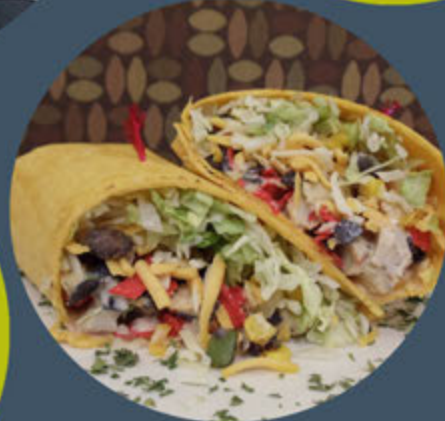
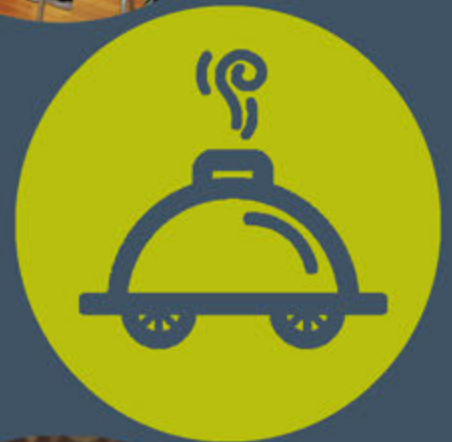


Redefining Age!



Annual Report
Fiscal Year 2017-2018

Mission

AgeWell invites you to redefine age! We provide vital connections to keep you nourished, active, learning and living independently.

Vision

Leading the way to aging well.

Board of Directors

President

Diane Cunningham

Vice President

Janet Hansen

Treasurer

Phil Kelly

Secretary

Jean Ann McCann

Members

Lori Barringer

LaTonya Beene

Sue Christiansen

Matt Mills

Directors Team

Executive Director

Kris Collee

Associate Director

Rhonda Skeba Rosenberg

Food Service Director

Chelsea Robinson

Mission Services Director

Laura Beechnau

Advancement Director

Diane Smith

Human Resources Director

Sue Cloutier

Finance Director

Elizabeth Johnson

275 W. Clay Ave., Suite 100
Muskegon, MI 49440
(231) 755-0434
www.agewellservices.org

LETTER FROM THE DIRECTOR

Dear AgeWell Services Supporters,

Fiscal year October 1, 2017 – September 30, 2018 was a record-breaking year for AgeWell Services! Last year we provided 411,472.5 meals to adults age 60 and older residing in Oceana, Muskegon and Ottawa Counties. This represents an increase of 9% from the previous year!

Where does the 9% increase come from? In a one simple word: YOU!

In addition to your generous contributions, Muskegon County taxpayers provided additional generous support through the Muskegon County Senior Millage. AgeWell Services is a proud partner. The Muskegon Senior Activities Committee (MSAC) is a group of dedicated volunteers and commissioners who make recommendations of funding to the full Board of County Commissioners for consideration. Administered by Senior Resources, this new source of funding to provide services for seniors age 60 and older is a funding of last resort. This means that because of this generous contribution, AgeWell Services is able to serve people, that would not have access to services otherwise.

AgeWell Services is grateful to partner with this fantastic team on five important programs:

- Home Delivered Meals (Meals on Wheels)
- Congregate Meal Sites (Lunch and Activity Sites)
- Elder Abuse Prevention
- Evidence Based Health Promotion Classes
- Senior Center Activities

Included in our Annual Report, you will read narrative and see a timeline on the important impact our programs are making across our three county region. We have also been working hard as a team to increase our efficiencies through continuous quality improvement techniques (LEAN/Six Sigma), reduced our overhead through comprehensive analysis of expenses, improved our accounting systems, conducted a wage analysis, increased our social media presence (including a new website launch), created preventative maintenance checklists for all kitchen equipment, implemented an employee giving campaign, updated inventory systems, and created a Certified Trainer position in our kitchen. Sometimes the vital work behind the scenes is important for our partners to know that we are working hard to make our donor and grant dollars stretch as far and wide as possible.

