

2023 Gratitude Report



# Trinity Woods



TRINITY WOODS!

THE UNIVERSITY OF OKLAHOMA  
Trinity Woods!

Trinity Woods!

Tulsa  
#FOKERCITY

WILSON  
189

GOOD NEIGHBOR

# Homecoming

*A lot of living to Do*





# Reflecting

## on the State of Trinity Woods and the Road Ahead

The Annual Report is the perfect time to count the blessings of last year and envision the promise of the year ahead. Last year we faced unprecedented challenges. We have emerged stronger, more cohesive, and with a renewed sense of purpose. The year ahead will bring significant change along with a renewed commitment to our mission of serving the Trinity Woods family in the spirit of Christ.

Building strong, lasting relationships with our residents has been a cornerstone of our success, and we remain committed to exceeding their expectations and growing our amazing community.

Staying relevant in today's ever-changing world requires a commitment to innovation. Trinity Woods is embracing the latest technologies and fostering a culture of continuous learning. By leveraging data analytics and other cutting-edge tools, we've enhanced our operational efficiency and gained a competitive edge in the market. We are even implementing a new resident engagement platform.

The Board announced the next CEO, Garrett Lee, whom you will learn more about on page 12. The entire community is excited

about starting this new chapter. Additionally, the Board is beginning the process for a new campus master plan, which will include the best way to gate the community and possible uses for the Dartmoor properties.

As we embark on this journey into the future, we can face these new challenges with confidence. Our collective strength, adaptability, and unwavering commitment will propel us forward. The road ahead is promising, and we stand ready to write the next chapter of our organization's success story.

*Bob*

**Bob Perugino**  
Board President







**Board of Directors**



**Current Board of Directors**

- Mary Alice Ahlgren
- Carol Bush
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- Curtis Craig
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- Herb Whitney
- Wendy Williams
- Don Wiruth
  
- Ex Officio Members
- Rev. Terry Koehn
- Billy Meade
- Bishop Jimmy Nunn

**Trinity Woods  
Leadership Team**

- Garrett Lee**  
Chief Executive Officer
- Dennis Graham**  
Chief Operating Officer
- Crystal Creekmore**  
VP of Human Resources
- Bonnie J. Polak**  
VP of Philanthropy and  
Community Engagement
- Jerome Steele**  
VP of Finance, CFO
- Jacob Will**  
VP of Health Services



**Leadership Team**

# Trinity Woods <sup>2023</sup> Numbers



## Health Center was a clinical site for:



CNA Students

CMA Students

Nursing Students

Medical Residents



## Human Resources

34%

of employees have worked at Trinity Woods for more than five years

20%

of employees have worked here for 10 or more years

6%

of employees have worked here at least 15 years

## Wellness

213

Musical Concerts, Theatrical Performances, Outings and Life Enrichment Programs

322

Lifelong Learning Opportunities

302

Spiritual Opportunities

5,244

Spa treatments at the Tranquility Wellness Spa

1,868

Fitness Classes and training throughout campus

## CMS 4 Star Rating



4-star overall rating out of the 5-Star from the Center for Medicare and Medicaid Services. The 2023 OSDH survey resulted in a single deficiency, our best survey in over 20 years.

## Philanthropy

Good Samaritan Fund raised \$293,200 and provided financial assistance to Medicaid recipients and people who have outlived their financial resources.

Employee Appreciation Fund raised \$155,980 with 70% participation of the entire campus - independent living, assisted living and healthcare community members and families.

