



**Annual Report 2020**



## 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 Board President*

**Reginald Hislop III**  
*Oakwood Village CEO*

**Heidi Lauhon**  
*AgeBetter Treasurer*

**Ruth Marion**

**Kristen Peterson**

### AgeBetter Legal Services

**John Mitby**  
*Attorney (pro bono)*

### SAIL Operating Council

**Christine Beatty**

**Dorit Bergen** *President*

**Beth Campbell**  
*Vice President July-Dec*

**Mary Ann Drescher**  
*AgeBetter Board*

**Sue Goldstein**  
*Vice President Jan-Jul*

**Don Haasl** *Secretary Jan-Jul*

**Ernie Hanson**

**Dianne Hopkins** *Secretary Jul-Dec*

**Christine Klotz**

**Kathleen Larson** *Jan-Jul*

**Alan Lukazewski**

**Galen Metz**

**Rick Sheridan**

**Thelma Wells**

### 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

As I reflect on 2020, I think about a quote from the ancient Greek

philosopher Heraclitus who lived around 500 BC. He said “The only thing that is constant is change.” Now, more than ever, this rings true.

Along with change being a constant, of course, is the idea that on any given day, the unexpected can happen. How we prepare for that and how we adjust and what we learn along the way are key to our well-being. I’m not sure anyone could have foreseen the pandemic but I can say that most of us have made some interesting discoveries and we’ve learned a great deal because of it.

We started 2020 with the adoption of a Diversity statement for our organization and were able to witness the formation of a SAIL member team dedicated to increasing SAIL’s ethnic diversity. As the year unfolded, we soon recognized the deep importance of our newly formed team and its work.

I’m especially proud of SAIL in other ways as well— we celebrated our 15 year anniversary and we absolutely shined throughout the year! Thank you to our past and present members, volunteers, service providers, and generous donors for making this possible. While we didn’t celebrate #15 in person due to the pandemic, we were able to engage with one another in new ways. Our staff, Nicole Schaefer,



Becky Rogers, Peggy York, and Sarah Kruse, demonstrated individual and collective creativity, flexibility, compassion, strength, and perseverance during these past twelve months.

In addition to facing the start of the pandemic in spring 2020, we received unexpected news—we were not awarded the 9% tax credits by WHEDA and we were unable to pursue the senior affordable housing project we envisioned on Elderberry Road. Our partner Gorman & Co. and our board reviewed the project scoring and made the decision to select another site location closer to the Madison metro bus line and submit another application. Additional details are included in this report.

We closed out the year at AgeBetter with word that our Payroll Protection Program loan was forgiven. In addition, the generous donations to SAIL’s Annual Appeal exceeded all previous years. And our board made the exciting decision to initiate a new program aimed to offer specialized one-to-one assistance to independent living residents living at the Oakwood Village and Attic Angel Community campuses.

### AgeBetter, Inc. and SAIL Diversity Statement

*Diversity is a source of strength, creativity, and innovation for AgeBetter. We commit to create an environment that welcomes and values the contributions of each person and respects their identity, culture, background, and abilities that enrich AgeBetter.*

Yes, 2020 proved to be full of the unexpected and we made huge programmatic and service changes to ensure the safety and well-being of seniors. We also gained new techniques, skills, and offerings that we will carry with us.

Ann Albert  
Executive Director

## AgeBetter Initiatives in Progress



### Affordable Senior Housing

- ▶ Developer: Gorman & Co. working with AgeBetter, Inc.
- ▶ Site proposed: 6145 Mineral Point Road, Madison, WI. Plan to purchase parcel from Oakwood Village
- ▶ Project named: AgeBetter Community Living
- ▶ Project description: Section 42 housing for elderly, four story building, 77 units, one and two bedroom apartments with washer and dryer, internet, indoor parking. Access to common areas such as, 5th floor sunroom and patio space, community room, etc.
- ▶ Applications to the City of Madison and Dane County for funding support
- ▶ City of Madison commits approximately \$1.3 million
- ▶ Application to WHEDA in December 2020 for 9% tax credits; decision in Spring 2021

*Editor's Note: As of the writing of this report, we learned we were not awarded WHEDA tax credits for this project. We remain committed to senior affordable housing and will explore other opportunities.*



### Connect

- ▶ 2020 pandemic experience motivated AgeBetter to seek one-to-one support for residents living on the Attic Angel Community and Oakwood Village campuses. The program will provide solutions for residents experiencing isolation and at risk for decline living in independent living and assisted living.
- ▶ One-to-one support is desired to assist residents in maintaining personal interests and hobbies, provide socialization, and offer learning opportunities as well as support with completing projects such as organizing closets, pictures, storage areas, etc.
- ▶ AgeBetter will employ "assistants" to match with individual residents for an hourly fee paid by the resident. This service offering will begin in Spring 2021.

