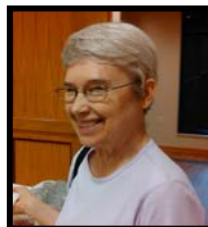


2013 ANNUAL REPORT



**TO ENABLE MEMBERS OVER 55 TO LIVE
SECURE, ENGAGED LIVES
ON THEIR OWN TERMS.**

FROM THE DIRECTOR



Last year in our first-ever *Annual Report*, I made the point that SAIL simply couldn't survive without the time and energy our members devote to this organization and to each other. While I didn't know it at the time, that basic idea would be a driving force through 2014, when our Staff and the Operating Council did some extensive and exciting long-term planning and organizational strategy work. Having taken an honest look at the work we do, the services we provide, and the resources and energy we expend, we have made some important decisions regarding the way SAIL operates. **In 2013, we saw record-breaking membership growth for the second year in a row, a reminder that SAIL has the potential to make an enormous difference in the lives of Dane County's aging population; to make those lives safer, more engaged, and more fulfilling.** And as SAIL grows, welcoming more members, the staff and leadership have set a course to providing a platform that encourages even more engagement, partnership, and community. In these pages, and through the next few months, we'll be sharing more about this new vision and direction. SAIL's future looks brighter than ever before, and we look forward to meeting it with energy, excitement—and YOU!

A handwritten signature in cursive script that reads "Ann Albert".

Ann Albert, Executive Director

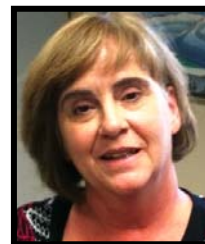
MEET THE STAFF



Laura Adell
Accounts Manager
and SAIL S.O.S.
Coordinator



Charlene Malueg
Administrative
Assistant



Peggy York
Member Services
Coordinator

FROM THE COUNCIL PRESIDENT



If you've met me or read anything I've written about SAIL, you'll likely know how strongly I feel about the wonderful benefits SAIL offers its members. You'll also likely know that one of my greatest hopes for SAIL has always been that it would build on its strengths of engagement and service, becoming a stronger voice in the greater community, guiding its members and influencing Dane County as to how to help individuals age gracefully while also adapting to a society that gets older every year. In 2013, the SAIL Operating Council worked with some active members and the SAIL staff to analyze the way we operate, what works, and what needs tweaking. **I am pleased to say that SAIL continues to be served by an excellent staff and a wonderful collection of smart, wise volunteers who offer insight and reflection into what SAIL is, a vision of what it might be, and how we might move closer to that reality.** Due to the strategic planning and organizational analysis this group did in the last quarter of 2013, there will be changes in the coming year that result in a more flexible and pro-active operational style for the organization and set the stage for a larger, even more active and engaged membership. This will give us the ability to **create a stronger network, both within our membership and in the greater Dane County community.** I look forward to working with all of you, as together we watch SAIL grow and flourish.

A handwritten signature in black ink that reads "Tom Popp". The signature is written in a cursive, slightly slanted style.

Tom Popp, Council President



A special thank you for the in-kind support from Attorneys John Mitby and Melissa Warner of Axley Brynelson, LLP for their guidance and support throughout the year.

SAIL GOVERNANCE AND LEADERSHIP

Madison Area Continuing Care Consortium, Inc. (MACCC)

SAIL was founded in 2005 by MACCC, whose members included Attic Angel Association, Oakwood Lutheran Senior Ministries, Agrace HospiceCare, and Home Health United. Each organization provided representation on the MACCC board. These members were Rick Bourne, MaryAnn Drescher, Barbara Gessner, Susan Kalin, Gerald Kelm, Lynne Meyers, Linda Wise, and Joe Xanthopoulos. Due to changes in strategic direction, on August 1, 2013, Home Health United and Agrace HospiceCare ended their membership to MACCC. Our sincere thanks to both organizations for their past support and leadership! And, our deepest gratitude to Attic Angel Association and Oakwood Lutheran Senior Ministries for their steadfast, generous commitment to SAIL!

COUNCIL MEMBERS

Created by MACCC in August 2010, this group oversees the day-to-day operations of SAIL and its membership development. Pictured left to right are the 2013 SAIL council members: Christine Beatty, Carol Brown, MaryAnn Drescher, (second row) Mike Flint, Barbara Gessner, Pat Kallsen, (bottom row) Tom Popp, Fred Ross, and John Schmidt.



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 135 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!



