



SAIL 2014 Annual Report:
Independence Through Connections

SAIL Supporting
Active
Independent
Lives



Charter member Sue Goldstein felt that SAIL offered the “pay it forward” services that could make a real difference in the lives of seniors.

Charter member Sue Goldstein first learned about SAIL at a community presentation in 2004. Listening to John Noreika, former CEO

at Oakwood Village, report the actual costs of building new retirement communities, the increasing population of older adults, and projected decreases in public funding, she was immediately convinced that SAIL was for her. Like many of us, she could see that, with a little help from people like her, seniors who wanted to stay at home would be able to. In addition, from her perspective as a Realtor, she felt it was doubly important that people not move from their homes as the result of a crisis. She had personally seen the losses that arise when people move in a panic: the loss of prized, meaningful items; lower gains from the sale; and higher moving costs. In addition, it was never clear to her whether the new apartment or condo would bring the comfort and security that the owner had enjoyed in their own home.

Sue felt that SAIL offered the “pay it forward” services that could make a real difference in the lives of seniors. She became a volunteer driver in 2005 and a member of the SAIL Connections Committee, a group that helps plan programs, promote member interest groups and activities, and provide

feedback to the SAIL leadership on proposed changes or new services. She’s provided valuable advice to members about moving and what kinds of improvements help make a difference to buyers. At SAIL’s request, she’s even taught a class for fellow members!

Sue never dreamed that nine years later, in 2014, she herself would have a major health event and would need some of those same volunteer services she performed for her fellow members. Helping others had always come easy for Sue—receiving help was a big step for her, but one she could not deny. Her experience on the receiving end has helped Sue to really understand what it’s like for fellow members—people once completely independent and in good health, whose illness or disability prevents them from doing activities they used to do effortlessly. “Having a serious illness is a life-changer. It brought home the reality of how important my family is, my friends and colleagues, and the many resources and friends I have at SAIL. The saying ‘it takes a village’ couldn’t be closer to the truth!”

Thank you to the SAIL volunteers who are making this kind of difference in the lives of seniors every day!



OAKWOOD
OAKWOOD LUTHERAN
SENIOR MINISTRIES

SAIL Governance and Leadership

SAIL is a non-profit program founded in 2005 by the Madison Area Continuing Care Consortium, Inc. (MACCC). MACCC is comprised of two organizations: Attic Angel Association and Oakwood Village. These organizations oversee SAIL’s annual budget and strategic plan while providing financial and in-kind support.

The MACCC board of directors includes: Rick Bova (Oakwood Village CEO), Mary Ann Drescher (Attic Angel Association President), Barbara Gessner, Susan Kalin, Gerald Kelm, and Linda Wise.

SAIL Operating Council

The SAIL Operating Council was created by MACCC in 2010 to oversee the day-to-day operations and increase member involvement and leadership of SAIL. Council members include: Christine Beatty, Carol Brown, Mary Ann Drescher, Barbara Gessner, Don Haasl, Pat Kallsen, Tom Popp (President), Fred Ross, and John Schmidt.

In addition to meeting each month, council members volunteer on one or more of the following work teams resulting from the 2013 Strategic Plan: Membership Growth and Marketing, Financial Resources Team, and the Member Engagement Team. Seven of the nine individuals serving on Council are SAIL members.

SAIL thanks former Council members Mike Flint and Chuck Hoornstra for their past valuable service to the SAIL Council.

Letter from the Executive Director



“On course” is the most accurate way to describe 2014 at SAIL. Encouraged by steady membership growth and a positive response to our investment in our volunteer and members-helping-members philosophy in 2013, we set out to accomplish our strategic-plan goal of selling SAIL S.O.S. This was no small decision. SAIL S.O.S. revenue was half our annual income, and our service footprint had grown to more than 900

older adults on any given day of the year. We had become well known and respected in the personal emergency response business. While a hard decision, it freed up our staff and resources to support members, improve our vendor program, and really helped us become a true membership organization in which members actively lead and operate our organization. This transition included re-organizing our staff roles and operations, and readying SAIL to develop a plan to replace SAIL S.O.S. income consumed the first six to eight months of 2014. Our plan includes increasing fees by growing membership and adding new products, developing a planned giving program and endowment, pursuing grant opportunities to expand community awareness and geographic coverage, and improving efficiencies internally by enlisting volunteer support to replace staff hours and avoid hiring staff as we grow.

