

# Faribault Area Senior Center



# 2017 Annual Report

Building Expansion Groundbreaking  
October 3, 2017

# MISSION STATEMENT

## Senior Center



The mission of the Faribault Area Senior Citizens, Inc. is to promote the physical, emotional, intellectual, economic and social well-being of older adults and to promote their participation in all aspects of community life in Faribault and the surrounding area.

## Fashions on Central



The mission of Faribault Area Senior Center's Fashions on Central is to provide essential financial support for the Senior Center. In addition, the Fashions on Central provides volunteer opportunities for its members and is environmentally responsible in encouraging the reuse of serviceable items.

## 2017 Staff

### Executive Director

Mona Kaiser

### Program Coordinator

Brenda Johnson

### Dining Site Manger/Business Office

Deb Kauffmann

### Business Office

Michelle Remold (through July, 2017)

### Fashions on Central Staff

Kathy Dodds, Gayle Watters

## Introduction

Mona Kaiser, Executive Director



It was in 2008 that the Senior Center began discussing the possibility of expanding our building. It started with concept drawings and many meetings with possible builders and City officials/staff. But the time has come and we are about to make history.

Raising nearly \$2M is hard work and the people that have worked on this know that is true. But there is an end in sight and the reward will be when we finally can utilize the new space and amenities that are so well deserved. Thanks to everyone who has shared in bringing this project to pass. You have my gratitude.



## 2017 Board of Directors

### Officers

**President** - Milt Plaisance

**Vice-President** - Richard Hansen

**Treasurer** - Richard Hora

**Secretary** - LaVonne Brick

### City Council Liaison

Kevin Voracek

### Directors

Clarence Anderson

Jack Claeson

Cathy Hoban

Dave Jacobsen

Irene Paquette

Gloria Rodriguez

JoEllen Schulz

Kathryn Speulda

# 2017 Volunteer Hours

The Senior Center continues to rely on its members for thousands of hours of volunteer work. In addition to having a work force that is dedicated to the mission of organization, it saves substantial amounts of money each year in labor costs. The following are those areas in which volunteers assist:

- |                                  |                                 |
|----------------------------------|---------------------------------|
| 1. Bake Sale                     | 11. Flower Basket Watering      |
| 2. Blood Pressure Checks         | 12. Funeral Escort              |
| 3. Board of Directors Work       | 13. Handyman Help               |
| 4. Book Club Leaders             | 14. Health Insurance Counselors |
| 5. Building Project Committees   | 15. Kitchen Band                |
| 6. Calls from Santa              | 16. Out to Lunch Planner        |
| 7. Card Recycling                | 17. Program Presenters          |
| 8. Counselors (Legal & Health)   | 18. Receptionist Desk           |
| 9. Defensive Driving Instructors | 19. Senior Dining Program       |
| 10. Fashions on Central          | 20. Tax Preparers               |

## 2017 Programming

	Participants		Participants
Cards, Games and Crafts	2,230	Medical Services	889
Caregiver Education (Family & Professional)	66	Meetings	355
Caregiver Support Group	105	Out to Lunch Bunch	95
Coffee Shop	7,058	Programs (speakers, local tours)	188
Defensive Driving Classes	252	Senior Dining (two locations )	10,381
Groups (Book, Writing, Coloring, Meditation)	528	Trips	849
Information and Referral	780		

Total number of participants in Senior Center sponsored activities and events in 2017 were 23,776

