

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.