

CLOSURE

Carillons closure stirs memories

Former manager shares history

By Rusty Bradshaw
INDEPENDENT NEWSMEDIA

When he read about the pending closure of The Carillons in the Sun City Independent, resident Jan Gajer got a lump in his throat and a tug at his heart.

Mr. Gajer was the construction manager and then facility manager when The Carillons were built in 1979. It was under his direction that Sun City's second senior care living facility was formed. His vision also helped shape the care facility whose officials will be tearing down The Carillons to make way for its own expansion.

"I had never overseen a construction project before," Mr. Gajer said. "I didn't even know how to read blueprints. A friend of mine taught me in about two hours."

The experience he did have that made him the top choice for the job, and later facility manager, was in food management. He oversaw several restaurants in the Sun Cities area built by Del Webb.

The Carillons current manager, Jill Parsons, said she was told The Carillons was originally built as a hotel for Del Webb Corp. employees, a claim made about more than one building in the community. Mr. Gajer said that was not the case.

"From the start this was to be a senior care facility," he explained.

As the campus was being developed, he rented some of the model units. The Carillons opened March 1979 and was filled by July that same year.

"We had a waiting list that stretched to about a year-and-a-half," Mr. Gajer said.

Care was taken to make The Carillons very special. Mr. Gajer focused on the dining facilities. Ms. Parsons related The Carillons staff continues to have people ask about the restaurant located there with the delicious garlic rolls. Mr. Gajer said it was not a restaurant but the facility's dining room people remember.

"Those were our rolls they talk about," he said.



Jan Gajer

The Carillons had an extensive menu, garnered from various sources, according to Mr. Gajer. The facility also had daily activities for residents. Mr. Gajer remembers Hal-

loween parties in which residents dressed in costume, and the time belly dancers were brought in for entertainment.

"We thought we were going to have to call the paramedics for those guys lined up to see them," he laughed.

The building itself was designed with a luxurious feel in mind. Mr. Gajer said the lobby was designed to resemble a ritzy hotel and the main building's tower had bells that, on an automatic timer, chimed at non and 6 p.m. daily. He also purchased a baby grand piano for the facility. A smaller structure on The Carillons campus used to be a greenhouse, built in response to a resident's request to have a place for a garden, according to Mr. Gajer.

"We really catered to our residents," he said.

The Carillons also included a soda fountain, he added. There were also atrium windows in the lobby, but designers underestimated the Arizona heat. The windows melted the countertops that came in contact with the sun until management got special glass from Puerto Rico for them.

Mr. Gajer created a western theme for the facility's grand opening, including a corral with live animals. He was advised against it, so instead talked with area car dealers to have automobiles with animal names on-

site during the grand opening. In an odd twist of irony, 36 years later The Carillons officials did host a petting zoo at the facility. However, two llamas escaped and ran amuck on Sun City streets for more than two hours before being captured.

"Maybe they were right way back then all along," Mr. Gajer joked.

In another ironic twist, when Royal Oaks officials began designing their facility, they turned to Mr. Gajer and The Carillons staff for guidance.

"We gave recommendations to Royal Oaks when they were getting started," Mr. Gajer said.

Mr. Gajer, who came to Arizona from New York in 1978, managed The Carillons for 3.5 years before moving on to oversee construction of another care facility in Phoenix. Prior to coming to Arizona he was a troubleshooter for Marriott and was dietary manager at a 350-bed hospital in upstate New York. Following the Phoenix care facility, Mr. Gajer drove buses for 18 years. He still volunteers as a driver for Ben-avilla.

He and his wife have lived in Sun City about nine years.

"The Carillons was a labor of love for me," Mr. Gajer said. "It will always be in my memory because it was so outstanding."

He recalled that about one year ago he found in his home an ornate glass engraved plate, similar to ones given to each Carillons resident in the early years.

"I decided to give that to The Carillons manager," he said.

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VF SC Residential Multi Family (file under Royal Oaks)

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COMMUNITY

Carillons will soon be gone

Officials helping residents find new homes

By Rusty Bradshaw
INDEPENDENT NEWSMEDIA

A Sun City landmark will soon be gone.

The Carillons, 10045 W. Royal Oaks Road, one of the first senior living communities in Sun City will close by the end of May. The campus, owned by Royal Oaks, 10015 W. Royal Oaks Road, another senior living community, is planned to be demolished to make way for development that will be part of expansion of the Royal Oaks campus, according to Kendra Ebberhart, Royal Oaks president and CEO.

"Royal Oaks will expand to that property as part of a 20-year master plan," she explained.

The Carillons residents — about 75 — will be transitioned into new homes over the next four months. Ms. Ebberhart said Royal Oaks and Carillons staff are working with other senior living communities in the area to relocate residents interested in remaining in Arizona.

"We have had a couple of residents who will be moving back east," said Jill Parsons, The Carillons executive director. "We will be able to relocate the rest. The (senior living) community can bear 75 new residents."

