



Successful living for the second 50 years

From the Chairman of the Board

What a difference a year makes! One year ago the CASI Board of Directors had to cope with the reality that we would be conducting a second search for a President/CEO. With the departure of Connie Benton Wolfe, approximately nine months after she was hired to replace Jerri Leinen-Moeller, the CASI Board of Directors authorized a new executive search. I am pleased to report to the Board of Directors that I believe the second time was a charm.

Our new President/CEO, Thomas Bahls, was brought on board in January. It is safe to say that Tom has hit the ground running and has accomplished significant results since he started. Many of these accomplishments are measureable, such as shoring up our financial situation and developing a business plan, while many other accomplishments are difficult to measure such as restoring workplace spirit and a sense of purpose with his staff. I believe CASI is, once again, a vibrant place to work, enjoy, and appreciate while serving the needs of older adults in the Quad Cities community.

In addition to our successful executive search, CASI also conducted many other successful activities this past year. One new event, the Family Festival held in December 2008, attracted a record number of one-day visitors to our beautiful facility while generating significant interest and rave reviews from our guests. CASI's annual Blarney Bash and the St. Patrick's Day Race were also considered outstanding successes once again. These are just a few of the many successes that were made possible by our dedicated and talented staff, countless willing volunteers, and CASI members that were willing to provide a helping hand. Many thanks go to everyone that helped make this another successful year at CASI!

After serving as your Board Chair for the past three years, I would like to thank each and every board member, staff member, volunteer, and member of this outstanding organization for doing their part in fulfilling the mission of CASI. Our locally-elected officials also deserve our appreciation and thanks for their support of CASI as the premier provider of services to older adults in the Quad Cities region.

Under the leadership of Tom Bahls and combined with the dedication of an extremely talented staff I believe the future is bright for CASI. The many successes of this past year along with our state-of-the-art facility will serve as the foundation for a renewed, energetic commitment to meeting the needs of our members and older adults. To borrow a line from our founding President and CEO, Jerri Leinen-Moeller, I believe the "best is yet to come"!

Sincerely,

Bryan Sievers, Chair
CASI Board of Directors

From the President and CEO

Since my first day in January as the Director of the Center for Active Seniors Incorporated (CASI), I have listened, learned, interacted with and befriended, and made challenging decisions. Most importantly, I have come to understand, be passionate about, and be an ardent and vocal supporter of our mission:

“To provide services that meet the needs of older adults and foster respect, dignity and quality of life”

I placed specific goals for CASI to achieve during the first six months of my tenure: Identify and implement cost saving measures and identify and implement revenue opportunity.

- Examine all fixed expenses to determine unnecessary and/or inappropriate costs and adjust accordingly
- Examine personnel and determine individuals value to the organization’s mission and business model and make necessary changes
- Evaluate all current revenue streams and determine how and where fixes with immediate results can be implemented
- Secure short term operational funding through a financial institution

I am pleased to report that CASI, although initially projected to run a \$125,000 operational deficit at the conclusion of the 2008-09 fiscal year, actually ended our year with a deficit of \$32,000. We have secured a \$300,000 operational loan that allows us to be in a cash position to take advantage of opportunity. While it is obvious we have much work to do to shore up the financial footing of the CASI operation, I believe we have constructed a solid financial foundation to build upon into the future.

The first six months are over and phase two of my “plan” has begun:

- Change community perception of CASI to reflect who and what we truly are
- Better the services we currently provide and strategically add services that meet the needs of the ever changing aging population
- Create an endowment fund that allows CASI greater long term financial stability
- Create a work environment that allows the staff to think big AND do big
- Diversify CASI in every sense of the word: with membership, with staff, through program and activity offerings, etc.
- Develop strategic relationships with area agencies, organizations, businesses and individuals

“CASI needs to be (WILL BE!), recognized by the community to be the premier resource center for persons over the age of 60.”

We all have a lot of work to do to reach our goals. But, with this hard work comes immeasurable satisfaction as we see and measure the outcome of our labors. On a personal note, I would like to reiterate a statement I made after the Board voted yes to my hire last November – Thanks for taking a risk on a “rink guy”.

Sincerely,

Thomas Bahls
CEO – Center for Active Seniors, Inc.



“My mother lives in the Davenport area and your organization has made a positive impact on her senior years” – Larry C.

