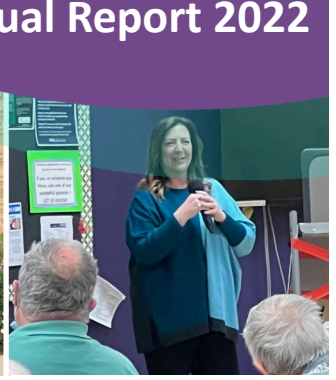


PrimeLife Enrichment Annual Report 2022



ANNUAL MEETING • THURSDAY, JUNE 22, 2023

Letter from the Executive Director Gary Wagner



To all members of the PrimeLife Enrichment family,

It doesn't seem possible that another year is in the books. I'm talking about fiscal year 2021-2022 which ended almost a year ago, not fiscal year 2022-2023 which will end in just a few days, followed by the beginning of fiscal year 2023-2024 (July 1st) just around the corner.

Admittedly, it's somewhat confusing, and it begs the question of who came up with fiscal years when calendar years are much easier to understand? The answer is beyond the scope of this message. Perhaps at some point in the future, we'll convert to a calendar-year basis, especially since some of our major funders such as CICOA and United Way seem to be moving in that direction. That being said, I want to touch briefly upon fiscal year 2021-2022, then share some highlights of 2022-2023. Please bear with me as we make our way through the gauntlet of both fiscal years.

Fiscal Year 2021-2022

In a nutshell, this was a transitional year, the first half of which was very much influenced by COVID and its variants. Thankfully, many positive things happened even with the dark cloud of COVID hanging over us. Some of the more noteworthy ones included:

- Launching computerized registration system for members officially on October 1, 2021. This system greatly enhances our ability to track, record and report on all our activities and programs.
- Kicking off our first-ever membership drive on October 19th, featuring *Dancing with the Stars'* very own Louis van Amstel. The drive officially ended on January 31, 2022, with over 120 new members joining PrimeLife.
- Welcoming three outstanding volunteers to our Board of Directors. Unfortunately, we also lost an outstanding Board member, Kaye Hirt-Eggleston who passed away in November 2021.
- Beginning our Adaptive Planning process in February to chart our future for the next three years.
- Receiving full accreditation for the next three years from UWCI.
- Repaving and restriping our parking lot thanks largely to a Facilities Maintenance Grant from UWCI that covered 75% of the cost.

Fiscal Year 2022-2023

In last year's annual report, I wrote that 2022-2023 would pose its share of challenges, not the least of which would be to find alternative or additional sources of funding. I also said that we would have to reduce expenses without sacrificing the quality and availability of our programs and services. I may be biased, but thanks to our staff, volunteers, members, and Board of Directors, plus several leaders in local government, I believe we are well on the way to meeting both challenges. By now, those who are most familiar with PrimeLife are well aware of the steps we have taken as we look forward to 2023-2024. They include:

- Meeting with Clay Township Trustee Paul Hensel
- Meeting with Clay Township Board (accompanied by many of our members who filled the room).
- Hosting a town-hall meeting in March for all Carmel City-Council candidates prior to

Letter from the Executive Director Gary Wagner (continued)

the primary election. Fifteen candidates spoke to a full house of PrimeLife members and the general public and answered questions submitted to our Board Member/Moderator Melody Cockrum.

- Hosting a similar town-hall meeting in April for Carmel Mayoral candidates, all four of whom participated. Again, PrimeLife members and folks from the general public showed up in force.
- Meeting with Mayor Brainard to discuss possible partnership opportunities with the City of Carmel. In addition to myself, former Mayor Jane Reiman, and Julie Barnes, our Community Engagement/Activities Coordinator, attended this meeting.