All relocation costs will be covered for each resident, she added.

Ms. Ebberhart said 150 new individual living units and some dining venues will eventually be built on The



Carillons residents Ann Lowery, left, Jenny Iles, center, and Eileen Blackler listen as Dr. Lydia Woods, not pictured, reads a passage from the Bible during a Bible study group Jan. 25 at The Carillons Senior Living, 10045 West Royal Oak Road. All activities at the facility will continue until it closes May 31. [Jacob Stanek/Independent Newsmedia]

WHAT DO YOU THINK?

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Carillons 8.5-acre site. None of the existing Carillons structures — a main building and some garden apartments — will be used as they will all be torn down prior to construction, she added.

The first phase of the Royal Oaks expansion will include The Carillons site, a 20,000-square-foot facilities building on the former Daily News-Sun site (10102 W. Santa Fe Drive), some additional parking and a new care center.

While The Carillons is planned to close in May, Ms. Ebberhart said groundbreaking on the expansion

may not come for about 18 months.

"We and the Royal Oaks staff came up with the closing date together," Ms. Parsons said. "We felt that would give us plenty of time for the transition."

She added no one at The Carillons was excited or happy about the closure, but they are all taking it in stride.

"Royal Oaks is making a bad situation as good as possible," she said.

Ms. Ebberhart and Ms. Parsons said their priorities are the comfortable relocation of residents.

"We have been working with placement agencies, and other senior living communities are letting us know of vacancies," Ms. Ebberhart said.

Ms. Parsons said some res-

idents asked to be moved to a place just like The Carillons.

"We have a very unique thing here, so there is no place like ours," she said.

Royal Oaks staff is doing whatever is necessary to pack residents' belongings and assist in their move, according to Ms. Ebberhart.

The Carillons staff and residents are doing what they can for each other, according to Ms. Parsons.

"The first question from our residents when this was announced Jan. 15 was, 'What about the staff,' and the staff's first question was, 'What about our residents,'" she said. "We have a very caring attitude and approach here."

The Carillons will remain open until the last resident

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Resid VF SC Residential (Multi Family) January 31 2017 (2) 2018

Carillons

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is relocated, Ms. Parsons explained. During that time, all events, activities and trips will occur as scheduled. Staff will continue to provide the ~~outstanding service that residents appreciate every day.~~ Staff members will receive a severance package that includes insurance and vacation time payout following the conclusion of their tenure with the organization.

Ms. Ebberhart said Carillons staff can apply for any openings at Royal Oaks.

Little is know about The Carillons history. Ms. Ebberhart believes it was built in the 1970s and Ms. Parsons somewhat nailed it down to 1979. Ms. Parsons also believes the facility might have originally been built by Del Webb as a "hotel" for his employees.

"We still have people asking us about the restaurant that was here and its garlic rolls," Ms. Parsons said.

Bill Pearson, active in archiving Sun City history, said information on the community's care centers is something of a vacuum.

"That is the one thing we don't have much of at the (Del Webb Sun Cities) museum — history on the continuing care centers," he said.

Ben Roloff, another Sun City historian, said his research did not turn up much

on the facilities either.

"But now I have a new challenge," he said.

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Royal Oaks updates expansion

By **Rusty Bradshaw**
Independent Newspapers

Royal Oaks Lifecare Community turns 25 this year and is celebrating the occasion by undergoing a facelift and expansion.

The retirement community at 10015 W. Royal Oak Road began construction in April on an expansion and renovation of its kitchen and dining facilities and the addition of a wellness center. The \$12.5 million project is expected to be complete in 16 months, according to Kendra Eberhart, Royal Oaks chief executive officer.

"This is the last piece of our five-year strategic plan," she ex-

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plained.

While the kitchen and dining area upgrades are important parts of the project, the 12,000-square-foot health and wellness building is the centerpiece. It will include an indoor lap pool, exercise equipment, room for classes, a Jacuzzi and outdoor walking pool.

"This will give the facility a spa-type feeling," Ms. Eberhart said.

The kitchen and dining area expansion and renovation will be a combined 14,500 square

feet. The dining areas will include a marketplace-style cafe for casual dining, a formal dining area with wait staff and the third will be upscale dining. The latter will be for specialty orders and special events, according to Ms. Eberhart.

While the project will present challenges for residents and staff, it is being done in a way to keep residents involved. The dining facility will be blocked off by a see-through barrier to allow residents to watch the progress of demolition of the existing area and its reconstruction. Some residents' homes face the inner courtyard.

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Independent Newspapers/Rusty Bradshaw

Royal Oaks Executive Director Kendra Eberhart looks over preparations for the facility's expansion, including demolition of the health center (background). Sun City firefighters have started the demolition process by using the building for practice.

Expansion

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where the majority of the expansion will take place. One resident described the work so far as more entertaining than television.