*Editor's Note: As of the writing of this report, AgeBetter named this program AgeBetter Connect.*



**2020 Financials**

(Includes SAIL Program)

**INCOME TOTAL**  
\$448,878

**EXPENSE TOTAL**  
\$378,466

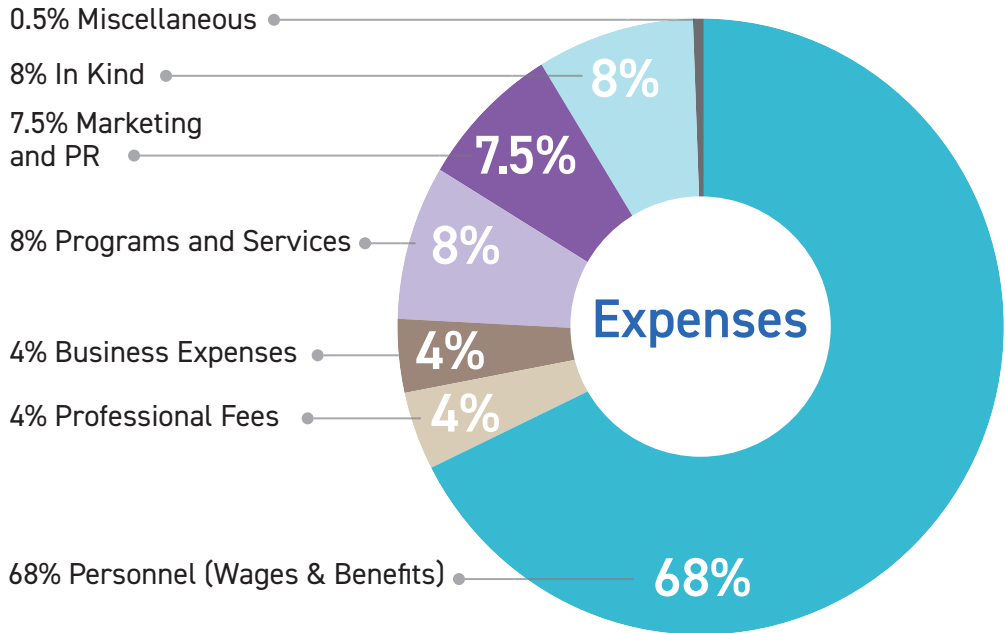
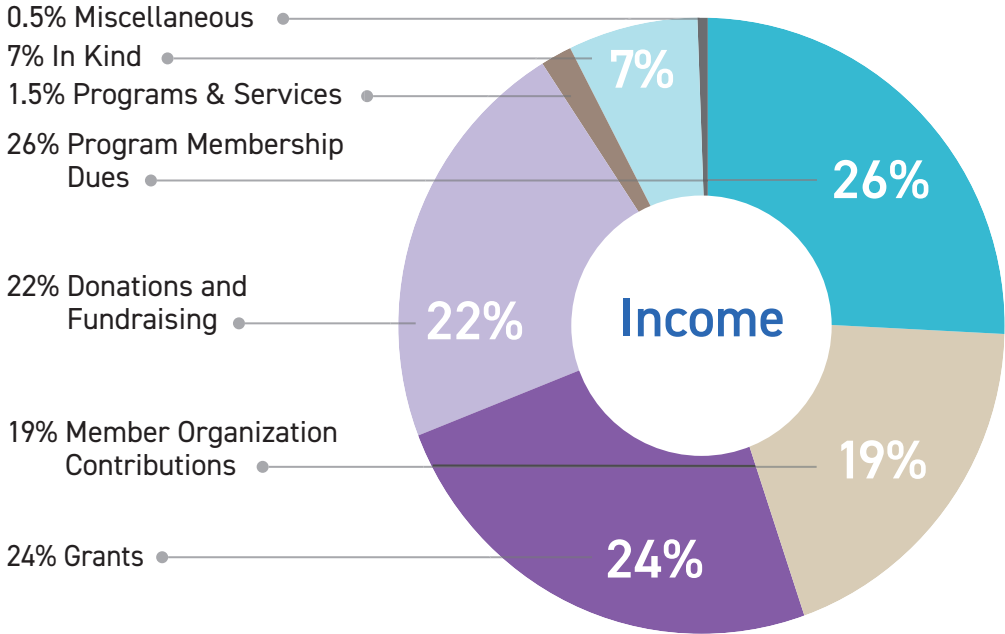
**INCOME OVER EXPENSES**  
\$70,412

