

SAGEWOOD HISTORY

The Growth Years

2010 - 2017

**Prepared by:
Carol Wagner & Susan Miller**

**History & Exhibitions Committee
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The Physical Campus

Sagewood officially opened on Monday, January 11, 2010. Some staff members had already been at work for several weeks, and the opening cocktail party had been held the previous weekend. At last, Sagewood's first residents began to arrive, a few at a time, to settle in. They were eager to get acquainted with the place, the staff and each other – happy to be in their new homes at last.

In the weeks and months to follow, the early residents had plenty of space to spread their wings, even though the population was growing. Dinner in the Palo Verde Dining Room was a treat, and they enjoyed the Canyon Café for breakfast or lunch. By year end, there were 126 residents at Sagewood!

However, as time passed and the population continued to grow, making a dinner reservation became a bit more difficult. It was later in 2013 when residents noticed construction activity in a vacant room on the first floor of Building Two. Naturally, everyone was curious . . . and happy when they learned it was to be a casual new dining spot! The Mesquite Grill opened in February of 2014 and was immediately popular.

Sagewood's growth had continued to be steady and, in the fall of 2013, other construction had taken place – the addition of a second casita neighborhood on the northern edge of the campus. Many of those duplex homes were sold and occupied soon after their October 2014 completion! The community's increasing size was remarkable!

One important addition appeared to be stalled, however. There was a delay in the construction of a promised enlargement of the Acacia building, the building that was to be the centerpiece of Sagewood's continuing care program. Residents learned that LCS was considering other investment options instead. This prompted serious discussion that, ultimately, resolved the issues and by the spring of 2015, the project moved forward. The Acacia building with 78 skilled nursing beds, 20 memory care beds and 10 assisted living was completed in the spring of 2016!

Building activity resumed in 2017, just across from the portico and entrance to Sagewood's main building . . . and what had appeared at first to be a relatively modest structure continued to grow . . . and grow! Residents learned to their delight that this substantial structure in the center of the campus was to be a multi-purpose building . . . later named in a contest, the "Oasis". It would accommodate both major gatherings and smaller groups as needed and provide much needed additional kitchen space. The exterior materials echoed those of other Sagewood buildings, yet its size and design made it stand out as a central feature of the campus. And, by late 2017, the drive leading past this new building to Sagewood's front entrance was widened and improved, as well.

During this same period, on the western edge of the campus, construction of 24 new Estate Homes was underway, creating a small community of its own. Again, advance sales were amazing! Most units were reserved in a few months despite the fact that

completion was still months away. Also, reservations for the next major apartment building, to be constructed in approximately two years, were also booming – again so that nearly all were reserved by year end!

Planning for the future continued as well. Construction of a two-story assisted living building adjacent to Acacia was begun later in 2017. It will accommodate 44 residents, freeing space in Acacia for more seriously ill patients. A similar building designed to accommodate 28 occupants for memory care is in the planning stages . . . for construction in the future.

The physical growth of the Sagewood community truly made huge steps forward during these years. Some projects were completed, others were underway, and several remain on the drawing board for the future. It is clear that Sagewood now enjoys a fine reputation as a leader among retirement providers in the Phoenix community!

Residents' Council and Committees

Bob and Helen Whipple became Sagewood residents in July of 2010, the community's first year. Coming from a background of financial and legal work, Bob began to think that Sagewood might benefit from the creation of a residents' council. When he broached the subject, however, the Executive Director, Stewart Ingram, suggested that it would be wise to wait until the community was more established and the population was somewhat larger. (At that time there were fewer than 100 residents!)

During that first year, the only organized resident group at Sagewood was the Library Committee, which Maureen Hopkins had started and continued to lead. Bob joined that effort and soon, he and Maureen initiated another "first", the Sagewood Thank You Fund, also managed entirely by residents. It provided a way, due to the community's "no-tipping" rule, for residents to express thanks to the employees with monetary contributions at Christmas. These early activities set a pattern: "when Sagewood residents saw a need, they could independently devise and support a solution! "

Early in the year 2011, Stewart Ingram appointed a group of residents to serve as the Sagewood by-laws committee for a future resident council. Chaired by Wade Brorby, it included Dan McKeithan, Carol Gasser, Shoshana Tancer and Bob Whipple. They created the Sagewood Residents' Council Bylaws, using documents from other LCS communities as examples, but with no involvement from management. When their work was completed, it received Stewart's blessing.