"She even prepares drinks and snacks for the workers and serves them from her patio," Ms. Eberhart said.

Watching the construction progress can also give residents a sense of ownership in the facility, according to Joan Sullivan, Royal Oaks resident.

"People will buy into it more if they can see it get done," she said.

Her husband, Ed, said the construction activity is also a highlight for some of the older residents.

The expansion project is exciting for residents for other than the entertainment and emotional value.

"Some things needed to be updated," Mrs. Sullivan said.

When completed, the expanded health and wellness center should bring more residents out of their homes to be active in the community," Mr. Sullivan said.

His wife agreed.

"Before the work started, we were in the pool almost every day," she said. "But it was so small and not everyone could take advantage of it."

The expansion also plays an important role in the community's marketing to attract new residents — when there is an opening. Royal Oaks is at 100 percent capacity with a waiting list of prospective residents, according to Barbara Mowry, marketing director.

"A lot of people are interested in health and wellness and the indoor pool," Ms. Mowry said. "The expansion has been good when talking to prospective residents because we are still taking people for the wait list. They are excited about what we are doing."

The construction will mean residents will be fed in the auditorium rather than the dining room and food will be prepared in a temporary kitchen made up of five trailers. But that and the other challenges of major construction around their home will be worth

it, according to the Sullivans.

"It may be a bit of a hassle for a short period of time," Mrs. Sullivan said. "But it will be worth it because we will have something good at the end."

Mr. Sullivan said the expansion will improve their quality of life.

"This is one of the best facilities of this kind in the country," he said. "This will just make it even better."

The project also includes adding another cooling "tower" to the campus to increase capacity.

"We have a vulnerable population and we don't want to be without adequate cooling or heating," Ms. Eberhart said.

Planning for this stage of expansion started in 2006 with focus groups that included facility residents.

No further expansion is in Royal Oaks' future, according to Ms. Eberhart.

"We believe we are pretty well maxed out with living units," she said. "This is probably the last of our bigger projects."

Future work will be of the routine maintenance and replacement type, she added.

A separate project advancing simultaneously with the expansion is the addition of walls, landscaping and gates to the Royal Oaks perimeter.

"We are becoming a gated community," Ms. Eberhart said.

Past expansion projects included the assisted living, life enrichment area and parking in 2004; 14 individual apartments and 18 garden homes the same year; and a remodel of the health care center in 2006. Smaller projects included a chapel, expanded offices and lobby, enlarged beauty salon and library and remodeling twice of dining area.

Royal Oaks Lifecare Community was the brainchild of Sun City residents Davis Illingsworth and Roe Walker. Initial planning began in 1981 and long-range construction planning began in 1982 after more than 800 families loaned \$1.2 million to the nonprofit corporation founded by Dr. Illingsworth and Mr. Walker. The facility opened its doors in 1983 on about 30 acres of land purchased from the Del Webb Corp.

"Dr. Illingsworth is still a resident here," Ms. Eberhart said. "That is pretty exciting to have one of the founding residents still

living at the facility."

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Sun City care center celebrates 25 years

CEO Kendra Eberhart talks about the \$12.5-million expansion project at Royal Oaks Lifecare Community in Sun City.



MOLLIE J. HOPPES/DAILY NEWS-SUN

Royal Oaks flourishes as lifecare community

First of two stories
ERIN TURNER
 DAILY NEWS-SUN

Upon reaching an exciting milestone, a pillar of Sun City has no intention of slowing down.

The Royal Oaks Lifecare Community celebrates 25 years of service this year. And while officials are proud of the success they've had in their first quarter-century of operation, the center is focused on the future and continuing to expand services to the community.

The 40-acre nonprofit lifecare community is in the process of expanding

its kitchen and dining area and will add a new fitness and wellness center in a 16-month project that will likely wrap up by summer 2009.

CEO Kendra Eberhart said the \$12.5 million project will provide much needed amenities for the center's active residents.

"We're building a 12,000-square-foot health and wellness building with an indoor pool, an outdoor pool and all the exercise rooms because people are really interested in health and wellness and staying active and vibrant," she said. "Even though we're 25 years old, we're still expanding and looking to provide new services."

"I think we've been successful be-

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CARE CENTER: 600 residents call Royal Oaks home

FROM A1

cause we've adjusted to what residents want and provided new services," she added.

The care center was founded in 1983 by Sun City residents J. Davis Illingworth and Roe Walker, who believed their community needed a retirement and health care center.

Although eight units were originally occupied at Royal Oaks when it first opened, the community quickly grew, eventually reaching capacity by the end of 1984. In time, the center has expanded with more living spaces to accommodate more residents, Eberhart said.

The now more than 600-resident community, which maintains a two-to-three-year wait list and continues to operate at maximum capacity, con-

sists of different levels of assistance. Residents live among 110 garden homes, 273 apartments and in the community's assisted living and specialized nursing centers. Eberhart said the community focuses on being positive and promotes a fun atmosphere.