2020 RESTRICTED GIFT by Anonymous Donor towards AgeBetter Affordable Housing  
\$30,000

PAYROLL PROTECTION PROGRAM GRANT Federal Pandemic Support  
\$45,320

*Sincere thanks to Founding Members Attic Angel Association and Oakwood Village for their financial support and leadership of AgeBetter.*

EIN #39-1969761





*I know that you are always there to listen to our questions, problems, and concerns, etc. — or maybe if we just need someone to talk with. However, it is at times like these that we especially appreciate your caring and concern.*

— SAIL Member Carol Brown

## Message from the SAIL Director

Creating connections became an even stronger focal point of our organization in 2020. To start the year, City of Madison Mayor Satya Rhodes-Conway spoke at our annual Winter Luncheon sharing information about the exciting endeavors in store for Madison's future and how older adults will benefit. And within the first three months of 2020, we had sixteen new members of SAIL!

As we prepared to officially begin our 15th anniversary celebrations in March, the world as we all knew it changed. In just a few days, our team had transitioned to working from our homes, our in-person social events were canceled, and we needed to rethink how we all would stay connected.

Over time, we began to see each of our member-led groups transition to hosting their meetings virtually and we soon realized that a virtual setting gave us an opportunity to reach many of our members that weren't able to attend programs in-person. Members even created new programs to generate different interests and create additional social opportunities.

Members also found new ways to support each other in a contactless manner. They created a Friendly Callers program in an

effort to help other members combat loneliness. Staff members made additional efforts to connect with each of our members at least twice over a five-month

period, equating to more than 1,000 phone calls made. Grocery shopping and medication pickups became a common service request and ensured that members could remain safe at home. And safety bags were created for the volunteer drivers able to help members during the summer months. Included in the bags were guidelines developed to keep everyone safe, disinfecting wipes, gloves, hand sanitizer, and masks.

We all adapted, and continue to adapt, with every change and unique need that presented itself in 2020. I am proud to reflect on just how much SAIL accomplished, not just in a year, but in a year where we were pushed into unknowns, yet continued to support each other as a village.



Nicole Schaefer  
SAIL Program Director

# Going Virtual

It didn't take long after the initial stay at home orders for SAIL members to begin to reach out and find ways to stay connected. Many Zoom tutorials followed as members persevered to learn new skills and engage from home.



Men's Roundtable was one of the first to begin meeting virtually—and, in fact, attendance has increased from pre-pandemic numbers. Member and Group Leader Fred Ross reported, "In the beginning, there were hopes that remote sessions would work, but also skepticism. To some degree it was a lifesaver for us. It was something to do, and something to look forward to."

# The Emergence of New Member Groups and Activities

SAIL members developed new interest groups that took root and blossomed in the virtual environment:

► **Nature Walks** allowed for in-person interaction while maintaining safe practices in the great outdoors.

*continued on page 8*

*Members JoAnn Savoy, Harriet Irwin, Donna Lotzer*



*I learned a lot about what others were going through—people who were confined in different ways, where people came from, what they had done in their lives. It has been a very satisfying experience.*

— Ethel Dunn

► **Sharing Memories/Women’s Chat Group**

Member Ethel Dunn was inspired to discuss memories during this unique time in history and engage with other members. The Sharing Memories group began with a topic of focus each month. The women attending soon discovered that they were enjoying general conversation and conviviality, and thus the transition to Women’s Chat Group meeting monthly.

► **Dancing with Joni**

The importance of movement and exercise became apparent as members left their homes less frequently. New Member Joni offered to share her lifetime love of dancing with other members and it was an immediate success. Joni’s experience and enthusiasm brought better health and smiles to those who have joined in the fun.



► **Holiday Meal Delivery**

Holidays were a bit brighter when volunteers delivered meals for Thanksgiving and Christmas.