Ann Albert, Executive Director

Volunteers provide valuable services to our members and to our organization. Over 78 volunteers helped members get to doctor appointments, grocery stores, and events. They also helped flip mattresses, complete light handyman tasks, set up phones and computer equipment, create holiday letters complete with photos, share SAIL information at community fairs, advise fellow members about real-estate values, offer support and advocacy at appointments, generate reports and run statistical data, lead teams and committees, offer social and educational programs, and more!

The members-helping-members focus at SAIL is definitely gaining momentum and is projected to grow significantly now that SAIL has invested in creating a full-time Volunteer and Outreach position.

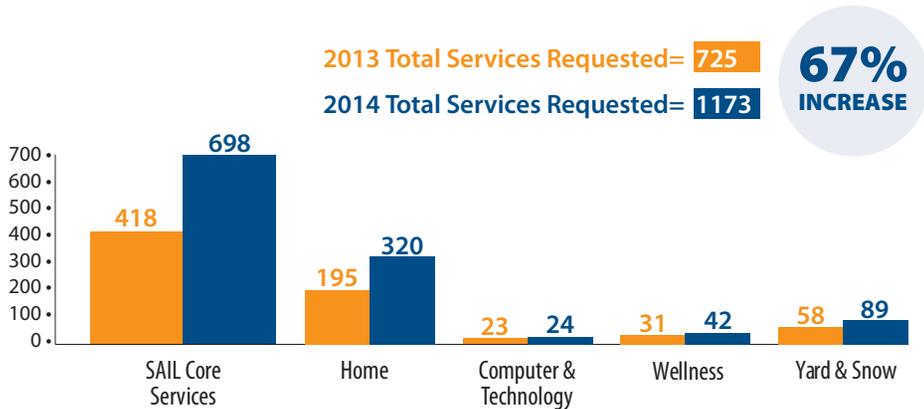
2014 Highlights

- Another record set with 87 new memberships!
- An overall 28% increase in volunteers with neighborhood meetings established and increased member engagement.
- SAIL donor names SAIL as a beneficiary of a \$20,000 Madison Community Foundation charitable gift annuity resulting in 2015 SAIL Endowment.
- Accepted as a Thrivent “Financial Donor Choice” Recipient.
- A new benefit was introduced for members: Notary Services.
- A new and popular Monthly Birthday Club was created by members Dorothy Batt and Sue Goldstein.
- University of Wisconsin School of Pharmacy’s POPs program, in collaboration with Oakwood Village and SAIL, celebrated its fifth anniversary. This program matches graduate pharmacy students with SAIL members to provide education about medications and healthy aging and to provide students with real life experience.
- Increased the number of SAIL members on the Council from six to nine. The SAIL Operating Council now has nine SAIL members, one MACCC representative, and two community representatives.
- Eight-year volunteer transportation coordinator, Betty Scott, received a Volunteer of the Year Award from the United Way of Dane County.
- Promotion of Charlene Malueg from Administrative Assistant to a new full-time Volunteer Services and Outreach position.
- Creation of the Member Services Manager position, a dedicated position for overseeing SAIL’s Pre-Screened Vendor program with Laura Adell accepting the role of Member Services Manager.

SAIL brings together a community of caring, talented people who help one another to live secure, engaged lives on their own terms as they age. With your support, we will continue to meet the needs of our growing senior population. Thank you for helping people stay in the place that’s most familiar to them—the place they call home.

Providing Services

SAIL assists members in finding trustworthy, high-quality service providers by recruiting and vetting providers, coordinating services, and following up with members to ensure their satisfaction.



*SAIL Core Services are those included in Membership and performed by staff or volunteers. These include: Rise & Shine Daily Check-in, Technology Assistance, House Checks, Comprehensive Medication Reviews, Rides, Mattress Flips, Other Volunteer Services, Information & Referral, New Member Visits, Shredding, Notary Services & more.