"We're a platform for people to just continue living," she said.

"We have a lot of outside activities, we have a lot of in-house activities; programs and entertainment. (Residents) go on a lot of trips and tours."

In addition to the expansion project, Royal Oaks recently was awarded a \$30,000 grant from the Arizona Department of Health Services. The grant will be used to enhance a fall reduction initiative.

Eberhart said the center was in the pool for the grant as a result

of its deficiency-free survey by the state.

The yearly rating is based on every facet of operation and serves as the highest echelon a care facility can receive, Eberhart said. Royal Oaks has been deficiency-free for three years in a row in addition to consistently achieving "excellent" ratings during the last 25 years.

"We have a great staff and it's a team effort in making sure we're deficiency-free" she said. "(The Department of Health Services) looks at everything. They interview residents and staff."

The funding for the grants comes from state-imposed fines to other facilities. Eberhart said the system is a way to reward good facilities.

"These monies come from the civil penalties

that the bad facilities are fined," she said.

The funding will likely be used for auto-locking wheelchairs, touch lights in residents' rooms, personal belonging bags for wheelchairs and other wheelchair and bed alarm devices.

Royal Oaks has planned a yearlong celebration marking "25 years of excellence." An anniversary committee composed of residents will help in planning events, which will likely include parties, dances and other activities, Eberhart said.

"The residents are really excited to (participate) in all the events and take a lot of pride in knowing that we were started by Sun City people," she said.

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DAILY NEWS-SUN

SATURDAY, JUNE 5, AND SUNDAY, JUNE 6, 2004

EXCELLENT CARE



STEVE CHERNEK/DAILY NEWS-SUN

Dina Capek, health services director at Royal Oaks Health Care Center, visits with Elva McKittrick, 103, who was playing bingo with other residents on Thursday.

State hails Royal Oaks

ANNIE KARSTENS
DAILY NEWS-6UN

Royal Oaks Health Care Center is the only Sun City care facility with no recorded deficiencies in the past two years, according to the Arizona Department of Health Services.

This is also the second year the center has earned an "excellent" performance rating.

"This is no easy task," said Kendra Eberhart, chief executive officer for Royal Oaks Lifecare Community. "There's so much negative publicity about care centers that I think it's important to mention the good ones."

Royal Oaks Health Care Center, 10015 W. Royal Oak Road in Sun City, is licensed for 124 beds and includes a memory-care unit for dementia residents. The center

provides long- and short-term care, respite care, hospice care and rehabilitation.

Inspectors from the department of health services surveyed the center during the week of May 10. The survey consisted of interviews with staff members and residents, facilities inspections, environment and food assessments, health-care standards and more.

"There are so many things they look at and disciplines they check out," Eberhart said. "They commented on how happy the staff and residents are, really noting the relationship and the positive feelings between the residents and the staff."

Resident activities, the memory-care unit and the state-of-the-art computerized records system were also

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OVER

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aspects that state surveyors applauded, she said.

"Our memory-care unit is really outstanding. They always comment on that," Eberhart said. "They were surprised by our completely computerized system. We are completely paperless, so with the ease of the computer, all of the reports and charts are at their fingertips."

Catherine Corbin, program manager for the health services department's long-term care office, said Royal Oaks' rating is rare and commendable since the facilities are highly regulated.

"Their facility seems aimed at resident-centered services, meaning the staff seeks to pay attention to what the resident wants," Corbin said. "For example, if a resident would rather have an evening shower, the staff will change their shower from the daytime to evening."

Corbin also reported that the facility and staff appeared to go the "extra mile" with

food service and environment, being customer-service focused. The number of staff members is also more than adequate for a facility its size, Corbin said.

"It's very encouraging for this office," she said. "The surveyor came back delighted that they were able to find this. It's affirming to know there are good facilities out there that do a good job."

Grace Stockl, a charge nurse with Royal Oaks Health Care Center, said the facility stands out because of its computerized system and its level of health care.

When a surveyor asked her to find a patient to show as an example of how to properly change the dressing on a bed sore, Stockl was at a loss. There are no residents who have developed bed sores while in the care of Royal Oaks, she said.

"They (inspectors) couldn't find a resident that wanted to change anything. They were all happy to call this place their home," Stockl said. "We called it an extended family."

Dina Capek, the center's health services director, said the surveyors were also impressed with the low turnover at Royal Oaks.

"They could see the continuity in care," Capek said. "We have such longevity in our staff — some have been here over five years, some 10 and 20."

Royal Oaks Health Care Center is now eligible for a grant made possible by legislation that passed three years ago when lawmakers decided to acknowledge exemplary care facilities, not just penalize the deficient ones,

Eberhart said.

The one-time grant is available to facilities that have received two "excellent" performance surveys in a row. The money must be used for improving resident care and quality of life, she said.

