



Annual Report 2021



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
- Linda Johnson**
AgeBetter Treasurer
- Ruth Marion**
- Kristen Peterson**

AgeBetter Legal Services

Attorney John Mitby (*pro bono*)

SAIL Operating Council

- Christine Beatty**
- Dorit Bergen**
President Jan-July; Secretary July-Dec
- Beth Campbell**
Vice President Jan-July; President July-Dec
- Mary Ann Drescher**
AgeBetter Board
- Sue Goldstein**
- Ernie Hanson**
- Dianne Hopkins**
Secretary Jan-July
- Christine Klotz**
Vice President July-Dec
- Alan Lukazewski**
- Galen Metz**
- Rick Sheridan**
- Dana Warren** *July-Dec*
- Thelma Wells**

Staff

- Ann Albert**
Executive Director
- Nicole Schaefer**
SAIL Program Director
- Becky Rogers**
SAIL Membership Services Assistant
- Peggy York**
SAIL Volunteer Coordinator Jan-Oct
- Sarah Kruse**
SAIL Communications Coordinator
- Andy Millman**
AgeBetter Connect Assistant
- Miriam Jeknavorian**
AgeBetter Connect Assistant
- Contract Contributors:**
 - Laura Adell**
 - Mary Helen Conroy**



Message from the Executive Director

2021 was quite the year! Our work in helping one another “age better” has become more important than ever as the pandemic continued throughout this year. The role and value of our organization continues to grow as we all navigate our “new normal” and hone in on our skills to offer flexibility, adaptations to service delivery, and creative ways to connect with one another.

Our member organizations Attic Angel Association and Oakwood Village continued to provide flexible space options, in-kind assistance, leadership on our AgeBetter board, and financial support to our organization—especially important to us at this time.

I hope you’ll enjoy reading this report and learning about the many accomplishments of our programs: Sharing Active Independent Lives (SAIL) and AgeBetter Connect. You’ll also see an update on our work on affordable housing for seniors. Our success as an organization is largely due to the dedication and commitment of older adults and our amazing staff.

As a small nonprofit, we are especially grateful for the local grant support we received as well as the incredible SAIL member support — through volunteering, membership, and donations. Small nonprofits are especially challenged during events like a pandemic and labor shortages. Costs increase, competition for donations and grants increase, and service needs change with many taking additional time to complete.



Volunteerism and donations exceeded our expectations in spite of the ups and downs due to COVID and the vulnerability of a vast majority of seniors.

SAIL’s grant income exceeded our budget in 2021 thanks to: Oakwood Foundation, Evjue Foundation, Madison Community Foundation, Dane County Nonprofit Assistance Fund, AARP Wisconsin, and an anonymous local charitable foundation.

During the past five years, SAIL member annual donations have steadily increased from \$40,600 to \$56,200! 2021 marked the highest level of member donations ever!

Our continued support by Attorney John Mitby for legal services to AgeBetter and our programs is deeply appreciated. Over 18 years of pro bono services is something we celebrate greatly!

I’m pleased to share that a new fundraising initiative began in 2021, the AgeBetter Community Supporter program. It’s a wonderful way for businesses to partner with us in supporting our mission to enhance the lives of older adults in the Madison area and beyond.

Our informal tagline, “Together we Age Better” is what I think of as I reflect on this year and all of the ways we come together to celebrate our lives and also thrive during difficult times.

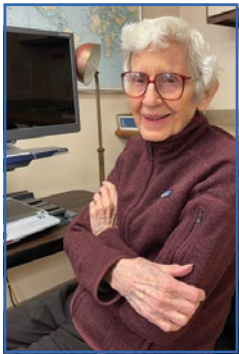
Ann Albert
Executive Director

AgeBetter Initiatives in Progress



Affordable Senior Housing

- ▶ Developer: Gorman & Co. working with AgeBetter, Inc.
- ▶ 2020 Application to WHEDA for tax credits for Section 42 senior housing project: Tax Credits not awarded in Spring 2021 WHEDA announcement.
- ▶ Exploration for alternative site continued throughout remainder of the year.
- ▶ Challenges facing construction industry relating to finances, supply chain issues, and labor shortages are being evaluated during this time.



