

# SAGEWOOD HISTORY

## Moving into Phase II 2018 – 2021



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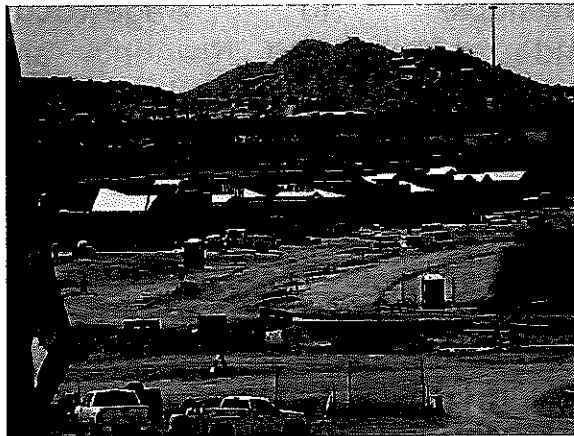
History Committee  
Dec., 2021

## INTRODUCTION

This is the third of a series documenting the history of Sagewood. The first document "SAGEWOOD HISTORY, THE EARLY YEARS" identifies how Sagewood was started. The second document "SAGEWOOD HISTORY, THE GROWTH YEARS" identifies the growth of Sagewood through 2017. This document updates the history of Sagewood from 2018 to 2021.

## COMPLETION OF PHASE I

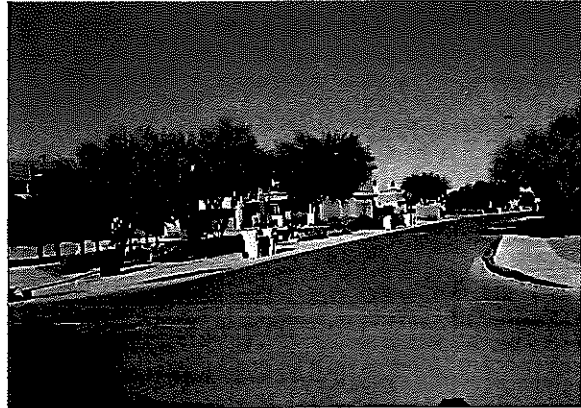
Twenty-four new estate homes ranging in size from 1,926 to 3,174 square feet on the western end of the campus were completed and occupied in 2018.



Estate Homes under construction

These homes added 48 new residents to the Sagewood community complementing the Sagewood apartments, villas and casitas. The new roadway along

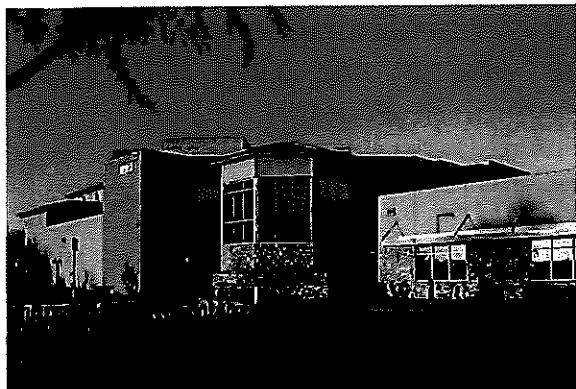
the Estate Homes also added some additional distance for those who take walks around the Sagewood campus.



Estate Homes after opening

Another welcome addition was the multipurpose Oasis building. An open house was held on February 7, 2018 kicking off its use. This facility was originally planned to be included in the phase II but was moved into phase I at the request of the residents. Construction was started March 1, 2017.

The Oasis interior can be configured as one large auditorium with a stage or as multiple smaller rooms. It has excellent acoustics for musical performances such as offered by Woody's Place with one or multiple screens for such events as SILL presentations or community updates. Woody's Place had their first performance in the Oasis on February 12, 2018. It is also being used by the Duplicate Bridge group and for religious services. The auditorium contains