"They tried to come up with positive reinforcement," Eberhart said. "It's really nice to see that the Legislature is trying to reward good facilities that are trying to do the right thing."

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DAILY NEWS-SUN THURSDAY, FEB. 13, 2003

Royal Oaks keeps growing

ERIN REEP
DAILY NEWS-SUN

What began as an idea at a Cincinnati Reds baseball game has grown into one of eight unique Arizona life-care communities.

Royal Oaks of Sun City, about to celebrate its 20th anniversary, is a nonprofit life-care community operated by People of Faith Inc., originally founded as a project of Faith United Presbyterian Church of Sun City. It offers retirees the chance to pay a one-time deposit and monthly fees in exchange for care for the rest of their lives, said one of Royal Oaks' founders, the Rev. J. Davis Illingworth.

"We promise anyone who comes here that we will care for them as long as they live," he said.

Once residents pay the entrance fee, they are set for life, Illingworth explained. The average fee is \$100,000, but varies according to the size of the unit being rented.

"We reserve a portion of the entrance fee over the lifetime of the entrance fee for their care," said Kendra Eberhart, chief executive officer.

Monthly fees average \$1,400. If a nonresident comes into Royal Oaks' nursing-care center for a period of skilled-nursing care, the charge is approximately \$146 a day, Illingworth said. That works out to \$4,300 a month, much more than for a resident.

The life-care system has brought peace of mind to Ellen Young, 96, who has lived at Royal Oaks since it opened.

"I think one of the biggest things is the relief that you give your children," she said. "It's been very good, and it's very fair. It takes a great deal of worry out of old age."

Buying in to a life-care community like Royal Oaks is akin to life-care insurance, Eberhart said.

"We are full life care, which means that it's the one fee for all

services," she said. "When you move into a community like Royal Oaks, it offers hassle-free or worry-free living."

Maintenance, housekeeping and preparing meals are no longer worries for those in the center, because they are included in the down payment and monthly fees, said Illingworth.

"We take a lot of the worries out of retirement living so that people have time to travel or enjoy their families," Eberhart said.

Royal Oaks consists of 249 apartments, 110 garden homes and a 124-bed licensed health-care center. It is completing the second phase of a renovation project to add 59 assisted-living and 14 independent-living apartments. There are 500 residents and about 275 employees, Eberhart said.

The idea for Royal Oaks was hatched during a Cincinnati Reds game in Ohio. Illingworth and co-founder Roe Walker discussed the concept for a quality-care retirement facility in Sun City.

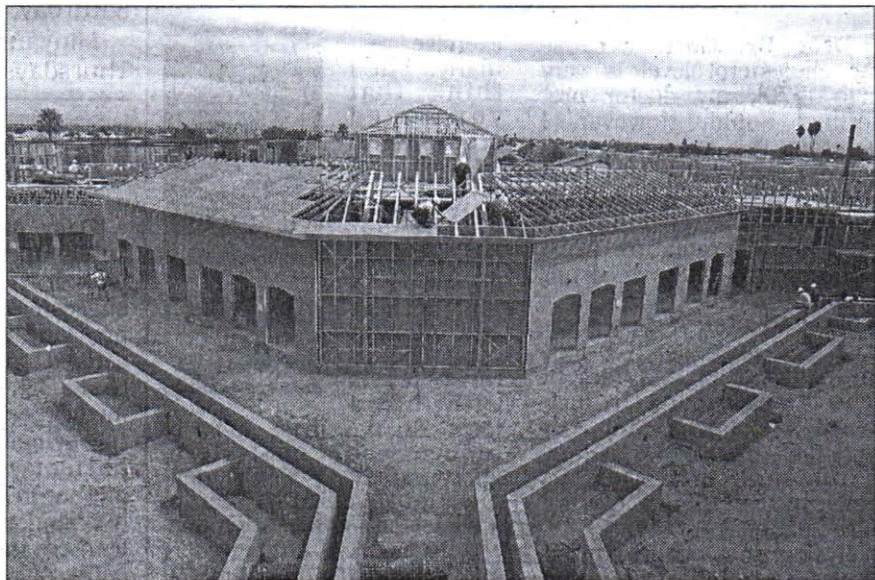
Illingworth, founding pastor of Faith Presbyterian, took the idea back to his congregation. A committee was formed to begin the initial planning, and then five committee members formed "People of Faith Inc." The corporation elected nine directors, with Walker as president.

The committee selected a 30-acre site owned by Del Webb Corp. The land was purchased for \$1.5 million, \$1.2 million of which was funded through loans from 846 families, according to Royal Oaks. The additional money was raised through the sale of bonds, Illingworth said. The community now includes 40 acres.

"We have done a lot of construction projects over the years," Eberhart said.

The front entryway has been enlarged and remodeled. The kitchen and dining rooms were

OVER



PHOTOS BY MOLLIE J. HOPPES/DAILY NEWS-SUN

Above, workers install the decking for the roof of the Royal Oaks Life Enrichment Center, part of Royal Oaks' expansion. Left, Ellen Young is in her second apartment in 20 years at the facility.



expanded, and a chapel was added, she said.