COMMUNITY PARTNERSHIPS

Networking within our community is important, too. Here in Dane County, SAIL is an active member of the following organizations:

- Area Agency on Aging Caregiver Alliance
- Community Care Transition Coalition
- Coalition of Wisconsin Aging Groups
- Dane County Continuity of Care
- Dane County Falls Prevention Task Force
- Elderly Services Network



We can’t say enough good things about SAIL! With our children spread all over the country, it’s so nice to have the feeling of a safety net when and if we need it. And the staff has been so attentive whenever we’ve called, **it’s like having a best friend at the ready!**” Alan and Linda Knox, SAIL Members

SAIL HIGHLIGHTS

Our members remain among the most vibrant, educated, and caring individuals in our community! Dwayne Rohweder authored the SAIL Primer for Living Independently, a helpful resource included in all new-member folders and available to the public on our website. Nancy Winton completed the Dane County Advocacy program sponsored by RSVP. Ted Goodfriend, MD, provided education on blood pressure and older adults, and Shelly Peterman Schwarz helped teach us tips on traveling as we age, and the list goes on!

We distributed the Senior Guide by the Department of Agriculture, Trade, and Consumer Protection and alerted members of four major scams occurring in 2013. In addition, **we offered two brand new “perks” to members:**

- **Shredding**—In alignment with the increased risks of identity theft and targeted senior scams, we added a valuable benefit for members they can enjoy throughout the year—free shredding!
- **Holiday Letters**—An opportunity to get help creating a personalized holiday letter. So often members are on the receiving end of the traditional “holiday letter” featuring pictures and updates from loved ones. SAIL helped members who don’t have the needed skills, or who lack access to computers or scanners, to create their own letter to send to family and friends!

SAIL S.O.S.: Laura Adell, with some additional help from SAIL co-workers, installed 182 new SAIL S.O.S. units and replaced over 900 emergency pendants. **The S.O.S. program helped 649 individuals receive 24-hour, 7-day per week emergency monitoring assistance in Dane County with just a push of a button.**

“I remember when I first joined and think about how much you have helped me through the years. You are all so nice, too. There were so many things to do here at my home that I wouldn’t have known about. **I really appreciate you.”** Eleanor Chipman, SAIL Member

SAIL ACCOMPLISHMENTS

SAIL's **top priority** is to help members live healthy, purposeful, and engaged lives. Our programs, our paid and volunteer services, and our social events kept this promise alive in 2013. We welcomed a **record number of memberships**—a total of 77 households or 109 members—mostly referred by current SAIL members.

We **provided direct service to over 900 older adults**—a combination of some 530 SAIL S.O.S. subscribers and almost 400 SAIL members! Add to that the hundreds of other seniors and their families who received assistance with referrals to community resources and education through our monthly educational programs!

Our volunteer program expanded with new drivers, program leaders, and office volunteers.

Changes in our external environment and within SAIL in 2013 prompted us to embark on a **strategic planning process**. A community volunteer and retired CUNA Mutual executive, Don Haasl, led the process, which included SAIL Council Members, volunteers, SAIL family members, and staff. We analyzed SAIL's growing membership, changes in technology, use of staff resources, and the anticipated needs of our aging SAIL members. This analysis supported a re-visit and focus back to our original design—**a stronger member focus aimed at nurturing member engagement, members helping SAIL operations, members contributing to the future of SAIL**. A key to healthy aging is purposeful living—our members' lives have purpose, and we need to cultivate and nurture ways for all members **to share with one another!**

“Volunteering for SAIL is easy, fun, and convenient. The friendly staff have my tasks ready to perform with ease. **What a neat way to get out of the house and see how hard SAIL works at keeping other members happy and safe.**” Rita Reffner, SAIL Member and Office Volunteer.

GIVING AND RECEIVING

SAIL hosted fifteen wellness lectures, provided five member perks (including mattress flips, computer recycling, shredding day, clean sweep, and holiday letter help), and welcomed ten new SAIL vendors.



I joined SAIL because I knew I would probably need their help someday, I just didn't realize that it would be so soon. **I was so impressed with how much SAIL had to offer me.** Carol Briscoe, SAIL Member.

SPENDING TIME WITH FRIENDS



Members traveled on five Explorers bus trips, attended monthly member groups, educational sessions provided by SAIL members and community partners, and attended our first Annual meeting.



