

2020

# GOLDEN OAKS VILLAGE ANNUAL REPORT



GOLDEN OAKS  
VILLAGE



ACTIVE FAITH-BASED LIVING

# 2020 YEAR IN REVIEW

At Golden Oaks, we take pride in our past and hold great anticipation for the future. In 2020, we refreshed our mission, vision, and standards of excellence to better reflect who we are as an organization today.



## GOLDEN OAKS VILLAGE STANDARDS OF EXCELLENCE

*Colossians 3:23, Ephesians 4:32*

This is our **COMMITMENT** to you and each other:

### → EXCELLENCE IN ALL I DO:

I will always dress professionally and wear my Name Tag proudly.  
I will manage my time and resources effectively.  
I will embrace change and strive to improve myself and my department.  
I will take ownership of making GOV the best it can be and will be looking for ways to enhance our facility.

### → EXCELLENCE IN CUSTOMER SERVICE:

I will strive to make everyone feel welcome by greeting them with a smile and politeness.  
I will offer assistance to anyone I encounter and will make sure they are taken care of.  
I will always use the words "Please", "Thank you", "You're welcome" and "Is there anything else I can do for you?"  
I will remember that each resident deserves their privacy and dignity and will always knock and ask permission to enter their home.  
I will never discuss personal information about any resident in public areas where it could be overheard.

### → EXCELLENCE IN WORKING WITH OTHERS:

I will treat my co-workers with kindness, dignity, and respect.  
I will maintain a positive attitude and will make every effort to build my co-workers up.  
I will be the best "cheer leader" for my department and my staff.  
I will refrain from "gossip" and "criticism" concerning fellow employees.

It's clear that Golden Oaks Village has a passion for maintaining a faith-based active Christian lifestyle for our senior community. With our consultation partnership with Baptist Village Communities, we have been able to continue the mission to honor God by creating a loving environment, excellent services, and compassionate care to our residents while providing a nurturing workplace for our employees. We can't wait to see where it goes."

— Gary & Annette Lillie, Board Members

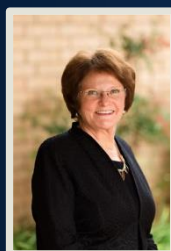
I'm so blessed to be living at Golden Oaks. Although I'm 98 years old, I still enjoy being active and use the walking trails daily during warm weather. I'm comforted in knowing my daughter is engaged in activities and events and will be well taken care of long after I'm gone. I wish I would have moved out here years ago. Don't wait so long to enjoy the social interaction and new friendships you make here! Join us, we are like a big family.

— Betty Evans-Ralph, Resident

## GOLDEN OAKS VILLAGE BOARD MEMBERS



Rev. Gary Lillie  
Board Member



Annette Lillie  
Board Member



Kyle Lillie  
Board Member



Tom Evans  
Board Member



Buddy Nichols  
Board Member

# 2020 YEAR IN REVIEW



*"I will bless the LORD at all times; His praise shall continually be in my mouth." (Psalm 34:1 NKJV)*

Although the year 2020 will forever be remembered as the COVID-19 pandemic "Lock Down" year, the community did not experience attrition in our resident population that was above our normal rate. Some of our employees tested positive and were isolated; however, none of them suffered any serious reaction to the virus. Golden Oaks followed the CDC and Health Department guidelines and participated in the "lock down" for the required timeframes. Everyone learned a great deal about becoming creative with communication and providing as much support to our residents as possible during this trying time. The staff are

sharply aware of the heightened need for aggressive infection control measures along with all the health screenings, tests, and vaccine opportunities that have become part of our new normal. All in all, we have much to bless the Lord for!

This year also marked the significant change from a for-profit entity to a 501c3 not-for-profit organization. This new change in organization is going to allow us to participate in fundraising, give us access to grants, and allow for more favorable financing for future projects. Additionally, Baptist Village Communities, a long-established organization who successfully operates multiple communities throughout Oklahoma, has been engaged to serve as operational consultants. They helped with the transition to not for profit status, and they continue to provide operational support to the management team.

This long pause that was caused by the pandemic has also provided the time to reflect on our very bright future and all that we hope to accomplish over the next several years. I joined this team in June of 2021 to serve as the permanent Executive Director, with the very task of leading the organization to achieve those planned-for accomplishments. If we stay the course and never waiver from our faith and dependence on a Holy God, then we will achieve all that He has for us to accomplish.

We give thanks to the Lord for the year 2020, for all the challenges and victories. Together, with His help, we will impact our world for Christ, right here at Golden Oaks Village. We have such a bright future!