"AgeBetter Connect is fantastic! I am legally blind and I needed some help keeping up with my mail, organizing papers, and updating my calendar. These are just a few things that my Assistant has helped me with and she was excellent... kind, honest, reliable, and

seemed like she always knew just what to do. She even helped me downsize after living in the same apartment for 25 years! If you could use a little help, be sure to give AgeBetter a call!"

— Milada Benca, AgeBetter Connect Client

"You made a perfect match. Andy assists me with shopping and organizing my apartment, but I also enjoy our conversations very much. We have a lot in common."

— George Peranteau, AgeBetter Connect Client



AgeBetter Connect

- ▶ Program name, AgeBetter Connect, developed with assistance from a volunteer task force including Mary Ann Drescher, Monique Banas, Rick Sheridan, and Jane Nemke Earl.
- ▶ Program purpose and scope of services developed and refined with Attic Angel Community and Oakwood Village staff and independent living residents input. AgeBetter Connect is designed to help residents remain active and connected with personal interests and independent living activities in spite of mobility, cognitive, sensory, or other challenges.
- ▶ AgeBetter Connect is a personalized service available to independent living residents and offers non-medical assistance and companionship. Services include: personal organizing, errands, downsizing, special projects, etc. An Assistant is selected based on skillsets and interests that align with the resident's request and fees are based on one-hour minimum with sliding fee availability.
- ▶ AgeBetter contracts with Sustainable HR and Organic Payroll for human resource related services.
- ▶ AgeBetter Connect launched in June 2021; three residents signed on this year.
- ▶ Promotional activities completed to help Attic Angel Community and Oakwood Village residents learn about this new offering.



2021 Financials

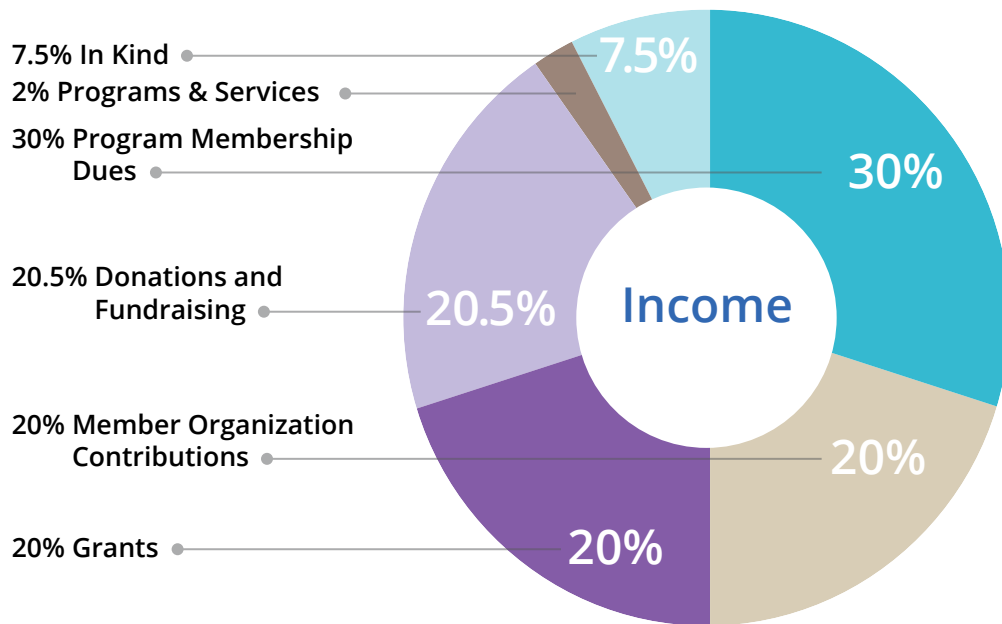
(Includes SAIL Program)

