



AgeBetter, Inc.

Annual Report 2019



AgeBetter Mission

Our mission is to work collaboratively with older adults, their families, caregivers, physicians, payers, educators, and providers to enhance the health, wellness, independence, and quality of life of older persons.

AgeBetter, Inc. is a 501(c)(3) nonprofit organization whose members include Attic Angel Association and Oakwood Village.



AgeBetter Board of Directors

- Mary Ann Drescher
Attic Angel Association President and AgeBetter Secretary
- Barbara Gessner
AgeBetter President
- Reginald Hislop
Oakwood Village CEO
- Heidi Lauhon
AgeBetter Treasurer
- Ruth Marion
- Kristen Peterson

SAIL Operating Council

- Christine Beatty
- Dorit Bergen *President*
- Beth Campbell *July-Dec*
- Mary Ann Drescher
AgeBetter Board
- Tom Evans *Jan-July*
- Sue Goldstein
Vice President July-Dec
- Ernie Hanson
- Don Haasl *Secretary*
- Dianne Hopkins
- Chris Klotz
- Kathleen Larson
- Alan Lukazewski
- Rick Sheridan
- Bob Topel
Vice President Jan-Jul

Staff

- Ann Albert
Executive Director
- Nicole Schaefer
SAIL Program Director
- Becky Rogers
SAIL Membership Services Assistant
- Peggy York
SAIL Volunteer Coordinator
- Sarah Kruse
SAIL Communications Assistant
- Contract Contributors:
 - Laura Adell
 - Mary Helen Conroy
 - Meghan Randolph



Message from the Executive Director

This year marked a year of change for our organization starting with our new name, AgeBetter, Inc., a new staffing model, two new staff, and a year of preparation and progress on our exciting initiatives established in 2018.

These include affordable housing for seniors, community gardens/local food sources for seniors, training and education programs for people working with seniors, and identifying potential shared services with Attic Angel Association and Oakwood Village.

In its 15th year, our flagship program Sharing Active Independent Lives (SAIL) ended 2019 with positive growth in membership numbers, volunteer hours, service requests, donor numbers, and overall strong financial performance.

We are truly touched by the appreciation and commitment expressed by AgeBetter stakeholders throughout the year, especially those who are part of the SAIL community!

Each of our initiatives, like the SAIL program, is and will continue to be considered “work in progress” as we begin the new year. Integrating quality housing, food, education, services, and social opportunities in partnership with older adults and for older adults is envisioned to greatly enhance the health and well-being of our community for generations to come—an outcome that is achievable with your support and participation!

We’re so glad you are taking the time to learn about AgeBetter and the important work we are doing. You’ll see first-hand that there’s no “one size fits all” when it comes to successful aging and it truly takes a village—together, we can all age better!

Ann Albert
Executive Director

AgeBetter Initiatives in Progress



Affordable Senior Housing

- ▶ Site proposed: 8552 Elderberry Road; long-term ground lease prepared with Attic Angel Association
- ▶ Request for Proposals completed and disseminated in order to select a developer as our partner; interviews with three reputable responding developers
- ▶ Selected developer: Gorman & Company
- ▶ Project named: Elderberry Place; LLC established with Gorman & Company and AgeBetter, Inc.
- ▶ Applications to the City of Madison and Dane County seeking funding support
- ▶ City of Madison commits \$1.4 million and Dane County commits \$450,000 to Elderberry Place, Inc.
- ▶ Application to WHEDA in December 2019 for tax credits for Section 42 project; decision in Spring 2020



Back Row L to R: Gorman Architect Sarah Ponko, Oakwood Leadership Jen Curliss and Nelson Kling, Sue Goldstein, Gorman Developer Ted Matkom. Front Row: SAIL members Jane Earl, Dana Warren



L to R: SAIL members Nancy Winton and Dana Warren and AgeBetter board member Ruth Marion assist in project's design discussion.



Tour of Milwaukee Catholic Home's Clare Gardens during its late summer event with residents and their full-time farmer Anna Metscher.



