



MISSION AND VISION

MISSION

PrimeLife Enrichment provides programs and services that promote independence, optimal wellness and socialization for those aged 50 and beyond.

VISION

PLE is recognized in Central Indiana as a pioneering force in the pursuit of empowered, independent living for older adults.



CORE VALUES

STEWARDSHIP

We believe we must responsibly use our resources to provide services that are effective, accessible and affordable.

GRATITUDE

We believe it is a privilege to be entrusted by our community to serve those who created the community.

INNOVATION

We believe in continuously striving to develop creative ways to meet evolving needs.

RESPECT

We believe in the intrinsic value of every individual and honor the contributions made by each.

OPPORTUNITY

We believe that the senior years should be a time of continued value and purpose, growing wisdom and creative expression.



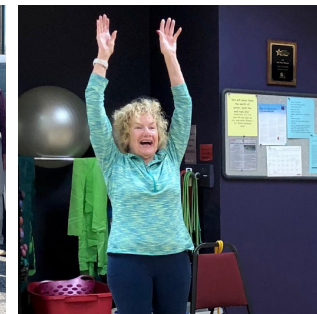
PRIMELIFE ENRICHMENT ANNUAL REPORT 2018-2020



TRANSPORTATION



FITNESS



ACTIVITIES



LETTER FROM THE EXECUTIVE DIRECTOR



Gary Wagner

Dear Members, Clients and Sponsors:

I first want to thank our entire Board of Directors for their show of confidence in appointing me as Executive Director. When I first signed on as PrimeLife Enrichment's development officer in 2018, I certainly didn't anticipate that two years later I would become its interim director and that within a few months I would be in the leadership position I'm in now. Along the way, there were several other things I didn't anticipate, including Linda Handy's retirement last November. I truly enjoyed being part of Linda's management team and wish her and her husband Ken the very best. I don't believe any of us anticipated just how devastating the pandemic would be. When we first closed our doors in March of last year, little did we know that it would be over a year before we could resume our "new normal" activities. Fortunately, we weathered the COVID crisis as well or better than many nonprofits in our community, thanks in large part to our many loyal members and their continued support for so many dark months.

Last but not least, special thanks to our entire staff for everything they did to help our members stay connected to PrimeLife throughout the pandemic. I look forward to working with our Board, our leadership team, and our tremendous staff. I know we still have many challenges ahead of us, but I am confident that working together, we will keep PrimeLife Enrichment moving forward as we chart a course to build an even better organization to serve our seniors in need throughout Hamilton County.

Our Staff

*Seated: (L to R)
Cindy Schembre,
Betsy Fowler, Julie Barnes,
Dee Timi. Standing: (L to R)
John Perkon, Dianna Hopper,
Lori Raffel, Colleen Bonanne,
Brent Hartman.
(Not pictured: Kelly Kahn)*



OTHER DONORS

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DONORS \$100 – \$499

| | | |
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| Bob and Karen Grenda | Rex and Lisa Melchi | |

OUR SPONSORS AND PARTNERS

Special thanks to our many sponsors and partners, all of whom make it possible for PrimeLife Enrichment to be the premier provider of senior services in Hamilton County. You'll find a complete list of them below:

GRANT PROVIDERS

Hamilton County Council
CICOA Aging: In-Home Solutions
United Way of Central Indiana
Community Development Block Grant
The City of Carmel

SPONSORS

IU Health
Discovery Commons
ManorCare of Summer Trace
Sanders Glen
Stinson Law Firm
Sycamore Reserve
Wellbrooke of Carmel
Woodland Terrace
Hamilton County Community Foundation



United Way
of Central Indiana



PROGRAMS AND SERVICES

| | Units of Service | | Individuals Served | |
|--------------------------|------------------|---------------|--------------------|--------------|
| | 2019 | 2020 | 2019 | 2020 |
| Information and Referral | 32,963 | 4,176 | 601 | 425 |
| Transportation | 6,179 | 4,483 | 172 | 133 |
| Community Outreach | 1,153 | 465 | 539 | 321 |
| Friendly Visitor | 3,311 | 1,111 | 16 | 35 |
| Respite/Attendant Care | 1,660 | 1,099 | 34 | 18 |
| Senior Activities | 41,535 | 38,722 | 776 | 765 |
| Volunteer Opportunities | 8,026 | 5,695 | 99 | 87 |
| TOTALS: | 94,827 | 55,751 | 2,237 | 1,784 |