# 2017 Community Partnerships **94 partners**

1st United Bank	Faribault Police Department	Owatonna Orphanage Museum
AARP	Faribault Public Schools	Parker Kohl Funeral Home
Aging Services	Faribault Senior Living	Patton, Hoversten & Berg
Allina Health/District One Hospital	Faribault Water Works Plant	Pearson, Carla
Anna Dee's	Faribault, City of	Perkin's
Basher's	Friendship Travel	Pleasant Manor/View Estates
Bathchelder, Jan	Glass Garden Beads	Realife Cooperative
Bernie's Grill	Godfather's Pizza	Rech, Diane
Bokman, Jean	Gran Plaza Mexican Grill	Retired Senior Volunteer Program
Boldt Funeral Home	Grandpa Al's	Reuvers, Lisa
Bottke, May	Grandprey, Lloyd	Rice County Fair Board
Boyes, Bill	GROWS Garden Club	Rice County Public Health
Braden, Scott	Haag, Bonnie	Rice County Social Services
Broaster, The	Hafemeyer, Jessica	SE MN Area Agency on Aging
Brookdale Senior Living	Harry Brown's	Sellner, Herb
Brown, Stella	Heritage House	SEMCCAC
Buckham Memorial Library	Holland, Mary Jane	Signature Bar and Grill
Buresh, Joyce	Honoring Choices	Sjolie, Kristin
Cannon Valley Elder Collegium	Insty Prints	SMRLS
Carbone's	Joe's Sports Bar	Southern China
Cardinal Pointe	Johnson, Jacki	St. Lucas Care Center
Civil War Roundtable	Jones, David	Stadler, Vicki
Community Thanksgiving Meal	KDHL	Statewide Hlth Improv. Partnership
Dodds, Kathy	Lincare	Stella, Peg
Donkers, Nancy	Med City Mobility	Tangren, Reuben
Faribault Community Television	Milestone Senior Living	Three Rivers CAC
Faribault Daily News	MN Elder Justice Center	Well Connect SE MN
Faribault Diversity Coalition	Morningsong, Anhei	Weston, Leah
Faribault Energy Park	Morristown Historical Society	Wille, Nyla
Faribault Fire Department	Murphy, Loren	Wilson, Sam
Faribault Main Street	NP Communities	
Faribault Parks and Rec	O'Connor, Isabelle	

# 2017 Fundraising

Bake Sale	\$2,340	Book Sales	\$282
Card Games	\$1,360	Recycled Cards	\$283
Fashions on Central	\$29,919	Miscellaneous	\$695
Coffee Shop	\$4,279	<b>Total General Funds Raised</b>	<b>\$46,058</b>
Flower Basket Watering	\$2,300	-----	----
Funeral Escort	\$4,600	Celebrating Seniors Capital Campaign	\$1,553,472
		Total amount raised from beginning of campaign through Dec. 2017	

## 2017 Donated Building Usage (to 16 agencies)

AARP Defensive Driving Classes and Tax Prep	Lion's Club Vision Screening Event
Aging Mastery Program– Catholic Charities of S. MN	MN Elder Justice Center
Cannon Valley Elder Collegium Classes	Senior Friend Program– RSVP
Faribault Community Center Classes and Meetings	Rice County Extension Annual Meeting
Foot Clinic Appointments	Rice County Public Health Classes and Flu Shot Clinic
GROWS Garden Club Event and Meetings	SEMAAA Education & Health Insurance Counselors
Honoring Choices Programs	S MN Regional Legal Services Clinics
Living Well with Chronic Conditions Classes– SHIP	Three Rivers CAC Senior Advocate Hours

## 2017 Fashions on Central

Fashions on Central continues to be a significant funding source for the Senior Center.



Key points of interest:

- The donations of high quality, gently-used clothing are received in abundance from Faribault residents
- All excess clothing items, saleable and unsaleable, continue being picked up and recycled by NP Communities, a Rochester-based non-profit organization. Senior Center is paid per pound for these items.

- Volunteer support continues to be strong from members and non-members alike.
- Kathy Dodds came back to the manager position as a paid staff member.



Kathy Dodds

### 2017 Financial Breakdown

Income	\$54,780
Expenses	<u>\$24,860</u>
<b>Net</b>	<b>\$29,920</b>

## 2017 Caregiver Support and Senior Center Programs

Brenda Johnson, Coordinator



## 2017 SEMCAC Senior Dining

Deb Kauffmann, Site Manager



### CAREGIVERS & COMMUNITY

The FASC continues its long tradition of working with Family Caregivers - those who provide help to an older or disabled adult relative or friend. Along with information & referral help and classes for family caregivers, I co-facilitate a family caregiver support group that meets monthly at Milestone Senior Living. We also maintain connections with professional care providers and facilitate continuing education classes for those providers.