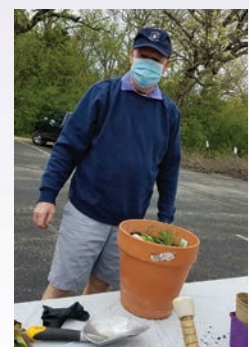
*Member Ken Martin delivering holiday meals.*

► **Container Gardens**

As the stay at home orders dragged on longer than initially expected, Executive Director Ann Albert brought forward the idea of offering container gardens, similar to the Victory Gardens of World Wars I and II. SAIL members requested the beauty of flowers and the deliciousness of aromatic herbs and fresh vegetables. Oakwood Village University Woods offered outdoor space for planting in a safe manner by SAIL staff and volunteers. Members reported throughout the summer and fall how well their gardens were continuing to grow.



*Top: Volunteer Duncan McNelly and SAIL staff Becky Rogers.*



*Left: Volunteer Jeff Walsdorf and Member Susan O’Dell. Right: Bob Topel helps with planting.*



## Staying Connected in 2020

Tech support was in high demand during 2020. SAIL members were impressive in their desire to learn new technology in order to maintain the ability to engage and learn. Visiting museums, traveling around the world, attending concerts, listening to lectures or attending meetings all became possible from the comfort of home. With the help of SAIL staff and service providers, members took on the task of embracing technology. We are grateful to the SAIL service providers who provided technical support. Special thanks to Dave Friedman for generously sharing his time and knowledge giving one on one support to members at no charge.



*I just had a WONDERFUL, absolutely FANTASTIC Tech Tutorial on the phone with David Friedman. He was ingeniously and patiently and clearly and successfully helpful!*

— SAIL Member Mary Lathrop

## New Member Benefit Offers Peace of Mind



Toilet overflowing in the middle of the night? Smoke alarm battery going off and keeping you awake? Heard something going bump in the night? At the suggestion of Charter Member Lois Curtiss and with the approval of the SAIL Council and Membership Matters, the After Hours Program was introduced in 2020. After Hours provides members a phone number to call when non-medical emergencies arise during times the SAIL office is closed on holidays, evenings, and weekends.

Charter Member Service Provider BrightStar's on-call staff answers calls and, during the next business day, alerts SAIL staff of the calls placed and actions taken. The program started as a 60-day pilot program and, after successful results, was continued as an ongoing benefit.

  
HOME CARE | MEDICAL STAFFING  
A Higher Standard

*If you need help, it's just a phone call away. If you need help in the garden, in the house, or if you need some rides to the doctor, they are available. You can join groups, and it gives you a feeling of belonging, and you are not alone.*

- Charter Member Maria Schnos

### SAIL Facebook Page Shows Growth in 2020

With engaging posts and promotion of SAIL events, Sharing Active Independent Lives—SAIL Madison showed tremendous growth from 2019 to 2020. The SAIL Facebook page is an important part of the ongoing outreach initiatives that help raise awareness about the organization and support for seniors throughout Dane County.

#### Reviewing the past 2 years

	2019	2020
Post Reach	15,391	42,541
Engagement	3868	9625
Followers	349	405
Posts	249	575



## BY THE NUMBERS

**2**   
full time staff

**3**   
part time staff

**3**   
contractors

**14**  
professional members

**529**  
members  
on average

**417**  
memberships

**13**  
committees and groups

**107** SAIL events  
+12 Attic Angel & Oakwood Village programs

**1000+**  
member wellness calls

**1250**  
service requests

**103**  
email blasts

**68**  
service providers

**11** mask makers

**300+**  
masks made and delivered



## SAIL Highlights

### Community Collaborations

Throughout this challenging year, many organizations supporting seniors throughout Dane County offered programming and resources to SAIL members.

- ▶ Attic Angel Association
- ▶ Continuity of Care
- ▶ Public Health Madison & Dane County
- ▶ Dementia Friendly Dane County
- ▶ Edgewood College School of Nursing
- ▶ Oakwood Village
- ▶ Pharmacy Society of Wisconsin
- ▶ PLATO
- ▶ West Madison Rotary Club
- ▶ RSVP Triad
- ▶ Safe Communities Falls Prevention Task Force
- ▶ University League
- ▶ UW-Madison School of Nursing – The Center for Aging Research and Education
- ▶ UW-Madison School of Pharmacy

### Education

- ▶ Attic Angel Lecture Series
- ▶ Avoiding the Holiday Blues
- ▶ Choosing an Investment Advisor
- ▶ Comprehensive Medication Reviews with Pharmacy Society of Wisconsin
- ▶ Finding Peace with your Money Management
- ▶ Monthly tech tutoring
- ▶ Our Changing Climate
- ▶ Professional Service Members Luncheon Program
- ▶ Planning for Life's Later Stages
- ▶ RSVP Triad program series
- ▶ *SAILing into the future!* series
- ▶ Telemedicine and Virtual/Indirect Care