Community Garden/ Local Food Sourcing

- ▶ Collaborative discussions with University of Wisconsin – Madison: West Madison Agricultural Research Station Task Force, Roots, FairShare CSA Coalition, Crossroads CSA, etc.
- ▶ Tour and study of Clare Gardens in Burlington—a model being considered that was founded and is part of the Milwaukee Catholic Homes Life Plan Community to serve AgeBetter member organizations and SAIL members
- ▶ Continued discussion with Attic Angel Community and Oakwood Village regarding expanding their local food sourcing to residents
- ▶ Research of area adjacent to Elderberry Place property for possible community garden project to include Elderberry Place residents and neighbors



Training and Education Center

- ▶ Collaborative discussions with local life plan communities staff regarding training needs and interests
- ▶ Research of potential locations and facilities, state requirements for long-term care positions, etc.
- ▶ Research of potential collaborator and current training providers
- ▶ Tour and discussion with Center for Healthcare Education and Simulation
- ▶ Development of draft plan for topics and sessions
- ▶ Business plan in development

Shared Services

- ▶ Discussions with leadership of AgeBetter member organizations regarding staff needs in specialized areas that are currently not feasible but could be with shared positions.



2019 Financials

(Includes SAIL Program)

INCOME TOTAL
\$385,497

EXPENSE TOTAL
\$356,672

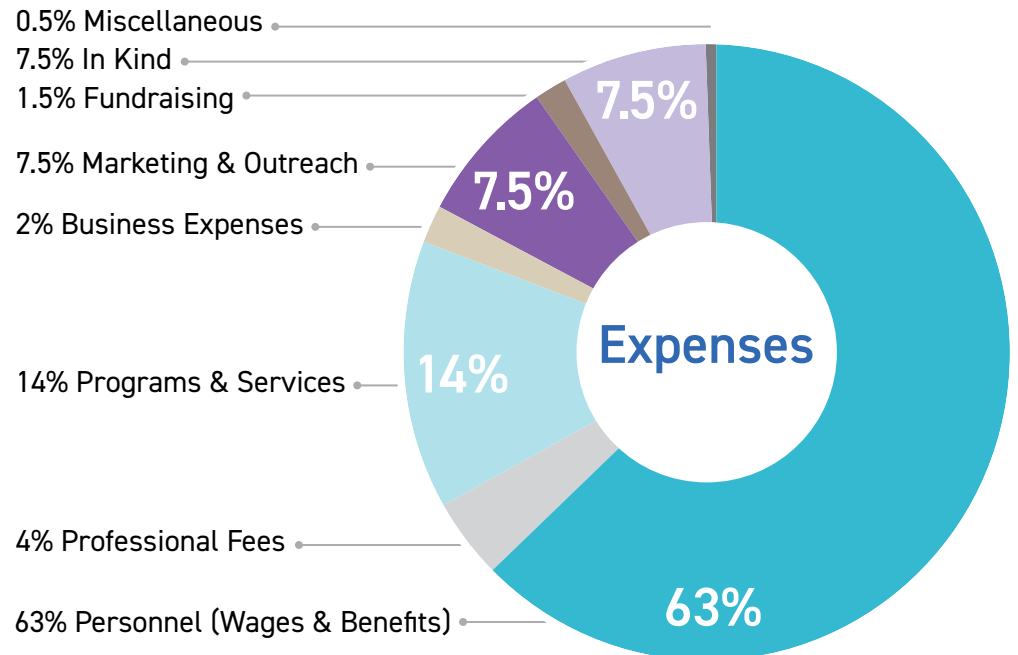
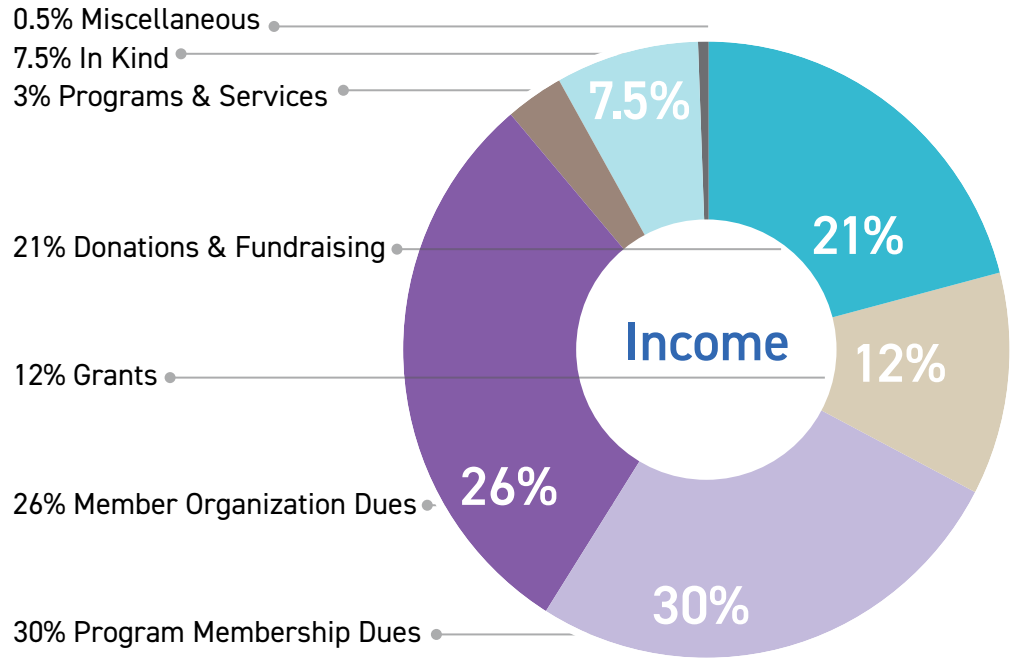
INCOME OVER EXPENSES
\$ 28,825