28

Remodeled Villas, Patio Homes, Lakeside Homes and Crestwood Apartments

1,837

Transportation trips for a total of 66,667 miles

76,770

Work orders completed with a 90% completed within 24 hours of submission

237,400

Meals served by the dining team



Operations



# Summary of Financial Results

## For the Years Ending December 31 2022 and 2023

### STATEMENT OF FINANCIAL POSITION

	2022 Restated*	2023
<b>ASSETS</b>		
Cash	\$1,592,413	\$1,982,841
Investments	2,916,223	3,163,188
Beneficial interest in endowments	4,517,964	5,033,889
Pledges receivable, restricted	743,041	670,936
Property and equipment, net	75,350,895	75,331,881
Other assets	1,774,587	1,888,970
<b>TOTAL ASSETS</b>	<b>\$86,895,123</b>	<b>\$88,071,705</b>
<b>LIABILITIES AND NET ASSETS</b>		
Notes payable	\$27,101,940	\$25,367,047
Refundable fees	36,492,982	38,897,427
Unrealized revenue	10,295,072	12,487,090
Other liabilities	2,710,300	3,064,997
<b>TOTAL LIABILITIES</b>	<b>\$76,600,294</b>	<b>\$79,816,561</b>
<b>NET ASSETS</b>		
Without donor restrictions	5,472,273	2,420,994
With donor restrictions	4,822,556	5,834,150
<b>TOTAL NET ASSETS</b>	<b>10,294,829</b>	<b>8,255,144</b>
<b>TOTAL LIABILITIES &amp; NET ASSETS</b>	<b>\$86,895,123</b>	<b>\$88,071,705</b>

### STATEMENT OF ACTIVITIES

	2022 Restated*	2023
Fees for services	\$19,919,004	\$ 22,024,524
Member support expenses	(19,734,740)	(21,251,998)
Contributions	716,255	1,253,208
Endowment earnings and appreciation	(1,004,943)	579,657
Other revenue	194,804	891,525
Depreciation	(3,588,584)	(3,849,954)
Interest expense	(1,153,646)	(1,160,972)
Other expense	(340,236)	(525,675)
<b>CHANGE IN NET ASSETS</b>	<b>(4,992,086)</b>	<b>(2,039,685)</b>
<b>NET ASSETS, BEGINNING OF YEAR</b>	<b>15,286,915</b>	<b>10,294,829</b>
<b>NET ASSETS, END OF YEAR</b>	<b>\$10,294,829</b>	<b>\$8,255,144</b>

\*Copies of the 2023 Audited Financials available upon request.





**A fond farewell for our faithful and fearless leader.**

*Steve Dickie*  
**Leaving**  
**A Lasting Fingerprint**

“If you ask me where my fingerprints are on Trinity Woods, I’d say it’s philanthropy, governance, and culture.”

Twenty years ago, Steve Dickie found himself at an interesting intersection of career and calling in his life, one that led him unexpectedly into his role as CEO at Trinity Woods. Tom Junk, president of the Board at Trinity Woods, reached out to Steve, who was working at the Baddour Center, a home for adults with special needs, in Mississippi.

“I still carry the phone message notification in my pocket Bible, because it was a providential call,” he explains. “I spoke with Tom, and he told me about the search here for

a CEO.” At the time, Steve and his wife Faith were casually contemplating moving east to be near their parents. He wasn’t actively looking for a new role, certainly not in Oklahoma. Yet he agreed to come speak with Tom as a favor.

But providence took over, and soon, Steve accepted the job offer, knowing full well there was a lot of work to be done to bring about the transformations that would equip Trinity Woods to thrive. He sensed right away that philanthropy, governance, and culture would form the three-pronged vision as he shaped the organization in his role as CEO. And above all else, he needed God’s help to succeed.

“I knew intuitively when I came here that it really didn’t matter what problems I found,” Steve says, “because I was going to find the assistance from above to address those problems. This is a complex organization, and you must have help from above to address these things.”

One of the biggest gems of wisdom that leading Trinity Woods has given Steve is the importance of community. “The most valuable assets you can have in the last chapter of your life are not financial. They’re relational,” he says. His relationships with the members and employees over the years have shaped him as a CEO, allowing him to leave a lasting legacy on the organization.