This past July, 13 team members joined the Downtown Muskegon neighborhood by relocating our Administrative Offices inside the new Berkshire Senior Apartment Complex located at First Street and Clay Avenue. We are excited to be located in the heart of the urban core where there is a high demand of services. This year we will begin seeking funding to launch a second café location that will be accessible to everyone who works, lives and plays downtown. Help us increase access to foods for our senior neighbors in the new Driftwood Café located at Berkshire!

In October, we celebrated an accomplishment of Tanglewood Park's 10th Anniversary. We are so proud to be part of the legacy created by Larry Hines and his team who helped our agencies raise funds to rehab the old D & W, now home to three agencies. These organizations collectively make a \$45 million economic impact in Norton Shores and employ more than 400 workers, engaging 500 seniors every day. The impact of these contributions helped our agencies grow more than ten-fold. Again, that impact is because of YOU.

Thank you for helping support seniors and expand in Fiscal Year 2018! YOU are the key to our success!

Yours in Service,
Kris Collee
Executive Director

PROGRAMS AND SERVICES

Driftwood Café

The Driftwood Café at Tanglewood Park is open to the public. It is the perfect place to pick up a specialty coffee, and enjoy breakfast or lunch Monday-Friday. The café also caters for groups of any size on site or off site.

Lunch & Activity Centers

Our Lunch & Activity Centers help adults age 60 or older to stay active. Each Lunch & Activity Center location is unique to the community offering activities and nutritious meals to support a healthy lifestyle. We have 2 locations in Oceana County, 8 locations in Muskegon County and 2 locations in Ottawa County, giving us a total of 12 locations throughout the three counties we serve.

Each meal is prepared daily in our licensed kitchen at Tanglewood Park in Muskegon, MI. Meals are served to seniors Monday-Friday at their local Lunch & Activity Center location. For many individuals, it is an opportunity to socialize and be active outside their home.

Meals on Wheels

Meals on Wheels helps adults age 60 and older stay healthy so they can live in their home as long as possible.

Each meal is prepared daily in our licensed kitchen at Tanglewood Park in Muskegon, MI. Meals are delivered Monday-Friday. Drivers deliver the well-rounded nutritious meals with a warm smile and a friendly visit typically between 10:30 am and 1:30 pm each day. They also check on the health and safety of each senior and forward any concerns to professional assessors. For many individuals, this is the only companionship they may have that day.

Senior Discount Dining Program

Our Senior Discount Dining Program is an opportunity for seniors to receive a Senior Dine card. Suggested donation for each meal credit loaded on the card is \$4, and the Senior Dine cards may be used at any of the participating Discount Dining Locations. There are 2 locations throughout the three counties we serve; Daniel's Restaurant in Hesperia and the Driftwood Café at Tanglewood Park in Norton Shores.

Tri-County Protection Team

The Tri-County Protection Team is a consortium of senior oriented agencies and organizations throughout Muskegon, Oceana and Ottawa counties. Their goal is to identify, advocate and seek justice through the court system for adult victims of abuse, neglect and financial exploitation.

Volunteers

Volunteers are vital to our success! It is through the dedicated services of volunteers that we meet the needs of so many seniors in Muskegon, Oceana and Ottawa counties.

Volunteers deliver meals to our Meals on Wheels participants, serve lunch at our local Lunch & Activity Centers, teach classes, enter data, file, make copies, be a host at our special events, run bingo, organize the library and much more.

Wellness

The Wellness program offers fitness & art classes, workshops, day trips and social opportunities to stay active and healthy. Members have the opportunity to use the Equipment Room, Computer Lab and Library.



Family Financial Credit Union Picks AgeWell Services as Charity of the Year!