Overview of CASI

CASI is an organization that offers a broad menu of programs and services in the community. Rather than thinking of CASI as just a “senior center,” we have found it best to talk about CASI in a way that truly reflects the rich texture of support, educational activities, entertainment opportunities and socialization that we make available to older adults and their caregivers and to the community:

- ❖ **Center for Active Seniors** offers seniors and their families educational opportunities, recreational activities, nutrition and wellness programs, volunteerism, multigenerational and cultural programming, socialization and creative expression.
- ❖ **Aging Resources & Advocacy Center** provides information and hands-on assistance with local, state, and federal benefits and programs through professional social-workers to older adults, their families and caregivers.
- ❖ **Jane’s Place Adult Day Health Center** provides care, safe, supportive and stimulating activities in a home-like setting to frail and dependent adults and provides assurance to their caregivers.
- ❖ **Community Center** provides facility use opportunities to the community for a wide range of activities and events: Fundraisers, support groups, parties and celebrations, expositions, education, business seminars, social clubs, etc.

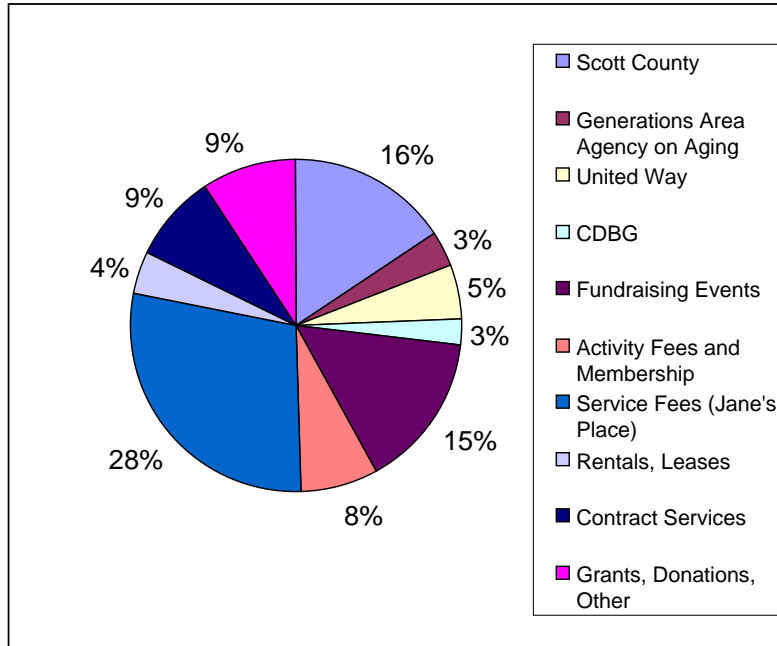
This broad scope of services and activities is what makes CASI unique. The facility is what makes CASI a community treasure. Without a doubt, CASI represents a premiere resource center for Quad City area seniors and their caregivers.



“If you don’t run your not-for-profit like a business, you won’t have a business to run.” – Barbara VenHorst

Business Operation

CASI has an annual operating budget of approximately \$1.4 million. Our funding sources are:



CASI currently receives 26% or \$364,000 in funding from Scott County, Generations Area Agency on Aging, the United Way and City Development Block Grants (City of Davenport). The remaining funding of 74% or \$1,036,000 is “earned” by staff through provision of services, membership fees and dues, grants and donations, fundraising, contract services and through rentals and leases of the facility.

Highlights in the Future

- The development of corporate partnerships through relationship building, increased exposure, event and activity interaction and program sponsorship will be critical to the financial success of CASI.
- Correcting and enhancing the perception of CASI by the general public will bring CASI greater opportunity to serve, resulting in increased usage and revenue.
- Building value for membership in CASI by creating greater opportunities, discounts for services and “value added” member benefits will create a larger membership pool to market to.
- Leasing operational space to service organizations that CASI shares commonalities with will increase revenue and will also enhance member experience and services.
- Diversification of programming and activities will attract additional members of the baby boomer senior population and will increase awareness in the community through event and activity marketing.



“... I want to thank you for the gifts (Holiday gifting program), my only ones... It means a lot to be remembered.” – Linom S.