DONORS

\$100,000 AND ABOVE

CICOA Aging and In-home Solutions
Hamilton County
Council and Commissioners
United Way of Central Indiana

\$50,000 – \$99,999

INDOT
IndyGo

\$25,000 – \$49,999

Clay Township

\$10,000 – \$24,999

Ascension/St. Vincent
Carmel Hospital
Central Indiana
Community Foundation
City of Carmel
Senior Medicare Patrol
Trilogy

\$5,000 – \$9,999

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Suzanne Marks
Tim McGuire
Phyllis A. Mohs
Bill and Sigrun Moore
Mehul and Sheel Patel
Denise Rabin
Rotary Club of Carmel
Sunrise Assisted Living



MEMBERS AND CLIENTS

| Age | Activity Center | | All Other Programs | | 2019 | | 2020 | |
|----------|-----------------|------|--------------------|------|------------|------------|------------|------------|
| | 2019 | 2020 | 2019 | 2020 | 2019 | 2020 | 2019 | 2020 |
| Under 40 | 2% | 5% | 0% | 4% | 10 | 0 | 27 | 19 |
| 40-54 | 4% | 6% | 1% | 5% | 19 | 5 | 29 | 21 |
| 55-64 | 7% | 9% | 7% | 9% | 35 | 35 | 43 | 39 |
| 65-74 | 27% | 25% | 23% | 24% | 135 | 110 | 128 | 105 |
| 75-84 | 37% | 36% | 40% | 37% | 189 | 191 | 185 | 160 |
| 85+ | 23% | 19% | 29% | 21% | 117 | 137 | 96 | 92 |
| | | | | | 505 | 478 | 508 | 436 |

| Gender | 2019 | 2020 | 2019 | 2020 | 2019 | 2020 | 2019 | 2020 |
|--------|------|------|------|------|------|------|------|------|
| Male | 25% | 22% | 44% | 36% | 126 | 212 | 114 | 159 |
| Female | 75% | 78% | 56% | 64% | 379 | 266 | 394 | 277 |

Members' and Clients' Socio-Economic Status

| Status | 2019 | 2020 |
|---------------------------|------|------|
| Below Poverty Level | 12% | 11% |
| 100% - 185% Poverty Level | 40% | 41% |
| 186% - 250% Poverty Level | 15% | 14% |
| Above 250% Poverty Level | 33% | 34% |

Members' and Clients' Race/Ethnicity

| Race/Ethnicity | 2019 | 2020 |
|------------------|------|------|
| African-American | 2% | 2% |
| Asian | 4% | 4% |
| Caucasian | 92% | 91% |
| Hispanic | 1% | 1% |
| Other | 1% | |
| 2% | | |

BOARD OF DIRECTORS

Marcia Claerbout, President
Sarah Schlifke, Vice President
Howard May, Treasurer
Suzanne Marks, Secretary
Stephen Gross, Past President

Terry Dollar
Kaye Hirt Eggleston
Charles Jeffras
Timothy McGuire
Dan Overbeck

FINANCIALS

Revenue and Support

| | 2020 | 2019 |
|---|------------------|------------------|
| Grants from Governmental Agencies | \$443,286 | \$460,670 |
| Federal | | |
| <i>Title III, Older Americans Act*</i> | 116,008 | 118,357 |
| <i>Senior Medicare Patrol</i> | 2,613 | 9,313 |
| State and Local | | |
| <i>Hamilton County</i> | 240,000 | 240,000 |
| <i>City of Carmel</i> | 10,000 | |
| <i>Clay Township</i> | 5,000 | 28,000 |
| <i>City of Noblesville</i> | | 1,000 |
| <i>Indiana Department of Transportation</i> | | 64,000 |
| <i>IndyGo</i> | 69,665 | |
| Grants from Foundations | \$5,000 | \$16,500 |
| United Way of Central Indiana | \$175,666 | \$175,655 |
| Contributions | \$73,944 | \$73,383 |
| Special Events | \$3,074 | \$44,993 |
| Program Service Fees | \$106,414 | \$94,250 |
| Other Income and Support | \$49,369 | \$70,956 |
| Total Revenue and Support | \$856,753 | \$936,407 |