Family Financial Credit Union (FFCU) is a very generous supporter of Meals on Wheels and Heels for Meals since 2016. In 2017, FFCU picked AgeWell Services as their Charity of the Year. FFCU held numerous fundraisers and events throughout 2017 including a golf outing at Colonial Golf Course in Hart. On Columbus Day, their employees came to Tanglewood Park and packed Emergency Meals. These meals are delivered ahead of bad weather and can be eaten when we cannot deliver meals. In January of 2018, FFCU made a \$10,000 donation as a result of their year-long efforts. Thank you Deb Dietz and the Family Financial Credit Union Team for your commitment to Meals on Wheels. We appreciate FFCU and their continuing generosity.



10 Year Anniversary for Dancing with the Local Stars



In February of 2018, Dancing with the Local Stars (DWTLS) celebrated their 10th anniversary! Organized by the Women's Division Chamber of Commerce, DWTLS raised \$923,000 for local food pantries in its first 10 years. To celebrate its 10th year, the show brought back more than 60 stars who competed throughout the first nine years. AgeWell Services Executive Director, Kris Collee, and Fitness Specialist, Francine Calandro, were among those participating in the event.

"Contributing to Dancing with the Local Stars is a great way to pay it forward to the community," Francine Calandro said. "I have participated in the show each year since the beginning. I was once someone on the other side who needed the services of local food pantries. This led me to get involved and help give back any way I could." In 2018, the show raised \$168,000 for local food pantries. AgeWell Services received \$15,500 to go towards the Meals on Wheels program.



Began serving meals at the new Lunch & Activity Center at Orchard View Community Education Building



Thanks to a **\$20,000 grant** from the DTE Energy Foundation

2,700 meals were prepared, served and delivered to local seniors on **Thursday, December 21, 2017.**



The Muskegon County Prosecutor's Office with local law enforcement and Adult Protective Services signs the Vulnerable Adult Investigative Protocol, creating a team approach for investigating vulnerable adult abuse, neglect and exploitation.

October

November

December

January

February

March



30-second commercials aired on Comcast Spotlight to promote the Wellness Program: fitness classes, art classes, nutritional counseling and more.

Family Financial Credit Union presented AgeWell Services with a check for \$10,000.



AgeWell Services was represented in the 10 year anniversary of Dancing with the Local Stars, organized by Women's Division Chamber of Commerce. A total of \$15,500 was donated to AgeWell Services.



Partnership With The Muskegon Food Hub To Provide Fresh Produce

AgeWell Services is proud to partner with The Muskegon Food Hub, located at the Muskegon Farmer's Market. Three years ago, AgeWell Services set a goal to increase fresh produce in our meal service programs by partnering with local farmers. During the height of the Michigan harvest season, AgeWell Services purchases asparagus from Golden Hart (Hart, Michigan) and potatoes, onions, and apples from Crisp Country Acres (Holland, Michigan) through the Muskegon Food Hub. Orders are placed by Friday and received on Tuesday, freshly picked the prior day. The expense of the extra labor and team work needed to clean, cut and prepare this fresh produce was generously provided by an anonymous donor who matched a \$7,500 grant from the Glick Gives Fund. AgeWell Services looks forward to expanding this initiative in the coming years!



Centers for Medicare & Medicaid Services (CMS) Annual Audit Results



Each year, the Centers for Medicare and Medicaid Services (CMS) perform an audit on LifeCircles PACE. They inspect not only the kitchen at Tanglewood Park, but also the kitchen at the LifeCircles PACE location in Holland Town Center. Every other year, the federal government joins CMS on their audit of the facilities. These audits are in addition to two other inspections received each year from the local health department.

AgeWell Services is also audited as we are the food service provider. The controls, operating procedures, safety and health code regulations are reviewed to make sure they are in compliance with the state procedures, policies and health code.

We are proud and excited to report that over the past three years, AgeWell Services' (Meals on Wheels) kitchen had no citations and issued a clean "Bill of Health!" Chelsea Robinson Food Service Director, says "the success our kitchen has had in the CMS Audits is due to the excellent leadership and dedicated kitchen team members we have. They understand the importance of the meals they are producing and the importance of being prepared for the audits. It is something we all take great pride in as it allows us to continue to provide meals."