Our culture is community. “Everybody is in charge of culture,” he says. “You have to uphold your mission, your vision, your values, and your culture. The greatest compliment that you could pay me, the greatest legacy in the coming years, would be to see the culture of the organization thriving.”

For Steve, that culture centers on touchstones that he and others have championed. These are the vital threads in the fabric at Trinity Woods—whole-person wellness, person-centered care, cultivating and sustaining an effective leadership team, investment in people—and most of all, serving people in the spirit of Christ.

“When people look at Trinity Woods in 2004, and compare it with Trinity Woods in 2024, what they comment on is how we have built buildings. What I would say is, great organizations build people, and they use buildings,” he explains. “We’ve done many capital projects, but it’s not about building buildings. It’s about building people.”

When asked what his favorite memory of the last 20 years is, Steve says it’s centered in the community of Trinity Woods: the annual Memorial Day service, which remembers the

people who have passed in the last year. He’s always mindful that those who live at Trinity Woods are in a very dear chapter in their lives.

“James 1:27 says, ‘Religion that God our Father accepts as pure and faultless is this: to look after orphans and widows in their distress and to keep oneself from being polluted by the world.’ This is the heart of what we do at Trinity Woods. That’s the most awesome thing for me,” he says.

To the members of Trinity Woods, Steve offers a blessing: “May grace, peace, and mercy be yours in abundance.” And to the people who have served as employees, board members, and in other roles to benefit the organization and its people, he says, “Thank you for the way that you have inspired me to be a more effective leader.”

Though Steve will be moving into his next chapter, he looks forward to seeing where Trinity Woods and its new CEO go next. “In Celtic Christianity, there’s the notion of thin spaces where the veil between heaven and earth becomes translucent,” Steve says. “Trinity Woods is a thin space where the veil between heaven and earth narrows. It’s a special place. And God has an extraordinary way of calling people to work here who somehow know that.”





# STAR

## Employees of the Month

2023



There are so many things that make Trinity Woods a special place to live but most residents will tell you that the people who work here truly make our community different. Whatever the job, the Trinity Woods team want to provide outstanding customer service to everyone who enters our campus. Each month we highlight outstanding employees throughout campus for going above and beyond in their job to make Trinity Woods a great place to live and work. Each of these employees was nominated by a community member, a family, supervisor, or fellow co-worker for being an exceptional member of the Trinity Woods team!