Election of the first members of the Council was to be the next step. However, the resident population was still relatively small and new – and not necessarily very well acquainted. Stewart was asked to appoint the members for the first Council and did so, with an effort to duplicate the balance of Sagewood residents in the casitas, villas and apartment buildings. Members of that first council were Dan Mc Keithan, Shoshana Tancer, Ray Domagala, Audrey Garagiola and Bob Whipple, who was elected the Chair. Committees were created as defined in the new Sagewood bylaws and each committee included a representative member of the Council. The focus of the system was to promote cooperation between the representatives of the community. These were not adversaries, "residents vs. administration", but rather "partners" working to make Sagewood better!

The Council began regular meetings in 2012 and faced a variety of issues from the start. Topics in the first year included discussion of the best use for the Canyon Café space now that a future grill restaurant had been announced. Should it become a coffee shop or be used as a dining area? Was the addition of a golf feature of some kind on the campus still a possibility? Is a volunteer coordinator needed for Acacia? Should another Residents' Association be created?

Discussion of a new program, SILL, the "Sagewood Institute of Lifelong Learning", began during that period. Based on a program that residents Warner and Ruth Davidson had enjoyed in Tucson, its goal was to provide the residents with educational speakers and opportunities for lively discussion. The Davidsons, Norm and Rose Levine and Robert and Shoshana Tancer formed an organizational committee in late 2012 and the program was introduced to Sagewood's residents in early 2013. It became popular and continues to offer a range of speakers on a variety of topics each year. (The Davidsons were presented with the Chairman's Award for Community Service in 2015 for their leadership in establishing the SILL program.)

Bob Whipple was re-elected Chair of the Council in 2013. Perhaps the most serious development of that year was the closing of the health clinic by Health at Home due to its lack of profitability. This meant that residents with a medical issue were required to use an independent walk-in clinic or the emergency room at one of the hospitals. However, the Sagewood Council was able to work quietly with management and LCS on the issue and the clinic was reopened.

Other concerns developed due to problems with the spreading roots of the sissoo trees which had been planted around the community. There was also the question of whose responsibility it was to pay for their removal! The problem was resolved eventually, however, to everyone's satisfaction; most of the trees could stay and the residents were not to be charged for removal at that time or in the future.

The Sagewood Residents' Foundation, a new non-profit organization, was created at that time, and Robert Tancer was named its first President. Due to the fund-raising efforts of the Foundation's committees and the generosity of Sagewood residents, scholarship funding became available to employees and their children. And still another activity was introduced in that year! Sagewood's Activities Director, Verna Chisman, helped to organize a group of volunteers for Acacia, creating a valuable program that Helen Whipple continued to run until December of 2017!

The Sagewood Cinema/Film Society was also initiated in that year. Phil Douglis and Mort Scult formed that committee and announced their plans to the community. Soon, a substantial number of Sagewood residents were viewing the "film of the month" and attending the spirited Sunday afternoon discussion of the movie. And, in yet another important first for Sagewood, Curt Westley was the first to receive the Chairman's Award for Community Service!

Ed Larson took over as the next Chair of the Council, and 2014 promised to be a busy year. Ann Funk received the Chairman's Award for Community Service for her untiring efforts to welcome new residents to the community. Also, plans for a major expansion of Acacia were announced, expected to begin in 2015 and take approximately a year. Another first in 2014, a new program, "Woody's Place" began offering free live jazz

performances to all residents, courtesy of Martin O'Sullivan and Lee and Susan Berk. Sagewood residents assisted with the funding with voluntary contributions of \$100 per patron.

