



## Willamette View: 1951 - 2015 History in a Timeline

The following are high points, dates and side notes in Willamette View's history – from the very beginning in 1951 when Willamette View was but a dream to the present, 60 years later. This chronology is as complete as possible, based on the documents available. Its contents are interesting and worth noting, but notations alone fail to capture the flavor and experiences, let alone the unique culture created by residents.

(Dates listed are as accurate as possible. When conflicting or non-specific dates were noted in documents, an estimated date or date range is listed in regular type vs. **bold** for exact dates. Additional and/or explanatory information are in *italics*.)

### **September 1, 1951**

**Oregon Methodist Homes, Inc. (OMH)** created. It is the sponsoring entity for the development of a “modern retirement residence.” An office was set up in Centenary-Wilbur Methodist Church, Rev. Edward Terry was named President of the new corporation and Clyde Mummery was named Executive Director.

*(From an account written by Clyde Mummer: During the first three months after coming on board, one of his first acts was to secure drawings of “the latest designs in apartment housing” from across the country. Architect Walter Kelly and building engineer W.C. Wilcox were recruited to work on floor plans without pay “until such time as we could pay them.” Mummery, Kelly and Wilcox took other drawings they had received from different sources, revamped them into apartments to “our way of thinking” and applied them to a new apartment building plan they had received from New York City, creating what was to become Willamette View Manor. Also during this time, Paul Biggs, attorney, was added to the Board of Trustees for “gratis legal advice” -- he reviewed contracts secured from other “old folks homes” across the country and revamped them into a contract for OMH.)*

- 1952-1958 As an enticement to sales, initial contracts included a “successor’s clause.” The first residents, in contract types #1 and #2, were able to designate a “successor” for their Manor (and later Court) apartment.
- June 1953 Option on 10 acres for the future building site expires. *Second extension refused.*
- (In a Milwaukie Review newspaper article dated June 25, 1953 this 10-acre tract was referred to as “the Lavagatto property.” It was just off Harrison Street, north of Johnson Creek at a bend in the Willamette River facing Elk Rock Island. The purchase price was \$50,000; \$1,000 was put up as earnest money in 1952. After one extension Oregon Methodist Homes, Inc. asked for a second extension which was denied.)*
- July 1953 22.5-acres on River Road purchased -- south of Milwaukie, Oregon, on a 150-foot-high bluff overlooking the Willamette River.
- (This site was immediately south of Matson Memorial Hospital, a hospital for “diseases of the lung.” About seven of the 22.5 acres was purchased from Matson Memorial. Additional property was added later; some of the new property was on the river bank and included a dock and boat moorage.)*
- August 14, 1953** Invitation to Manor groundbreaking event sent to Founders and dignitaries.
- (Why were they called Founders? It was their money, paid in advance, that financed Willamette View Manor in the beginning: acquisition of the property, construction and promotion. Because of the Founders, Willamette View Manor opened without a mortgage and any debt.)*
- August 23, 1953** Willamette View Manor groundbreaking event. Three hundred people braved “dripping skies” to attend the groundbreaking ceremony for Willamette View Manor. Rev. Edward Terry, President, and Clyde Mummery, Executive Director of Oregon Methodist Homes, Inc., with Bishop A. Raymond Grant of the Portland Area Methodist Church turn the first shovel of earth.

**October 10, 1953**

All but 62 of the 240 apartments are reserved.

*(Forty-five of the 240 units were sold on a deferred entrance plan of five years or more; 28 of these were then re-sold, with permission of the deferred buyer, to people desiring to enter the Manor immediately upon construction completion. These residents were expected to move to another apartment when the original buyer wanted to move in.)*

**December 4, 1953**

Oregon Methodist Homes, Inc. elects new members to the Board of Trustees, replacing three of the five members who resigned during a dispute about the Manor project.

*(The three new members were: David B. Simpson or Norris, Beggs & Simpson; John L. Snead of Consolidated Freightways; and Carl L. Krause, president of Imperial Furniture.)*

**March 23, 1954**

Clyde W. Mummery appointed first Administrator of Willamette View Manor.

**May 21, 1954**

Concrete poured for six floors of the four wings. Construction of the superstructure estimated to be complete by the end of May.

**December 11, 1954**

Open house event, followed by the Founders Banquet at 6:30 p.m. Rev, Edward Terry is the featured speaker. (Rev. Terry is now Superintendent of the Portland District of the Methodist Church.)