Desert Willow

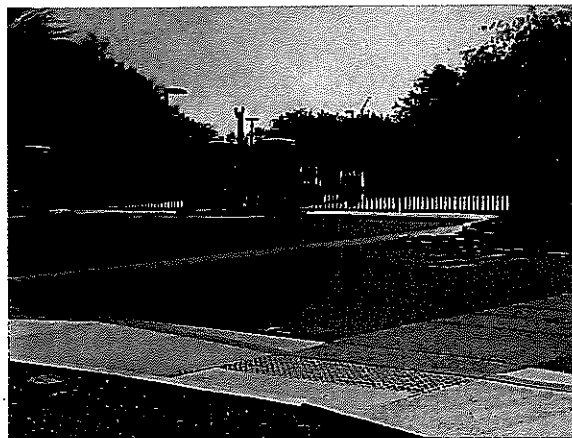
While Acacia has its own parking spaces it was soon found that the need exceeded the amount initially provided. A new parking lot adding 41 parking spaces was approved and paid for by the LCS Partnership rather than the funds coming from the Sagewood operating budget. On Jan. 21, 2021 the Acacia Parking Lot was completed.



Desert Willow Dining Room

On February 5, 2019 the new Rosewood Memory Care facility was dedicated and was ready for occupancy on June 1, 2019.

Rosewood adds 10 beds to the 20 provided at the Cottonwood center for those requiring memory care. As of February 19, 2020, all but one of the units were occupied.



Security Gates at Tatum Entrance

While not a major construction project as were those described above there was the installation of security gates at the Mayo and Tatum entrances. These gates are to be closed from 9 pm at night to 5:30 am the next morning allowing access to the community via the transponders in residents cars, or with resident's card keys, or with a code, or through phone communication to a resident, or through contacting a Safeguard employee by dialing 0001. The project was started in 2018 but had a number of problems which delayed their operation until early 2020. A permanent Security Guard Housing Structure was scheduled to be added at the Mayo entrance but has been delayed until 2022.

Repainting of the exterior of the original Casitas and Villas along Tatum Rd. was started on Oct 18, 2021 and was completed by year end.

The indoor pool was shut down starting Nov. 28, 2021 to replace the pool deck. All the existing pool deck tiles were removed and will be replaced with new tile by early January 2022.

Keeping the Sagewood movie theaters open was becoming a problem due to audio and visual technical problems. It was determined that the technology in the theaters needed to be upgraded. As a result, it was authorized to replace all the equipment in both theaters. A timetable for this work is not yet available. In the meantime, Michael Dobbs staff reopened the theaters after a shutdown of several weeks with temporary fixes.

But even the best of operations has some problems, and we are no exception. In December of 2018 a sewage backup closed the Palo Verde dining room, briefly disabling dishwashers in the Mesquite Grill and impacted several apartments. This was caused partially by inappropriate articles being flushed down toilets and sinks, and partly by a broken sewer pipe. The sewer

line in the Town Center was replaced, the Palo Verde kitchen was cleaned and sanitized, and damage to three apartments was repaired. The sewer lines were inspected and ground settling was found to have caused damage to some pipes near the entrance to buildings and these were replaced.

Another incident was the failure of a water heater in a second-story villa causing considerable damage to that unit and the one below it. The water unit was only 8 years old and they are normally expected to last 10 to 12 years, nevertheless the incident resulted in an extensive inspection of all of the Villa and Casita water heaters.

Finally, on December 15, 2019 residents in the 3000 building were startled by the arrival of 18 fire trucks outside their building. A call was made by a resident when smoke was detected coming from one of the apartments in that building. It was a blocked vent from a second story fireplace which had overheated and caused the surrounding wood structure to burn. The fire was quickly extinguished but firemen had to make holes in the walls plus the smoke damaged several apartments that had to be vacated for several weeks while the damage was repaired. This

## SAGEWOOD PHASE II

A major expansion of the Sagewood residential facilities had been in the planning stages for many years. It was called the Phase II building Project. This \$100 million second phase includes 101 one- and two-bedroom apartment homes, an 18-hole golf putting course, new and expanded dining venues, card rooms, meeting rooms, and new administrative offices. The phase II developer is LCS Development, the architect is Todd & Associates, the civil engineer is Dale Evans & Associates, the MEP engineer is MSA Engineering, the structural engineer is MSA Engineering and the general contractor is Weitz Company.

Marketing began taking deposits for the phase II apartments in October of 2015. Since then, there has been a constant flow of phase II depositors to fill phase I openings with the resulting phase II opening filled from a waiting list which at one time had over 70 applicants. On December 12, 2018 Phase II financing was closed with National Health Investors. This opened the way to begin construction with excavation work started February 2, 2019. Official groundbreaking ceremonies were held February 20, 2019.