The new Mesquite Grill restaurant opened and was a huge success -- the original Canyon Café was once again somewhat abandoned. However, as the population grew, it provided options for light meals throughout the day and added additional seating on evenings when many residents enjoyed the cafeteria-style meal in the Rotunda.

Verna Chisman was asked by LCS officials in Des Moines to assist in making Sagewood a CareMerge portal for on-line communication with residents. Intended primarily to provide information such as coming events, menus and calendars, it was not designed to include much local input. However, as committee members became familiar with its capability, "Odyssey" developed as a major Sagewood tool for communication. And its content and scope continued to change under the leadership of Pat Mellendorf. By 2017, it had become the "Communications Committee" and was represented by Pat on the Sagewood Council.

Also during 2014, members of the History and Exhibitions Committee unveiled the Sagewood Showcase, located in the hallway outside the Canyon Café in building five. Dwight Lanmon created the initial display featuring Sagewood's founding and continued to create its exhibits since that time. He will also create and manage the Sagewood Art Wall when it is launched in the adjacent hallway early in 2018.

A long-standing issue related to cell phone reception in the resident halls was solved at last in 2014. However, another repair issue related to waterpipes in the two main residence halls required attention, making it necessary for many Sagewood occupants to move temporarily into other apartments in the lofts of building two while repairs were made --- an opportunity, they said, for them to discover how the other half lives!

Shoshana Tancer's term as Chair of the Council in 2015 was also a busy time -- due in large part to continued interaction with LCS concerning the delay of the Acacia construction project. Plans were ultimately resolved, and it was felt that the frequent contact and regular meetings of Council members with the LCS personnel had contributed to more positive interaction on all issues there-after. It was during this time that a decision was made to add a multi-purpose building to the campus soon, rather than postponing it for Phase Two.

Bill Pendleton chaired the Sagewood Council in 2016, a year that brought a significant increase in activity related to Acacia. Completion of its new building was a welcome campus event, celebrated by staff and the residents. However, Sagewood's population and medical needs were changing. More detailed agreements were developed for all

physicians with patients on Acacia's skilled nursing floors, and additional physicians were added, giving patients more options when seeking medical care.

During the later months of 2016, both the Acacia Administrator and the Director of Nursing resigned. Timothy Kersey was hired as the new Administrator of Health Services, and he led Acacia through a period of rapid growth in the later months of 2016 and early 2017. The new year brought another related action: the Residents' Council established an Acacia committee with Ken Bash as the Chair. He announced that the management of "complaint procedures" was to be one of its primary concerns that year – and the instructions for that process were prominently displayed.

The Chairman's Award for Community Service in the year 2016 was awarded to Mort Scult and Phil Douglass, honored for their creation of the popular Sagewood Cinema Society, which had grown to more than 125 members in the third year of its existence.

Dale Baker became the Council Chair in 2017, continuing many of the activities and efforts already underway. Sagewood's population exceeded 400 for the first time, and construction projects were active in several areas of the campus. Interest in Acacia remained high. On a lighter note, the Chairman's Award for Community Service that year was presented to Martin O'Sullivan for introducing his popular programs, Woody's Place and Ted Talks to the Sagewood community.

Exercise Available for All

“Active living” has been an emphasis at Sagewood from the start. Workout machines and equipment in the fitness room are busy much of the day, and morning exercise classes have been offered since Sagewood’s opening year. An energetic young woman, Kimberly Morris, led the classes at first on a part-time basis. . . until they were so popular that she became a full-time employee and, later, required a helper! And, not only were the classes providing good exercise, they served as a casual way for the early residents to get acquainted.

Sagewood’s population continued to expand, and management of the exercise program was taken over by Morgan Garrett and Jack Davey, full-time employees of NIFS (National Institute for Fitness for Sport). The residents’ fitness evaluations became their responsibility as well.

Currently Sagewood’s fitness program serves over 50% of the resident population each month -- about 225 users who average 125 to 150 workouts a day! It offers five exercise classes on Monday, Wednesday and Friday – three Advanced and two Balance and Strength, the latter serving several determined residents who are brought to the classes by their care-givers! The schedule of classes on Tuesday and Thursday includes tai chi, yoga and once a week, a popular Zumba class! Swimming has been available from the start, and water exercise classes are held twice a week.

