

caring for GENERATIONS

2022 Annual Report



Valley VNA
Senior Care

Facility Improvement Project

Valley VNA Senior Care celebrates 115 years of serving the community in 2023. We have a rich history from well-baby checks and home visits by Ida Heinke and her fellow nurses to providing full nursing care to people in their homes and at our residential facility. We also help the wider community through services such as Meals on Wheels and respite programs. Valley VNA provides these quality services thanks to your generosity.

We learned during our Capital Campaign that many people did not know who we are and what services we offer. Our goal is to change that. Valley VNA has become more visible to the community through our Capital Campaign — Caring for Generations. If you drive down Bell Street in Neenah, you can see the construction of our new addition, which will be finished this fall. As part of the campaign, one court in the existing building has been renovated with residents and staff happy with the results.

Our work is not finished. The project's costs increased significantly since we began the Capital Campaign due to increased labor, material costs and inflation. While we received a \$4.4 million matching grant through the City of Neenah — which is a huge help to us — it still leaves us with a gap. We hope our generous donors and community members can help us cross the finish line so Valley VNA can continue to provide the quality and care you expect from us.

There are no words to adequately thank our staff members, our volunteers who lead residents in enrichment activities, our board members and the Neenah-Menasha community, who have supported us for the past 115 years.

With your continued generosity, we are ready for the next 115!



Theresa Pichelmeyer, President & CEO



Frank Kearny, Board Chair

BOARD OF DIRECTORS:

- Denise Burkett
- Tim Galloway
- Frank Kearny (Board Chair)
- Joe McGrane
- Paula McNeil
- Fritz Merizon
- Mike Rohrkaste
- Paul Schulz
- Paul Verbeten
- Cyril Walsh, MD

Theresa Pichelmeyer (President & CEO)



Progress

The new building and other facility upgrades continue. Watch the progress of this new addition to our campus!



New Faces at Valley VNA Senior Care

Tracy Nikolai

Tracy Nikolai was named Valley VNA's Director of Marketing and Development. Tracy was first introduced to Valley VNA during her time as a development manager with the Alzheimer's Association where she managed the Walk to End Alzheimer's.

Before starting a career with non-profits, Tracy worked for J. J. Keller & Associates, Inc. for 12 years where she planned and emceed live events throughout the United States. Volunteering for non-profits has been a passion for Tracy, starting at a young age thanks to her parents' influence. The Neenah Public Library is one of her favorite organizations to work with, where she served as the President of the Board of the Friends of the Neenah Public Library for five years.

Tracy's responsibilities include planning, developing and implementing Valley VNA's marketing strategies, communications and public relations activities. She also will provide leadership and management of fundraising efforts to cultivate and secure financial support from individuals, charitable foundations and corporations.

Prior to receiving her bachelor's degree in marketing from Marian University, Tracy was a full-time cosmetologist. In her spare time, Tracy enjoys going to events in the community, traveling and still works two days a month at a salon.

Carolina Bryant

Carolina Bryant is the new Director of Human Resources at Valley VNA. Carolina previously worked in human resources at both nursing homes and assisted living residences. She has volunteered through the Center for Disability and Elder Abuse, Department of Aging, Chicago Boys & Girls Club and Chicago Public School Systems. Carolina has a passion for working and advocating for the elderly and at-risk youth.

Carolina began her career in the legal and paralegal profession and has hands-on experience in office management and administration with in-depth knowledge of executive-level recruitment and training. Her areas of expertise revolve around delivering efficient human resource solutions.

Carolina possesses outstanding people skills in managing personnel and ensures that human resources programs and initiatives are effective, efficient and aligned to overall business objectives. Collaborating with leaders and key stakeholders across business areas, she excels in identifying issues and opportunities and tying them to Key Performance Indicators, directing training toward actual business needs.

She has a bachelor's degree in law office administration, an associate's degree in paralegal studies, an MBA in human resources management and an MPA in Nonprofit Administration. Carolina enjoys spending time with her family, writing short stories and poetry, cooking and having game nights.