The 5th Annual Heels for Meals was held on April 21 at Bella Maria's Event Center. 220 attendees raised funds for our Meals on Wheels program.



AgeWell Services administration offices moved to downtown Muskegon into the Berkshire Senior Apartment Community.



The Café operated by AgeWell Services began the process of rebranding to the Driftwood Café at Tanglewood Park.

April

May

June

July

August

September

A new Lunch & Activity Center opened in Holton at Holton United Methodist Church.

AgeWell Services Food Service department received a 100% score on the Center for Medicare & Medicaid Services (CMS) yearly audit for the 2nd year in a row.

AgeWell Services received a grant from the Oceana County Community Foundation for a street team to promote our Meals on Wheels program.



The 3rd Annual Senior Symposium was held at the Folkert Community Hub on September 25. 180 seniors were treated to 6 different workshop speakers, 27 resource vendors and a lunch catered by the Driftwood Cafe.

AgeWell's impact by the numbers!

AgeWell Services provided services to **4,410 seniors** throughout Oceana, Muskegon and Ottawa counties.



Served...

411,472.5 Total Meals

Lunch & Activity Centers: 86,774

Home Delivered Meals: 240,800

PACE Programs: 83,898.5

to 4,113 Seniors

Lunch & Activity Centers: 1,865

Home Delivered Meals: 1,824

PACE Programs: 424



297 Seniors

participated in at least one
program or service offered
at our Wellness Center at
Tangelwood Park.

Art Class: 19

Clubs: 10

Fitness and Exercise: 268



226 volunteers donated
13,628 hours of
service ... valued at

\$330,144!

*Defined by Independent Sector.

Muskegon County Senior Millage Numbers

AgeWell Services is a recipient of funding from the Muskegon County Senior Millage (MCSM). This funding allows AgeWell Services to provide services and activities to Muskegon County residents who are 60 years of age and older. The funding is administered through Senior Resources of West Michigan.

Elder Abuse Prevention

Total MCSM Revenue: \$15,035

Health Promotions

Total MCSM Revenue: \$10,808

Home Delivered Meals

Total MCSM Revenue: \$232,021

Lunch & Activity Centers

Total MCSM Revenue: \$20,214

Senior Activities

Total MCSM Revenue: \$36,633

Total MCSM Funding

\$314,711



Financial Report

	2018
Revenues and support	
Grants	
Federal	937,918
State	442,927
Local	330,812
Medicaid Waiver	243,814
Public support	
Contributions	373,527
Fundraising	58,072
Program income	386,373
Contracted services	679,427
Wellness	64,352
Café	102,899
Investment income	
Interest and dividends	3,146
Realized and unrealized gain (loss)	3,895
Investment fees	(1,528)
Other interest income	8
Gain (loss) from beneficial interest in assets held by others	1,436
Other	23,187
Total revenues and support	3,650,265
Expenses	
Program services	
Congregate Meals	753,115
Home Delivered Meals	1,202,420
LifeCircles	662,322
Medicaid Waiver	326,598
Wellness Center	243,097
Café	169,238
Other services	51,183
Supporting services	
Management and general	67,213
Fundraising	160,719
Total expenses	3,635,905
Change in net assets	14,360
Net assets at beginning of year	535,648
Net assets at end of year	550,008

Financial statements audited by Brickley DeLong, P.C.