**December 12, 1954**

Dedication events:

- Special 11:00 a.m. worship service at Centenary-Wilbur Methodist Church. Bishop A. Raymond Grant of the Portland Area Methodist Church is the featured speaker
- Formal dedication ceremony at 3:00 p.m. held in the Manor. Dr. Karl P. Meister, Executive Secretary of the national organization of Methodist Homes & Hospitals, Inc. is the featured speaker. His talk is titled "Adding Years to Life and Life to Years."

*(At this time, there are nearly 200 institutions affiliated with Methodist Homes & Hospitals, Inc., including 71 hospitals, 61 homes and agencies for the aged, and 48 homes for children. In 1953 it "rendered services to 1,200,000 persons.")*

**January 3, 1955**

Willamette View Manor opens.

*(Two of the first residents are OMH board member John L. & Louise R. Snead who move into Manor apt. 606A the first week. Seven Founders move in on the first day, 25 enter the first week. The south wings (A & B) are filled first -- by February 1<sup>st</sup>. The two north wings (D & E) and center section (C) are available starting in February. By mid-March most of the 240 Manor apartments are occupied.)*

**Spring 1955**

Landscaping contract awarded to Barbara Vorse Feal, Landscape Architect in Residential Garden Design.

**May 23, 1955**

The 20-bed-capacity infirmary is licensed by the Oregon State Board of Health as a "nursing home" with 14 licensed beds.

*(The infirmary is located on the Manor first floor, "E" wing; oversight provided by a registered nurse and a physician employed by Willamette View Manor.)*

**May 23, 1955**

Founders hold their first meeting (approximately 300 residents attend).

**May 25, 1955**

Founders' Council elected, installed by Ernest Peterson, Vice President, Oregon Methodist Homes, Inc. Board of Trustees.

*First Council Members: Term -- May to December 1955*

*Si C. Berry, Chair*

*Ernest R. Allmen, Treasurer*

*Winifred Robinson, Secretary*

*Harry F. Heilman*

*Robert Lee*

*Charles Barnes*

*Alice Campbell*

*Alta Edgar*

*Nell Unger*

**June 24, 1955**

Founders' adopt "Willamette View Association" as its name.

**July 11, 1955**

Willamette View Association adopts Constitution and By-laws.

**August 3, 1955**

Milwaukie Chamber merges with Gladstone Chamber to form the North Clackamas County Chamber of Commerce. Willamette View Manor is a charter member.

**November 10, 1955**

“Manor News Letter” printed by Administration, “...let this little communication be a ‘clearing house’ between the Founders and the employees so that we may work together in harmony...”

*(In some shape, form, authorship and title a bulletin to residents and staff has been consistently and regularly produced since November 1955 -- today’s Friday Notice is its legacy.)*

**March 2, 1956**

Plans announced for a “manorette” expansion. Architect and Structural Engineer is Leslie E. Poole.

*(Originally, a 70-cottage expansion was planned, “but a study by retirement communities across the nation indicated a trend away from cottages toward a fireproof annex.)*

**June 26, 1956**

Working drawings for the now-named Court expansion project released for bid. Contract awarded to Frank C. Ralph & Son.

**August 3, 1956**

Groundbreaking held for 127-apartment Court building.

*(The 4:00 p.m. ceremony featured Bishop A. Raymond Grant as the speaker. Rev. Edward Terry, Portland Methodist District Superintendent and Chairman of the Oregon Methodist Homes, Inc. Board of Trustees, presided.)*

**April 11, 1957**

Clackamas County assesses Willamette View Manor ad valorem taxes for the first time (property and buildings). Value set by County Assessor Donald Hattan between \$4.5 and \$5 million.

*(In August 1964 WVM petitions for reduction of assessed value to \$2 million [based on capitalization income theory vs. cost of buildings]. On March 1, 1969, residents accept amendments to their contracts providing that each would pay a “fair share of operating costs and taxes,” ending flat rate “life care” monthly fee contracts.)*

**October 2, 1957**

Oregon Methodist Homes, Inc., original sponsor of the Willamette View Manor project, transfers all of its right, title and interest to Willamette View Manor, Inc., a new not-for-profit corporation.

**January 15, 1958**

Court building officially opens.