INCOME TOTAL
\$377,202

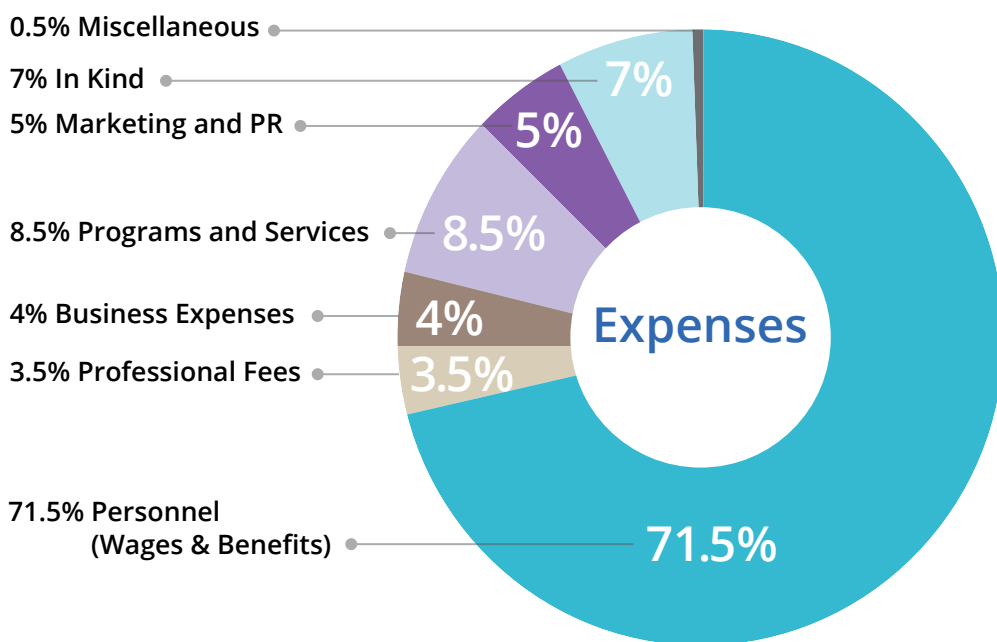
EXPENSE TOTAL
\$388,683

INCOME MINUS EXPENSE
TOTAL
-\$11,481

Income Breakdown By Category



Expense Breakdown By Category





"SAIL is an amazing resource that has provided me with many outreach opportunities, especially during COVID lock down. I recommend SAIL to everyone I know. SAIL certainly has very friendly personnel, educational and informative programs, social opportunities and most importantly, help is only a phone call away."

– SAIL Member



Message from the SAIL Program Director

This year we continued to embrace technology and all of the ways we could use it to gather during the pandemic. We even realized the positives of virtual meetings during the winter months to avoid being out in the snow and ice. Through the support of a grant from Oakwood Foundation we were able to purchase the Meeting Owl Pro for us to effectively host hybrid programs when the time came. During the times it was safe to do so, we invited members to gather outdoors for walks and socializing.

SAIL not only increased the number of programs offered this year, but worked to bring new types of programs to our members. Our Ethnic Diversity Committee played a major part in this through the development of our cultural meal program and video discussion groups. These programs included local presenters to provide educational opportunities for members to discover and learn more about other cultures living in the Madison area.

When Madison received support from AARP to become an Age Friendly city, SAIL joined the committee to speak on behalf of older adults. Throughout the year we took part in the planning process, a city-wide survey, and led focus groups with our members to hear their thoughts and concerns. SAIL will remain committed through this multi-year project.

One bittersweet moment of the year was the retirement of Volunteer Coordinator Peggy York in October. Peggy had worked with SAIL for seven years and helped our volunteer program expand tremendously in volunteer numbers and opportunities, offering great support to our members and our team. We remain grateful for all that Peggy achieved during her time with us, and look forward to her continued contributions as a volunteer for SAIL.

It's always my pleasure to welcome new members. 2021 brought us 45 new members. Through another whirlwind of a year, I am proud to look back and reflect on all the ways SAIL continues to thrive. I am grateful for all of our members, volunteers, and service providers for the various ways they support our Village.