THE HEART OF SAIL—VOLUNTEERS

In 2013, SAIL volunteers provided an array of volunteer support including administrative assistance, event and outreach help, volunteer transportation, leadership, participation in strategic planning groups, member visits, handyman services, and much more. We sponsored our first volunteer recognition events in 2013. In February, a volunteer driver luncheon program and in August, a volunteer event with live music. **Volunteers are the heart of SAIL—and much appreciated!**

Nick Adell	Linda Gorman	Fred Ross
Anna Albert	Sue Goldstein	Mary Ross
Mike Albert	Linda Gorman	Roland Rueckert
Stephanie Albert	Don Haasl	Jan Sampson
Dorothy Batt	Jack Hafner	Lawrence Schaefer
Jim Batt	Joan Hafner	John Schmidt
Christine Beatty	Herb Hellen	Jan Schur
Bette Barnes	Pat Kallsen	Betty Scott
Shirley Bergen	Howard Kanetzke	Johanna Shea
Mary Bjorklund	Kristina Klehr	Leah Shea
Ruth Bogart	Lu Kness	Winnie Shea
Dorothy Bollant	Kayla Malueg	Megon Siegert
Joan Box	Deb McClintock	Betty Stern
Carol Brown	Jake McClintock	Lyn Stewart
Martha Christensen	Faith Miracle	Judy Taylor
Lois Curtiss	Barbara Nodine	Cliff Voegeli
Betty Dovenbarger	Jeannine Nusbaum	Bob Weber
MaryAnn Drescher	Elayne Orr	Nancy Winton
Bobbi Dumas	Noelle Penshorn	
Bill Ehlert	Donna Ploc	
Robert Firkus	John Porto	
Mike Flint	Tom Popp	
Mary Fulton	Alice Punwar	
Donna Fullerton	Frances Rademaekers	
Janice Gary	Rita Reffner	
Heather Geier	Phyllis Reisdorf	
Barb Gessner	Jan Rom	
Johanna Ghei		

We tried very hard to include all of the volunteers that assisted SAIL this past year. Please accept our apology if we inadvertently missed you.

IN MY OWN WORDS BY JOAN BOX, SAIL MEMBER

Over 80 years, living alone and without family nearby, I joined SAIL to gain assurance that I could reach help in case of need. Immediately, SAIL offered more—advice about the vendors I needed for house maintenance, care for the house and indoor plants when I was out of town, help with the computer, and rides to appointments. And, of course, it was SAIL I called when one morning I fainted and came to myself bleeding on the floor.



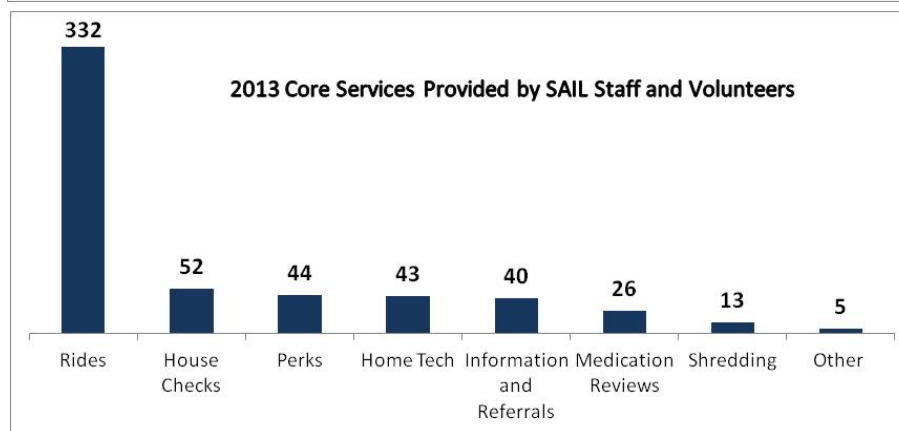
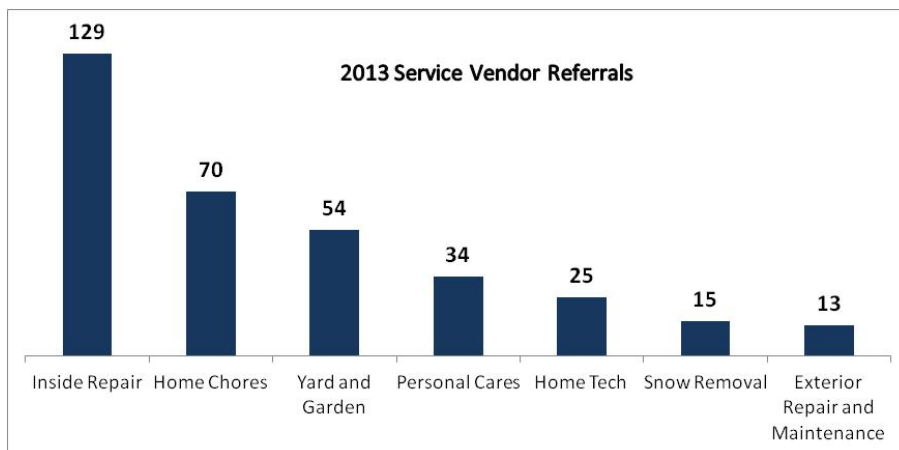
By this time, I had met other SAIL members. I had joined the SAIL book club and enjoyed the company of members meeting every month to discuss a new book. Now I lead the group.