Lunch & Activity Center Locations open to all individuals 60 and older

Oceana County

Hart

Oceana County Council on Aging (OCCOA)
621 E. Main St. / 231-873-4461

Hesperia

Daniel's Restaurant
55 E. South Ave. / 231-854-1313

Shelby

The Ladder Community Center
67 N. State St. / 231-259-0211

Muskegon County

Holton

Holton United Methodist Church
9530 Holton Duck Lake Rd. / 231-821-2705

Muskegon

Driftwood Café at Tanglewood Park
560 Seminole Rd. / 231-733-8644

Muskegon

Egelcraft Mobile Home Park
2129 Arrowhead Dr. / 231-773-4400

Muskegon

Jefferson Towers Apartments
1077 Jefferson St. / 231-557-1189

Muskegon

Pine Grove Manor - Senior Community Apartments
1764 E. Apple Ave. / 231-557-2284

North Muskegon

Community United Methodist Church
1614 Ruddiman Dr. / 231-744-8613

Orchard View

Orchard View Community Education Center
1765 Ada Ave. / 231-760-1348

Ravenna

First Reformed Church
3327 Mortimer St. / 231-557-4825

Whitehall

S.H.A.W.L. - Whitehall
225 S. Hall St. / 231-894-4670

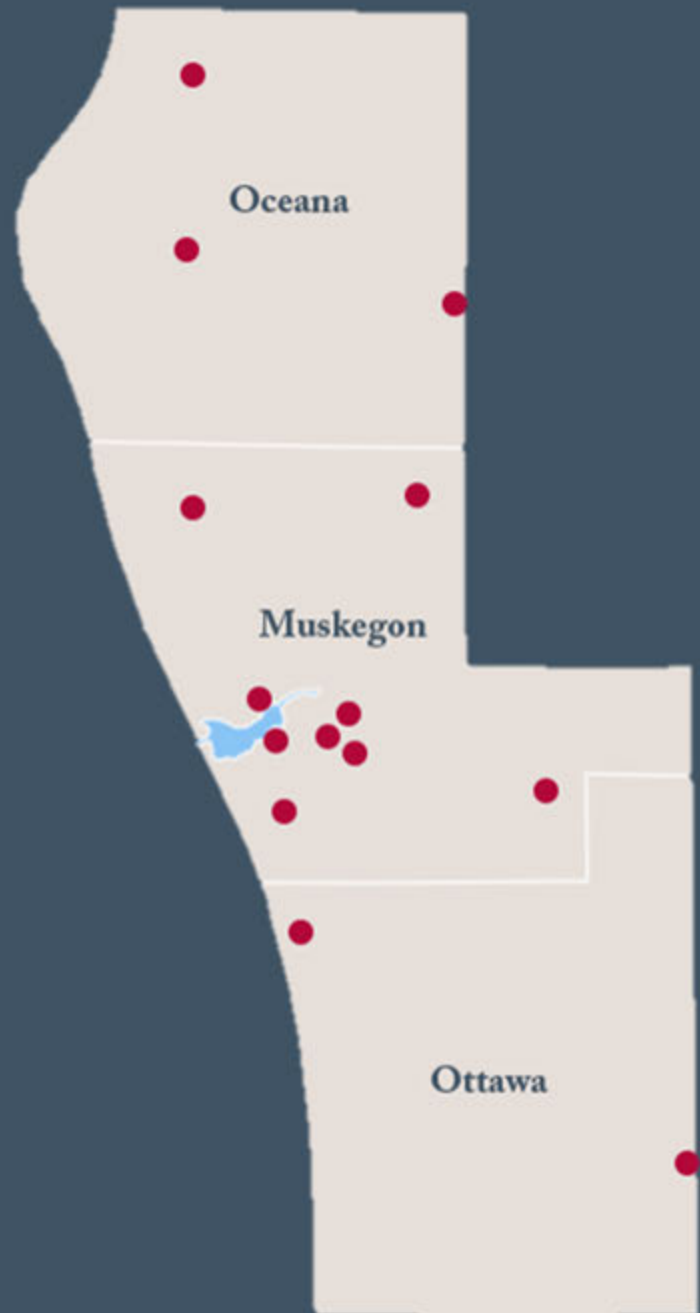
Ottawa County

Grand Haven

Four Pointes for Successful Aging
1051 S. Beacon Blvd. / 616-842-9210

Jenison

Georgetown Connection
7100 Eighth Ave. / 616-457-1170



Administrative Office

Berkshire

275 W. Clay Ave., Suite 100
Muskegon, MI 49440

Wellness Center &

Driftwood Café

Tanglewood Park
560 Seminole Rd.
Muskegon, MI 49444

Phone: (231) 755-0434

Website: www.agewellservices.org