*(First 21 residents move in starting December 7, 1957. By January 15, 1958 all 127 apartments are completed, ready for occupancy by Court “Founders.”)*

**January 26, 1958**

Court building dedicated.

*(With the opening of the Court, the total number of Court and Manor apartments is noted at 375 with approximately 500 residents.)*

**May 29, 1958**

Groundbreaking for 60-bed Willamette View Hospital: Leslie E. Poole, Architect, and Frank C. Ralph & Son contractor.

January 1959 – October 1962

Willamette View Hospital, the first hospital in Portland to be fully air-conditioned, opens in three stages:

1. Winter 1959 - L-shaped, 60-bed two-story hospital for “chronically ill and the aged” opens.
2. Summer 1959 – An additional second section with 20 beds opens, making the L-shaped building into a T-shape; includes doctors’ offices, space for out-patient care, and a pharmacy.
3. Fall 1962 - A third floor is added with 40 “ambulatory” beds.

*(The hospital building has had several names throughout the years: Willamette View Hospital, Willamette Methodist Hospital, Willamette Methodist Convalescent Hospital, and Willamette View Convalescent Center. On July 19, 2002, the building was repurposed and renamed the Plaza.)*

**October 24, 1959**

*Saturday Evening Post* article published. Willamette View Manor receives world-wide attention.

1960-1962

Willamette View Manor, Inc. Board of Directors creates an Endowment Fund for Charitable purposes. The two original sources of income were from Founders’ donations and resale of apartments. The Fund is administered by the WVMI board and administrator.

*(In a letter, circa 1962, written by Clyde Mummery, Administrator, he states “the purpose of the Endowment Fund was created to take care of the Founders and members who outlived their pocket books,” and “to take into our program people from the outside... all of whom have been carefully screened to determine that they are needy and worthy, and all will be given a nice apartment, gratis. He also writes, “The operating fund of the Manor will not suffer because the endowment fund earnings will pay the operating fund the amount necessary to make up the shortage caused by our taking someone in on our charitable program.” During its first few*

*months, the endowment fund raised “over \$150,000 from Founders.”)*

**August 1, 1962**

The first issue of a publication called “Willamette Views” is distributed.

**May 1, 1963**

Marshall C. Hjelte appointed (second) Administrator following the retirement of Clyde Mummery.

**March 19, 1964**

Clyde Mummery, 77, passes away at Willamette View Hospital.

January 1967

Willamette View Hospital is sold to a new, private, non-profit corporation called Willamette Methodist Hospital, Inc.

On January 30, 1967, the hospital is licensed by the Oregon State Board of Health as a “convalescent hospital” with 120 beds. In addition, it is approved by the U.S. Social Security Administration to take Medicare patients, becoming one of 42 “care facilities” in Oregon approved for Medicare.

*(The hospital’s name is changed to Willamette Methodist Convalescent Hospital in 1972, and again in 1978 to Willamette View Convalescent Center following an operational reorganization.)*

**March 1, 1967**

James G. (Jim) Edwards appointed Acting Administrator.

*(In November 1967 Jim Edwards is officially appointed (third) Administrator by Willamette View Manor, Inc. Board of Directors.)*

**January 7, 1969**

Turning point in Willamette View’s future, ongoing existence: Willamette View Manor, Inc. Board of Directors and Administration hold an all-resident meeting to introduce essential revisions to the older, flat rate contract with a new pricing/fee adjustment based on the cost of actual operations; pro-rated property taxes would also be passed on to residents. Factors beyond WV’s control that contributed to the situation included: inflation, taxes and the failure of the legislature to provide property tax relief, Minimum Wage law increases, longevity of residents, and the inability to refinance due to an operating deficit. This rate change required all residents to sign an amendment to their contracts – a process that took approximately 4 to 5 months.

*(In 1969, 65% of WV’s nearly 450 residents are original Founders*

*holding a \$100 per month flat rate, lifetime contract. The revised new monthly fee would be \$140 per month plus taxes, adjusted annually as needed. All but six residents signed new contract addendums and 14 moved out with a partial refund of their entrance fee [Note – some of those 14 move outs, moved back later].)*

September 1969

Director of Development position established; duties are public relations, marketing and sales.

*(First to hold the position was Richard E. Osburn. Ronald G. Hauxwell succeeded Osburn in 1971.)*

October 1970

Street address changed by Post Office from 2705 to “12705” SE River Road.