In 1997, the community planned a major expansion project. Phase 1 included 18 new garden homes and a new parking structure, completed in August. Phase 2 includes a 300-seat auditorium in addition to the assisted-living and independent-living apartments.

"We're also building a life-enrichment center," Eberhart said.

The auditorium is part of that, in addition to classrooms and game rooms. Royal Oaks offers several learning opportunities for residents, such as computer classes, Bible

studies, current-events discussion groups and craft classes, she said.

"Our residents are life-long learners. They're interested in keeping their minds sharp," she said.

Royal Oaks recently won a national award for its construction project. The community, along with architectural firm Todd & Associates, won a Silver Achievement Award presented by the National Association for Home Builders in the senior-housing category. The award was for a project currently under construction for enriching senior housing, Eberhart said.

Young said she has enjoyed the many changes at Royal Oaks over the years.

"They've all been good," she said. "It started out with a good plan, and they just kept improving."

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SUN CITIES INDEPENDENT

February 5, 2003

RCSC board approves controversial fee change

By **Mike Russo**
Independent Newspapers

Changing the annual fee assessment method from per person to per property received the unanimous approval of the Recreation Centers of Sun City Inc. Board of Directors during its Jan. 30 meeting.

Effective Feb. 1, the annual assessment for new Sun City residents is \$300 per household. The change will not immediately affect current residents, whose assessment

will remain \$150 per person. However, several board members cautioned that fee would likely eventually go because costs are constantly rising.

Even if the per person fee rises, it will remain half of the per property assessment, according to Norm Dickson, board member.

Under the new assessment method, property owners paying the \$300 fee will be entitled to a maximum of two recreation cards. Additional cards for owners of record, or residents of a dwelling, may

be purchased for \$150 annually.

The board's action prompted Ann Randall Stewart, an opponent of the new system, to announce that she will seek to recall all nine board members.

Mrs. Stewart unsuccessfully attempted to recall the board last fall because she opposed the directors decision at a June 27 meeting to lift a ban on communications towers on RCSC property.

Director Jim Frederick, who introduced the motion to

change the assessment method, said the new system will allow the RCSC to better budget revenue and "will provide a firm financial footing for future boards."

"We wanted to find a more predictable form of collecting money than we do now," Mr. Dickson said. "Under the present system, it is very difficult to accurately predict the amount of revenue coming in each year from the assessment fee."

Both men emphasized that the new system will place no

immediate financial burden on anyone presently living here.

The decision was reached after directors listened to more than 25 residents comment on the proposal, with those comments being divided about evenly between those who favored the change and those opposed.

Several of those opposed to the plan said it was discriminatory to charge a one-

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VER

Fee

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person household the same assessment as a two-person household.

Mary Louise Cook, a 29-year Sun City resident, said, "It is better to put it (the financial burden) on the backs of newcomers than the longtime residents who live on smaller incomes."

Phyllis Roach agreed with Ms. Cook that the new residents would be better able to bear the financial burden. "People retiring today, usually are retiring with more money than people who retired 10 or 15 years ago," observed Mrs. Roach.

She added, "Any year we have an overabundance of deaths ... it may keep the RCSC from attaining its budgeted revenues" under the old system.

Resident Susie Morrison, who sells real estate, said she opposed the new method because she believes it will negatively affect sales.

Ms. Morrison said many single, senior citizens move to Sun City because of its affordability, and that advantage could be lost with the new assessment system.

"There will be repercus-

sions," she warned.

Rather than change the manner of levying the annual assessment, Nancy Brandt suggested raising the per-person fee by \$50.

The new plan "would adversely affect the singles," she said.

Bill Gill was one of many residents who spoke in favor of the proposal. He said he moved to Sun City 9 or 10 years ago because of the amenities and lifestyle.

"I want the quality of life we have here," Mr. Gill said. "I want to maintain it."

"I feel Sun City is a wonderful place to live," added Lois Morrissey. "The amenities it offers enhance our property values and our lives."

Steve Morrissey said, "I wouldn't have moved here if the amenities were not here, and you have got to pay for (the amenities)."

The board dispelled rumors that the proposal to change the assessment system was hastily devised.

"We have not jumped into this," Mr. Frederick said. "It was first proposed by Treasurer Bud Hantke in early 2002."

"This has been in the public record for a year now," Mr. Dickson said. "It is not something that has been rushed into."