Phase II Groundbreaking

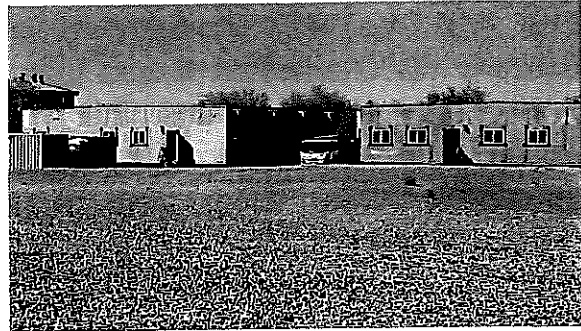
All the new residences have patios or balconies and range from approximately 870 to 2,350 square feet. The structure of the new building is similar to phase I buildings 3 and 4 with 13 individual floor plans the same as in those buildings with the addition of one new floor plan called Picacho Peak, a two-bedroom unit having 1,840 sq. ft of living space and two 82 sq. ft balconies.

Also located within the building on its north 4<sup>th</sup> floor is a lounge called the Owl's Nest. The Owl's Nest will be a nightclub-like restaurant and lounge setting. Originally the Owl's Nest was planned to be located on the side of the building overlooking the current rotunda but had to be relocated to opposite corner because of Phoenix Fire code restrictions which said it had to be accessible by fire truck ladders



Putting Course Nov 18, 2020

On June 14, 2019 temporary trailers were delivered and reconstructed to house marketing and administrative offices until the new offices in the phase II building were available. The trailers were attractively refaced to match the décor of the other Sagewood buildings so as not to look like temporary structures. The old offices in the main building had to be evacuated for phase II construction including expansion of the dining rooms. All personnel had moved into the temporary offices by the end of February, 2020. By August 2021 all occupants of these buildings had moved into their permanent locations and the temporary buildings were removed. See "The Trailer Story – By Mary Lorenz" for more details and photos of the temporary trailers. It can be found on Touchtown under the Photos tab and sub-tab "Mary's Photo Moments".



Trailers being reconstructed for temporary office



Trailers after refacing

By mid 2020 the entire phase II basic structure was in place and finishing work on the outside partially done. The structure was completed by the end of 2020 with the addition of landscaping and parking spaces around the building in their final phases. The completion of the 6000 building makes a total of 417 Independent living units available in the Sagewood complex.

The first occupant of the 6000 building was Community Life Services who moved from their temporary quarters in the Billiards Room to their new offices on Feb. 22, 2021.



Sonoran Restaurant Opening June 21, 2021

On June 10, 2021 Ross Nichols, Project Development Manager for LCS Development presented plans for a large new landscaping project north of the new 6000 building during the weekly ZOOM Community Update meeting. This area had been used for construction vehicle and material storage during the phase II construction and was now a large dirt field surrounded by an ugly construction fence. The "Sagewood Park" project was developed working with the Sagewood Residents' Council. It was originally thought that the Sagewood Park could be paid for by the excess funds held in the Sagewood Phase 2 development program, but it was later determined that the land was not held by Sagewood, and those funds could not be used. This land is set aside by LCS for future growth and development of the community. Therefore, a reduced plan concentrating on landscape

enhancements was developed by LCS. Bids for this "Landscape Enhancement Project" were issued in November 2021 with the hope that construction could start in early 2022.



Site of Landscape Enhancement Project May 2021

On June 11, 2021 the residents of the new 6000 building were evacuated under the direction of the Phoenix Fire Department when a strong electrical odor was detected. It was determined that the odor was due to a non-threatening electrical issue from an older AC unit in Marketing near the rotunda. Although the incident was non-threatening and of some inconvenience, we were encouraged by the rapid response by the Phoenix Fire Department Station #52 on Tatum Blvd.

practice with performances given throughout the year for and with other residents. However, the COVID outbreak shut down the Choir from March 2020 to October 2021 and our music director was replaced by his son Ryan Gunderson. Ryan is a graduate of USC with degrees in music composition. He has directed orchestras, choral groups -- he is an arranger/composer for the Phoenix Symphony. He sings in local choral groups and has directed other singing groups.

**Dec. 2018:** Bob Byrnes received the 2018 Community Service Award. He served as the first Chairman of the Activities Committee responsible for introducing Wii Bowling, Wii Golf, Blackjack and Bocce to the community. Bob also successfully lobbied for the construction of the Bocce courts in the new recreation area including the essential sun shades. He continues to volunteer his time in teaching, organizing league play and serving as a referee for the games and teaching residents in their play.