Access to our pre-screened service providers continues to be the most widely used benefit offered by SAIL with over 70% of our members requesting services throughout the year. Members can rest assured we are carefully vetting providers by completing reference checks, background checks, personal interviews, and formally orienting them once accepted as a SAIL provider. Seniors continue to be targets for well-known scams such as the “grandparents scam,” identity theft, international lottery fraud, “storm chaser” contractors, phishing and work-at-home operations. SAIL staff field calls from members who receive suspicious calls that are quite upsetting and sometimes scary to them. It’s understandable why having access to pre-screened providers is of such importance to our members! Plus, most of our providers offer a small discount.



SAIL Offers Educational & Cultural Programs for Members/Public

More than 700 people attended SAIL's 14 programs, six of which were presented by SAIL members:

- Power of Color
- Parkinson's Disease Education and New Research
- High Blood Pressure
- John Peterson Fiddle Show
- Living Well Class
- Winter Birds of Wisconsin
- Sue's Sage Advice for Anticipating a Move
- Stepping On: Falls Prevention Class
- Internet Security
- Dollars and Donuts
- Mind Over Bladder
- Play, Play, Play for Pet Owners
- SAIL 101
- Is Your Estate in Order?

SAIL Organizes Special Member Events

10% increase in participation in 2014 with an average of 100 members and their guests attending each of SAIL's quarterly events:

- Winter luncheon with author and *Wisconsin State Journal* columnist, Doug Moe
- Spring luncheon and annual meeting with Carol Koby, host of her “All About Living” radio talk show on AM 1550 WHIT.
- Cornucopia Vendor Fair, our very first dedicated event featuring our pre-screened service providers organized by vendor volunteers and staff member, Laura Adell.
- Getting out and about is important to SAIL members. Fred Ross led two bike rides—a new offering for members! And we enjoyed bus trips to the Orchid Garden Centre and Nursery, the Madison Senior Center for holiday tea, and the Madison Public Library.

SAIL Offers PERKS for Members

- 3 Mattress Flips – SAIL volunteers replaced staff in flipping mattresses for members.
- Clean Sweep – SAIL volunteers replaced staff and assisted members in delivering their toxic trash to the Dane County Recycling Center.
- Computer pick-up day.
- Holiday Letter – SAIL staff and volunteers helped members create their personal annual holiday letter.
- Shredding – SAIL sponsored a free shredding day in addition to maintaining a shredding receptacle at the SAIL office for members to use.

caring



giving



sharing



helping

Collaborating to Build Our Community

Vendors: SAIL added 15 new vendors in 2014.

Health Fairs and screenings: SAIL provided information at a number of community events including the MATC Community Resource Fair, the UW Institute on Aging's "Colloquium on Aging," and the Triad Crime Prevention and Safety Fair.

National organization: SAIL, which was the second organization of its kind in the country, was represented at the 2014 national conference of the Village to Village Network.

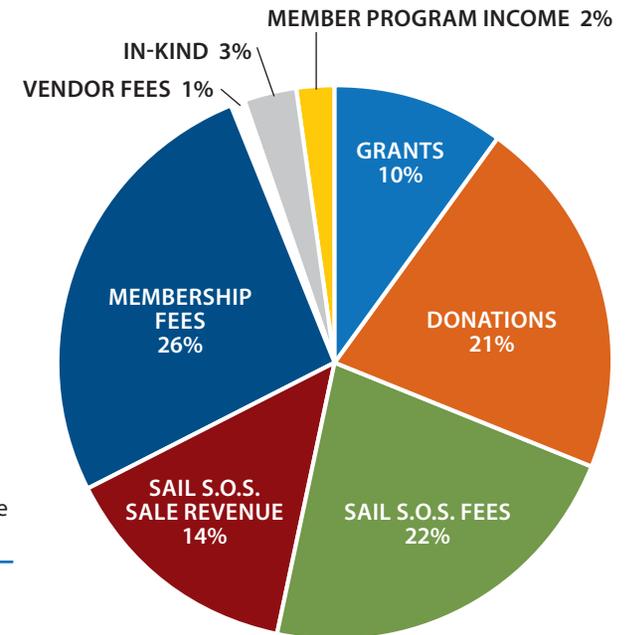
Co-sponsored programs: SAIL co-sponsored programs with local organizations including: Stepping On, Living Well, Alzheimer's Disease – Research and Updates, and Parkinson's Disease Education and Updates.