Programs Update

Valley VNA was thrilled to bring back many of our community-based events in 2022. We held several sessions of our beloved Lyrics & Laughter, a free program designed around the benefits of music and singing for individuals with dementia and their caretakers. Through music, participants are able to engage and socialize in a supportive group setting.

We were also excited to reintroduce our Memory Care Respite Partners program. This program offers a safe and engaging activity for people with memory loss while providing their caregivers with a break. This free program provides two hours of respite that includes activities, music and snacks. Care partners can participate or take the time for themselves. Valley VNA staff provide the respite care. A volunteer-based program, respite is coordinated by Memory Care Respite Partners.

Respite is offered at two locations:

- **Neenah Respite:** First and Second Monday of each month from 1:30 to 3:30 p.m. at St. Paul Lutheran Church, 200 N. Commercial St., Neenah. Call 920-383-1180 to pre-register.
- **Oshkosh Respite:** Fourth Tuesday of each month 1:30 to 3:30 p.m. at Christ Our Savior Lutheran Church, 1860 Wisconsin St., Oshkosh. Call 920-727-5555 to pre-register.

Getting to Know Board Members

Fritz Merizon is a long-time Neenah resident. He has a bachelor's degree in economics from the University of Denver and an MBA from the University of Wisconsin-Oshkosh. He is married to Elizabeth, who was also born and raised in Neenah, for more than 30 years. They



have three children — a daughter living in Virginia with her husband and baby; a son in Denver; and a daughter at Neenah High School.

Fritz was president and owner of Modern Business Machines (MBM) in Appleton for more than 20 years

until he sold the business to the Xerox Corporation. He is active in the community and sits on numerous non-profit boards, including serving twice as president of Future Neenah Inc., the Community Foundation of the Fox Valley Region and the INCubator EDU program at Neenah High School.

Fritz is a longtime member of the Young President's Organization (YPO) and has served on the board in various capacities. He is also very active in life — he loves to be outside and share his passion for skiing, boating and duck hunting with friends and family.

Paul Schulz joined Valley VNA Senior Care's Board in late 2020. His mom is currently a resident of Valley VNA in assisted living, which is the primary reason he wanted to get involved with the board. He is very active in his community and involved in several



boards for both for-profit and nonprofit organizations.

Paul served as president and CEO for several area manufacturing companies for over 20 years. Paul and his wife, Mary, are originally from Wisconsin Rapids

and moved to Neenah in 1996. They have one daughter living in Milwaukee and are excited to be first-time grandparents.

Outside of Paul's continued board responsibilities, Mary and Paul like to travel domestically and internationally to new destinations. Paul enjoys various racket sports along with golf, even with his frequent errant shots.

“Back Together Again”



They made about \$20 a week back in 1937. The two women became friends as they worked across each other for more than 10 years until one became engaged and left her job.

Fast forward to 2021 in Neenah. One of the two ladies, both now much older, was talking about her job as a younger woman and how things have changed over the years. Upon reminiscing, a scrapbook came out, and tucked away inside was an engagement announcement.

This is where the story gets really interesting! The young woman in the announcement was the other woman's old table mate from Gilbert Paper Company from 1937! It turns out both women are over 100 years old and shared one birthday together at Valley VNA and will soon celebrate another one.

This big world we live in really is very small.

The world is a big place when we think about it. The different cities, states and countries plus, all the different people we meet in our daily lives. A smile to a neighbor on the way to the store or meeting your new coworker. The world is a very big place, yet it seems that paths cross for unknown reasons for people — and some again 86 years later!

Our story starts in Menasha at the Gilbert Paper Company. It was 1937 and women could work at Gilbert until they became engaged. At that

time, women would begin planning their married life. Two remarkable young women started work in 1937 at Gilbert, neither one knew of the other but soon their paths would cross. Even in our own small town, the world is still a big place.

These two women started as strangers working at the same table together. Both were very young women ages 18 and 19. They were stationed on each side of a large table and would work together as a team to wrap large reams of paper.

Carol Erickson In-Home Personal Care Worker

After years of being a stay-at-home mom, Carol decided to go back to school and get her CNA certificate at Fox Valley Technical College. Her role model was her mom, who was a caretaker for her aunt after she was diagnosed with Alzheimer's.