As we look forward to the beginning of a new fiscal year, I am optimistic that we have greatly increased public awareness of PrimeLife and the services we provide to all Hamilton County seniors. Our membership has now grown to over 500, which is a testament to the programs and services offered here at our Enrichment Center. In addition, the demand for our unique on-demand, door-to-door transportation program has increased to the point where we now provide over 1,000 rides per month. 2022-2023 leaves no doubt that PrimeLife Enrichment is a dynamic, valuable community asset, for which the demand will continue to grow as does the senior population in Hamilton County. The upcoming year no doubt will have its challenges. I'm confident that with the support of our staff, members, volunteers, Board of Directors, and community leaders, we will reach new heights and continue to impact so many lives of those we serve.



Board of Directors

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

Michael Bratcher
Melody Cockrum
Becky Henn
Dan Overbeck
Linda Ramey-Greiwe

Grants and Donations

\$100,000 AND ABOVE

Hamilton County Council
and Commissioners

\$50,000 – \$99,999

CICOA Aging and In-Home Solutions
United Way of Central Indiana

\$25,000 - 49,999

Central Indiana Community
Foundation Endowment

\$10,000 - 24,999

Women's Sports Foundation

\$5,000 - 9,999

Dave and Jan Brown
Lumina Foundation (match)
Sandra Farr Frick

\$1,000 - 4,999

Adventure Archives
Carpenter Realtors
Delta Faucet
Melissa Eldredge
Andrew and Irene Engel
Hamilton County Community
Foundation Endowment
Kaye Hirt-Eggleston
I.U. Health North
Ann Johnson
Suzanne Marks
Roger and Winnie Nestle
Mr. and Mrs. Robert J. Popovich
Joy Ressler

Riverview Hospital
Sycamore Reserve

\$500 - 999

Dale Alianiello
Tom and Julia Bontrager
Marcia Claerbout
Terry Dollar
Joan Ehman
Ken Handy
Jim Hodgins
Tim McGuire
MIBOR Foundation
Linda Ramey-Greiwe
Wendy Stang

\$100 - 499

Lorraine Albright
Paul Ayers
George Babbitt
Norma Barry
Dianne Beardsley
Bernice Betts
Judy Blalock
Colleen Bonanne
Eleanor Bradley
George Brooks
Bruce Calabrese
Janet Casper
Susan Cornelius
Judith Delaney
Linda DeLillo
Grace Dudeck
Susan Dunlap
Deborah Dzeguze
Kay Fagin
Chris and Pam Finn

Grants and Donations (continued)

\$100 - 499 (continued)

Terrel Ann Gagermeier
Gretchen Geary
Peggy Gfell
Cis Haas
Brent Hartman
Don Hay
Bob Jedamzik
Beth Johnson
Leah Johnson
Kenan Kersten
Robert Laflin
Gretchen Logan
Suzanne Marks
Mike Mathews
Frank McClelland
Marilyn Menalo
Marianne & Greg Merchun
Bonnie Merklin
Carol Mihalik
Jackie Mock
Bill Moore
Robert Morris
Sharon Nelligan
Joey Neve
Mary Osmond
John Perkon
Jill Phillips
Mark Pickett
Julie Reeve
Whitney Robinette
Gregory Ross
Don Schafer
Sarah Schlifke
Seemein Shayesteh
Margie Sims
Ian Smith / Seniorpoint, Inc.
Michelle Stanley
Shay Tucker

James Vento
Gary and Debbie Wagner
Katie Walker
Peter Wood
Ben Zavala
Tracy Zimpfer

\$50 - 99

Jackie Brookie
Thomas Buehner
Sunny Cohen
Lynn and Charlean Croxton
Raquel Fernandez
Forum Credit Union
Suzanne Frye
Joy Graham
Yvonne Hammond
Sandra Harlan
Philomena Harrington
Barbara Harrison
Fred Hecker
Steve Hull
Sandra Humphrey
Pat Jackson
Lauren Jerome
James Johansen
Katie LaFollette
Eleanor Matusz
Jane Nevers
Paul Odendahl
Don Pickett
Daniel Rathburn
Laura Roman
Cynthia Schembre
Daniel and Judy Schwinghammer
Sandra Walker
Marge Wavrica
Sharon West
Nancy Whitaker

