand for skilled nursing services.

"Construction of these facilities is consistent with our commitment to provide patients with a full range of locally accessible health care services," said W.A. Turner, president of the non-profit Sun Health organization.

Wednesday, June 2, 1982 NW

The Arizona Republic

Care-complex financing awaits OK on study

SUN CITY — Financing for a 350-unit lifetime-care complex planned here by a community-based, non-profit corporation will require final approval of the project's feasibility study by the state Department of Insurance.

Insurance Director J. Michael Low said Friday that People of Faith Inc. must have the feasibility study for its Royal Oaks project approved before the county issues \$40 million in tax-free bonds to build the project.

"Nobody's going to want to buy those bonds without the feasibility study and its final approval by the department," Low said.

Also on Friday, Roe Walker, president of People of Faith, said he expects the feasibility study — including estimates on construction costs and interest rates on the bonds — to be ready by Sept. 15.

The Maricopa County Board of Supervisors tentatively is scheduled to consider final approval of the bond sale Sept. 27, Walker said.

The supervisors voted 4-1 on May 17 to grant preliminary approval of the \$40 million bond issue.

Their approval came after an April agreement between People of Faith

and the Department of Insurance that granted conditional approval for the corporation to sell lifetime-care contracts that guarantee living quarters and health care to senior citizens for the rest of their lives. The approval was made conditional on the Insurance Department's OK of the feasibility study.

People of Faith sought the agreement because it agreed to sell at least 175 of the 350 units proposed at the Royal Oaks complex, 99th Avenue and Royal Oaks Drive, before the bonds can be sold.

"It won't take very long at the rate we're going," Walker said.

More than 115 units have been sold since April 22, he said.

Walker said the sales are an example of the project's wide support. He said similar projects average only 10 sales a month.

The contracts require buyers to place a 10 percent deposit on their living quarters, which range in price from \$33,000 to \$110,000.

Low and Walker said the April 19 agreement allows buyers to back out of the agreements and get back their entire deposit, including the required \$500 application fee.

The deposits are being held in an escrow account until the project is completed.

However, after the project's feasibility study is approved by the Department of Insurance, notices will be sent to those who have signed contracts. Those buyers will have 14 days to cancel the contracts, according to the April 19 agreement.

"After that date, your application fee will not be refundable," according to a notice to potential buyers.

More than 250 Sun City residents made interest-free loans of between \$1,000 and \$10,000 last year in order to get their names on a waiting list for the project, Low said.

People of Faith used the loan money to put \$500,000 toward the 1981 purchase from the Del E. Webb Development Co. of a 30-acre site for \$1.5 million.

The \$1 million balance to Webb is due in May.

Walker said the agreement with Webb gave People of Faith full title to 10 of the 30 acres.

If for some reason the project fails, the 10 acres could be sold to repay the loans, Walker said.

"This is a solid, well-financed project, and adequate reserves are being set aside," he said.

Walker said he believes the Department of Insurance has been too critical of the project.

An endowment fund to help people pay for the contracts should total between \$3 million and \$5 million within a few years, he said.

Low defended the scrutiny his department has given the People of Faith project. Similar projects have gone bankrupt, and the economy is uncertain, he said.

"As far as I'm concerned, we're not going to let the thing go forward unless we think they can make it."

Low said, however, that the project looks promising.

"The one thing that is so clear is that people out here in Sun City are wild about this," he said.

People of Faith officers have scheduled a public meeting to discuss the project's floor plans, elevations, costs and a new waiting list at 9:30 a.m. Monday at Faith United Presbyterian Church, 16000 Del Webb Blvd.

— Steve Yozwiak

Long-term health-care complex to be built in Sun City

By Steve Yozwiak
Northwest Valley Bureau

5-20-81

SUN CITY — A non-profit, community-based corporation plans to build a multimillion-dollar long-term health-care complex in the heart of Sun City, project organizers announced Tuesday.

The new corporation, People of Faith Inc., expects to construct the complex during the next four years on about 30 acres west of 99th Avenue between Sante Fe Drive and Royal Oak Road.

Preliminary plans call for as many as 350 dwelling units — enough to house 500 people, according to Roe Walker, corporation president.

Walker said the complex may have several dozen cottages around a three- or four-story center

that would include a central dining room, apartments and skilled-nursing facilities.

Arrangements for the land sale were completed Tuesday with John W. Meeker, president of Del E. Webb Development Co.

The land price was \$1.5 million, Walker said, adding that building-cost estimates were unavailable.

Walker said People of Faith Inc. was organized through the Faith United Presbyterian Church in Sun City by a non-sectarian group of residents who saw a need for long-term-care facilities but grew impatient with the apparent inability of private firms to build them economically.

Walker called the proposed site ideal because it would be close to Boswell Memorial Hospital,

doctors' offices and other health-care facilities.

People of Faith Inc. plans to deliver a \$500,000 down payment to Webb as soon as final legal agreements are approved, Walker said.

Money for the down payment was collected from more than 300 Sun City residents who gave loans to People of Faith Inc. until permanent financing can be arranged, he said.

The \$1 million balance will be paid through a promissory note due in about two years.

Permanent financing probably will come from the sale of tax-free bonds similar to those used for construction at Boswell.