ENDOWMENT FUND BALANCE*
\$56,712

**SAIL's endowment fund is held at the Madison Community Foundation*



EIN #39-1969761





"My husband and I just joined SAIL but are already reaping the benefits. Wishing we had joined sooner!"

Message from the SAIL Director

Growth was the overarching theme for this year. Entering into the SAIL Program Director position, I was provided with the opportunity to help a successful organization continue to grow while expanding my abilities as a leader. Coming out of a previously strong year, we continued moving forward by presenting new opportunities and programs to members and expanded our outreach to community members.

We saw positive growth in our new member numbers this year. We also saw an increase in our member retention numbers, signaling to us the importance of a village concept in which we all come together to help each other – member, volunteer, service provider, community member, and staff member alike.

Our member survey allowed all of our members to express what they enjoy about their membership and how SAIL can continue to support them. This helped to increase programs and committees offered through SAIL, including the creation of the Ethnic Diversity Committee aimed at helping SAIL grow and learn while becoming a more

diverse organization. Additionally, *SAILing into the future!* officially launched as a five-workshop series on important life topics. In addition to presenting valuable content, our expert faculty encouraged participants to learn from one another's life experiences.

2019 began and ended with new team members joining SAIL. Becky Rogers, Membership Services Assistant, joined us right at the beginning of the year and Sarah Kruse, Communications Assistant, joined us right at the end of the year. Peggy York, Volunteer Coordinator, has continued to guide the volunteer program as it grows and expands service offerings.

We look forward to celebrating our 15th anniversary next year while we continue to support and nurture independence through connections!



Nicole Schaefer
SAIL Program Director



“SAIL helped our mom live on her own for 12 years after our dad passed away. John P., an affable and talented jack-of-all-trades, and the rest of the SAIL team helped her navigate the challenges of staying in her own home well into her 80s. SAIL is a fantastic resource for seniors--and their kids!”

SAIL's Vision

Piecing It All Together

Quilts tell stories about moments in time and about the people who made them. A quilt about the development of SAIL (Sharing Active Independent Lives) would be bold and strong, yet warm and comforting, and the golden thread connecting each of the squares would surely represent Mary Ann Drescher. Drescher, president of Attic Angel Association for more than 20 years, has been strengthening the fabric of SAIL and AgeBetter, Inc. from vision to inception to expansion. Recently, Mary Ann shared some of her time to reflect on the vision that started SAIL, as well as the highlights and the challenges that brought the organization to where it is today.



It began in September 2002, when the Madison Area Continuing Care Consortium, Inc. (MACCC), now named AgeBetter, Inc., sponsored a public forum in Dane County, Wisconsin, to explore the growing population of people over 60 years of age and the resources needed to uphold the quality of life for them. Three CEOs of continuing care retirement communities and their respective boards supported the initiative and worked together to respond to the needs identified. From afar, it might seem counterintuitive for these organizations to look to provide resources to those who choose to live independently; however, Drescher didn't see it that way. “We recognized that not everyone would choose a lifeplan community, and it was our responsibility to support them in their choice to age in place and remain as independent as possible for as long as possible.”

continued

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Drescher points to a few highlights over the years that, in her estimation, were pivotal moments.