Grants and Donations (continued)

Other

Morrie Adams

Julie Barnes

Nora Beglaryan

Family Blanner

Million Bowman

Alison Brown

Jo Ann Bule

Erlinda Chavez

John & Nancy Fezzey

Joseph Gardner

Kathleen Gorman

Zaher Hasanzada

Doug Holtz

Jimmie Hunter

Jolene Hurst

Ellen Adams

Andree Lacasse

Sue Langeman

Joel Lisker

Karen Madzelan

Eula and Darrell Megli

Alta Parrish

Carolyn Pasanen

Joan Pell

Donna Rollman

Patricia Shafer

Linda Snyder

Sandy Stewart

Carlos Torres

Shannon Veltrop

Joyce Washburn



Balance Sheet

	2022	2021
ASSETS		
Current Assets		
Cash	\$ 68,821.13	\$ 135,194.28
Accounts Receivable	105,000.00	226,086.50
Prepaid Expenses	10,738.29	10,738.29
Total Current Assets	\$ 184,559.42	\$ 372,019.07
Property and Equipment		
Property and Equipment	\$ 3,475,696.90	\$ 3,448,574.94
Accumulated Depreciation	(2,223,914.86)	(2,055,448.12)
Total Property and Equipment	\$ 1,251,782.04	\$ 1,393,126.82
Total Assets	\$ 1,436,341.46	\$ 1,765,145.89
LIABILITIES AND NET ASSETS		
Current Liabilities		
Accounts Payable	\$ 0.00	\$ 14,851.12
Deferred Membership Fees	5,313.19	4,470.62
Wages Payable	12,863.58	12,863.58
Accrued Vacation Wages	16,148.78	16,148.78
Notes Payable	57,450.00	57,450.00
Accrued Interest	928.65	928.65
Total Current Liabilities	\$ 92,704.20	\$ 106,712.75
Long-Term Liabilities		
Mortgage	\$ 328,097.57	\$ 360,292.73
PPP Loan	0.00	91,930.00
Total Long-Term Liabilities	\$ 328,097.57	\$ 452,222.73
Total Liabilities	\$ 420,801.77	\$ 558,935.48
Net Assets		
Temp Restricted Fund Balance	\$ 147,768.34	\$197,269.75
Unrestricted-Designated	10,000.00	10,000.00
Beginning Balance Equity	552,366.34	552,366.34
Unrestricted Fund Balance	446,574.31	493,351.22
Net Income	(141,169.31)	(46,776.91)
Total Net Assets	\$ 1,015,539.69	\$ 1,206,210.40
Total Liabilities & Net Assets	\$ 1,436,341.46	\$ 1,765,145.88

Income Statement

REVENUE AND SUPPORT	2022	2021
United Way of Central Indiana		
Basic Needs Impact Fund	\$50,000	\$90,000
Technology and Facilities Maintenance	\$24,135	\$7,667
Donations and Sponsorships	\$47,692	\$54,913
Life's A Journey Special Event (Net)	\$24,326	\$36,797
Foundations and Endowment	\$46,681	\$33,162
Total Contributed Income	\$192,834	\$222,538
Government Support		
Hamilton County	\$209,667	\$232,500
Central Indiana Council on Aging (CICOA)	\$81,436	\$80,566
SBA Paycheck Protection Program (PPP)	\$91,930	\$91,930
Community Development Block Grant	\$0	\$25,000
Senior Medicare Patrol (SMP)	\$3,958	\$3,713
IN Department of Workforce Development	\$0	\$9,834
Total Government Support	\$386,990	\$443,542
Enrichment Center Fees		
Membership Fees	\$75,644	\$62,302
Insured Fitness Fees	\$23,369	\$12,649
Program Fees	\$7,264	\$3,289
Transportation Fees	\$4,361	\$1,523
Total Enrichment Center Fees	\$110,637	\$79,763
Other Income		
Facility Rental	\$36,992	\$30,230
Miscellaneous Income	\$8,340	\$14,852
Total Other Income	\$45,332	\$45,082
TOTAL REVENUE AND SUPPORT	\$735,793	\$790,925
OPERATING EXPENSES	2022	2021
Salaries and Benefits	\$402,172	\$401,541
Professional Fees	\$73,788	\$72,824
Occupancy	\$104,909	\$95,204
Telephone and Internet	\$15,288	\$11,154
Insurance	\$44,354	\$37,990
Interest Expense and Bank Fees	\$26,191	\$26,681
Supplies	\$9,502	\$3,660
Vehicle Operation	\$20,854	\$7,393
Advertising, Printing and Postage	\$8,990	\$9,350
	\$1,083	\$2,223
	\$707,131	\$668,019
Depreciation	\$168,467	\$169,692
TOTAL OPERATING EXPENSES	\$875,598	\$837,711
OPERATING INCOME (LOSS)	(\$139,805)	(\$46,786)