Blessings,

Mark



# 2020 YEAR IN REVIEW

## Standards of Excellence a Success

In 2020, we launched a new Standards of Excellence culture to redefine our mission, vision and values statement to Golden Oaks team members. Our Standards reflect the evolution and aspirations of Golden Oaks and provide a consistent way for all Golden Oaks team members to express who we are. These standards guide us in providing a life of excellence through our day to day work.



## Golden Oaks Village Opens Renovates the Fitness and Wellness Center

The community made the decision to renovate the fitness center that would be open to residents to provide our seniors a place to work-out independently. This strategy has not only increased the number of current residents who work-out consistently. The aquatic center was open *to the outside community* for group work-outs – it was also a way to get to know potential *future* residents. *We had one community aquatic member move to GOV.*

## Golden Oaks creates new partnership with a Rehabilitative Therapy Team

Coinciding with the new Patient Driven Payment Model (PDPM) for patients receiving skilled nursing care, Golden Oaks created a new partnership with Reliant rehabilitative therapy team to manage the provision of physical, occupational, and speech therapies.



## Health Services News

In accordance with the CMS requirements for all facilities that offer long term care and participate in Medicare and Medicaid programs, our facility has a dedicated Infection Control Preventionist on staff who has been trained and certified in Infection Control and Epidemiology. The goal is to protect our residents and have fewer people returning to the hospital.



# 2020 YEAR IN REVIEW

## Tomorrow's Leaders Internship Program

Opportunities are available to young people who are interested in careers within the senior living industry. Our program helps develop the next generation with hands on experience and is beneficial to both residents and interns. We recently announced that five interns graduated from the program earning their Certified Nursing Assistant Certifications. There are currently eight students in the program.



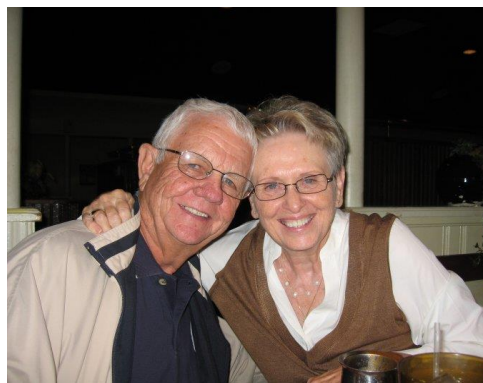
## Resident Financial Assistance Fund

Qualified residents in our community, who have outlived their resources through no fault of their own, received assistance through the Resident Financial Assistance Fund. Through the compassion of this program and the generous support of donated resources, residents were able to stay in their long time homes through financial difficulties.



The number one goal of our Life Enrichment team is to improve the quality of life for each of our residents through activities, events, and social interaction. We're more than bingo, crafts, and card games!

#morethanbingo



# 2020 YEAR IN REVIEW

## **Making an Impact through Community Partnerships**

During the COVID-19 pandemic Golden Oaks Village (GOV) received more than 750 hand crafted masks to deliver to employees and to distribute to seniors living independently outside our community.

Residents and employees provided more than 30 boxes of Christmas gifts to overseas children through Samaritan's Purse.

Groups of GOV residents and staff participated in multiple walks/runs to raise awareness and funds for issues affecting our community to include: Arthritis, Alzheimer's, Fallen Heroes, and OKC Memorial Marathons.

Temporary Compassionate Housing was provided to families displaced by inclement weather or natural disasters.

Employee Appreciation Fund provided financial benefits to staff.

## **Community Partnerships cont.**

The Compassionate Quilter Group provides quilts for all GOV veterans, Gold Star families for Memorial Day and for honored veterans at the Legacy Award Ceremony on Veterans Day. More than 40 quilts were distributed.

For recognition on their partnership with the veteran community, GOV received a donation of a visitation pod used as a safe and secure visitation center for residents in all certified health services.

The Needlecrafters Group provided caps and matching blankets for stillborn baby's reunion with parents. They also provide caps and prayer shawls for cancer and hospice patients.

GOV uses surplus furniture assets to provide assistance to needy families.

GOV professionals provided assistance to ten (10) veterans needing Aid and Attendance benefits to offset certified health services.





# 2020 YEAR IN REVIEW



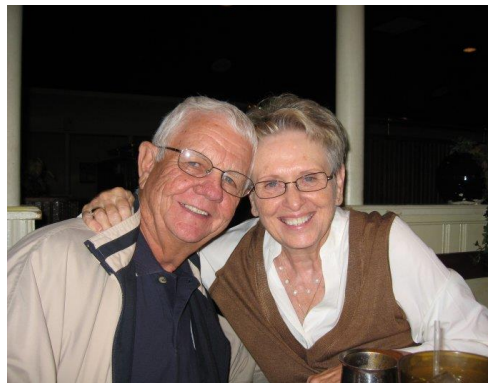
## Serving Together – Baptist Village Communities and Golden Oaks a Win-Win Partnership

More than 90 years. That's the combined years of experience Baptist Village Communities (BVC) and Golden Oaks Village have in providing outstanding service in Oklahoma.