Nicole Schaefer

SAIL Program Director

Ethnic Diversity Committee (EDC) Brings Education and Great Food to SAIL

At the recommendation of Membership Matters in 2019, the SAIL Council approved the formation of a new member team to consider ways to increase emphasis on supporting diversity, equity, and inclusion in SAIL membership. Since that time, the EDC has been hard at work bringing programming, education and awareness to the forefront. 2021 was a banner year for programming. SAIL was fortunate to have received a grant from Evjue Foundation to support the work of the committee this year.

The EDC sponsored two cultural meal opportunities and two virtual video discussions to introduce members and guests. They also encouraged attendance at SAIL's Book Club meeting with author Madeline Uranek to join their discussion on her book *How to Make a Life: A Tibetan Refugee Family and the Midwestern Woman They Adopted*.

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.

Cultural Meals were planned to introduce members to local minority-owned food purveyors, enjoy a delicious meal, and learn from the business owner about their culture and its food. Volunteers and staff members delivered meals to the homes of members who chose to participate and then enjoyed a virtual presentation about the meal and the business.

EDC member Tom Popp shared his thoughts on the importance of this new component of the committee's work. "It is



SAIL Member Dana Warren has chaired the Ethnic Diversity Committee since 2019.

sometimes very easy for older folks to become isolated and insulated from an increasingly diverse world, and to assume that how we do things is the right or even the only way. Encountering persons and cultures not like our own broadens and enriches us. The idea of the cultural meals was to expose ourselves to

others by sampling the food of other traditions, and thereby to widen our perspectives and increase our respect for folks whom we did not previously know. In sharing these meals we heard stories of Hmong refugees and Mexican migrants, Jamaican immigrants and Native Americans, all of whom live in our part of Wisconsin. We found we had fun with each other, too, and were eager to learn more. We loved the food and gained an appreciation for the places where it comes from and the special cultural ways of preparing it. Perhaps we grew in our own ability to play our role in creating an accepting, open, inclusive world. While sharing our own active independent lives, we saw how much richer we could be by being open to the worlds of others."

EDC Committee Member Kathleen Larson brought forward the idea of virtual video discussion programs. "The content of the selected videos was in keeping with our committee goal of providing learning experiences on the topic of diversity to our SAIL membership. The video presenters were generally well-known authors, activists, and innovators. All attendees viewed the presentations at the same time on Zoom. This created an environment similar to a classroom style of learning. All had the same exposure at the same time. The group discussion that

Ethnic Diversity Committee cont.

followed allowed for clarification, differences of opinion, consensus, suggestions, and hopefully even an attitude change." The response was positive and there are plans to offer more in the future.

Member Dana Warren chairs the EDC and is pleased with work to make diversity more visible for SAIL members, while she shares there is still work to be done. "SAIL members are reminded and encouraged to invite friends, acquaintances, neighbors and coworkers who are people of color who would benefit from a SAIL membership. I believe 'each one bring one' will help us to achieve our goals."



Mall Walking- Another new group activity encourages mixing movement with socializing. Becky Evans, Service Provider Stephanie Haggan, Barbara Hekel, Karen Goebel.



Stitch and Fix- This new offering assists members with small sewing and mending projects. Carol Karls, Bev Priefer, Beverly Resch.

I am proud to be one of the early members of SAIL. It has been a tremendous resource and I am happy to see it growing and developing new services.

– Alice Punwar, SAIL Member

New Member Group Inspired Writing and Sharing

Rhonda Mossner and her husband joined SAIL in September of 2020. In no time, Rhonda was embracing the foundation of the Village Model by volunteering to share her skills and interests with other members. As members remained primarily isolated at home, Rhonda virtually led a new member group to tap into creativity and encourage documenting life stories. The group met twice per month, receiving writing prompts at each gathering and then sharing their work, as they felt comfortable, and discussing the writing process. Rhonda shared, "The most rewarding experience of The Writing Project was the sharing of life stories. The bond the group of us made during our six-month adventure started as strangers and ended in friendship." As time passed, some group participants moved on and new participants joined the group and tried their hands at writing down the stories of their lives.

Thanks to Rhonda for the leadership, time, and energy she shared with her fellow members. "I hope I have left the group inspired and ready to write their life stories down for future generations to come."