- ▶ First on the list was receiving initial federal Administration on Aging funding and a Madison Community Foundation grant that allowed the group's planning to move forward. "The awarding of these funds validated the project and gave us momentum."
- ▶ The next was being able to hire Ann Albert to lead SAIL in 2004. According to Mary Ann, "She is a person who brings her talents and her personal touch. She assesses people's strengths and brings them out for the good of the organization. No one can say no to Ann."
- ▶ She also points to the decision in 2018 to transition Ann to lead AgeBetter and the additional initiatives as its first Executive Director, while continuing to strengthen SAIL by promoting Nicole Schaefer to Program Director. "As an AgeBetter Board, we knew that without someone steering our direction, we would be well intentioned but not always be able to make this a priority."
- ▶ Connecting to other communities for ideas that might serve Dane County residents well has also been instrumental

in SAIL's development. "The connection to The Village to Village Network has been critical to the success both as validation to the work we are doing but also helped us to shift the focus. Members aren't just here to receive services; they are engaged in varying ways to help other SAIL members. It is good to have a purpose."

No organization is without its challenges. Drescher notes, "An early challenge was the common response, 'We don't need this service yet.' We shifted our marketing focus from, 'What can we do for you?' to, 'Are you ready to help others successfully age?' People began to see it as something that they could assist with in early retirement and be grateful for the services later."

"Funding is an ongoing challenge for any organization such as this. We've met the challenges and yet continue to strive to build our membership and secure financing." With leadership and commitment like that offered by Mary Ann Drescher, progress is steady and strong. When asked how she maintains her energy and interest in continuing to invest in AgeBetter while leading Attic Angel, she answered without hesitation, "It's the right thing to do, and it is always the right time to do the right thing."

SAIL Member Benefits

Our talented staff facilitates the many services and programs provided by SAIL. Most of these SAIL member benefits were either created by or inspired by SAIL members.

- ▶ At Your Service Information and Assistance
- ▶ Access to:
 - Pre-screened Service Providers
 - SAIL's *Tech Tutoring 4 You* Sessions
 - Information and/or Referrals to Community Resources & Professional Service Members
 - Selected Programs at Attic Angel Community and Oakwood Village
- ▶ Invitations to Interest Groups, Social, and Educational Events (rides provided)
- ▶ SAIL Monthly *Messenger*
- ▶ Shredding at SAIL
- ▶ Volunteer Opportunities & Services
- ▶ Discounts on:
 - VRI Personal Emergency System
 - Madison School and Community Recreation Programs
- ▶ Rise & Shine Daily Check-in
- ▶ In-home Technical Help
- ▶ Transportation and Other Volunteer Services
- ▶ Medication Reviews
- ▶ House Checks
- ▶ Mattress Flipping & Perks
- ▶ Notary Services

BY THE NUMBERS

2 
full time staff

80
vendors

2 
part time staff

3 
contractors

13
professional members

513
members
on average

1,700
service requests

15
committees and groups

159
events
+9 Oakwood events



“There’s always a way to accomplish what has to be done and often SAIL is that way for [me].”



“Volunteer handyman Phil came over and did several small jobs for me—didn’t take him long, but these were things I could not do without risking injury. Thanks to Phil and thank you for providing this service!”

SAIL Highlights

Community Collaborations

SAIL is grateful to be associated with many organizations supporting seniors throughout Dane County to offer programming and resources to SAIL members.

- ▶ Attic Angel Association
- ▶ Continuity of Care
- ▶ Dementia Friendly Dane County
- ▶ Edgewood College School of Nursing
- ▶ Falls Prevention
- ▶ Oakwood Village
- ▶ Plato
- ▶ Pharmacy Society of Wisconsin
- ▶ West Madison Rotary Club
- ▶ Triad
- ▶ University League
- ▶ UW-Madison School of Pharmacy

Volunteer Activities

Members assist each other throughout the year by volunteering their time and talent to get members where they need to go and accomplish tasks around their homes.

- ▶ Mattress Flipping
- ▶ Sunday Drives
- ▶ Volunteer Celebrations
- ▶ Volunteer Driving
- ▶ Volunteer Handyman
- ▶ Small Yard Work
- ▶ Prescription and grocery pick up
- ▶ Planning outings to Overture Center and American Players Theatre
- ▶ Be Prepared “Go Bag” Assembly

Education

Ongoing education is critical to SAIL members who wish to continue to learn and engage at every turn. The speakers who give their time to present in a variety of locations and formats provide topics and styles to match everyone's interests.