**Sherry Belcher**  
Housekeeping



**Barbara Bradley**  
Housekeeping



**Irene Brown**  
Wellness



**Dunel Calixte**  
CMA, Holliman  
Center



**Crystal Creekmore**  
Human Resources



**Nita Dunbar**  
RN, Holliman  
Center



**Aaron Farr**  
Security



**Heidi Garrett**  
Administration



**David Kruse**  
Dining



**Maria Morris**  
Dining



**Lori Morton**  
Member Services



**Jennifer Mullenix**  
Housekeeping



**Greg Nievar**  
Maintenance

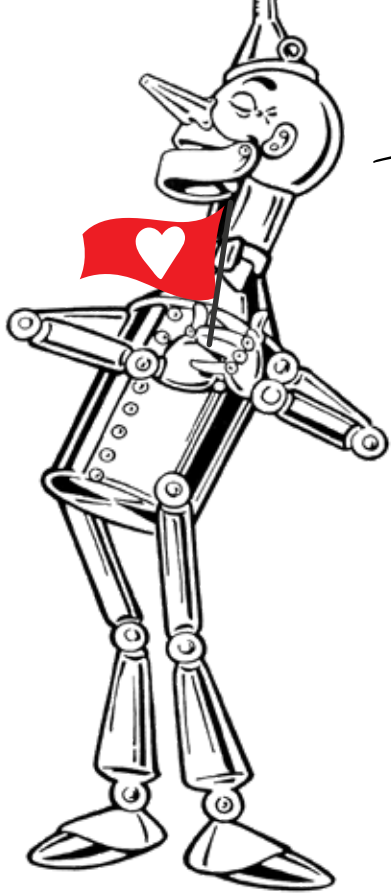


**LeaAnn Sims**  
Sales and Marketing



**Carlena Walker**  
LPN, Health Center





# The Tin Man SOCIETY

In 2023, the Tin Man Society celebrated its 10th anniversary. When this legacy program was first established it was a small group of individuals who felt passionately about preserving the mission of Trinity Woods. Much like the people in 2013, couples, individuals and foundations are still expressing their intentions to leave a gift to Trinity Woods upon their death. Many designate Trinity Woods through a Will or Revocable Living Trust, Charitable Gift Annuity, Charitable Remainder Trust, Insurance Policy or Membership Refund Plan (to receive a donation). These are the gifts that truly allow Trinity Woods to keep serving in the spirit of Christ year after year. We graciously thank and recognize the Tin Man Society Members.

Asa and Suzanne Adamson  
Jim and Sara Bailey  
Harold Bockelken  
Mark and Susan Butterworth  
Rev. Carl and Donna Cartwright  
Patrick and Patricia Cobb  
Julia Couch  
Ann Dorff  
Sue Duncan  
Beth Dunkin\*  
Ray and Sharon Earley  
Jerry and Carolyn Ehlers

Andy Ewing\*  
Charlene Fabian  
Tom Freeman  
Bob and Jeanne Funk  
Margie Herndon  
Kerry Malone  
Phillele McBrayer  
Richard and Barbara Lilienthal\*  
Robert and Jane Mansfield  
Charles and Candace McBrayer  
Tom and Kay Owens  
Helen Pummill

Linda L. Reid  
Howard and Phyllis Rhodes  
Rollie Rhodes  
Melba Rice  
Gail Runnels  
Jan Steffensen  
Paul David Strokey Trust\*  
Stan and Gayle Teter  
Gary and Dorothy VanFossen  
Richard and Peggy Ziglar

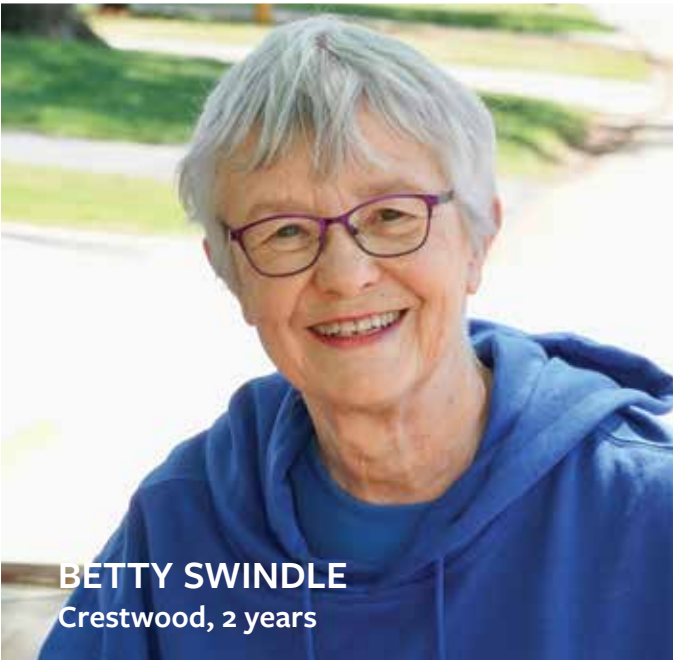
\*New Member in 2023



# Finding

## Your Community at Trinity Woods

**Home.** It's the word that comes to mind when you think of your family, your tribe, the place you belong and have relationships that enhance your life. At Trinity Woods, everyone from directors to employees to residents puts forth effort to create that sense of home that gives vital energy and connection to our community. A few of our residents came together to share how they see the value of the community they've discovered waiting for them at Trinity Woods. In a sense, a true homecoming!