Senior Advocacy and Resources

As individual seniors or their caregivers need help, the first challenge is finding where to look for information and guidance. CASI is fortunate to have our trained professional social workers available to answer questions and provide referral to the appropriate company or organization. There is no charge for the information & referral service regardless of income. We can help with many questions, such as:

- ❖ Aid in identifying needs
- ❖ Assistance with securing benefits
- ❖ Links to community programs and agencies
- ❖ Eligibility for local, state, and/or federal programs
- ❖ Benefits management
- ❖ Housing alternatives
- ❖ Heating assistance
- ❖ Services to support at-home independence
- ❖ Caregiver support
- ❖ Medicare Part D and Medicare billing options
- ❖ Long term care options
- ❖ Advanced Care Planning and End-of-Life decisions

Our highly trained team of seven caseworkers provided the following units of service to seniors and their family caregivers:

<u>FY 09</u>	<u>FY 08</u>	
7600	5,141	Information & Referral Units
7514	4,893	Assistance Units
6409	5,009	Monitoring Units
7536	5,383	Clients Contacts
3760	4,356	Collateral Contacts

In Fiscal Year 09, there were a total of 710 unduplicated participants, 82% of which live in Davenport.

Also in Fiscal Year 09:

83	Group Presentations by CASI Senior Advocates
294	Rent Rebates, Property Tax Applications
274	Santa for Seniors Gifts Distributed
160	Food Baskets Distributed
219	Holiday Meals delivered (Thanksgiving, Christmas)
8	Projects for Seniors Coordinated

Future Goals

- Increase presentations to the community
- Development of an all encompassing senior resource guide
- Increase presence of advocates at rural meal sites, and assistance centers



"I can't begin to thank you enough for the tender care you gave Gary... Gary would say to me: These girls are gems!" – Ginger M.

Jane's Place – Adult Day Care Center

The community can be proud to offer services for frail seniors and their caregivers through Jane's Place Adult Day Care Center. Our state licensed program provides the support and care that each of us would want for someone we loved. Whether it is a spouse suffering with dementia or a parent who can no longer be alone during the day, Jane's Place offers professional personal assistance with a structured program in a home-like setting. This is an excellent alternative to institutional care.

New this year at Jane's Place was the addition of music therapy for our Jane's Place guests. Research has shown that music is one of the most powerful tools we have for reaching patients with memory-loss or depression.

In Fiscal Year 2009, Jane's Place staff worked to accomplish the following:

Total Unduplicated Clients	112
Total New Admissions	36
Average Daily Attendance	36
Total Annual Hours of Service	59,751

Our services keep growing and improving:

- Revised manuals and information sheets to better inform our clients caregivers
- Outings like: bowling, fishing, botanical gardens, festival of trees, community lunches
 - Music and pet therapy
 - Holiday celebration events and activities
 - Ceramics and art classes
 - Exercise classes and activities
 - Games, games and games!
 - Outdoor tomato and pepper garden
- Participation in all Celebration Hall events, lunches and presentations

Looking to the Future

- Increase daily average attendance by creating greater awareness of Jane's Place service through corporate presentations and referral agency relationship building
- Increase in number of "brain game" activities effective at slowing the onset of dementia
- Recruitment of additional volunteers for kitchen and activity assistance
- Provide additional support materials and activities to caregivers



"I never cheat, I just sometimes forget the rules..." Jack on playing cards

Activities and Programs

CASI has historically offered a wide range of activities and programs to the community, like:

- Ceramics – Beginning and Advanced Classes
- Art Classes – One Stroke Painting, Acrylic Painting, Pop-up, Pencil and Charcoal Drawing, Sgraffitto Egg, Bob Ross, Digital Photography, Fiber Art Seminars, Hand Sculpture, watercolor, silk painting, etc.
- Music – New Horizons Band, Golden Tones Choir, Harmonica Classes
- Day Trips – Canal Boat, Waterloo, Woodfield Mall, White Pines Dinner Theatre
- Cards/Games – Pinochle, Euchre, Bridge, Friday Bingo, Shuffleboard, Billiards, Wii, Dance Town
- Computer Classes – Beginner, Intermediate, Advanced
- Educational – Eldercare Senior Social, We Have To Talk, National Health Decision Day Seminar, Dependant Adult Abuse Meeting, Stroke Prevention, Dementia Training, Money Week Seminars, AARP Defensive Driving Class
- Health and Wellness – Gentle Exercise Classes, Yoga, Meditation, Line Dancing, Tai Chi
- Support Groups – Caregiver Support, Grief Support, Parkinson Support, TOPS, Low Vision, Alzheimer Support
- Social and Entertainment – Social Dancing, Square Dancing, Salsa Dancing, Golden Wedding, Movie Matinee, Book Club, Red Hat
- Luncheons – Monthly Lunches for Card Club and Bingo