**Jan. 2019:** Ken Bash took over as Chair of the Residents Council in 2019 and continued in that position in 2020 and 2021. Ken was the vice chair of the Council in 2018, Chairman of the Acacia Committee for two years, chaired the Ad Hoc

Bylaws Committee in 2018 and has been an active member of the Sagewood Community since he and Joyce moved here. He was Chief Administrative Officer for the Carle Clinic in Urbana, IL for 25 years and was very active in community affairs there.

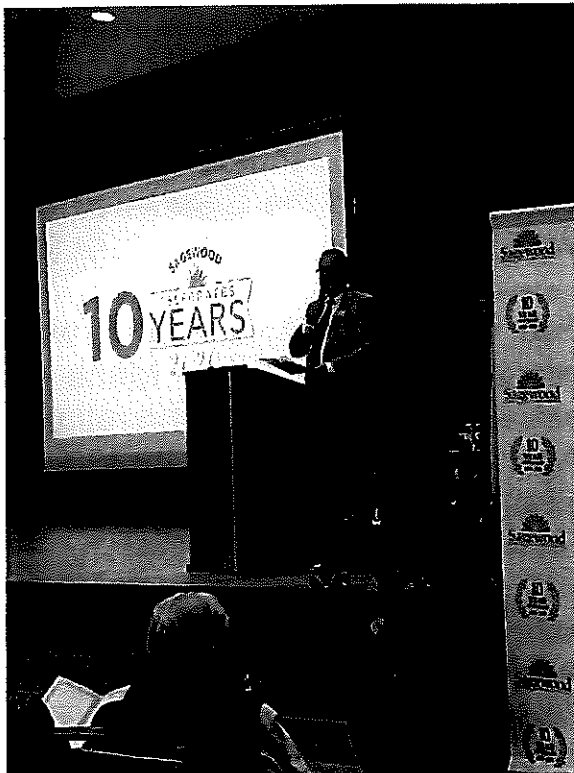
**Feb 18, 2019:** Natalie Miko became the new Administrator of Acacia Health Center replacing Tim Kersey who retired. She serves as the licensed nursing home administrator for the 78 skilled nursing beds at Acacia plus providing oversight of Desert Willow, Cottonwood and Rosewood.

**Apr. 18, 2019:** Jennifer LaForest became the Acacia Director of Business Development. She provides hospital to Acacia transfers and manages daily operation of ACH admissions.

**2019:** Gina Razdan was appointed Director of Assisted Living and Memory Care. Gina is a Registered Nurse with a Bachelor of Science in Nursing from Arizona State University. She has over 25 years of experience in various health care settings. She came to Sagewood in 2019. She oversees roughly 30 caregivers serving 3 units including 4 floor nurses who are LPNs.



the city of Phoenix. Executives from the Sagewood parent company Life Care Services and Westminster Capital also spoke at the event which was held at the Oasis.



Sagewood 10<sup>th</sup> Anniversary in Oasis

Afterwards a reception was held with tables are set up in the exercise room, the Palo Verde Dining Room, the Bar-Lounge area, out in the Ironwood tree patio area, in the Reading room, and in the class room.



10<sup>th</sup> Anniversary Reception Setup

**Feb. 2020:** The Administration Community Newsletter which had been issued monthly changed format to be a quarterly newsletter. With the increased use of ZOOM Community update meetings, the newsletter was discontinued.

**Mar. 24, 2020:** Food and Beverage announced a grocery ordering and delivery service from a Grocery List provided to residents each Wednesday. List of items desired are to be returned by 2 pm each Friday and delivery will be made the following Monday. Dining dollars could be used for this service. This was discontinued April 23, 2021.

**Jun. 10, 2020:** The Sagewood Virtual Gift Store was opened. Sagewood memorabilia such as apparel, hats, drinkware, etc. may be purchased for use by the residents or as gifts to family and friends.

of Lieutenant commanding a Sheriff's office patrol force.

**May 15, 2021:** An Alzheimer's Walk was held on the Sagewood campus to kick off fundraising for the Alzheimer's Association.