Carol started working at Valley VNA shortly after she got her certificate and has been here since 2019. One of the things Carol loves most about her job is hearing the life stories of her clients. She even had a client who grew up a half block away from her dad and his family, who shared new stories about her dad and aunts.

Carol appreciates the flexibility in her work hours at Valley VNA. She has six children ages 13 to 23 and they keep her very busy. She also has a Golden Retriever, three cats and a tortoise so she says there is a never dull moment at her house.



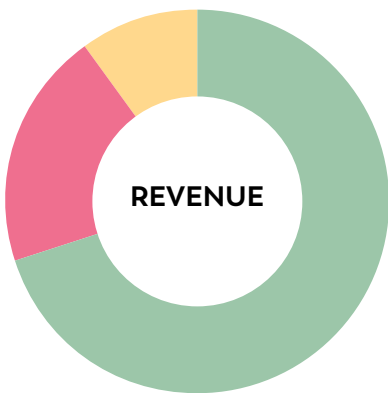
WCCEAL Survey Results

Each year, residents are asked to complete a survey that covers areas of service such as staffing performance, resident rights awareness, environment and safety, activities offered, meals and dining experience and health maintenance/care of residents. The survey results are compiled by Wisconsin Coalition for Collaborative Excellence in Assisted Living (WCCEAL). The summary of the surveys allows us to compare our scores over the past years and against other organizations within WCCEAL. This year, there was an above-average return rate of 64%. We are thankful to all residents and family members that took the time to fill out and return the surveys. A review of these surveys assists Valley VNA Senior Care in determining where efforts for improvement can be made.

Currently, Valley VNA is actively working to improve staff orientation and training flow. The dietary team has a new manager, Mary Salscheider, who brings her expertise and fresh ideas for meal planning. The Life Enrichment team and members of the Fun Committee are providing both resident-focused and staff/resident engagement opportunities to improve the overall well-being of residents and staff alike. In addition, our clinical staff team and residents collaborate daily on developing care plans to meet each resident's individual needs and rights. Also, the ongoing renovation and construction projects are underway and progressing well with the Amber Court renovation completed. The renovation has created a beautiful, updated and safe atmosphere for our residents to live in and staff to work in.

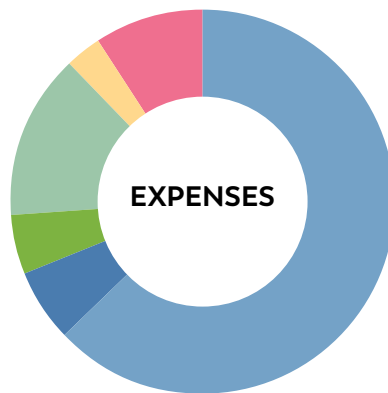
The Year in Review

Financial Highlights



- **70%** Assisted Living/Apartments
- **20%** In-Home Care Services
- **10%** Contributions

 **GRANTS AND CONTRIBUTIONS**
\$893,584



- **63%** Salaries, Wages and Benefits
- **6%** Fixed Expenses
- **5%** Maintenance & Operating Expenses
- **14%** Residential/Client Care Expenses
- **3%** Utilities
- **9%** Administrative & Other

Services Provided:



MEALS ON WHEELS

74 Clients
7,186 Meals



FOOT CARE

4,409 Appointments

By the Numbers:



APARTMENT OCCUPANCY

38 Residents Served
98.6% Occupied



ASSISTED LIVING OCCUPANCY

75 Residents Served
90% Occupied



IN-HOME CARE

168 Clients
35,270 Hours of Care

Valley VNA Senior Care gratefully acknowledges our wonderful donors who have supported us throughout 2022. To view the annual report online, go to www.valleyvna.org



Our Mission

Providing quality choices for senior living.

Our Vision

The provider of choice for in-home care, independent living and assisted living.

A resource for seniors and their families in our communities.

The employer of choice in the Fox Valley for senior care.



In-Home Care | Independent Living | Assisted Living

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