Operating Expenses

| | | |
|--------------------------------|-------------------|------------------|
| Salaries and Employee Benefits | \$445,619 | \$462,624 |
| Professional Fees | \$67,832 | \$48,061 |
| Supplies | \$6,149 | \$4,855 |
| Mortgage/Loan Interest | \$24,605 | \$24,040 |
| Occupancy | \$104,610 | \$121,996 |
| Postage, Shipping and Printing | \$4,466 | \$5,820 |
| Transportation and Travel | \$10,563 | \$13,583 |
| Insurance | \$39,189 | \$37,342 |
| Fundraising Events | \$2,125 | \$16,283 |
| Advertising/Marketing | \$6,295 | \$4,659 |
| Other Expenses | \$14,179 | \$13,708 |
| Depreciation | \$142,242 | \$133,144 |
| Total Expenses | \$867,874 | \$886,115 |
| Operating Income (Loss) | (\$11,121) | \$50,292 |

| Unrestricted Revenue and Functional Expenses by Program | In-Home Services | Info and Referral | Transportation | Enrichment Activity Ctr | Supporting Services | Total |
|---|------------------|-------------------|----------------|-------------------------|---------------------|-----------|
| <i>Revenue and Support</i> | | | | | | |
| Year Ended June 30, 2020 | \$45,985 | \$40,894 | \$204,398 | \$254,676 | \$380,470 | \$926,423 |
| Year Ended June 30, 2019 | \$42,494 | \$52,038 | \$113,861 | \$203,104 | \$465,076 | \$876,573 |
| <i>Functional Expenses</i> | | | | | | |
| Year Ended June 30, 2020 | \$48,965 | \$70,251 | \$180,510 | \$402,498 | \$165,650 | \$867,874 |
| Year Ended June 30, 2019 | \$46,441 | \$78,694 | \$198,329 | \$349,445 | \$213,206 | \$886,115 |

STATEMENT OF FINANCIAL POSITION - ASSETS

| | <u>2020</u> | <u>2019</u> |
|---|---------------------------|---------------------------|
| Current Assets | | |
| Cash | \$90,025 | \$111,933 |
| Promises to Give and Grants Receivable | \$225,523 | \$316,482 |
| Prepaid Expenses and Other Assets | <u>\$3,421</u> | <u>\$1,355</u> |
| Total Current Assets | <u>\$318,969</u> | <u>\$429,770</u> |
| Property and Equipment | | |
| Building and Improvements | \$2,736,566 | \$2,630,579 |
| Land | \$150,000 | \$150,000 |
| Furniture and Equipment | \$252,008 | \$250,221 |
| Vehicles | \$299,722 | \$137,496 |
| Less: Accumulated Depreciation | <u>(\$1,885,757)</u> | <u>(\$1,743,514)</u> |
| Total Property and Equipment | <u>\$1,552,539</u> | <u>\$1,424,782</u> |
| Long-Term Promises to Give and Grants Receivable | <u>\$5,000</u> | <u>\$10,000</u> |
| Total Assets | <u><u>\$1,876,508</u></u> | <u><u>\$1,864,552</u></u> |



LIABILITIES AND NET ASSETS

| | <u>2020</u> | <u>2019</u> |
|---|---------------------------|---------------------------|
| Liabilities and Net Assets | | |
| Current Liabilities | | |
| Accounts Payable | \$6,348 | \$5,632 |
| Accrued Payroll and Other Accrued Liabilities | \$31,726 | \$31,792 |
| Deferred Membership Fees | \$3,354 | \$6,510 |
| Current Maturities of Long-Term Debt | \$30,381 | \$28,754 |
| Line of Credit Borrowings | <u>\$62,450</u> | <u>\$100,000</u> |
| Total Current Liabilities | <u>\$134,259</u> | <u>\$172,688</u> |
| Long-Term Liabilities | | |
| Note Payable, less Current Maturities | \$360,166 | \$390,590 |
| PPP Loan* | <u>\$91,930</u> | <u>\$0</u> |
| Total Long-Term Liabilities | <u>\$452,096</u> | <u>\$390,590</u> |
| Total Liabilities | <u>\$586,355</u> | <u>\$563,278</u> |
| Net Assets | | |
| Without Donor Restrictions | | |
| Board Designated | \$10,000 | \$10,000 |
| Undesignated | \$1,045,718 | \$987,169 |
| With Donor Restrictions | <u>\$234,435</u> | <u>\$304,105</u> |
| Total Net Assets | <u>\$1,290,153</u> | <u>\$1,301,274</u> |
| Total Liabilities and Net Assets | <u><u>\$1,876,508</u></u> | <u><u>\$1,864,552</u></u> |