Members and Clients Demographics

	2022		2021	
	Number	Percentage	Number	Percentage
Total Served	1,283	100%	537	100%
Gender				
Female	945	74%	427	80%
Male	338	26%	110	20%
	1,283	100%	537	100%
Race/Ethnicity				
African-American	17	1%	9	2%
Asian	47	4%	23	4%
Caucasian	1191	93%	484	90%
Hispanic	16	1%	8	2%
Other	12	1%	13	2%
	1,283	100%	537	100%
Income Level (If Disclosed)				
Below Poverty Level	42	6%	14	4%
100-149% of Poverty Level	98	14%	41	12%
150-272% of Poverty Level	280	41%	158	47%
273% or more of Poverty Level	256	38%	125	37%
	676	100%	338	100%
Age (If Disclosed)				
Under 55	76	8%	54	11%
55-64	62	6%	37	8%
65-74	270	28%	152	32%
75-84	357	37%	167	35%
85+	193	20%	67	14%
	958	100%	477	100%



Grant Providers and Sponsors

GRANT PROVIDERS



United Way
of Central Indiana



HAMILTON COUNTY
INDIANA



SPONSORS AND PARTNERS



Indiana University Health



First Financial Bank



**Majestic
Care**
Carmel



Stinson Law Firm
Providing peace of mind with care and compassion.



GARY WAGNER • Executive Director
Ext. 200 • gwagner@primelifeenrichment.org

CINDY SCHEMBRE • Assistant Director
Ext. 203 • cschembre@primelifeenrichment.org

BETSY FOWLER • Fitness Director
Ext. 219 • bfowler@primelifeenrichment.org

JULIE BARNES • Community Engagement and Activities Coordinator
Ext. 223 • jbarnes@primelifeenrichment.org

LORI RAFFEL • Marketing and Social Media
Ext. 206 • lraffel@primelifeenrichment.org

NIKKI VAUGHN • Transportation Coordinator
Ext. 205 • nvaughn@primelifeenrichment.org

JOHN PERKON • Facility Manager
Ext. 219 • jperkon@primelifeenrichment.org

DIANNA HOPPER • Data Entry
Ext. 202 • dhopper@primelifeenrichment.org

CAROL OUTLAND • Transportation Assistant
Ext. 205 • coutland@primelifeenrichment.org

DRIVERS

Brent Hartman, Senior Driver

Rich Arends
Nanette Bryant
Don Fritz
Phil Hagen
Tom Kapostasy
Mimi Merchum
Larry Price
Dee Timi

Dianne Beardsley
Brenda Craig
Tim Gallagher
Charlie Hanover
Dave Koch
Bob Morris
Matthew Siewert

George Billeisen
Bud France
Randy Gomez
Doug Holtz
Mike Mathews
John Perkon
Sam Thorp

Mission, Vision, and Core Values

OUR MISSION

Our mission is to help seniors lead active, independent and purposeful lives by providing access to clinical and social determinants of health.

OUR VISION

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

OUR 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.

