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Continuum of Care Retirement Communities
Madison Wisconsin

Prepared by the Committee on Financial Matters in Retirement of the University of Wisconsin – Madison Retirement Association

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Other organizations in the Madison area have facilities that are similar to some or all of the facilities covered in this presentation.
THREE EXAMPLES OF CONTINUUM OF CARE RETIREMENT COMMUNITIES

Attic Angel Community
Far West Madison location with surface and garage parking for residents and surface parking for staff and visitors. 
Continuum of Care Retirement Community (CCRC). 
Not for profit corporation. 
Board of Directors – volunteers and community experts. 
Resident Association and Resident Council. 
Residents must be 55 years old. 
Unique feature—ranch style homes.

Capitol Lakes Retirement Community
Downtown location with a parking ramp for residents, staff, and visitors. 
Continuum of Care Retirement Community (CCRC). 
Not for profit corporation owned by Pacific Retirement Services, Inc. 
Board of Directors – Pacific Retirement people and local community people. 
Resident Association. 
Residents must be 62 years old. 
Unique feature—Aquatic and wellness center.

Oakwood Village
West Madison and East Madison locations with surface parking for visitors and underground parking for residents, staff, and visitors. 
Continuum of Care Retirement Community (CCRC). 
Not for profit corporation supported by 37 Lutheran Churches. 
Board of Directors – Local clergy and community people. 
Resident associations. 
Residents must be 55 years old (62 for subsidized units). 
Unique feature—nature preserve and auditorium at University Woods and new nursing and rehabilitation center at Prairie Ridge.

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RANGE OF FACILITIES
Independent living – apartments with services and ranch homes
Assisted living
Skilled nursing and rehabilitation care
Memory care (Alzheimer’s Disease or other irreversible dementia)

INDEPENDENT LIVING – APARTMENTS WITH SERVICES
(Certified as RCAC – Residential Care Apartment Complex)

Attic Angel
*Attic Angel Place  4 floors  74 apartments
Living room with dining area, kitchen, 1 bedroom, full bath, washer and dryer, some have den: 690 - 850 square feet.

OR
Living room with dining area, kitchen, 2 bedrooms, 2 full baths, washer and dryer, some have den, some have balcony: 975 – 1,155 square feet

Entrance Fee for Attic Angel Place (NOT covered by Medicare or Medicaid):Traditional with 25-month pro-rated refund ($12,750 - $19,000)

Capitol Lakes
*Maingate  5 floors  52 apartments
*Heights  14 floors  134 apartments
Living room with dining area, kitchen, 1 bedroom, full bath. Some have washer-dryer. 500 – 1,000 square feet

OR
Living room with dining area, kitchen, 2 bedrooms, 2 full baths, washer-dryer. Some have den, some have balcony. 1,000 – 2,000 square feet

Entrance Fee for Maingate and Heights (NOT covered by Medicare or Medicaid): Traditional with 36-month pro-rated refund ($62,000 – $357,000)

OR
Life lease payment with 90% refunded at end of occupancy ($118,000 – $600,000)
Social Membership during waiting period after 100% refundable deposit.

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Oakwood

*University Woods – The Oaks (west) 4 floors 90 apartments
*University Woods – Heritage Oaks (west) 8 floors 124 apartments
*Prairie Ridge – Settlers Ridge (east) 4 floors 103 apartments
*Prairie Ridge – Pioneer Prairie (east) 4 floors 103 apartments

Living room with dining area, kitchen, 1 - 2 bedrooms, 1 - 2 full baths, washer-dryer, some have screened porch, some have den. 1,000 – 2,300 square feet

Entrance Fee for The Oaks and Heritage Oaks (NOT covered by Medicare or Medicaid):

Life lease payment with 90% refunded at end of occupancy ($180,000 $410,000)

Entrance Fee for Settlers Ridge and Pioneer Prairie (NOT covered by Medicare or Medicaid):

Life lease payment with 90% refunded at end of occupancy ($130,000 - $230,000)

*University Woods – Tower (west) 15 floors 144 apartments*
*University Woods – Gallery (west) 6 floors 56 apartments
*30 units HUD Section 8 subsidized

Washers and dryers in separate laundry room.

Studio: 488 square feet
One bedroom: 530 square feet
Two bedroom: 700 – 1,167 square feet

Entrance Fee: $7,500 with $2,500 refundable at end of occupancy

Residents NOT entitled to priority access to other levels of care within Oakwood Village.

Monthly Fee (NOT covered by Medicare or Medicaid) Ranges from $1,289 – $4,360 depending on size of unit and services included by the facility.