As the community has grown, newcomers suggested new groups and activities, including hiking with options for differing energy and skill levels. These range from challenging mountain hikes to “easy walker” outings on the grounds of a Phoenix resort. Others walk regularly around the Sagewood grounds or in the residence hallways. Golf continues to be popular as well.

A significant exercise addition was recently added on the Sagewood grounds: an outdoor recreation area, completed in the spring of 2017 which offers pickle ball, shuffleboard and bocce ball . . . and a grassy dog park for Sagewood’s canine residents.

Activities and Programs

Activities – A Choice for Every Sagewood Resident! A variety of choices are planned by the staff. However, residents are encouraged and often do begin activities of their own as well.

Card games, especially bridge, regularly attract a substantial number of participants on several afternoons each week. Duplicate bridge on Tuesdays draws the most players, but the tables in the main card room are in use almost every day. In addition to bridge, other games including Mah-Jong are also popular. And occasionally a very quiet pair of gentlemen play chess in an otherwise empty room.

-X-

Sagewood **volunteers** are always appreciated at Acacia! Some of the possible activities range from delivering treats to patients' rooms or spending time reading with an individual.

-X-

Sagewood's **Play Reading Society** was developed by two residents, Ann and Jeff Reese. Retired professional actors, they had lived at Sagewood just a short time when they offered to organize and lead a weekly reading group. Popular from the start, it is being led again this year by the Reeses even though they no longer live at Sagewood.

-X-

The opportunity to play or compete in a variety of on-line athletic events such as **Wii bowling or golf** is ideally suited for senior players. Although a planned competition on the pool room TV is occasionally scheduled, individuals can usually have access to the set at their convenience.

-X-

Ann Funk began recording names of Sagewood newcomers because it helped her remember them. When friends asked if they might share her information, Ann's **directory of residents** became so popular that she was encouraged to create an official version for distribution to all residents . . . and she has continued to do it ever since.

-X-

Gardeners are grateful for the chance to cultivate one of the raised planter boxes located on the Sagewood grounds. This shared interest may lead to informal discussion of gardening . . . and pleasure for those who pass the boxes.

-X-

The **SILL** program, a concept resident Warner and Ruth Davidson helped to develop in Tucson, has been popular at Sagewood as well. Residents on the committee arrange for community speakers or Sagewood residents to present a program related to their specialty.

-X-

Those with interest in **creative writing** or poetry meet to share their work with a other writers, while those who enjoy singing join the Sagewood Singers to rehearse regularly and perform for holiday celebrations and sing-alongs.

-X-

The **Cinema Society's** monthly viewing and discussion of outstanding films draws a large Sunday afternoon crowd. (Mort Scult and Phil Douglis received a Sagewood Chairman's Award for suggesting and managing this popular event!)

-X-

Residents who have paintings or collections of artistic objects that could be displayed in the **Sagewood Showcase** or on the adjacent Sagewood Art Wall, are encouraged to contact Dwight Lanmon, a member of the History & Exhibitions Committee.

-X-

The **art room** off the main corridor in Building two serves many purposes. Various classes and craft projects are scheduled there, and occasionally Sagewood women gather to visit while knitting. It has recently become popular with oil painters, as well, whose "works in process" attest to their excellent skills. Male residents also use that space to work on craft projects . . .and another workshop in the garage area is available for projects requiring larger tools.

-X-

The **Sage Woody newsletter** was started by two residents – Cheryl Kirk and Dick Tucker -- in 2011. Billed as the "irregularly published, unofficial newsletter by and for Sagewood Residents", a team of Sagewood volunteer writers contributes short articles about new residents, health and fitness subjects, special meeting and event notices, and just about anything else a resident might like to promote.

-X-

Many opportunities are available at Sagewood. You are encouraged to enjoy them!