November 1970

Post Office installs locking mailboxes in Manor and Court buildings; WV staff can no longer handle U.S. Mail -- postal employees put incoming mail into resident boxes.

**January 1, 1971**

Willamette View Manor, Inc. receives a modification of its non-profit status from the State of Oregon to a 501(c)3; originally it was designated a 501(c)4 corporation.

October 1977

First “Replacement (Bus) Fund” is created by residents to replace the circa 1960s Willamette View bus. A new bus, cost approximately \$30,000, was delivered in the fall of 1978.

January 1978

Reorganization plan adopted for on-campus healthcare services: internal changes in the operation of what will become known as the Willamette View Convalescent Center, formerly Willamette Methodist Convalescent Hospital, take place with the combining of its business and administrative functions into Willamette View Manor, Inc. operations.

*(Jim Edwards is given the title of Executive Director of Willamette View Manor, Inc. as well as continuing on as the Administrator of Willamette View Manor and Court; Ruth Slick continues as Administrator of the new Willamette View Convalescent Center; and Ron Hauxwell’s title becomes Associate Administrator [Hauxwell’s title had been Director of Development]. Edwards’ duties now include both residential and nursing/healthcare services.)*

**January 1, 1979**

The Successor clause from the first two contracts continues to be honored, but in 1979 the “Successor Fee” credit is set at 50%



of Founder's apartment value. This benefit applied to people entering the Manor or Court as a designated Successor to a Founder.

*(The original Founders' contracts had a clause allowing them to "will" their apartment to a named individual. The named individual/Successor had to move into Willamette View to claim the benefit. A Successor could not "resell" the apartment to another person.)*

**March 28, 1979**

Willamette View Manor, Inc. Board of Directors Building Committee and WEGROUP Architects present initial plans for a new Manor dining room, kitchen, and auditorium complex to residents. Estimated budget for the project is \$1.5 million.

*(On April 19, 1979 bids for the new dining room, kitchen, and auditorium complex come in \$425,000 over budget; the WVM Board rejects all bids and the plans are referred back to WEGROUP to cut square footage and costs. June 6, 1979 -- redesigned drawings approved and sent out for bid.)*

**June 29, 1979**

Todd Building Company (headquartered in Roseburg with an office in Portland) is selected as contractor for the dining room, kitchen, and auditorium complex construction project.

*(The cost of the project is \$1,620,000 and includes: \$34,000 -- architect supervision; \$1,475,614 -- building construction, \$102,360 -- interiors and furnishings, and \$8,026 landscape design and materials. The project is financed through bonds issued by Foster & Marshall, Inc.)*

**July 27, 1979**

Groundbreaking ceremony for the new Manor dining room, kitchen and auditorium complex.

**September 1, 1979**

Positions and duties of Willamette View Manor, Inc. Executive Director and Manor/Court Administrator redefined.

*(Jim Edwards is Executive Director of Willamette View Manor, Inc. with overall supervision of the Manor and Court, Convalescent Center and Foundation. Ron Hauxwell is named Administrator of Manor and Court, overseeing departmental operations as well as marketing and sales.)*

**December 12, 1979**

The Boards of Directors for Willamette View Manor, Inc. and Mann Home, Inc. ratify merger. Willamette View Manor, Inc. becomes the surviving corporation, assuming all assets and

obligations of the Mann Home, located at Northeast 33<sup>rd</sup>. Ave. and Sandy, Blvd.

*(The Mann Home, originally the Old People's Home of Portland, was opened by Mrs. Anna Lewis Mann following the death of her husband Peter John Mann in 1908. It was located at 1021 NE 33<sup>rd</sup> Ave., Portland. It was a solo operation from 1910 to 1980 when it merged with Willamette View Manor, Inc. It actually closed September 17, 1982 when 19 of its last remaining residents transferred to apartments in the Manor and the Convalescent Center.)*

**January 1, 1980**

The Mann Home merges with Willamette View Manor, Inc. WVMI is the surviving corporation, absorbing all assets, including the property and building, valued at \$1.5 million and a trust fund of \$2.5 million.

*(Willamette View Manor long range plans call for construction of a "personal care facility" south of the Court building. The Mann Home property is designated to be sold to finance the new Willamette View Manor facility.)*

**January 14, 1980**

25<sup>th</sup> anniversary celebration banquet held.