Second person fee of $173 – $500 per month. (cont’d)
Monthly fee covers:

- Rental of unit.
- Payment in lieu of city property tax for municipal services (excluding schools and MATC).
- City of Madison services such as 911 emergency, city library, police and fire.
- Utilities (varies).
- Heat and air conditioning.
- Exterior maintenance and snow removal.
- Maintenance—changing light bulbs, filters.
- Trash and recycling removal.
- Parking.
- Appliance replacement—refrigerator, range, microwave, dishwasher, washer, dryer.
- Common areas and lounge areas.
- Use of party rooms and meeting rooms.
- Library.
- Social, recreational, educational, and cultural programs.
- Entertainment.
- Exercise room.
- Newsletter and other publications.
- Telephone calls to check on residents, if appropriate.
- Storage units.
- Priority access to facilities with advanced levels of care.
- Emergency response.
- Transportation to super markets, shopping centers.
- Transportation to medical appointments (varies).
- Some: cable or satellite television.
- Some: linen service twice monthly.
- Some: housekeeping service twice monthly.
- Some: use of aquatic center.
- Some: complimentary short-term skilled nursing stays.
- Some: weekly or monthly nursing allowance.

(Cont’d)
University Woods, covered by monthly fee, (cont’d)
  Some: computer room with printer, high speed internet access, and photocopy machine.
  Some: allowance for casual or more formal dining.
  Some: allowance for optional services.
  Some: arts program and music therapy.
  Some: art studio and wood working shop.
  Some: use of garden plots.
  Some: walkways through nature preserve and garden areas.
  Some: wireless internet.
  Some: 24-hour reception desk.
  Some: chaplain services.
  Some: chapel with ecumenical worship services.
  Some: car wash bay for resident automobiles.
  Some: free temporary days in skilled nursing and rehabilitation.

Optional Services with additional fee
  Meals in dining room or casual dining area.
  Pharmacy prescriptions and products.
  Health services—audiology, dental, massage, and podiatry.
  Mini-grocery or convenience store.
  Housekeeping and window washing.
  Hair styling, cutting, etc.
  Gift shop purchases.
  Extra storage.
  Bus transportation and fees on special trips.
  Emergency alert system.
  One-time nursing assistance.
  Use of guest rooms for overnight stays.

Application Assessment
  Written application.
  Minimum age.
  Physical and mental condition of individuals.
  Finances (re-evaluated annually).
  Availability of desired unit.
Waiting Lists

Time on list depends on facility and type of unit.
Typically 1 – 3 years.
Requires a deposit of $1,000 - $2,000.

Financial Assistance if financial resources are exhausted:
Some: Federal Section 8 program.
Some: Assistance from Foundation under certain circumstances.

INDEPENDENT LIVING – RANCH HOMES

Attic Angel Prairie Point

*Prairie Point
1 floor
108 units
13 units new construction

Barrier-free ranch style homes: single, duplex, and triplex.
Living room with dining area or dining room, kitchen, 2 or 3 bedrooms, 1 ½ to 2 ½ bathrooms, washer and dryer, sun room or screen porch, concrete patio, attached single or double garage, private entrances, and full unfinished basement.
1,375 – 2,325 square feet.

Entrance Fee for Prairie Point (NOT covered by Medicare or Medicaid):
Life lease payment with 90% - 95% refunded at end of occupancy
Payment varies with unit size and features; currently $200,000 – $590,000

Monthly Fee (NOT covered by Medicare or Medicaid) $549 per month

Monthly fee covers:
Maintenance of unit interior and exterior.
Maintenance of furnished appliances and mechanicals.
Maintenance of lawns and grounds.
Snow removal of sidewalks and driveways.
Private garden space.
Access to Attic Angel Community transportation, events, activities.
Priority access to facilities with advanced levels of care.
Insurance.
Municipal services—waste management, police, fire protection.
911 emergency service, etc.

(Cont’d)
Attic Angel Prairie Point (cont’d)
Additional required fees and costs:
- Property tax or municipal fees on unit.
- Water and sewer.
- Natural gas and electricity.
- Telephone.
- Cable television.

Optional Services with Additional Fees
- Meals in Attic Angel Place.
- Housekeeping.
- Laundry.
- Convenience store.
- Hair styling, cutting, etc.
- Health services—audiology, dental, massage, and podiatry.
- Clerical and notary services.
- Bus transportation and fees on special trips.
- Emergency alert system.
- One-time nursing assistance.

ASSISTED LIVING

Attic Angel Place

*Households 36 units

Living room, bedroom, kitchen area with small refrigerator and microwave, and bath: 368 – 470 square feet

No Entrance Fee. Monthly Fee—three levels of care:

Level 1 at $5,340 per month includes:
- Health and wellness monitoring.
- 24-hour staffing and call light system.
- Breakfast, lunch, and dinner.
- Daily bed making and trash removal.
- Weekly housekeeping and laundry.
- Weekly bathing assistance.
- All utilities except telephone.
- Cable television.
- Use of common areas and lounge areas.

(cont’d)
Attic Angel Place assisted living, Level 1 (cont'd)
  Storage locker.
  Transportation.

Level 2 at $6,232 per month includes Level 1 services plus medication management and wound care OR assistance with activities such as dressing and personal care.

Level 3 at $7,403 per month includes Level 1 services plus medication management and wound care AND assistance with activities such as dressing and personal care.

A second occupant adds 45% at the lowest assessed level.

Prairie Point ranch home residents and Attic Angel Place apartment residents have priority access to Attic Angel Place assisted living.

