THREE EXAMPLES OF CONTINUUM OF CARE RETIREMENT COMMUNITIES

• Attic Angel Community
• Capitol Lakes Retirement Community
• Oakwood Village

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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

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

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)

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)

Oakwood (Continued)

- **University Woods – Tower (west)**
  - 15 floors, 144 apartments*

- **University Woods – Gallery (west)**
  - 6 floors, 56 apartments

* = 30 units HUD Section 8 subsidized

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

- Washers and dryers in separate laundry room

- 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

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
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

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

Some facilities offer:

- Cable or satellite television
- Linen service twice monthly
- Housekeeping service twice monthly
- Use of aquatic center
- Complimentary short-term skilled nursing stays
- Weekly or monthly nursing allowance
- Computer room with printer, high speed internet access, and photocopy machine
- Allowance for casual or more formal dining
- Allowance for optional services
- Arts program and music therapy

Monthly fee covers (Continued)

- 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)
- Weekly or monthly nursing allowance
Some facilities offer (Continued):

• Art studio and wood working shop
• Use of garden plots
• Walkways through nature preserve and garden areas
• Wireless internet
• 24-hour reception desk

• Chaplain services
• Chapel with ecumenical worship services
• Car wash bay for resident automobiles
• Free temporary days in skilled nursing and rehabilitation

Fees for Optional Services

• 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

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 Exhaust Financial Resources

- Some offer Federal Section 8 program
- Some offer Assistance from their Foundation under certain circumstances

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, 1½ to 2½ 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

INDEPENDENT LIVING RANCH HOMES

- Attic Angel Community

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.
Additional required fees and costs

- Property tax or municipal fees on unit
- Water and sewer
- Natural gas and electricity
- Telephone
- Cable television

Fees for Optional Services

- 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 Community
- Capitol Lakes Retirement Community
- Oakwood Village

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

Capitol Lakes

- Terraces 44 units

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

- No Entrance Fee

- 10% discount if transfer from Independent Living Apartments

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

Capitol Lakes (Continued)

- Additional Fees for extensive nursing, social services and staff escorts

- 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

Oakwood (Continued)

- 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 Community
- Capitol Lakes Retirement Community
- Oakwood Village
Attic Angel

- **Attic Angel Place** 1 floor, 44 beds
- 28 private rooms and 8 double rooms: 218 - 622 square feet
- Prairie Point ranch home residents 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 Terrace 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 beds
- 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

Monthly Fee

- MAY be covered by Medicare for limited time under Medicare guidelines
- **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; Fee 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 include Telephone
**Fees (Continued)**

**Additional Fees**
- Pharmacy prescriptions & products (MAY be covered by Medicare)
- Physician and laboratory services
- Physical therapy
- Occupational therapy
- Eating/swallowing therapy
- 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 vs. 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
- Services similar to Assisted Living units with enhanced nursing and supportive services

**Attic Angel**

- **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

Fee

- Private room: $220 - $247 per day
- Shared room: $412 - $438 per day