*(To accommodate the 359 who attend, two dinner services have to be held even though the banquet occurred during a "silver thaw," complete with a power outage.)*

**August 27, 1980**

First dinner service held in the new Manor Dining Room.

**October 12, 1980**

Dedication event held for Manor dining room and auditorium complex.

**October 18, 1983**

Old "switchboard" replaced with new telephone console system.

May – July 1983

Addition of a larger (bump-out) communal dining room in the Willamette View Convalescent Center.

October 1983

Manor front entrance remodeled for handicap accessibility; interior entry hallway and reception area updated.

**December 18, 1983**

Groundbreaking ceremony for Mann Terrace held.

*(Initial plan calls for a 101-room, three-story personal care facility. Proposed cost \$5,000,000. WEGROUP Architects designed the building, Westwood Construction Company of*

*Portland, Oregon, wins the bid.)*

**January 30, 1985**

30<sup>th</sup> anniversary event held.

**March 30, 1985**

Dedication of 96-unit, four-story Mann Terrace supported living/personal care facility; keynote speech delivered by Senator Mark O. Hatfield. Final cost of the Mann Terrace is \$6 million.

*(Now known as the Terrace, originally its name included reference to the Mann Home, acquired by Willamette View Manor, Inc. January 1, 1980.)*

1985

Corporate name changed, shortened to Willamette View, Inc.

*(With the opening of the Mann Terrace in 1985 and the absorption of the Convalescent Center into WVMi operations in 1978, the campus now included more buildings than the original Manor and Court. To reflect this expansion, "Manor" is dropped from the corporate name.)*

1990

Willamette View, Inc. initiates a self-insured Workers' Compensation program saving \$255,000 annually – previously paying \$400,000 in premiums with \$145,000 in claims.

*(At the same time, WVI establishes safety committees to review injuries, screened job applicants for drugs, and finds light-duty jobs for injured employees enabling them to return to work earlier. As a result, time-loss plummeted from 225 days in 1989 to ten days in 1990. In addition, WVI elects to share \$50,000 from the savings with its 290 employees – some individual checks totaled up to \$300.)*

December 1992

\$12.5 million campus renovation and upgrades completed. Major components include: new two-story garage, surface parking lot, sky bridges, Manor front entry and portico, Convalescent Center River Road entry, and the addition of central air conditioning and a seventh floor to the "wings" of the Manor building.

1994

Tennis court and putting green built through resident donations. Credit for orchestrating the campaign to build an outdoor sports area goes to residents Mel Whitman, a retired tennis pro, and Bill Case, who loved golf. With their guidance, funds were raised from other residents to build the court, green and a gazebo – all still very much in use today.

March 1995	Mann Terrace name shortened to Terrace.
<b>March 13 &amp; 19, 1995</b>	40 <sup>th</sup> anniversary activities – celebration dinner and open house.
August 1995	Seismic upgrades made to the Manor kitchen, dining room and auditorium.
1995	Willamette View, Inc. receives national accreditation from CCAC, Continuing Care Accreditation Commission, and later CARF-CCAC, now CARF International. In June 2015, WVI receives fifth five-year accreditation certification from CARF.
November 1997	Board of Directors initiates planning to review steps for constructing a new “health center” and “cottage-style homes.”
<b>September 1, 1998</b>	Home Care department established.  <i>(Initial name was Health Services Staffing, which was later changed to Community &amp; Staffing Services, then it became To Your Home, and lastly Willamette View Home Care.)</i>
<b>September 23, 1999</b>	Site work begins for new Health Center and The Homes on River Ridge development.
<b>October 1, 1999</b>	Mark T. King appointed (fourth) executive director; title changed to CEO and President.
<b>October 23, 1999</b>	Groundbreaking ceremony for new Health Center held.
<b>October 24, 1999</b>	Construction starts for Health Center.
<b>April 24, 2000</b>	Construction starts on The Homes on River Ridge.
<b>February 9, 2001</b>	Health Center dedication event held – private, invited guests.
<b>February 10, 2001</b>	Health Center open house held – public event.
March 2001	WVI received certificate of occupancy for the Health Center from the State of Oregon. Residents move from Convalescent Center to new Health Center.
<b>April 16, 2001</b>	First residents, Ed & Gloria Biow, move into The Homes on River Ridge, 1550 RR.
<b>November 2001</b>	Hoffman Construction begins internal demolition of vacant