Then, SAIL members from church befriended me, took me to coffee, to lunch, and introduced me to SAIL meetings of the Connections Group. It was there that I learned more about the wider interests of SAIL and met the wonderful friendly group as they shared their ideas and ambitions for SAIL and plans for the future. This was fun.

When members meet we are all involved together, in a meaningful project. I feel I belong. It makes me proud to know that I have a part to play, something to contribute. Now I must learn how to do more so that along with SAIL, we may help others cope and make good their own way of aging. Together we can make a difference for everyone.

MEMBER SERVICES

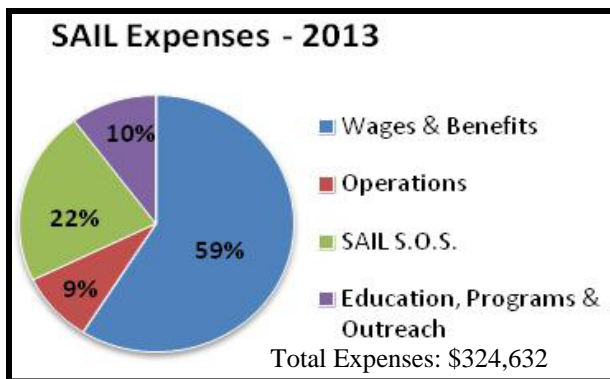
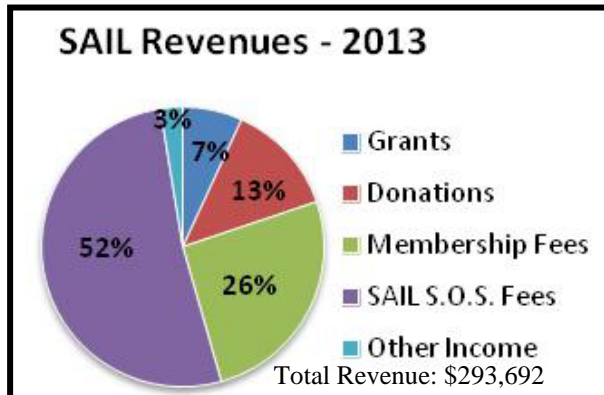
In 2013, **70 percent of members utilized SAIL services.** This does not include attendance at SAIL programs. **SAIL staff responded to nearly 900 service requests by members in 2013!** Members asked for assistance with home repairs, chores, and referrals to various aging service organizations or businesses. **We added ten new service providers** in areas of care management, carpentry/handyman service, housecleaning, and personal bill-paying and organization. Many members have established ongoing service with handymen and gardeners—**often times becoming good friends, too.**



This does not include more than 14,800 Rise and Shine daily check-ins and more than a dozen personal follow-up visits.

FINANCES

SAIL continues to operate on a slim margin while ensuring an efficient and high-quality operation throughout the year. This year's financial statements reflect an unanticipated tax liability for SAIL S.O.S. services covering a span of four years, and also a delay in revenue from



2013 donor commitments. Staffing expenses and SAIL S.O.S. equipment expenses exceed budget due to unexpected equipment replacement costs that occurred twice in 2013.

Fortunately, because of committed donations that arrived in January, our budget was balanced in January 2014.

Two revenue streams are depicted on the 2013 pie chart as “other” income—this

is a combination of event income and charges relating to added member services. While this only accounts for 3% of our total income, they are a positive start for future sustainability and increased member service. Events are an excellent way to familiarize the community with SAIL and can lead to memberships and donor support. Providing members additional core benefits is a way to improve member satisfaction and meet their changing needs. Fees received for these services, e.g., additional house checks or visits for Rise & Shine, help us increase revenue to offset staffing expenses. SAIL's operational costs which mainly include: staff wages, benefits and travel, office expenses and equipment, and marketing and advertising comprise a total of approximately 70% of our overall budget.