Events from the Past Year

- Fathers Day and Mothers Day Luncheons and Entertainment
- Davenport Jaycee's Thanksgiving Lunch
- Davenport Firefighters Holiday Lunch (Christmas Season)
- Membership Picnic
- Veterans Day Concert
- Valentines Day Lunch and Celebration
- Spring Break Choir Concert
- Concert in the Park
- Art Shows – Plus 60, Fibre Art, Senior Olympics
- Holiday Band and Choir Performance
- Holiday Light Tour
- Money Smart Week Seminars
- AARP Tax Aide
- Fall Festival and Bake Sale

Looking to the Future

CASI is committed to continuing the quality programming we currently offer and adding additional activities and events that broaden the scope of our offerings. Activities like:

*Senior Theatre * Language Classes * Cooking Classes * Monthly Educational Seminars
Cultural programming * Event Related Dances * Trivia Contests * and more!*



“Were you serious about me teaching the language class? I am old, but my brain still works!” – Dianne when offered the opportunity to teach Spanish classes

Volunteers

Our volunteers are a tremendous asset for CASI. They not only assist with or lead regularly scheduled activities, but they are invaluable at special events: Holiday Festival, Blarney Bash, St. Patrick’s Day Race, Membership Picnic, Annual CASI Garage Sale, Thanksgiving and Christmas Parties, AARP Tax Aid, etc.

In Fiscal Year 2009, CASI Volunteers logged:

Total Hours Volunteered 26,724
Unduplicated Volunteers 507
New Volunteer Applications 35

Looking into the Future

- Increase number of volunteers participating in various activities by better identifying and promoting volunteer opportunities at CASI, and by presenting volunteer opportunities to area businesses, social organizations and community groups
- Develop orientation packet with pertinent information for volunteers at CASI
- Improve volunteer data collection and method of reporting hours with the implementation of My Senior Center software

Listen to Me Read

Over the past twelve years Listen to Me Read has provided critical support and mentoring to thousands of area school children during the school year. In fiscal year 2009, the Listen to Me Read program had:

38 Volunteers
23 Participating Schools
9600 Students
2274.5 Volunteer Hours

While supported by schools, administrators and volunteers, some of the “luster” has worn off the program. Beginning in mid-August of 2009, a renewed effort to reach out to teachers, administrators and volunteers will be undertaken with the goal of increasing awareness of the program and ultimately, student participation.

Other Volunteerism by CASI Members

CASI member volunteers knitted over three hundred sets of gloves, scarves and hats which were distributed by the Listen to Me Read volunteers to five needy schools in Scott County during Fiscal Year 2009.

The “ugly quilt” ladies stitched together dozens of sleeping bags made out of used quilts during the past year. These quilts were given to various charitable organizations in the Quad Cities who serve the homeless.



*“What a beautiful building...How many people stay here at night?”
Virtually every first time visitor to CASI*

Meal Site

The CASI meal site, funded by Generations Area Agency on Aging, is designed to serve nutritionally balance meals to seniors in a safe, social atmosphere. The meals “sell” for a requested donation of \$2.75 per meal. In Fiscal Year 2009, the CASI meal site served 5,268 meals over 238 days – an average of 22.1 meals per service day.

Our goal is to increase service numbers by scheduling performance activities (band, choir, etc.) before and/or after the meal service time, as these days traditionally have higher attendance than days where no “spectator” activities are scheduled.

Fit for Life Fitness Center

With over one-hundred and forty members and open six days a week, the CASI fitness center is an active place! Personalized customer service creates a “Cheers” like environment at the fitness center, where all are welcome.

Efforts are underway to increase referral membership via the cardio-pulmonary programs at Genesis and Trinity, with the likelihood of the institution of a collaborative program sometime in the fall of 2009. We are also exploring the addition of “value added” services, like: personal training opportunities and additional exercise classes for varying levels of fitness.

Retail Spaces

The **CASI Gift Shop** is staffed exclusively by volunteers. The merchandise in the store is targeted for needs of seniors who need a gift or item, but find mall or super store shopping inconvenient or even hazardous. The net sales total for the Gift Shop in Fiscal Year 2009 was almost \$2,000.

Eleanor’s Café has become a busy place! Not only has the menu been revamped and the variety of daily offerings greatly increased, but the café is now offering catering services to lunch groups, private rentals and other facility use activities. Additionally, businesses in the direct vicinity of CASI have been contacted and sample food delivered in an effort to increase the services volume. Currently, when all direct expenses are totaled (COGS, Payroll), the café is operating at Fiscal Year loss of @ \$5,000.00. The goal of the coming year is to increase revenue to arrive at a break even Fiscal Year End total.