"SAIL has been a blessing to me and I'm so glad I got connected to it. My family is too."
 - June Matoushek, SAIL Member

Social Media Draws Attention to SAIL



With engaging posts and consistently promoting SAIL events, Sharing Active Independent Lives—SAIL Madison showed another year of substantial growth in all categories from 2020-2021. Additionally, in 2021, SAIL's LinkedIn presence was a focus of attention for business related posts, which led to increased engagement with the organization. Member and *SAILing into the future!* presenter Mary Helen Conroy is the creative mind behind the social media presence that is an important part of the ongoing outreach initiatives helping to raise awareness about the organization and support for seniors throughout Dane County.

Reviewing the past 3 years

| | 2019 | 2020 | 2021 |
|------------|--------|--------|---------------|
| Post Reach | 15,391 | 42,541 | 79,692 |
| Engagement | 3868 | 9625 | 12,623 |
| Followers | 349 | 405 | 477 |
| Posts | 249 | 575 | 601 |



BY THE NUMBERS

14,600
 rise & shine
 morning check-ins

1317
 service
 requests

66 service
 providers

142
 SAIL events

13
 professional
 members

120
 stretch bands

523
 members
 on average

2629
 member
 contacts

409
 memberships
 on average

63
 volunteers

13
 committees
 and groups

1300
 volunteer hours

12 council
 members

12
 monthly
 newsletters*

2 national
 programs

*Our monthly newsletter is 8+ pages of information, tips, and resources shared with our members and the public.



SAIL Highlights

Education

- ▶ Cultural Meals
- ▶ Diversity Video Discussion Group
- ▶ Endings Matter: Creating a Visual Vigil for End of Life
- ▶ Healthy Living with Mild Cognitive Impairment
- ▶ Identity Theft: Protect and Prevent
- ▶ Life's a Daring Adventure – Carpe Vitam (offered nationally through The Village Network)
- ▶ Lighthouse Keeping
- ▶ Monthly Tech Tutoring
- ▶ Recycling in Dane County
- ▶ RSVP Triad program series
- ▶ SAFE at Home with SSM Home Health
- ▶ *SAILing into the future!* series
- ▶ Sharing the Highlights of Our Lives Visually
- ▶ Vaccine Questions Answered
- ▶ Village to Village Network Avoiding Scams program

Health and Wellness

- ▶ After Hours Program
- ▶ Annual Triad Statewide Conference — Presentation on The Village Model/ AgeBetter and SAIL
- ▶ Comprehensive Medication Reviews with Pharmacy Society of Wisconsin
- ▶ Dancing with Joni
- ▶ Falls Prevention — Only Leaves Should Fall with Safe Communities
- ▶ Mall Walking
- ▶ Nature Walks

Community Collaborations

- ▶ Age Friendly Madison
- ▶ 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
- ▶ RSVP Triad
- ▶ Safe Communities Falls Prevention
- ▶ University League
- ▶ UW-Madison School of Nursing – The Center for Aging Research and Education
- ▶ UW-Madison School of Pharmacy
- ▶ West Madison Rotary Club

90+ Morning Buns Surprise

Thanks to the creative idea and generosity of Charter SAIL Member Lois Curtiss, along with the efforts of SAIL volunteers and staff, members age 90 and better received a special treat on Thursday, December 9th. Each one received a surprise delivery of freshly baked Morning Buns generously donated by Clasen's European Bakery, with a special note from SAIL.



*Becky Evans, Becky Rogers,
Beth Campbell*



Volunteer Activities

Volunteers are the heart of SAIL and continued to support SAIL members while maintaining safe health guidelines and protocols.