**BETTY SWINDLE**  
Crestwood, 2 years

**“Trinity Woods is like your own hometown.”**

Trinity Woods provides a whole little community for you. It's like you have stepped into your own hometown again. You're simply in a different place in life, and it's a different town. You have everything you need here. Like any community, it's the people who make it home. The employees are not only welcoming, but also put themselves on an equal footing with us. The residents are very welcoming people. I have lots of best friends here! I was acquainted with some people here, and more people I'm acquainted with have moved here. I was in a lot of circles in life in Tulsa, and moving here expanded the circles as well as allowed me to reconnect.



**DUANE AND JANICE BLANKENSHIP**  
Patio Home, 10 months

**“Trinity Woods is like a resort you'll love to move into.”**

Living here is much better than any place we've ever lived. We knew we'd meet new people, but we had no idea we'd meet virtually everyone. And a huge percentage of them have become really good friends. When we moved in, so many people introduced themselves, asked if we were new, and invited us to eat with them. That's the norm here. Being here is like taking a vacation to a resort that has everything and deciding to just stay. There are so many wonderful people, and so many things to do. This place is so special, and I'm so happy that I can stay here the rest of my life.





**CHUCK HANNA**  
Patio Home, 5 years

**“At Trinity Woods, I have a great support system.”**

When I first moved here, I thought of it simply as a place that would take care of me and my wife as we aged. I’d been diagnosed with a rare infection and my wife had some health issues so I thought I’d better get her over here in case something happened. I wanted her taken care of. It worked well, except that she passed away first. Since I moved in though I’ve started meeting people. I still have my friends in Broken Arrow but now I have friends here too. There’s a good support system here because we have good people here.



**RICH LILIENTHAL**  
Crestwood, 3 years

**“Trinity Woods is a community I’m invested in.”**

When I moved in, the last thing on my mind was to be involved in the community. But I started hosting trivia, and that’s perhaps how I became known around campus. People started asking me to get involved in other things on campus and I said, “Well, if people want me to do that, I’ll go ahead and try it.” So, it’s a whole new life. I’m a sportsman, an activity guy, a mover, and there are lots of different things like ping pong and pickleball and other activities to do here. My wife and I loved to cruise, so when we moved here, we decided Trinity Woods was just a cruise on land. We unpacked once and now we’re here, and there’s all this stuff for us to do. The people here are really friendly. Everybody wants to be helpful. It’s like having all your best neighbors nearby.



**TOM AND KAY OWENS**  
Lakeside Home, 8 years

**“Trinity Woods is a great fraternity of men and women.”**

We live in a home, right across from the Community Life Center, so we can see everything that’s going on, which is really fun. We’ll say to each other, “Oh, look, the parking lot is full. What’s going on? Let’s walk over.” What makes Trinity Woods feel like home is our house, which we love, and our neighbors. The people are very friendly. I’ve gotten to know a lot of the people here. In college, being in a fraternity was a great experience, and it was just a great group of people. And that’s true here too; it’s kind of like a fraternity of men and women.



**MARY DAVIS**  
Crestwood, 3 years

**“I have a tribe here.”**

I love people. I can get along with anybody. I was raised with 14 brothers and sisters, and I can see them in all the people I know here at Trinity Woods. It’s important not just to meet people, but to know them, and that’s how I interact here. I believe that God made us all, and we’re all brothers and sisters. We belong together. So I really do have community here. I like everyone who lives here, and that’s what makes Trinity Woods feel like home—the people. These people are my family now, and I love it here.



*Garrett Lee*

# Meet

## The New CEO of Trinity Woods

In May of 2024, Trinity Woods welcomed Garrett Lee as its new Chief Executive Officer. Born and raised in Muskogee, Garrett has always held a deep appreciation for healthcare and planned a career in it from his college days. “I am an original Okie from Muskogee,” he says jokingly. He received his undergraduate degree at NSU-Tahlequah, married his wife Lauree, and their family moved to Missouri. While living in Missouri, he worked in a clinic as a phlebotomist and lab tech while obtaining a master’s degree in Healthcare Administration. Soon, he found himself moving into a career in senior living, something with which he’d had a connection since he was a young boy.