Catholic Charities of Southern MN (Retired and Senior Volunteer Program and Active Aging Programs) has been a long-term partner with us. An 11-year partnership with RSVP provides the local Senior Friendship Volunteer Program with meeting space and in-kind support. Partnering with Active Aging Programs has brought Aging Mastery and SAIL—Stay Active and Independent for Life to Faribault. The FASC is also part of the Well Connect SE MN Network through Rice County's Statewide Health Improvement Partnership (SHIP) which brings the Living Well with Chronic Conditions and A Matter of Balance classes to our community.

New partnerships in 2017 brought programming and information from the community initiative Honoring Choices—Advance Care Planning; the Minnesota Elder Justice Center around issues of elder abuse, neglect and exploitation; and local food support through the non-profit, Fare for All. We also piloted a unique project that matches seniors with high school students at Faribault's Area Learning Center for tech/computer tutoring.

### SENIOR CENTER PROGRAMS

#### *Relevant, Responsive, Connected*

Faribault Area Senior Center membership is representative of our senior population in the Faribault community with a range of socioeconomic situations and an age range from 50 to 100 years. While programming is focused on our members we have a strong commitment to providing options for community members as well.

Programs include a variety of health and wellness classes, opportunities for creativity and social connectedness, services that assist with legal planning and financial well-being, and presentations just for the joy of

SEMCAAC's Senior Dining continues to be a signature program for the Faribault Senior Center. For many community residents, this is what they know us for— a noon meal for older adults. During 2016-2017, SEMCAC handled the Site Manager duties for the dining program, but beginning in 2018 the Senior Center assumed those duties once again. Deb Kauffmann, will take the lead on this.

### 2016 Statistics

Senior Center Meals Served = 7,117

Golden Meadows Meals Served = 3,264

**In addition, meals were also prepared and delivered to Faribault's Head Start program.**

learning. We strive to be responsive to the wants and needs of the community. Partnerships with individuals and agencies is an important way for all of us to increase our ability to provide these types of community-based programs and access to services. The list of partnerships found on page 3 is indicative of the powerful way in which our center is truly a community center for seniors.

In 2017, specific options included programs such as Jewelry-making at Glass Garden Beads and Fall Gardening with Master Gardener, Lisa Reuvers. We also learned about bluebirds, Charles Lindbergh, and travels in India. We hosted a "Resilient Community" series learning about Faribault's environmental practices and taught by Leah Weston, MN GreenCorps member. Members themselves brought new programs to us in the way of Mindfulness Meditation taught by Anhei Morningsong and Mah Jongg with Jacki Johnson.

In some respects, the FASC also reflects that place "where everybody knows your name". While we grow into new and improved spaces in 2018, we hope to continue that level of responsiveness to our members and our community.

# Faribault Senior Center Historical Timeline

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**1968-** Faribault seniors began meeting at McKinley School. An average of 40 seniors played cards and socialized.

**1970-** The Senior Center, a 501c3 private, non-profit organization, was incorporated under the name of the "Faribo Golden Age Club".

**1971-** The Golden Agers moved to St. Lucas Convalescent and Geriatric Care Center. Membership was over 1,000 and known as Minnesota's largest and most active senior citizens' group.

**1980-** Senior Center's Board of Directors passed a resolution announcing its desire for a permanent place to meet.

**1981-** Group moved to the lower level of the old Armory building.

**1984-** The Golden Agers moved to the Buckham Memorial Library, although monthly meetings were held at the Knights of Columbus hall because the space at the library wasn't large enough to hold its approximately 576 members.

**1989-** The City of Faribault and the Senior Center jointly fund a study to assess the needs of Faribault seniors.

**1993-** Current location was secured and an agreement with the City of Faribault was drafted

**1994-** The City Council approved the project on June 28, 1994

**1995-** After two years of fundraising, the Senior Center broke ground on their building in and occupied it in 1996.

**2008-** Experiencing space constraints, the Senior Center began exploring expansion by soliciting proposals from a variety of architectural firms.

**2012-** An architect from I & S Group (now known as ISG) met with a newly created committee that was formed for the consideration of a building expansion. The architect drew several concept drawings which were presented back to the committee, a final choice was made and preliminary plans were prepared.