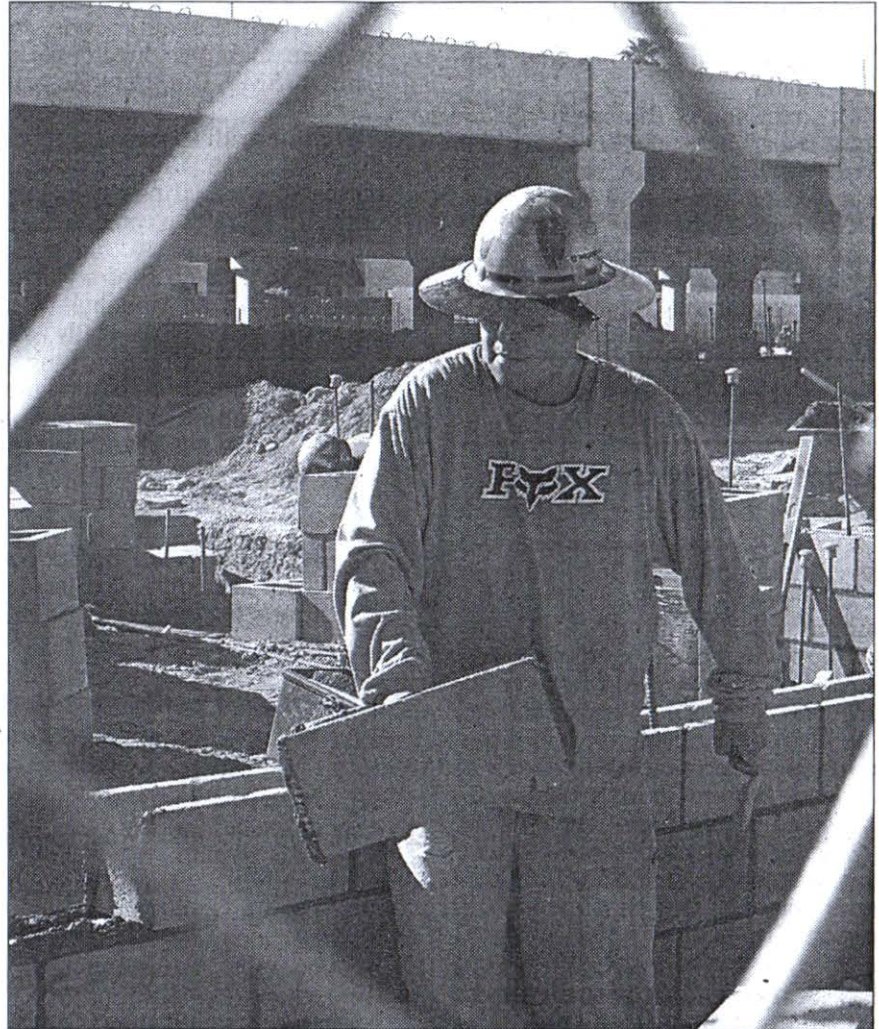
Daily News-Sun • Tuesday, May 14, 2002

Royal Addition



MOLLIE J. HOPPES/DAILY NEWS-SUN

A construction worker cuts block for the parking structure at Royal Oaks Lifecare Center Friday. At right, a worker makes a block wall around the parking structure at Royal Oaks. Royal Oaks is expanding, with an assisted-living facility and garden apartments being built this summer.



MOLLIE J. HOPPES/DAILY NEWS-SUN

Royal Oaks ready for ground breaking

FRED KUHNE

SPECIAL TO THE DAILY NEWS-SUN

Ground-breaking to add 59 assisted-living apartments and 18 garden homes to Royal Oaks lifetime community is expected to begin within a matter of weeks.

The \$19.4 million project, on the existing independent-living complex at Royal Oaks, 10015 W. Royal Oak Road, is awaiting the receipt of approved building permits. Construction is tentatively scheduled to finish by July or August 2003.

Kendra Eberhart, CEO of Royal Oaks, said the addition, will feature a life-enrichment center, a three-story building with 14 independent-living apartments on the third floor, and 35 assisted-living apartments on the first two floors.

The building will flow into the independent-living structure. It will

include an auditorium, classrooms, library, multi-purpose room, beauty salon, main and private dining rooms, a bistro and general and administrative offices. Amenities also will feature crafts, billiards and table tennis.

Eberhardt said the project is the result of a study that began in March 1997 by the non-profit Royal Oaks Life Care Community. The board of trustees voted in 1999 to proceed with the project, which is designed to complete the transition from independent living to assisted living to a health-care center. It also should shorten the wait time for admission to the community.

Royal Oaks officials said they consulted with professionals in the retirement housing field and held meetings with residents and employees to incorporate as many features as possible and to make

the best possible use of the expansion.

The addition will be built where the covered parking is now. A new two-level parking garage for residents and employees will be added where the employee open parking area now sits. An additional parking lot for assisted-living residents will be added near the apartments.

The 18 new garden homes will be built on three acres north of the existing complex.

Funding for the project is through 30-year, tax-exempt bonds issued by the Arizona Health Authority.

Royal Oaks officials said there should be only minimal added costs — to cover extra meals or medications — for current or future residents should they decide to take advantage of assisted-living facilities.