- ▶ Attic Angel Lecture Series
- ▶ Brain health workshop
- ▶ Comprehensive medication reviews
- ▶ Direct primary care presentation
- ▶ Donor advised funds education program
- ▶ *SAILing into the future!* series
- ▶ RSVP Triad program series
- ▶ Technology
 - Monthly tech tutoring
 - Identity theft and fraud programs

Health and Wellness

- ▶ ADRC Caregiver Celebration
- ▶ Alzheimer's Research Fair
- ▶ Attic Angel Fair
- ▶ Brain Health and Fitness Class
- ▶ Brava Thrive after 55 expo
- ▶ AARP Catch Him If You Can Resource Fair
- ▶ Colloquium on Aging Fair
- ▶ Health Resource Fair
- ▶ Madison Senior Center Fair
- ▶ Falls Prevention Programs
 - *No More Spring Breaks*
 - *Only Leaves Should Fall*
 - *Preventing Falls: Life in Balance*
- ▶ Safe Assist Tips and more
- ▶ Spirit of Aging Camp Fair
- ▶ SAIL Vendor Fair



SAILing into the future! team. Front Row: Nicole Schaefer, Tom Evans, Lucy Lasseter; Back Row: Fred Ross, Dianne Hopkins, Ken Martin, Don Haasl (Leader)

***SAILing into the future!* Series**

2019 marked the introduction of the *SAILing into the future!* series. Thanks to the hardworking team of individuals who dedicated many hours to helping to develop and plan this series.

- ▶ ***Embracing Change - All of it!***
with Dr. Kristin Litzelman
- ▶ ***Limitless Options: Your Personal Legacy***
with Karen Rose Gredler
- ▶ ***Life's a Daring Adventure - Carpe Vitam!***
with Mary Helen Conroy and Galen Metz
- ▶ ***Aging 101 - What is Normal and How Do I Proact to it?***
with Dr. Alexis Eastman
- ▶ ***You and Your Money: A Dynamic Relationship***
with Connie Kilmark

Be Prepared “Go Bags” Assembly Event with SAIL volunteers—assembling the bags was a lot of fun for all!



Go Bags were created and distributed to members of SAIL for use during emergency situations requiring them to leave their homes. Supported by the Oakwood Foundation and AARP Wisconsin.



The Village Movement is a nationwide, grassroots effort for older adults to nurture independence, engagement, and comfort. The model focuses on groups of older adults helping one another through volunteerism, education, and social opportunities, and being there to provide support if and when the need arises. SAIL is proud to be a founding member of The Village to Village Network and the second oldest Village in the United States.

Social Activities

SAIL social events are well attended and often planned by members for members. Meeting new people or seeing old friends, social activities are a touchstone of membership for many.

- ▶ 90's Coffee
- ▶ AgeBetter Coffee Discussion
- ▶ Monthly Book Club
- ▶ On Our Own Holiday Dinners
- ▶ East Side Member Gathering
- ▶ Fall Bus Trip
- ▶ Golf Outing
- ▶ Governor's Mansion Bus Trip
- ▶ Holiday Fantasy in Lights Tour & Supper
- ▶ On Our Own Holiday Tea
- ▶ Monthly Lunch Bunch
- ▶ Madison area Master Gardener Event
- ▶ Bi-monthly Membership Matters
- ▶ Monthly Men's Roundtable
- ▶ Midsummer Dueling Pianos Gathering
- ▶ SAIL Bike Rides
- ▶ Smooth SAILing Celebration
- ▶ Spring & Winter Luncheons
- ▶ On Our Own Valentine's Day Breakfast

Perks

- ▶ Mattress Flipping, Shredding, Vendor Fair, Two Men Without a Truck Indoor Moving Help, and more!

“Just wanted to let you know that my Tech Tutoring was GREAT!!! I'm so thankful that this is part of SAIL's regular benefits!!!”