**Capitol Lakes**

*Terraces* 44 units

Living room, bedroom, kitchen area with small refrigerator and microwave, and bath: 300 – 350 square feet

No Entrance Fee.

Monthly Fee of $5,296 – $5,758 includes:
  Health and wellness monitoring.
  Medication management.
  Limited nursing care.
  24-hour staffing and call light system.
  Breakfast, lunch, and dinner.
  Housekeeping and laundry services.
  Personal care assistance.
  Weekly bathing assistance.
  All utilities.
  Cable television.
  Use of common areas and lounge areas.
  Transportation.

Optional Services with Additional Fees:
  Extensive nursing.
  Social services.
  Staff escorts. (cont'd)
Capitol Lakes assisted living, (cont'd)
A second occupant adds $2,500 per month.
10% discount if transfer from Independent Living Apartments.
Capitol Lakes Maingate and Heights residents have priority access to Capitol Lakes Terraces assisted living.

**Oakwood Village**

*Tabor Oaks (University Woods) 60 units
*Oakwood Seasons (Prairie Ridge) 20 units

Living room, bedroom, kitchen area, and bath: 300 square feet
No Entrance Fee.

Fee of $183 per day ($5,490 per 30 days) includes:
- Health and wellness monitoring.
- Medication management.
- 24-hour staffing and call light system.
- Breakfast, lunch, and dinner and snacks.
- Housekeeping and linen and personal laundry services.
- Personal daily care assistance.
- Weekly bath and shower assistance.
- Three hours of skilled nursing intervention per week.
- Activities programming seven days per week.
- All utilities.
- Cable television.
- Use of common areas and lounge areas.

A second occupant adds $183 per day ($5,490 per 30 days).

The Oaks, Heritage Oaks, and Prairie Ridge residents have priority access to Tabor Oaks and Oakwood Seasons assisted living.

**SKILLED NURSING AND REHABILITATION CARE**

**Attic Angel**

*Attic Angel Place 1 floor 44 beds

28 private rooms and 8 double rooms: 218 – 622 square feet

Prairie Point ranch home and Attic Angel Place apartment and assisted living residents have priority access to Attic Angel Place skilled nursing and rehabilitation care.
**Capitol Lakes**

*Capitol Lakes* 2 floors 86 beds

58 private rooms and 14 double rooms: 150 - 250 square feet

Capitol Lakes Maingate, Heights and Terraces residents have priority access to Capitol Lakes skilled nursing and rehabilitation care. 50% discount on permanent residence if moved from Independent Living Apartments.

**Oakwood Village**

*University Woods – Hebron* 3 floors 95 beds

91 private rooms and 2 double rooms: 200 – 300 square feet

Prairie Ridge – Health and Rehabilitation Center 1 floor 42 rooms

38 private rooms and 2 double rooms: 200 – 250 square feet

The Oaks, Heritage Oaks, Settlers Ridge, Pioneer Prairie, Tabor Oaks, and Oakwood Seasons residents have priority access to Hebron and Prairie Ridge Health and Rehabilitation Center skilled nursing and rehabilitation care.

Fees: Daily Fee of $270 - $343 plus monthly Wisconsin State Tax of $170 per month results in a total of $8,270 - $10,460 per 30 days; MAY be covered by Medicare for limited time under Medicare guidelines. Includes:

- Breakfast, lunch, and dinner and snacks.
- Medication management.
- 24-hour nursing and supervision.
- Restorative nursing.
- Weekly bath and shower assistance.
- Daily bed making and housekeeping.
- Social services support.
- Utilities.
- Television (cable or satellite).
- Specialized activities and courtyard garden.
- Some: Telephone.

Optional Services with Additional Fees:

- Pharmacy prescriptions & products (MAY be covered by Medicare).
- Physician and laboratory services.
- Physical therapy.
- Occupational therapy.
- Eating/swallowing therapy.

(Cont'd)
Oakwood Village optional services (cont'd)
   Speech therapy.
   Salon services.
   Guest meals.

Can keep other living units in the continuum for a limited time during stay in skilled nursing and rehabilitation care.

Role of Medical Director v. Private Physician
   The Medical Director provides staff with medical guidance and support on policies and clinical issues.
   Resident’s private physician attends to the health care needs of the resident.

**MEMORY CARE**
   (CBRF – Community Based Residential Facility)

**Attic Angel Place**
   *Haven* 1 floor 20 rooms
   18 suites and 2 deluxe suites (possible shared occupancy)
   Prairie Point ranch home residents and Attic Angel Place apartment and assisted living residents have priority access to Attic Angel Place Haven.

**Capitol Lakes**
   *Terraces* 3 floors 44 rooms
   Capitol Lakes Maingate, Heights, and Terraces assisted living residents have priority access to Capitol Lakes memory care.

**Oakwood Village**
   *University Woods – Covenant Oaks* 1 floor 40 rooms
   The Oaks, Heritage Oaks, Tabor Oaks, and Prairie Ridge residents have priority access to Covenant Oaks memory care.
   Services similar to Assisted Living units with enhanced nursing and supportive services.
   **Daily Rates:**
   - Private room: $220 – $247 per day.
   - Shared room: $412 - $438 per day.