Acacia Health Center

When the first residents arrived at Sagewood in 2010, most were healthy and active. Long term care was not an immediate priority, although the promise of its future availability may have influenced their decision to come to Sagewood. At that time, the only available health care on the campus was treatment for simple needs such as a cut or sprain -- the nurse practitioner's office was located on the first floor of Building Two. For more serious medical issues, residents were referred to their private doctors or a local hospital.

The original Acacia building opened in 2011 and provided three floors of space for potential patients, but few of the rooms were occupied in those early days. The 38 beds were used primarily for Sagewood residents in need of either post-surgery or long-term care. A patient stayed briefly in the hospital, then transferred to Acacia for rehabilitation. That may have taken three to four weeks before the patient was considered ready to return home.

During those years, Acacia had 65 -- 70 employees and a staff that sometimes worked three 12-hour shifts in a week. . . an exhausting schedule. Supervision of Acacia fell directly under Stewart Ingram at that time until, early in 2013, a young man, Tyler Gudex, was hired to be the Acacia Administrator. The importance of Acacia was growing as the Sagewood population grew larger!

LCS had promised the addition of a new and larger on-campus care facility, but no action seemed to be coming! By 2014, Sagewood residents became concerned. It appeared that other corporate investments were being given priority over that LCS construction promise. Members of Sagewood's Residents' Council, during the years when Ed Larson and Shoshana Tancer served as Chairs, expressed their concerns to LCS officials in Iowa and to the corporate investors in Chicago. It was this action that moved the project forward and, as another long-term benefit, established improved communication with LCS.

Construction of the new Acacia building began in April of 2015 and concluded in the spring of 2016. The original 38 beds had become 108 -- 78 of them intended to be used for skilled nursing patients (both long-term and rehab) -- the others for 10 assisted living patients and 20 memory care patients. Those arrangements will change, however, when the construction of Acacia's assisted living building has been completed. The 44 apartments will be devoted entirely to assisted living residents -- and another new structure is planned to provide memory care for 28 patients. When that, too, is put into use, Sagewood's original Acacia building will be used only for acute and long-term care patients from Sagewood and the Phoenix community.

Timothy Kersey joined the Sagewood community in November of 2016. While serving as the Director of Health Services for Westminster in Scottsdale, he watched the Sagewood

campus being built. As growth continued, he could see that Sagewood might soon be one of the country's leading retirement communities! Mr. Kersey contacted Stewart Ingram and by year-end, he had stepped into the role of Administrator at Acacia. He brought with him years of experience in the health care industry.

Mr. Kersey explains that the world of health care for the elderly has changed substantially in recent years. Under his leadership the size of the staff has been increased – due to the much larger number of patients at Sagewood and the need to deal with growing government regulations. Patients' concerns are also addressed . . . such issues as monitoring activities and response times – in an effort to improve Acacia's overall service.

Dr. Helene Labonte serves as Medical Director of Acacia under contract with Mayo Clinic. Acacia does not employ doctors – instead they have admitting privileges. A patient's average rehab time is nine to fourteen days. After that time, it is expected that the patient will return home and rely on home health care for any continuing needs.

The long-term care business is extremely competitive. At present, Sagewood's facility does not participate in managed care plans, Medicaid or other low cost programs. And challenges are plentiful. For example, helping Sagewood residents make decisions and relocate to the most appropriate alternatives -- to make the choice between long-term care and assisted living? As the current Sagewood construction is completed, the alternatives for Sagewood residents will become even more attractive.

Sagewood Staff

Stewart Ingram – Executive Director: An employee of Life Care Services, Sagewood’s corporate owner and manager, his role is to assure resident satisfaction and manage the operation of the community in a financially sound and efficient manner. Under his leadership, the residents find opportunities to explore or create satisfying and worthwhile activities on the campus. He is enthusiastic about his staff of more than 300 full and part-time Sagewood employees. “Our managers may sometimes work behind the scenes, but they are essential to the Sagewood community’s smooth operation and the comfortable lifestyle its residents enjoy!”