- ▶ Be Prepared "Go Bag" delivery
- ▶ Birthday calls
- ▶ Container garden
- ▶ Ethnic meal delivery
- ▶ Grocery shopping and pick up
- ▶ Friendly Callers
- ▶ Mattress flipping
- ▶ Note writers
- ▶ Office support
- ▶ Prescription pick up
- ▶ Small yard work
- ▶ Special occasion cards (milestone birthdays, new home)
- ▶ Stitch and Fix
- ▶ Stretch Band Deliveries
- ▶ Sympathy and get well cards
- ▶ Thanksgiving meal delivery
- ▶ Volunteer driving
- ▶ Volunteer handyman



2021 began with nine dedicated volunteers donating their time to safely deliver stretch bands and suggested exercises to help keep members active while staying isolated.

What's in Your Mailbox?

Finding a personal note in your mailbox is a pleasant surprise in this time of digital communication. Whether celebrating a milestone, mourning the loss of a loved

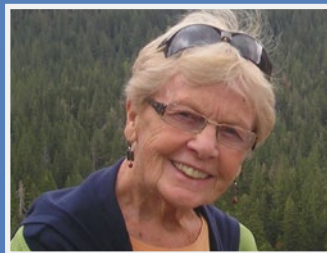


one, or recovering from an illness, SAIL members are likely to find a kind and thoughtful note in their mailbox. Member Charlotte Woolf has made it her mission to support members through all the ups and downs of life with a reminder that

SAIL is with them through it all. Thank you to Charlotte for all the time and effort she puts into sending comfort and joy through the mail.

Happy Birthday to Each and Every One

Each year for more than five years, Member Mary Ross has called each SAIL member with a cheery birthday greeting on their special day. Many have come to look



forward to this exchange that adds a genuine and personal connection to SAIL. Mary's willingness to volunteer her

time and share best wishes for the year ahead is genuinely appreciated.

Avoiding Scams

SAIL took part in a national program, offered through the Village to Village Network, about cyber scams, how to recognize a scam, and what to do if you get scammed. SAIL Program Director



Nicole Schaefer co-presented alongside Wendy Zenker with Arlington Neighborhood Village and representatives from the Federal Trade Commission and Consumer Financial

Protection Bureau. SAIL focused on the Pass It On mantra adopted by our village. SAIL strives to communicate consistently and promptly about scams, and share member stories to help others avoid being victims of a scam.



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

- ▶ Apple Picking at Eplegaard
- ▶ Book Club
- ▶ Craft Share
- ▶ Electronics Recycle
- ▶ Group Bike Rides
- ▶ Happy Hour
- ▶ Lunch Bunch
- ▶ Member Gathering in the Park
- ▶ Membership Matters
- ▶ Men’s Roundtable
- ▶ On Our Own gatherings
- ▶ Women’s Chat Group
- ▶ Writing Project



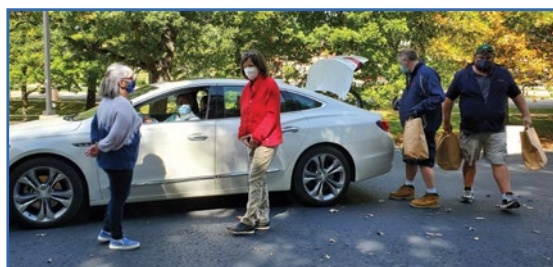
Apple Picking- Heidi Gottman, Dana Schreiber, Becky Rogers