MEMBER DONORS

This year we received our largest individual donation ever—\$10,000 from an anonymous SAIL member! This gift, along with the generous support from all donors has been extremely inspiring! **In addition to helping us continue evolving our services and volunteerism, gifts to SAIL enable us to provide service to older adults who have low incomes.** We increased the number of people receiving support by 30% in 2013. The community-at-large has benefited by SAIL-sponsored educational programs and community referrals made throughout the year.

Belzer, Marion	Matkom, Tony and Elizabeth
Benevenga, Norlin	Miracle, Faith
Bicknell, Frances	Mulligan, Elinor
Box, Joan	Murphy, Joan
Bringe, Allan and Joyce	Orr, Elayne
Brown, Carol	Popp, Tom
Christensen, Martha	Punwar, Jalam and Alice
Critton, Mary Ellen	Ramberg, Kathryn
Curtiss, Lois	Rebholz, Nancy
Esch-Theobald, Jean	Riggert, Jeanette
Epsenshade, Jean	Rom, Jan
Fox, Donna	Ross, Frederic and Mary
Gessner, Barbara	Rueckert, Roland and Ruth
Ghei, Johanna	Russell, Joyce
Gottman, Heidi	Schaller, Rick and Doris
Gurda, Anita	Schmidt, John and Marilyn
Harriman, John and Sue	Schnos, Maria
Harvey, Susan	Schultz, Lorene
Hellen, Herb	Scott, Betty
Horton, William and Carolyn	Scott, Pauline
Hutchison, Kay	Shaw, Barbara
Jennerjohn, Joan	Shea, Winnie
Kallsen, Jim and Pat	Steeves, Richard and Elyane
Kanetzke, Howard and Lucetta	Sweet, Jean
Knox, Alan and Linda	Thurrell, Mary
Kringle, Irene	Walker, Dorothea
Krueger, Patricia	Weiss, Lee
Marion, Bruce and Ruth	Winter, Barb
Martin, Charlotte	Winton, Nancy
	Wolf, Marilyn

INDIVIDUAL AND CORPORATE DONORS

Individual Supporters

Albert, Ann
Avery, Charlene M.
Beatty, Christine
Drescher, Mary Ann
Flint, John
Haasl, Donald
James, Margaret
Landsman, Abe
Lotridge, Jean
Lukazewski, Alan
Pollock, Mary “Diane”
Porto, John
Priegel, Nancy
Russell, Jay and Dana
Ryden, Sue
Schoen, Lexie
Schwab Charitable Fund
Stein, Charlotte
United Way of Dane County
(Anonymous)
Voegeli, Clifford
Wiegman, Ella
Xanthopoulos, Joe

Corporate Supporters

Attic Angel Association
Boustead, Barbara
BrightStar Health Care
Buit Mobility Solutions, LLC
Creative Ironworks
Designers for Independent Living
H & H Industries
Home Health United, Inc.
Home Instead Senior Care
Agrace HospiceCare Foundation
Kwik Kill Pest Control
Matejka, Claire
Oakwood Lutheran Senior
Ministries, Inc.
Porto, John
Rounds TLC LLC
Skupien, Larry
Strander, Angie
Tony Trapp Remodeling & Repairs, LLC
TZ of Madison, Inc.
Wall, Shannon

We tried very hard to include all of the donors that supported SAIL this past year. Please accept our apology if we inadvertently missed you.



“I’m very pleased that my parents signed up. **I have a lot of peace of mind knowing things will get done, with one phone call to SAIL when I’m not around to help.**” Jeff Sweet, with mother and SAIL member, Jean Sweet.

SAIL MEMBER BENEFITS

Each and every one of the SAIL member benefits began because of member requests. Listening to member's suggestions and involving them in creating programs are keys to our success. Members receive the following benefits.

- Access to pre-screened service providers
- Invitations to social and educational events
- Information and referrals
- Discounts on:
 - Personal emergency systems
 - MSCR programs
 - Home Health United Medical Equipment
- One number to call
- Monthly newsletter
- Volunteer opportunities
- Rise and Shine daily check-in
- In-home technical help
- Transportation
- Comprehensive medication reviews
- House checks while you are away
- Shredding at SAIL



Sue Goldstein, SAIL volunteer driver, takes a call request from Betty Scott, SAIL transportation coordinator.



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