Baptist Village and Golden Oaks announced a consulting partnership that went into agreement in 2020. Golden Oaks has been serving the Enid area for more than 30 years. Started in 1988 as Christian Life Care Retirement Village, Wesley Kroeker was instrumental in enlarging the campus. Located on 110 acres and featuring independent living, home health services, residential living, assisted living and a health center with skilled rehabilitation and therapy services. More than 200 residents call GOV home.

The announcement was made in the chapel of GOV in a Town Hall setting in early 2020. Dr. Bill Pierce, President of BVC; Wendell Short, Vice President of BVC and the Kroeker/Lillie Family. Both organizations have a rich Christian heritage and combined desire to serve aging adults and look forward to serving together.

For Additional Information on Baptist Village Communities, visit [www.baptistvillage.org](http://www.baptistvillage.org). To learn more about Golden Oaks Village visit [www.goldenoaks.com](http://www.goldenoaks.com)



# 2020 YEAR IN REVIEW

To view the Annual Report and Financials in its entirety, go to [www.goldenoaks.com/resources](http://www.goldenoaks.com/resources)

Form **990** **Return of Organization Exempt From Income Tax** OMB No. 1545-0047  
 Under section 601(e), 627, or 4947(a)(1) of the Internal Revenue Code (except private foundations)  
 Department of the Treasury Internal Revenue Service  
 Do not enter social security numbers on this form as it may be made public.  
 Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.  
**2020**  
 Open to Public Inspection

**A** For the 2020 calendar year, or tax year beginning **2020**, and ending **20**

**B** Check if applicable:  
 Address change  
 Name change  
 Initial return  
 Final return (section 501(c)(3))  
 Amended return  
 Application pending

**C** Name of organization: **OAKWOOD RETIREMENT VILLAGE INC**  
 Doing business as: **GOLDEN OAK VILLAGE**

**D** Employer identification number: **73-1397021**

**E** Telephone number: **(580) 249-2600**

**F** Name and address of principal officer: **GARY LILLIE**  
**5801 N OAKWOOD RD, KNID, OK 73703**

**G** Gross receipts \$: **10,557,285.**

**H(a)** Is this a group return for subsidiaries?  Yes  No  
**H(b)** Are all subsidiaries included?  Yes  No  
 If "No," attach a list. See instructions.

**I** Tax-exempt status:  501(c)(3)  501(c)(1)  (insert no.)  4947(a)(1) or  527

**J** Website: **GOLDENOAKS.COM/**

**K** Form of organization:  Corporation  Trust  Association  Other

**L** Year of formation: **1992** **M** State of legal domicile: **OK**

**Part I Summary**

**1** Briefly describe the organization's mission or most significant activities: **PROVIDE COMPASSIONATE CARE AND SERVICE TO OUR RESIDENTS AND A NURTURING WORKPLACE FOR EMPLOYEES BY OPERATING IN A MANNER CONSISTENT WITH BIBLICAL PRINCIPLES AND VALUES**

**2** Check this box  if the organization discontinued its operations or disposed of more than 25% of its net assets.

**3** Number of voting members of the governing body (Part VI, line 1a) **3** **5.**

**4** Number of independent voting members of the governing body (Part VI, line 1b) **4** **2.**

**5** Total number of individuals employed in calendar year 2020 (Part V, line 2a) **5** **245.**

**6** Total number of volunteers (estimate if necessary) **6** **5.**

**7a** Total unrelated business revenue from Part VIII, column (C), line 12 **7a** **0.**

**7b** Net unrelated business taxable income from Form 990-T, Part I, line 11 **7b** **0.**

	Prior Year	Current Year
<b>8</b> Contributions and grants (Part VIII, line 1h)	0.	718,525.
<b>9</b> Program service revenue (Part VIII, line 2g)	6,671,190.	9,485,457.
<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d)	7,000.	26,528.
<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	257,049.	326,775.
<b>12</b> Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	6,935,239.	10,557,285.
<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3)	0.	0.
<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4)	0.	0.
<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	3,456,864.	4,722,340.
<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e)	0.	0.
<b>b</b> Total fundraising expenses (Part IX, column (D), line 25)	0.	0.
<b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	3,235,285.	4,976,352.
<b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	6,692,149.	9,698,692.
<b>19</b> Revenue less expenses. Subtract line 18 from line 12	243,090.	858,593.
<b>20</b> Total assets (Part X, line 15)	Beginning of Current Year 5,212,985.	End of Year 6,058,575.
<b>21</b> Total liabilities (Part X, line 25)	6,806,003.	6,793,000.
<b>22</b> Net assets or fund balances. Subtract line 21 from line 20	-1,593,018.	-734,425.