**May 17, 2021:** The first Parkinson's disease support group met led by Sheryl Lowenhar.

**May 2021:** A new contract was signed with Sonora Quest for primary laboratory services in Acacia.

**Sept. 2021:** Kelly Streck-Ryder replaced Nancy Jameson as Director of Admissions in Desert Willow Assisted Living & Memory Care. She is from Milwaukee, Wisconsin and moved to Arizona in 2002. She has over 25 years of experience in serving senior living sales & marketing.

**Sept. 2, 2021:** Stewart Ingram assumed corporate oversight responsibilities at Fountain View Village in Fountain Hills, AZ which is now owned by LCS and Chicago-based FOCUS Healthcare Partners. He continues as the Sagewood Director but eliminates his duties as part time director at Timber Ridge community in Seattle, WA.

**Sept. 2021:** LCS began working with Johnson and Johnson utilizing the Apple Watch and iPhone in a new heartline research study for the early detection of atrial fibrillation. Sagewood residents could participate by registration for the study.

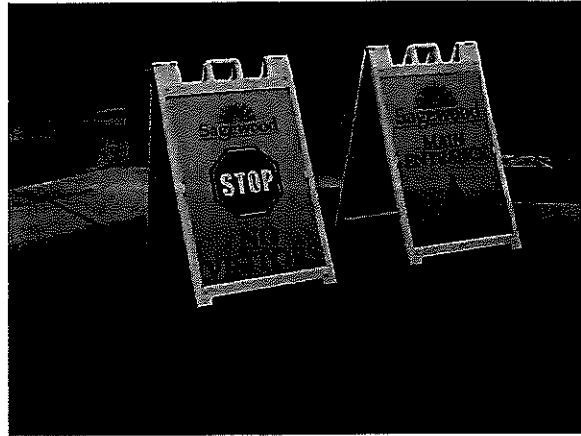
**Oct. 2021:** Dr. Shah of the Mayo Clinic School of Medicine announced the Senior Sage program where Mayo medical students would interact with Sagewood residents who volunteered to participate in the program throughout the year as part of their curriculum.

**Nov. 12, 2021:** The Sagewood Painting Studio Art Wall was created. It features new paintings created by Sagewood artists in the 6000-building new Painting Studio. The paintings will be changed every three months as new paintings are available. The Painting Studio is open daily for scheduled classes and Open Studio time for all Sagewood residents. Will include painting workshops with guest artist instructors.

## **SAGEWOOD IN THE MIDST OF A WORLDWIDE PANDEMIC**

When the first reports of the Corona virus in China came out in January 2020 none of us anticipated that this happening on the other side of the globe would affect us here at Sagewood. And when the first case was reported in the US most of us thought it would be temporary or no worse than the flu. But as cases spread throughout the World and the United States and Arizona, LCS and Sagewood staff began taking steps to shield or at least limit the effects of the virus on the vulnerable Sagewood population.

On March 6, 2020 the salad bar in the Mesquite Grill was closed, then visitors to the campus were restricted, and social distancing was instituted. By the end of March all of the Sagewood restaurants had been closed, all group activities were suspended, employees, caregivers and residents who left the community for any reason were required to go through a temperature check and screening whenever they came into the community. Residents were advised to wear masks when in contact with others and not congregate in groups.



No visitors

One restriction which was resisted by the Sagewood residents was the elimination of the weekly housekeeping service. Sagewood management was able to get LCS to grant us an exception from this restriction with limited housekeeping services to the independent living residents.

Sagewood had transitioned from an active, friendly and interactive community to one with limited group interaction and residents staying for the most part in their homes. All of this, of course, was to protect the residents from the disease.

LCS and Sagewood management are to be commended for their dedication in taking measures to prevent the spread of the disease here. Despite their efforts the Corona virus was destined to effect Sagewood with the first Acacia employee testing positive on May 7, 2020. The first resident in Acacia

continued for 20 consecutive months with a reduction to every 2 weeks beginning Oct 21, 2021.

Recognizing that the pandemic eliminated high school graduation ceremonies, Michael Kunze organized a graduation ceremony for 5 members of his staff who were graduating from high schools in this area. The ceremony was broadcast May 25, 2020 from the Oasis to family members and Sagewood residents via ZOOM with resident Dr. Marlene Ross giving the commencement speech.

Sagewood residents contributed to an Above and Beyond Fund which was distributed to the staff on May 22. In addition, the LCS Westminster Partnership provided close to \$100K as a thank you to the staff for their extended efforts during the pandemic.