Timothy Kersey – Administrator of Acacia: Previously associated with Westminster Village in Scottsdale, Tim joined the Sagewood community in 2016. He had followed Acacia’s earlier construction and growth with interest and considers it one of the country’s leading communities of its kind. In his relatively short time at Sagewood, he has responded to the challenges presented by Sagewood’s rapid growth and increasing government regulations.

David Bennett – Director of Accounting: He has been associated with Life Care Services for 13 years and has served here at Sagewood from its beginning. He frequently meets with prospective residents to review their financial questions and is supported by a financial team at Life Care Services as well as his co-workers at Sagewood.

Sharon Chadwick, Director of Human Resources: Her primary responsibility is the hiring, training and supervision of new employees. When she arrived three years ago, Sagewood had 135 employees. That number has grown to 300 and turnover of staff has significantly decreased! Last year she held Sagewood’s first service awards luncheon and added other new activities, including “Fun Team” meetings to stimulate employee morale.

Iveta Delic – Director of Environmental Services: One of the original employees, she began working at Sagewood even before the construction was done, wearing a hardhat! Her duties include scheduling and supervision of housekeeping staff, janitors, laundry attendants and even a grounds-keeper – currently 42 people but soon to be close to 50. They process almost 2,000 lbs. of laundry a day, serving approximately 325 homes as well as Acacia!

Ellen Devine – Marketing Manager: Associated with Sagewood since 2006, she and her staff offer a wealth of knowledge regarding senior housing options. Due to Sagewood’s continued growth, she is not so much concerned with finding Sagewood new residents but rather must manage a reduced inventory for them to consider. For the first time, Sagewood is almost totally occupied, and even the future building is nearly 100% reserved! Referrals by residents offer proof of their satisfaction with the Sagewood community

Jim White – Director of Plant Operations: When he came to Sagewood in 2013, his primary goal was to add skilled people to the staff rather than to continue paying outside vendors. Currently, that staff includes nine maintenance employees, nine security guards and three valets as well as Shaz, his administrative assistant. They handle most needed services for residences, inside and out, the clubhouse and the grounds except for work done by Jeff Gibson's able landscaping company.

Ronald Williams – Director of Community Life Services: Ron began his involvement at Sagewood while still a student in graduate school. Verna Chrisman, his predecessor in this position, had developed a broad range of activities, trips and events. Ron assisted with many of them and, when she left Sagewood in 2016, he became Director. He has continued a broad schedule of events that fill the Sagewood calendar and his days!

Food & Beverage Services

Michael Kunze, Director: Joined Sagewood in the summer of 2015 after 12 years in the hospitality industry, including time as food and beverage manager at Talking Stick Resort and Troon North Golf Club. **Vince De Mar, Executive Chef:** With more than 15 years of culinary experience, he also came in 2015. Together they are committed to providing high-quality service and superior dining pleasure to Sagewood residents. Efforts to accommodate residents' special diet needs are ongoing and they hold periodic meetings with residents to provide helpful information related to nutrition and diet issues. **Suela Kalavrezi, Dining Room Manager:** One of the original employees, she came prior to Sagewood's January 2010 opening and currently has a staff of 50. They manage a busy schedule of meals in the Palo Verde Room and the Grill, as well as weekly buffets in the Grill and Canyon Café.

Sagewood – The Future!

As the year 2018 begins, growth is visible on all sides of the campus! The new assisted living building is in the final stages of construction next to Acacia -- no doubt its red siding will soon be covered in Sagewood brown. To the west, a broad driveway leads to the new "Estate Homes" community where the first residents are starting to move in. And "Oasis", the handsome new community building, will welcome Sagewood residents for the first time in February! It has been a pleasure to look back over the community's early years -- and we look forward to those to come here at Sagewood.

Members of the 2017/2018 History and Exhibitions Committee

Phil Douglis, Chair
Naomi Goodell
John Haro
Cheryl Kirk
Dwight Lanmon
Pat Mellendorf

Susan Miller
William Sumner
Carol Wagner
Judy Erickson -- Resident Council
Fred Emerson -- Resident Council
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