	Convalescent Center; repurposed and renamed the Plaza.
<b>July 19, 2002</b>	Plaza grand opening event held.
<b>July 23, 2002</b>	First residents, Hugh & Nancy Bridges, move into Plaza, 310P.
<b>October 1, 2003</b>	Formation of Hillside Senior Services, Inc. in partnership with Willamette View, Inc. announced; becoming a sister corporation.
<b>November 1, 2003</b>	Hillside Senior Services, Inc. begins oversight of Hillside Health Center, formerly Hillside Convalescent Center.
<b>June 26, 2004</b>	Frank McNamara appointed acting, interim CEO.
<b>January 1, 2005</b>	Jim Mertz appointed (fifth) CEO and President.
Fall 2005	Wellness program formally initiated; contract with Age Dynamics, Inc. to develop programming and hiring of a full-time wellness director, Jay Ego.
<b>March 31, 2006</b>	Main Auditorium remodel complete.
July 2006	Construction of 5,600 sq.-ft. Wellness Center begins.
<b>February 15, 2007</b>	Grand opening of the Wellness Center held; later renamed Fitness Center in 2013.
April 2007	Construction of Patio Homes begins by R&H Construction.
<b>September 15, 2007</b>	First residents, Marc & Eva Polz, move into Patio Home 105PH.
<b>August 14, 2009</b>	Craig Van Valkenburg appointed acting, interim CEO; "President" dropped from title.
<b>January 1, 2010</b>	Craig Van Valkenburg appointed (sixth) CEO.
<b>May 13, 2011</b>	Grand opening of <b>artworks</b> studio and programming– located in the Terrace, overseen by two licensed art therapists, Sally Giles and Kristen Larsen.
<b>June 11, 2012</b>	Groundbreaking for Harmony Garden held.
<b>September 5, 2012</b>	Grand opening of Harmony Garden held, a horticulture therapy garden located at the Health Center.

- October 27, 2014** Construction begins on the \$1.8 million Terrace kitchen-dining room remodel. Design by Opsi Architecture, contractor is Fortis Construction, Inc.
- December 2014** Willamette View opens Development and Donor Relations office, hiring Carolyn Dickman as manager and Loraine Collacchi as development associate.
- Development Committee formed to oversee philanthropy programs and fundraising; members include residents, board members and staff. Four over-arching “Community Funds” established: Capital Fund, Benevolent Fund, Heron Fund and the Alan Fibish Employee Scholarship Endowment.
- January 9, 2015** Year-long 60<sup>th</sup> Anniversary celebration kicks off with the 1950s-themed “Milkshake Rattle & Roll” party for residents and employees.
- (Three additional large events are held: Pancake Breakfast on July 18th for residents and employees and their families; August 22nd’s “SummerBash” party for residents, employees and invited community and business partners; and an October 2nd Open House for the general public.*
- In addition, several Resident Association committees create programs and activities for the 60th, including the Willamette View Chorus’ May 6th Spring Concert, featuring songs from the 50s; the Movie Committee’s free Friday night movie series of 1955 films; and the International Relations and Public Affairs Committee’s October 15th program on “Strategies and Trends in Senior Housing,” presented by Steve Maag, Director of Residential Communities at LeadingAge.)*
- January 13, 2015** WVI leadership meets with Greystone Associates on master site planning and marketplace assessment work to be undertaken.
- January - September 2015 Master site planning and marketplace assessment continues with Greystone Associates; final plan to outline options for Willamette View’s campus and future expansion.
- March 27, 2015** Grand opening held for White Oak Grill, formerly Terrace Dining Room.
- September 18, 2015** Willamette View is selected by the Portland Business Journal as one of the Healthiest Employers of Oregon (100 – 499 employees); awards program and luncheon held October 21st,

2015 at the Hilton Hotel.

**October 15 – 20, 2015**

Balcony Homes planning moves to implementation: Meetings held with Terrace staff and residents regarding construction of 12 Balcony Homes on the west wings of floors two and three of the Terrace. The Balcony Homes will be new, independent living apartments, ranging in size from 920 to 1,880 sq. feet.