### Health and Wellness

- ▶ After Hours Program
- ▶ Annual Triad Statewide Conference – Presentation on The Village Model/ AgeBetter and SAIL
- ▶ Dancing with Joni
- ▶ Falls Prevention – Only Leaves Should Fall with Safe Communities
- ▶ Nature Walks
- ▶ Zoom Yoga with Service Provider Jesi

*Below: Ann Albert, Rick Sheridan, Maria Schnos, Christine Klotz, Nicole Schaefer*

### Celebrating 15 Years of SAIL

The Communications Team took on the task of organizing the filming of Charter Member video interviews and the creation of a 15th Anniversary commemorative booklet to preserve the history of this organization. The videos and an electronic version of the booklet are archived on the SAIL website at [sailtoday.org](http://sailtoday.org). Thanks to Communications Team Chair Christine Klotz, Member Dana Warren, and Team Member Rick Sheridan for your hard work.



## Volunteer Activities

Volunteers are the heart of SAIL and made an even greater impact this year. They supported SAIL members in a variety of ways while staying safe during the pandemic.

- ▶ Holiday meal delivery
- ▶ Volunteer driving
- ▶ Volunteer handyman
- ▶ Small yard work
- ▶ Prescription pick up
- ▶ Grocery shopping
- ▶ Planning outings to American Players Theatre and Overture Center
- ▶ Be Prepared “Go Bag” delivery
- ▶ Container garden
- ▶ Mask making
- ▶ Friendly Callers
- ▶ Birthday calls
- ▶ Sympathy and get well cards
- ▶ Note writers

The following activities are new volunteer activities developed this year in response to the pandemic.

- ▶ **Friendly Callers** – member volunteers were paired up with other members as a way to generate more social opportunities during a time when we had to be apart. Each pair conversed at their leisure and some have found new friendships blossom from this.
- ▶ **Masks** – to help our members, volunteers, and service providers stay safe, SAIL volunteers sewed hundreds of masks, adapting along the way when supplies were hard to come by.
- ▶ **Note writers** – members and volunteers conversed through short letters, by both mail and e-mail, as another way to stay connected. Some note writers found a way to connect by sharing their poetry.

## Volunteer Safety Bags and Guidelines

Throughout the year, there were many scenarios where members utilized volunteer support. SAIL volunteers stepped up to help in safe, contactless ways. Precautions were also put into place to help with needed rides to medical appointments, including the creation of safety bags. Our volunteers received:

- ▶ **Educational training**
  - Shared and discussed procedures, recommendations, and safety standards
- ▶ **Written guidelines**
  - AgeBetter presented guidelines for all representatives to follow
- ▶ **Sanitizing products**
  - Drivers and handymen received a bag filled with masks, wipes, disinfectant spray, and gloves
- ▶ **Health screening**
  - Both volunteers and members completed health checks before each appointment to try and limit exposure



*Volunteer Coordinator Peggy York shares safety information with Volunteer Edie Anderson at a drive-by training session.*

## Gathering for the Winter Meeting at Blackhawk Country Club

Little did those gathered know that the winter meeting would be the last chance for us all to gather together in 2020. The luncheon was filled with smiling faces, good conversation, and an informative talk by Mayor Satya Rhodes-Conway



*Heidi Lauhon and Member Betty Scott*



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

- ▶ Book Club
- ▶ Men's Roundtable
- ▶ On Our Own gatherings
- ▶ Lunch Bunch
- ▶ Membership Matters
- ▶ Group Bike Rides
- ▶ Winter Luncheon
- ▶ On Our Own Valentine's Day breakfast
- ▶ Sharing Memories/Women's Chat Group
- ▶ Happy Hour
- ▶ Nature Walks

## Perks

- ▶ Two Men Without a Truck (below top) and Drive-through shredding (below bottom)