2019 SAIL Program Financials

INCOME TOTAL
\$285,497

EXPENSE TOTAL
\$278,396

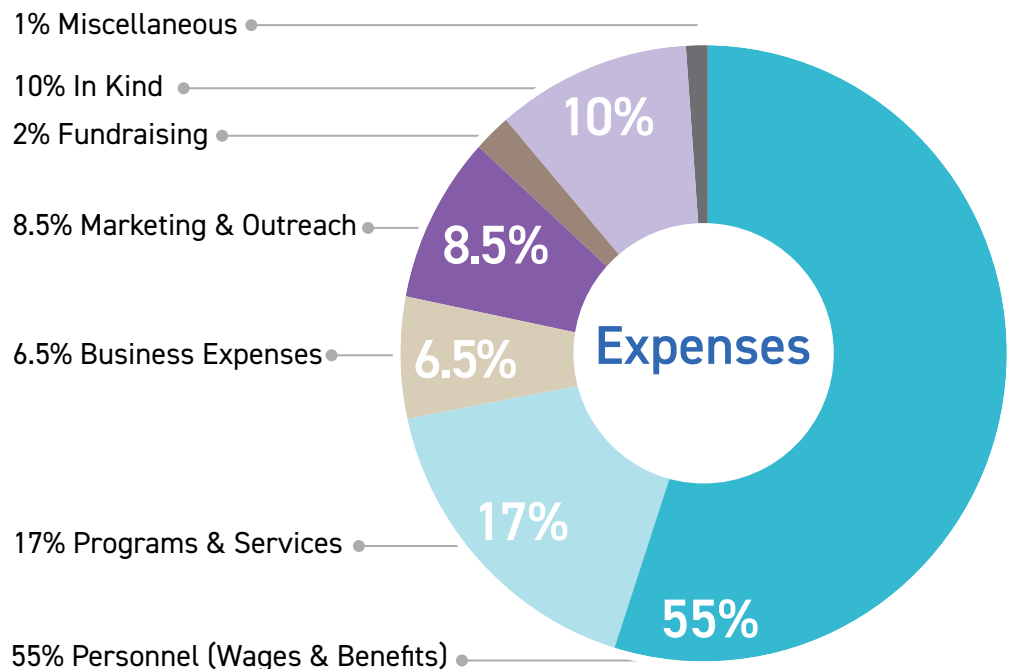
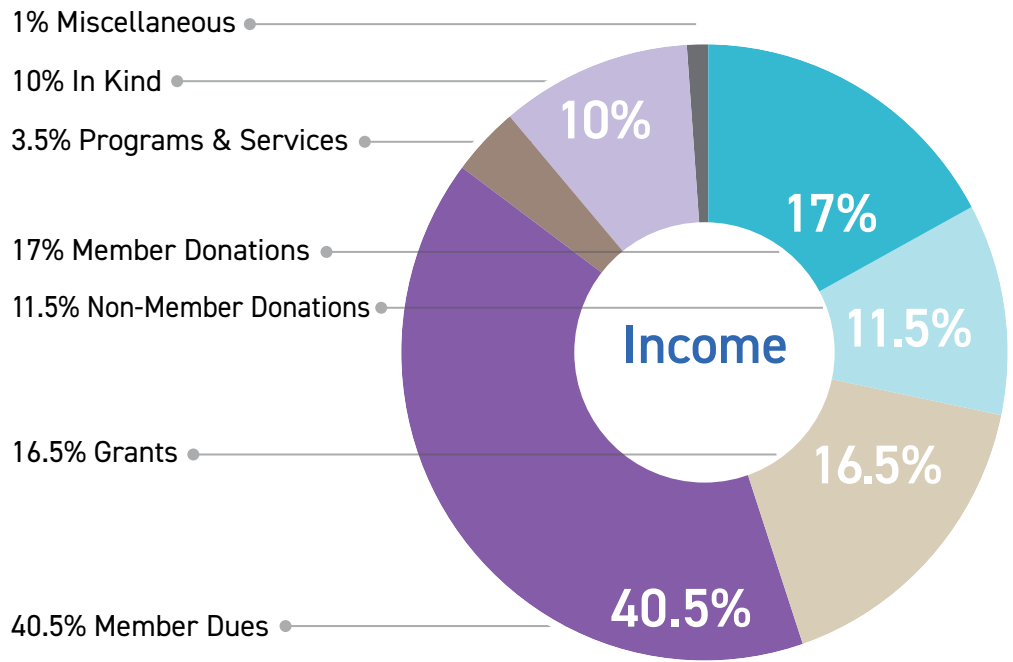
**INCOME OVER
EXPENSES**
\$7,101

**ENDOWMENT FUND AT
MADISON COMMUNITY
FOUNDATION BALANCE**
\$56,712

We are grateful for the support of the members, volunteers, and donors who make SAIL services and programs possible for hundreds of older adults living in Dane County. Donors are recognized quarterly in The Messenger found at www.sailtoday.org.

Grant Support Provided By: Madison Community Foundation, Oakwood Foundation, AARP Wisconsin, and the West Madison Rotary Club.

In-kind Support: Office space, IT, and Human Resource services — Oakwood Village; Legal Services and Advice — Attorney John Mitby



AgeBetter, Inc. | 608-230-4445 | info@agebettertoday.org | AgeBetterToday.org
6209 Mineral Point Rd. Suite 210, Madison, WI 53705