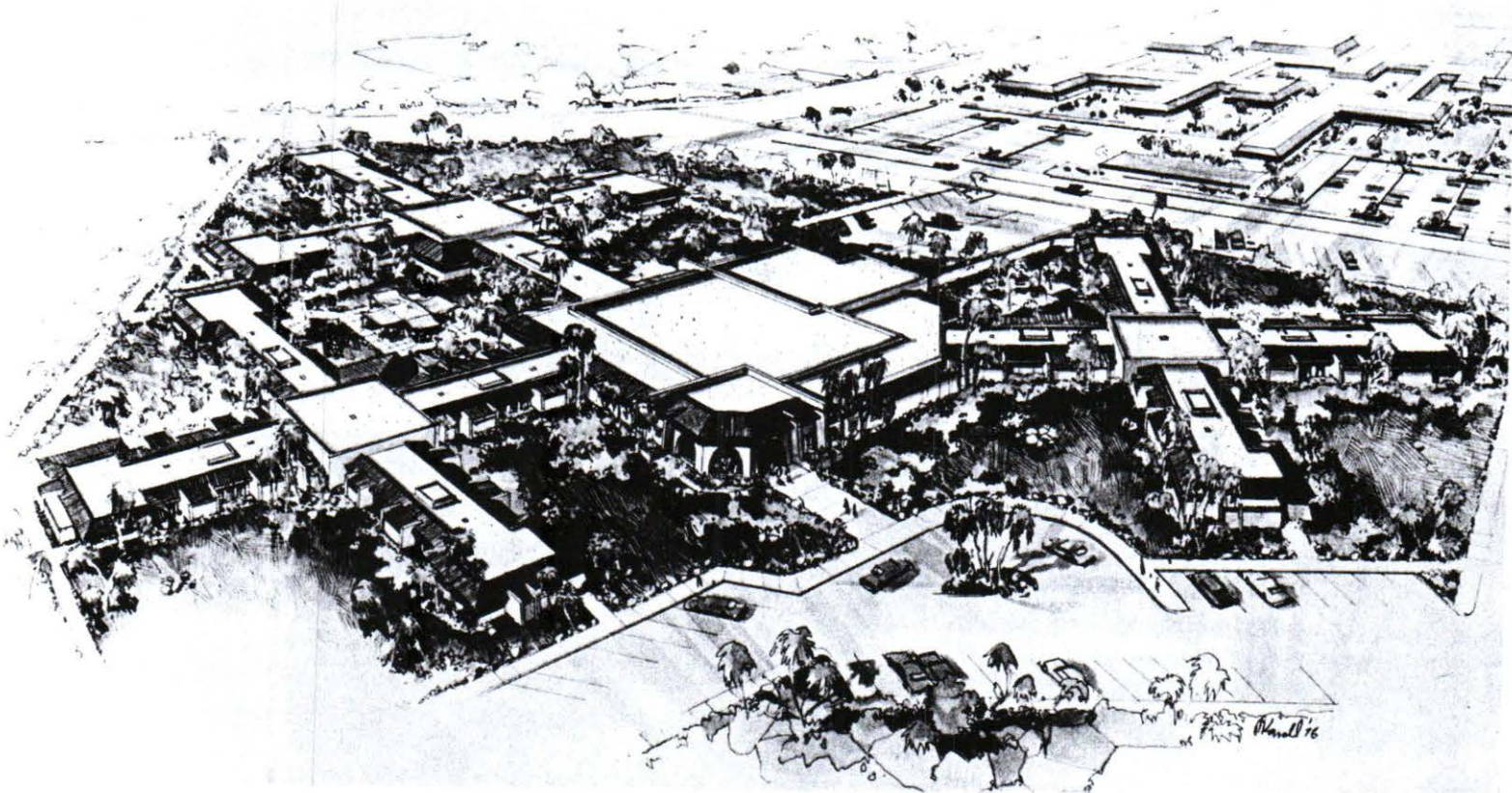
Residents, who will invest in the complex, will be guaranteed living quarters and health care in their later years, Walker said.

AZ. Republic

Sun City Activities Calendar



Del E. Webb Development Co. ★ Public Relations Dept. ★ P.O. Box 1705 ★ Sun City, Arizona 85351 ★ August, 1977



Artist's conception of new Beverly Manor Convalescent Center, under construction near 103rd and Thunderbird

Boulevard, shows three wings linked to central entry. Completion is expected in December.

BEVERLY MANOR UNDER CONSTRUCTION

Beverly Enterprises of Pasadena, California has announced construction on the new 195-bed Beverly Manor Convalescent Center near 103rd Avenue and Thunderbird Road is expected to be completed in December.

The 74,000 square foot, single-story building will include three 65-bed wings; two for skilled nursing and one for personal care. The skilled care wing will be for patients with illnesses or recent surgery who require frequent nursing attention and rehabilitation during convalescence. The personal care section will provide care for those with minor or chronic conditions who require as-

sistance in ambulation, supervision of medications, special diets or similar institutional care.

The Sun City center will be Beverly's 70th nursing facility and will be similar to those operated by the company in retirement communities in Laguna and Seal Beach, California.

William Eckholdt, administrator for the operation, will be in Sun City on a part-time basis to coordinate the project and plan for staffing needs.

For additional information, Eckholdt may be contacted at (602) 977-3253 on Thursdays only.