Perks

- ▶ Two Men Without a Truck, Drive-thru Shredding



October Book Club with Madeline Uraneck



Shred Day- Peggy York, Edie Anderson, Ann Albert, Access help



2021 SAIL Program Financials

INCOME TOTAL
\$299,864

EXPENSE TOTAL
\$300,706

INCOME OVER EXPENSES
-\$841

ENDOWMENT FUND BALANCE*
\$85,734

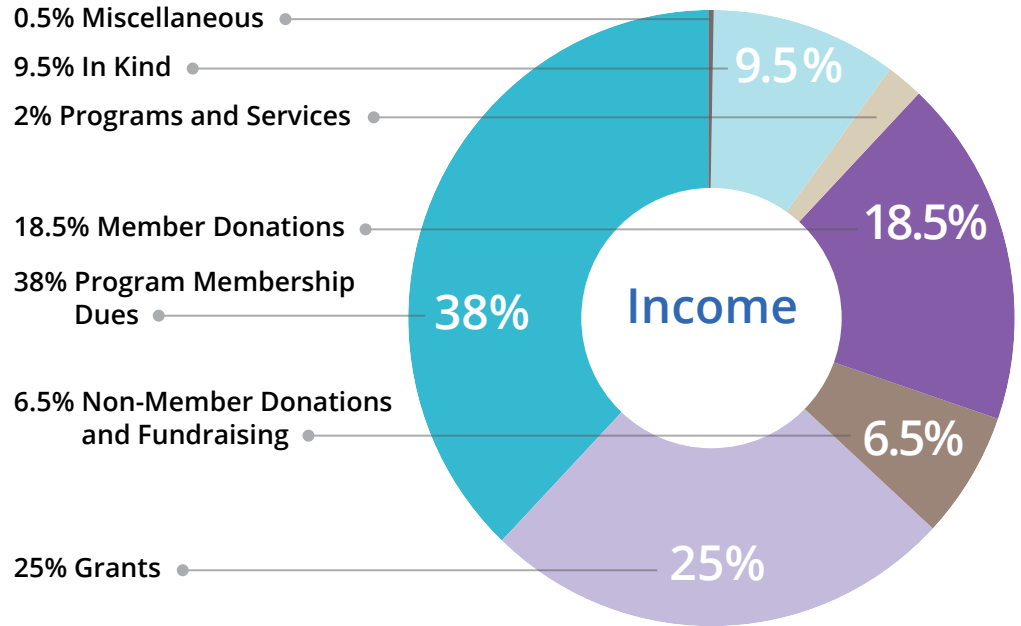
**SAIL's endowment fund is held at the Madison Community Foundation. Amount as of 12/31/2021.*

*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.*

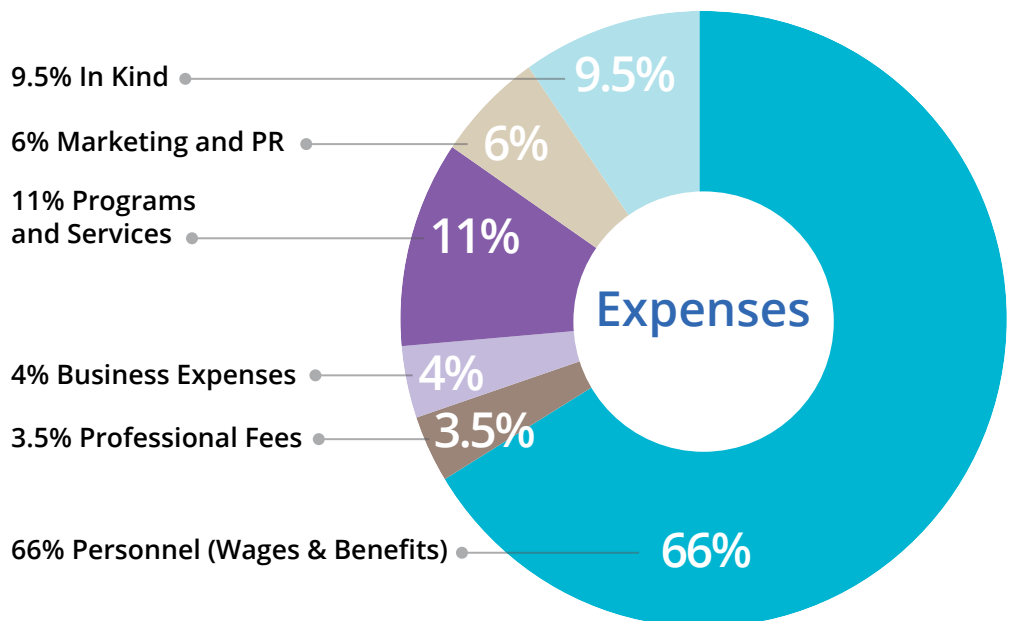
Grant Support Provided by: Madison Community Foundation, Oakwood Foundation, AARP Wisconsin, Dane County Nonprofit Assistance Fund, Evjue Foundation, and an anonymous local charitable foundation.

In-kind Support: 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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