Resident Mike Mellison conducted a daily music series that was enjoyed from resident's balconies and open windows. Some of the residents, while keeping social distancing came outside and danced while the music was playing both for their enjoyment and that of the other spectators.



Dancing at outdoor music series

While phase II updates in the main residents building were halted, the construction of the phase II apartments continued as did the construction of the putting course. Also, Sagewood marketing activities continued with restrictions on touring the facilities. None-the-less several new residents moved in during this period and were welcomed, although meetings with other members of the community delayed until the campus could be reopened. New residents were visited daily by the nursing staff for 14 days following their move.

Plans were put in place for a 3-phase approach for resuming Sagewood normal activities when deemed appropriate by state and LCS authorities. Phase I of the plan was started on June 15, 2020 with limited use of the indoor pool and fitness center and resumption of group activities of less than 10 people. We entered phase II on Sept. 14, 2020 which included the



Sagewood Residents waiting to be vaccinated

By Feb 5, 2021 a total of 71 of the 95 Acacia residents were fully vaccinated with 9 more scheduled to receive their first dose on Feb. 8. In Independent living 397 of 422 residents were vaccinated for 94% of that population. Of the 300 Acacia and Sagewood employees 194, or 64% of the were vaccinated. The employee vaccinations for all LCS communities was running about 50 to 60% at that time. By this time a total of 814 people had been vaccinated including those who were vaccinated offsite.

The effects of the vaccination program at Sagewood were dramatic. During the week ending Feb 18, 2021, no Sagewood residents had tested positive for COVID, and this has continued throughout the rest of 2021 except for occasional 1 or 2 breakthrough cases. There were no active cases being treated in Acacia and the

COVID-19 unit was closed Feb. 20, 2021.

Second shots were given in a clinic held at Sagewood by CVS on Feb. 23–25. At this clinic 573 vaccines were administered

A third clinic was held Mar 1, 2021 for Acacia and Mar. 25 for others. By March 4 approximately 857 individuals had been vaccinated. With the completion of this clinic 97 of the current 98 residents in the Acacia Health Center had been vaccinated. A total of 401 of 418 people in Independent Living had received at least one dose of the vaccine.

Kelly Schultz's Sagewood Clinic continues to provide COVID-19 shots and tests for Sagewood employees, residents and resident family members as requested.

On March 8, 2021 the Salon was re-opened; the Indoor (with reservations) and Outdoor pool reopened as did the Fitness center with reservations. Grocery Store runs were resumed with capacity limited to 5 per outing.

On April 5, 2021 in-person dining was resumed at the Mesquite Grill and Canyon Café with capacity restrictions and reservations requirements. On May 3 the Ironwood Lounge reopened. The

As of Aug 12, 2021 there were 530 of 542 Independent Living Residents who had been vaccinated (98%). No new COVID cases were reported among the Sagewood residents or staff the week ending March 11.

In July LCS notified Sagewood that all LCS employees must be fully vaccinated by Oct. 16, 2021 in order to work in an LCS facility except for approved health or religious exemptions. It should be noted that all employees are also required to have flu vaccines each year, a requirement that has been in place since 2012. When the COVID mandate was issued there were 84 Sagewood employees unvaccinated. This was reduced to 21 who resigned or placed on a leave of absence when the deadline occurred. This caused some operational adjustments in Environmental Services, Plant Operations, and Community Life Services particularly in transportation and tech support. A third-party security company was hired by Sagewood to ensure that there would be no interruption in security services.

The Palo Verde Dining Room was reopened Oct. 4, 2021 with a nightly buffet Monday thru Saturday each week. To-go pickups were permitted. The Agave

Grill by the outdoor pool was reopened for lunch on Saturdays beginning Oct. 9, 2021.

A COVID-19 Booster Clinic was held by the Nurse Practitioners Clinic on Oct. 29, 2021 with the support of the Sagewood Health Education & Fitness Committee. Many of the residents already had their booster shots but this provided a convenient local source of those shots. They continue to provide the booster shots when contacted by Sagewood residents.



Oasis Reopens to Entertainment Nov. 2021

By the beginning of November 2021 Sagewood appeared to be returning to normal. However, on Nov. 24, 2021 a mutation of the virus was reported in South Africa. This mutation, which was named Omicron was found to be highly contagious and spread rapidly around the world including the United States and of course Arizona. It was also found that the new COVID mutation could cause