Royal Oaks eyes land for growth

By BRUCE ELLISON
DAILY NEWS-SUN

Royal Oaks, the Sun Cities' original life care community, soon may be getting bigger.

Directors of the non-profit community organization that operates the Royal Oaks Life Care Community, want to add assisted living to the services now offered its hundreds of residents.

But to do so, they will need more space. So they've been dickering with adjacent landowners to see if they could get it. That dickering has gone so far as a formal offer on about six acres that could help solve the problem, said Lori March, director of resident services.

"But I don't know if that (offer) has been accepted, if a purchase will actually occur," she said Friday.

If it is, she suggested, things could move along smartly.

People of Faith Inc., the group set in 1981 to build and operate Royal Oaks, now provides independent living both in large apartment-style buildings and in separate smaller structures on the expansive and landscape grounds on Royal Oak Road. There are 249 apartment units and 100 cottages.

It also has an on-site nursing home with 127 beds for the seriously ill. But those in-between, who might need help with daily living, now cannot easily be accommodated on the campus.

That's why directors want to build about a 40-unit assisted living complex on campus. That could cost as much as \$6 million.

Meantime, they've also begun remodeling and renovating existing space, March said.

Two weeks ago, the center had a grand opening ceremony for the revamped Alzheimer's and dementia unit, also known as Station 2.

Skylights were put in, a memory walk area was built and other features that made the place better able to meet the needs of those with dementias have been added, she said. The front office area now is being remodeled, with staffers operating from temporary quarters.

Upcoming are additional facilities that will allow Royal Oaks, founded in 1983, to offer additional services in cooperation with other outside community agencies. The services would be similar to the adult day care center now operating at Royal Oaks.

They could include day care for the children of Royal Oaks workers and those of other businesses in the area; and meeting and lecture rooms for presentations from Sun Health, ASU West or other information resources.

"I think you'll be seeing construction of one sort or another for the next couple of years as we complete this," March said Friday.

Neither the Royal Oaks administrator, Kendra Eberhart, nor board vice president Noel Willis, who's been leading the expansion efforts, was available Friday for additional information.

The five founders, all from Faith Presbyterian Church, were David S. Butler, the Rev. J. Davis Illingworth (now board president), Donald Ingman, Roe Walker and Allen Zaring.

Royal Oaks serves people of all faiths and is non-sectarian.

Bond sale for Sun City retirement center gets initial OK

\$35 million issue would build facility with 350 housing units, nursing home

By Phyllis Gillespie
Republic Staff

A non-profit corporation Tuesday received preliminary approval by the Maricopa County Industrial Development Authority for the sale of \$35 million in low-interest bonds to finance a retirement center in Sun City.

People of Faith Inc. plans to use the development-authority bonds to construct a facility with 350 residential units and a 100-bed nursing home on 30 acres, Donald Meyers, an attorney for the authority, said.

The bonds will carry a lower interest rate than a conventional loan because bond buyers do not have to pay taxes on the interest.

Merrill Lynch Pierce Fenner & Smith Inc. would be the lead underwriter of the bond issue, Meyers said.

The land for the facility is two blocks from Boswell Memorial Hospital and is being acquired from the Del Webb Corp., which developed Sun City.

People of Faith is paying \$1.5 million for the land, bringing the total project cost to \$36.5 million, Meyers said.

As a non-profit corporation, People of Faith is exempt from an Industrial Development Authority policy limiting bond issues to \$10 million for a single project, according to Clarke Greger, another attorney for the authority.

The bond authorization, which will be sent to the Board of Supervisors for preliminary approval, eventually also must receive final approval from both the authority and the supervisors.

Roe Walker, People of Faith president, said several Sun City residents began working on the project two years ago.

Since then, the group has incorporated and 846 individual loans totaling \$1.2 million have been made to People of Faith to provide starting capital for the project, Walker said.

The corporation is not affiliated with any church, although several churches support the concept, he said.

Retirement Centers of America Inc. of Lee's Summit, Mo., will be the project adviser and marketing agent.

The Sun City facility will be a retirement community within a retirement community, which is an unusual situation, said James Smith of Retirement Centers of America.

Elderly people whose basic health is good but who need services such as transportation, housekeeping and meal preparation would live in the 350 residential apartments and cottages, he said.

If the need arises, these residents could move to the

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nursing-home facility, he said.

Residents would pay an initial charge, estimated at \$33,000 to \$110,000 depending on the type and size of the unit, Smith said. There also would be monthly fees for services, he said.

The initial charge guarantees the resident a home for life, but the residential unit reverts to the corporation when the person dies.

People of Faith already has applied for a state Department of Health Services certificate of need for the nursing-home portion of the project.

If the certificate of need and the Industrial Development Authority bonds are approved, Walker said, the retirement center could be ready for residents by the summer of 1984.

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

By Steve Yozwiak
Northwest Valley Bureau

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.