# 2020 SAIL Program Financials

**INCOME TOTAL**  
\$320,182

**EXPENSE TOTAL**  
\$289,219

**INCOME OVER  
EXPENSES**  
\$30,963

**ENDOWMENT FUND  
BALANCE\***  
\$56,712

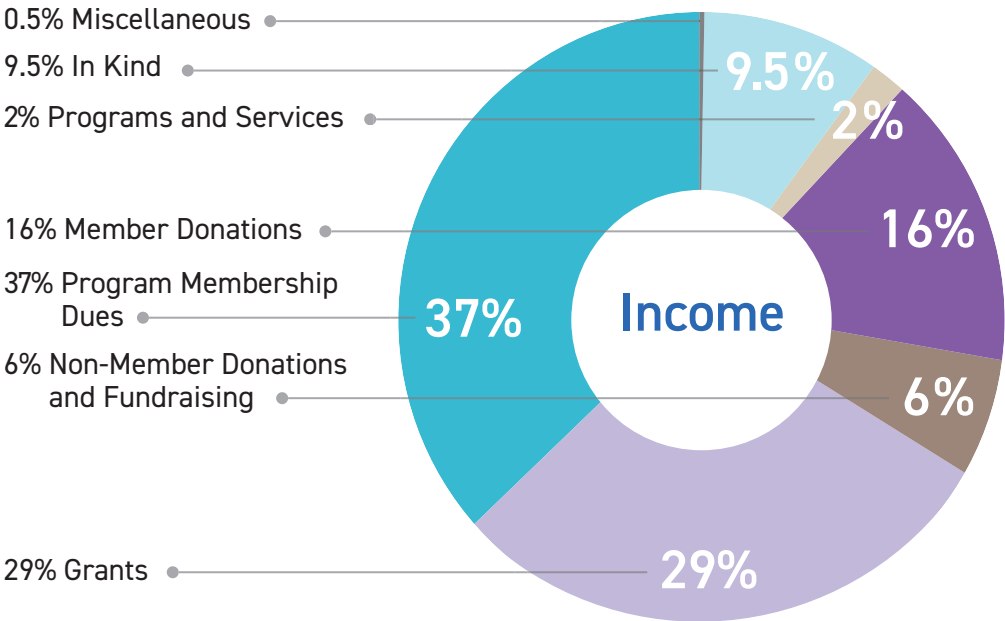
*\*SAIL's endowment fund is held at the Madison Community Foundation*

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

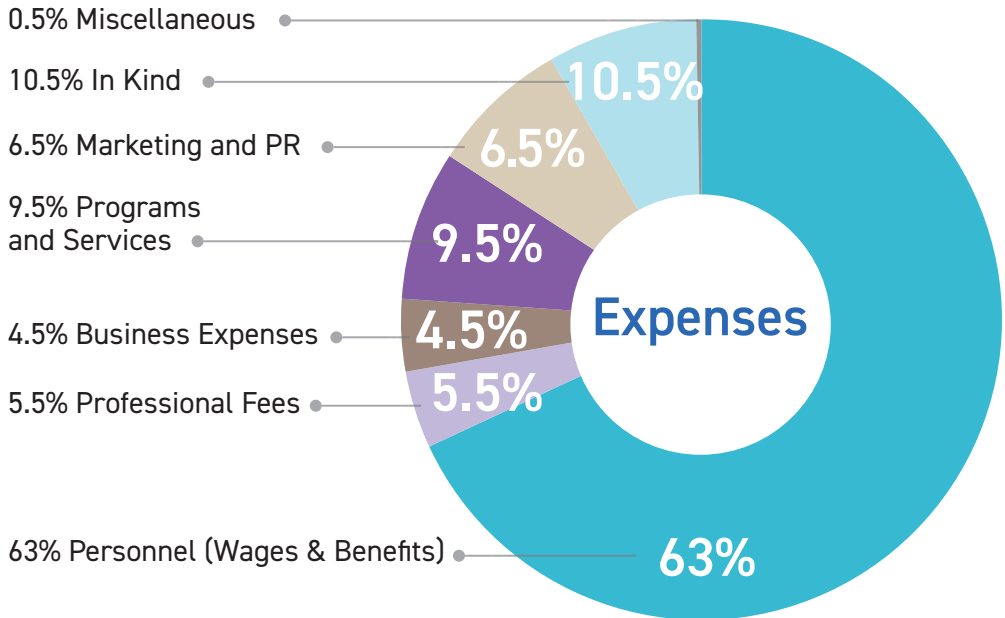
*Grant Support Provided by: Madison Community Foundation, Oakwood Foundation, AARP Wisconsin, and the West Madison Rotary Club.*

*In-kind Support: Rick Conroy; Jane and Tony Earl; Billy Harris; RSM US LLP; Office space, IT, and Human Resource services—Oakwood Village; Legal Services and Advice—Attorney John Mitby*

## INCOME BREAKDOWN BY CATEGORY



## EXPENSE BREAKDOWN BY CATEGORY



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