“My mother worked in elder care, so I was constantly going to nursing homes to entertain residents,” Garrett says. “We would go to people’s houses and visit them. I always had this affinity toward the elderly.” So when the opportunity presented itself to become involved in senior living in his career, it felt like the right move. “I feel like it was definitely divinely inspired,” he says.

He returned to Oklahoma and went to work with Covenant Living Communities & Services, which provides senior living care. In his role as Executive Director of the Bixby and Tulsa Covenant Living communities, he oversaw the full gamut



of executive-level responsibilities—including operations, finance, compliance, acquisitions, and change management. Now, in his role as CEO at Trinity Woods, Garrett is looking forward to new growth and new opportunities as he serves the residents and employees.

One of the things that attracted him to Trinity Woods is its strong reputation for person-centered care and its welcoming culture. “This is a fantastic place to live and work,” he says. “It’s welcoming, accepting and loving.” This lasting legacy is a testament to people like his predecessor Steve Dickie and others on the leadership team, with whom Garrett has had the pleasure of interacting over the years in professional circles before stepping into his new role.

“Trinity Woods’ culture, to me, is serving in the spirit of Christ,” Garrett says. “This is what should always be evident here. If we’re truly living in the spirit of Christ, we’re serving others. We are welcoming others.”

When asked about his leadership philosophy, Garrett echoes a piece of advice from Pastor Craig Groeschel, “Do consistently what others do occasionally.” For him, that means his first priority is to get to know the people who make up the community at Trinity Woods—its residents, their families, the employees, and the Board of Directors. “First and foremost, it’s all about relationships,” he says.

Garrett also looks forward to accomplishing the existing projects that have already been signed off on, bringing them to completion, and then setting new goals that breed ongoing growth and success. And that ties into other leadership values he’s bringing with him into the role of CEO.

“Leadership is about listening, hearing, and understanding. It’s about being flexible and open minded,” he says, “and trusting those around me to use good judgment and make good decisions.” Listening is essential to that process, he says. “It helps you to serve people better because you can meet people where they are at and adapt to their needs,”



he notes. “If you’re not listening, you’ll miss that.”

With his years of experience in senior living and his excitement about the values and culture for which Trinity Woods is known, Garrett says he feels like this new role is a way of coming full circle. “The entire process of taking on this new role has just validated everything I already thought about Trinity Woods,” he says. “This is a special place with special people, and I’m going to be a part of that. Serving at Trinity Woods, in the person-centered environment, feels like coming home to me, and I’m excited for what the future will bring.”



## *Fun facts about Garrett:*

- As a kid, he performed as a singing Tiny Tim at Christmastime during decorated house tours with his aunt.
- He met Carrie Underwood during his college days—before she became famous on American Idol.
- His favorite food is fried chicken—especially when his mother makes it.
- His favorite scripture is Phil 3:13-14 — I focus on this one thing: Forgetting the past and looking forward to what lies ahead, I press on to reach the end of the race and receive the heavenly prize for which God, through Christ Jesus, is calling us.
- He was chosen to be Homecoming King at Northeastern State University—and he credits the win to selling fried chicken at his campaign booth.
- He’s been married for 18 years to his wife, Lauree, whom he met in 3rd grade, and he lives on a 5.5-acre farm in Bixby with her and their four daughters, Adelyn (14), Molly (11), Audrey (9) and Jordyn (3). They take care of chickens, rabbits, goats, dogs, cats, and their pig, Lemon!
- Garrett enjoys spending time with his girls, running, fishing, hunting, and anything else that involves being outdoors.
- He is an active member at LifeChurch in Bixby.



# Donors

## THANK YOU FOR YOUR SUPPORT

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