*(The plan is to convert the remaining residential care/supported living apartments in the south wing on floors two and three of the Terrace building to independent living Balcony Homes within 18 to 24 months, by 2017. At that time, the Terrace will cease to be a state-licensed residential care facility.)*

**October 20, 2015**

Willamette View initiates activities for the Riverview Project: first informational/project educational meeting held for initial group of residents -- start of build up to the feasibility study and future capital campaign. Additional small group informational sessions planned for more residents.

*The Riverview Project includes the addition of a second floor above the existing Riverview dining room and Main Auditorium footprint: construction of a new dining room, outdoor patio, bistro, bar, and a-much-larger kitchen; upgrading of infrastructure and systems equipment; and the repurposing of current Riverview dining room and kitchen spaces.*

**October 23, 2015**

Master Site Plan unveiled by Craig Van Valkenburg, CEO, to WV residents during a monthly "Q&A Forum."

*(Excerpt from the October 30, 2015, Friday Notice – from Craig Van Valkenburg, CEO: "During the October 23rd Q&A program I shared with you the 'bubble diagram' — where we are in our Master Site planning work. I realize this diagram was challenging to dissect all the various projects that I talked about. I'd like to assure you that we are working with a conceptual plan of what the WV community might look like over the next 10 to 15 years, with the following being our first priorities:*

- *Riverview Project (kitchen and dining room)*
- *Transition of the west wing of the Terrace (2nd and 3rd floors) to independent living apartments*
- *Alterative uses of current spaces on campus*

*All projects will be subject to final WV Board approval and financing. But an important component of every project is to*

*incorporate needed upgrades per our Facility Conditions Assessment and an Energy Study. While underway with the Riverview and Terrace projects we will begin addressing the next sequence of projects: memory care services, updating of the Health Center, adding independent living apartments, and the best use of space. We have been discussing the Master Site work for a long time, which has included numerous sub-projects along the way, but we are now nearing the end of years of planning work and beginning the actual development and construction.”)*

**October 23, 2015**

Plan for Balcony Homes construction formally announced to all residents during October Q&A Forum.

**December 1, 2015**

**The Road to the Future:** article by Craig Van Valkenburg, Willamette View CEO, for December issue of *Willamette Views*

The author Lewis Carroll said it best, “If you don’t know where you are going, any road will get you there.” In 1955 the founders of Willamette View knew the direction they wanted to go, but no road existed. Instead they paved a new one; and so it has been at Willamette View ever since. When looking to the future we take a chapter from our past and chart the best course to get there.

The “road” we now map will lead to the further transition of Willamette View over the next five to ten years. But envisioning “what next” doesn’t happen in a vacuum: The roots for today’s path stated five years ago, when a strategic planning consulting firm was hired to guide us through the long-range planning process.

Several milestones have been reached since 2010, including a detailed look inside our organization and the larger marketplace to understand our strengths and weaknesses as well as possible opportunities and threats. The outcome of this work was the crafting of the “Vision 2020” strategic plan. In 2012 an advertising firm was hired to help with “branding” and market positioning. They discovered that Willamette View is about “expanding life,” and then identified four brand pillars representative of how we stand apart from competitors: ***purposeful Individuals, spirit of innovation, culture of wellness, and a connected community***; this branding work led to a revision of our Mission ***“To Inspire the Art of Living Well”*** and our Vision statement, ***“To Transform the Experience of Aging.”***



We also measured Willamette View's infrastructure with a Facility Conditions Assessment and an Energy Study in 2013 and 2014 and development of the Master Site Plan in 2015, examining growth areas and the optimal use of space, internally and externally. I recently shared plans for repositioning Willamette View for the future -- adding more independent living apartments and houses, expansion of assisted living and memory care, redesign of our front entrance, and the continuing evolution of a signature Food and Beverage program.

How to make this happen was also part of our planning process. In the 2011 strategic planning work we identified the need for a philanthropy program to support Willamette View's long-term capital needs. In 2014, the Development and Donor Relations office was created and the formalization of Willamette View Community Funds as well as the subsequent Development Committee to direct our philanthropy programs.

As our 60<sup>th</sup> Anniversary year comes to a close we find ourselves at the intersection of the past and the future. To paraphrase Lewis Carroll, "It's no use going back to yesterday, because we were a different community then." We can only move forward.

**December 15, 2015**

Second follow up presentation and discussion on Master Site Plan held for WV residents.