Facility Leases and Rentals

Increased facility use payments to CASI is a tremendous area of revenue opportunity. Through renegotiation and an expected increase in lessee’s, leased space revenue is expected to increase from Fiscal Year End 2009 totals of \$10,980 to \$20,000 + by the end of the 2010 Fiscal Year.

Rentals, due in large part to exemplary customer service and emphasis on providing the best customer experience possible, increased dramatically during the second half of Fiscal year 2009. With continued emphasis on these two key factors, rental revenue should meet or exceed Fiscal Year 2010 budget projections.



“CASI has put the FUN back in fundraiser” – Gwen T.

Development

From the first ever Light up the Holidays Family Festival to the Blarney Bash to the St. Patrick Day Race, CASI experienced tremendous success with it's fundraisers during the 2009 Fiscal Year, netting a total of \$94,834!

The three “big” events are again planned for Fiscal Year 2010 with additional events planned:
USO Dance – Fall 2009
Wine Tasting – Spring of 2010

Corporate Sponsorship

Corporate Sponsors played a big revenue role during Fiscal Year 2009, committing over \$61,000 in cash sponsorships. Based on response from our corporate partners, the future looks bright for increasing the overall level of corporate sponsorship during the 2010 Fiscal Year. Only one month into this year, we have already sold sponsorships for the USO Dance, Talk of the Town Seminar series and a variety of activities and events that have never been sponsored before!

Birdies for Charity and Friends of CASI Campaigns

Total contributions for the Birdies for Charity Program have not been released, but CASI is expecting at least \$10,000 for the 2009 campaign, a significant increase over the 2008 campaign. The Friends of CASI annual campaign has been disappointing thus far, with totals expected to be similar to the 2008 Fiscal year in the range of \$17,000-20,000. Beginning in 2009, we are planning to move the Friends of CASI campaign to the late fall and early December time period, as this campaign currently occurs at the same time as the Birdies for Charity campaign in June and July each year. We believe this will give donors two opportunities a year to donate to CASI instead of “forcing” them to choose between one campaign or the other.

Grants and Organizational Giving

Continued relationship building and a “master application plan” have been instituted with results already being recognized: CASI has received contributions toward the roof replacement project totaling \$43,000 to date. An organized plan that incorporates listening to charitable organizations' wishes will result in increased giving activity that will enable CASI to leverage additional funds from an increasing number of charitable donors.

Endowment Development

Historically, there has been no organized effort by CASI to develop and maintain an endowment development program that incorporates bequeathals, insurance policies, annuities and charitable estate planning. Given the member demographics of CASI, this appears to be a program whose institution is long overdue. Working with area agencies and local experts in the field of charitable giving, a plan is being formed, with a tentative institution date of Fall 2009, where we can begin to actively build relationships with potential donors and outline options for their charitable estate plan. The goal of the endowment development program is to achieve a balance of funds that ensure the financial stability of CASI, even during tumultuous financial times, and allows for the ability of CASI to consider future strategic capital projects.



*"Age is an issue of mind over matter. If you don't mind,
it doesn't matter." – Mark Twain*

Membership

CASI currently has over 1,600 members, with a year end total expected to be near 2,000. We have developed a value added program that brings substantial and tangible benefits to our members. Continued support of members services coupled with the addition of a corporate membership plan, an increased variety of programming and activities, higher visibility and community awareness should make these numbers steadily increase. We must always remember that we serve our member and our community and we must always remain nimble enough to adjust what we do and how we do it to accommodate the changing needs of seniors.

In Summary

People in positions of power have the ability to speak loudly and be heard. They have the ability to create change, betterment, progress. In all areas of life, people in positions of power are advocating causes; support for children's services, health care reform, racial and ethnic inequalities, etc. Unfortunately, after a person has aged, then retired and has become removed from his/her position of power, their voice is seldom heard, their concerns rarely addressed. CASI must be the voice for seniors. We must lead in senior advocacy, be heard and we must create change and betterment for the seniors in our community and beyond.

CASI is positioned to take advantage of great opportunities that will further our mission. We have a tremendous amount of work ahead of us that will seem unending and most likely will never be fully accomplished to our satisfaction. But, it is our charge to champion! We have the expertise, the commitment and the support to accomplish great things in our and for our community.

Now is the time, are you ready?



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2008 – 09 Annual Report

July 28, 2009