SAIL staff and volunteers participate in the following community groups: Dane County Transition Care Coalition • Coalition of Wisconsin Aging Groups • Dane County Continuity of Care • Safe Communities Falls Prevention Task Force • Elderly Services Network • RSVP Triad

SAIL Revenues 2014

- Grants \$33,000.00
- Donations \$70,669.00
- SAIL S.O.S. Fees \$71,768.00
- SAIL S.O.S. -Sale Revenue \$47,673.00
- Membership Fees \$86,850.00
- Vendor Fees \$2,625.00
- In-Kind \$11,058.00
- Member Program Income \$6,455.00

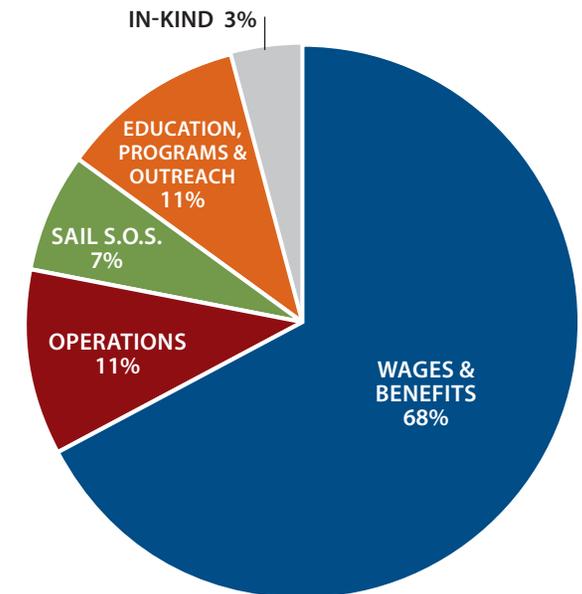
Total- \$330,098.00



SAIL Expenses 2014

- Wages & Benefits \$195,022.00
- Operations \$32,499.00
- SAIL S.O.S. \$19,204.00
- Education, Programs & Outreach \$30,985.00
- In-Kind \$11,057.00

Total- \$288,767.00



Our Thanks

“...a strong organization that is prepared to meet the growing needs of older adults and to assure that those with low incomes have the support needed to live healthy and safe lives today...”

We all know there are hundreds, if not thousands, of deserving organizations seeking donor support here in Madison and nationally. SAIL's donor program is relatively new, and we are proud to see a steady growth in donor support. Building a strong organization that is prepared to meet the growing needs of older adults and to assure that those with low incomes have the support needed to live healthy and safe lives today, is a formidable goal and one that is thankfully embraced by an increasing number of SAIL members, community supporters, businesses, and local foundations.

Participation in SAIL's annual appeal is one way to gauge the level of our members' satisfaction and support—this year we saw a 46% increase in the number of member donors!

The overall percentage of donations to SAIL increased from 13% in 2013 to 21% in 2014, and this is above and beyond the generous \$20,000 charitable gift annuity made at Madison Community Foundation naming SAIL as the beneficiary. Planned giving is a wonderful way to help SAIL sustain and position itself to continue growing new services that meet future needs. Establishing our SAIL Endowment Fund in January 2015 will provide yet another avenue for donors to help assure our sustainability.

A Huge Thank You

for the in-kind support from Attorneys John Mitby of Hurley, Burish and Stanton S.C. and Melissa Warner of Axley. They continue to provide on-going legal advice throughout the year and provided counsel and technical support leading to the successful sale of SAIL S.O.S. to Life Assist USA.



Major Donors

Attic Angel Association
Oakwood Lutheran
Senior Ministries
Oakwood Foundation

In-Kind Donors

Oakwood Lutheran Senior
Ministries—*for in-kind office
space and technical support*
Attorney John Mitby
Attorney Melissa Warner

Individual Supporters

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It Takes A Village

SAIL is a member of a growing network of community organizations throughout the nation called the Village to Village Network. The "village movement" began with Boston's Beacon Hill Village and now includes over 190 nonprofit membership organizations aimed at helping people remain healthy, safe, and connected while they age in the homes they love. SAIL is considered one of the earliest villages and assisted several other communities to create their own villages throughout the past nine years. Today, SAIL and other villages exchange ideas and information on a daily basis through this well-established network. Annual conferences have been a terrific way to meet fellow "villagers." Feel free to visit the network's link on the SAIL website and learn more!



*To enable members over 55 to live secure,
engaged lives on their own terms.*

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