**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

**Sign Here**  
 Signature of officer: \_\_\_\_\_ Date: \_\_\_\_\_  
 Type or print name and title: \_\_\_\_\_

**Paid Preparer Use Only**  
 Print/Type preparer's name: **JON P REDELSBERGER** Preparer's signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Check  if self-employed  if PTIN: **P00431562**  
 Firm's name: **BKD, LLP** Firm's EIN: **44-0160260**  
 Firm's address: **205 W. MAPLE, STE 200 ENID, OK 73701-4026** Phone no.: **580-237-3300**

May the IRS discuss this return with the preparer shown above? (see instructions)  Yes  No

For Paperwork Reduction Act Notice, see the separate instructions. Form **990** (2020)



# 2020 YEAR IN REVIEW

## Financial and Operational Performance

Despite the unprecedented challenges of the COVID-19 pandemic, our strong operating and financial performance has kept the organization on solid ground and assured the long-term viability of our mission. This past year we have continue to focus on executing the right strategies and action plans to assure Golden Oaks remains well positioned to serve current and future residents through programs, services, and amenities that promote joy, peace of mind and a life of continued purpose. Contributing to our solid financial standing is our high levels of occupancy, with 78% of our units occupied, sold, or committed companywide.



## Physical Improvements Continue

Furthering the Leadership Team's commitment to the highest-quality resident experience possible, the past year brought continued improvements to the physical structure of Golden Oaks. Renovation work was completed on several vacant Independent Living homes. Our Plant Operations Team organized a series of projects designed to increase the reliability of our HVAC system and improve our ability to respond to issues. They continue to make improvements to reduce overall maintenance and utility costs, improve our relationships with consultants and vendors, and prepare our campus for growth.



## More than 98% of Golden Oaks Residents Receive COVID-19 Vaccine in December

Golden Oaks is proud that more than 98% of our residents received their first COVID-19 vaccination. We've been so blessed as an organization to have the ability to vaccinate our residents and staff members conveniently within our campus.



“Good things happen at Golden Oaks! It’s a very reputable place with kind and thoughtful staff members who serve from their hearts! We moved here in 2019 and immediately built on a sunroom to our home. This is a beautiful place, and this is why we chose to support Golden Oaks for years to come. Thank you, Golden Oaks, and keep doing what you do!”



— Mickey & Kay Blakley, Residents

The virus has brought with it a myriad of issues for each segment of our homes to consider – from lockdown implications for both residents and staff, through outbreaks in our community and more recently vaccinations against the variances.

In February of 2020, we experienced firsthand the impacts of an outbreak at Golden Oaks and although we implemented our COVID-19 management plans, we never thought we would be using them for the entire year. Now it’s part of our everyday policies and procedures as we learn to live with it.

To the credit of our staff and residents, each healthcare service has coped remarkably well with the changes, some at short notice and with quick turnaround times to meet the state mandates and requirements.

As we come to terms with living with COVID-19 in our communities, we never stray from making the safety of our residents our number one priority and we are fortunate to have our residents and their families work with our wonderful staff and volunteers to accomplish that.

With that, we want to thank the employees of Golden Oaks who sacrificed time with family and worked above and beyond during those times to keep safety our #1 priority.

Their teamwork saved lives, kept our residents safe, found engaging ways to entertain, shared hugs through masks and shields while keeping smiles on their faces.

We are blessed with great employees!



Golden Oaks Retirement Village is a continuous care, non-denominational Christian not for profit senior care corporation located in Enid, Oklahoma. Founded by Wesley Kroeker, Golden Oaks is the largest senior retirement campus in Northwest Oklahoma.

**Independent Living**

176 Independent Living Units  
For more information: 580-249-2606

**Residential Care & Assisted Living**

46 Private Units  
For more information: 580-249-2606

**Golden Oaks Village**  
**5801 N. Oakwood Rd**  
**Enid, Oklahoma 73703**  
**580-249-2600**

**Long Term Care**

90 Certified Beds  
For more information: 580-234-1911

**Short Term Restorative Care**

90 Certified Beds  
For more information: 580-542-5323