**2013-** (January) A letter was sent to the City of Faribault requesting that the Senior Center be placed on a City Council meeting agenda to begin discussion about a future building

expansion. (May) City Council approved the purchase of a property adjacent to the Senior Center, which will be needed in order to do the expansion. The Senior Center will reimburse the city for the demolition costs. (June) Meetings of inquiry were conducted with three potential Capital Campaign consulting firms. (September) A presentation was made to Joint Committee of city council a plan for expansion and request for property that is needed.

**2014-** (June) Meeting with City leaders was held to review the 1993 Development Agreement. (September) Negotiations begin with City leaders on a new Development Agreement. This agreement would replace the 1993 document and take effect

when a building expansion is complete. (October) Negotiations complete on the new Development Agreement and approved by City Council at October 28, 2014 meeting. (November) Senior Center Board of Directors approved the agreement at its November 10, 2014 meeting. Document was signed by Mayor John Jasinski, Board Chair Milt Plaisance, City Administrator Brian Anderson and Executive Director Mona Kaiser at same meeting. (December) Interviews of Capital Campaign consulting firms held on December 9th and



## Faribault Senior Center Historical Timeline

**2015-** (March) Community Assessment interviews held by Crescendo Consulting. (April) Results of interviews presented on April 20. Board of Directors approved a motion to proceed with hiring Crescendo Consulting to conduct a capital campaign on April 23. (May) Committees formed and process to start fundraising begins. (August) Board approved the hiring of Colin Oglesbay of Dwyer/Oglesbay in Minneapolis to write a Request for Proposal (RFP) for Design/Build Contractors. (September) First donation towards the capital campaign was received. (November) Kick Off Celebration held at American Legion with 350 people in attendance. There was over \$200,000 raised at this event alone. (December) Year ends with \$750,000 raised in cash and pledges.

**2016** (January) "Every Member Counts", the fundraiser portion of the capital campaign which is geared towards Senior Center members is launched. (February) RFP approved by Board of Directors. Mandatory meeting of contractors interested in bidding the project with bids due on April 4. (March) Event held at Vintage Ballroom



for top level donors in an effort to engage their assistance in solicitations. (April) Interviews held on April 22<sup>nd</sup> for prospective contractors. Healy Construction, Procon and Met-Con were all interviewed. (May) Met-Con hired at the May Board meeting. (June) Campaign topped \$1M. Met-Con signed contract to handle Phase One of the building project. (September) Sent letters to City of Faribault and also to Rice County for funding support. (October) Receipt of in-kind gift of glass from Sage-Glass valued at \$50,000. (November) Presented requests City and County. (December) Funds approved from City of Faribault and also



Rice County which triggered matching money equal to it. Campaign ends 2016 with \$1.39M

**2017-**(February) State Bank made a donation of 4 acres of land. (April) Property sold to S. MN Woodcraft for



\$130,000. Eviction notices given to renters of city-owned homes which are adjacent to Sr. Center expansion property. (May) Building plans finalized, bids advertised and due back on May 17<sup>th</sup>. Fundraising currently at \$1.5M. (June) New staff, Deb Kauffmann, hired and begins on June 22<sup>nd</sup>. Request made to Daikin for in-kind gift of HVAC units. (July) City council began process of replatting and rezoning the expansion property. (September) Kathy Dodds hired as manager of Fashions on Central. City council approved amending its Comprehensive Plan to rezone Buckham Center block to Central



Business District (CBD) and issued building permits for FASC to proceed. Initial meeting held with State Bank of Faribault and Reliance Bank to discuss construction loan options. Daikin Applied informed us of their intent to donate three HVAC units to the Senior Center. (October) Ground-breaking held on the 3<sup>rd</sup>. Board approved the contract with Met-Con and construction timeline with completion date anticipated in Nov. 2018. Loan proposal from State Bank of Faribault and Reliance Bank received and approved. House demo, site prep, foundation and block work begins. (November) Steel work started. Campaign ends 2017 with \$1.5M





# 2018 Budget

<b>Income</b>	<b>2018 approved</b>
Advertising income	\$3,850
City of Faribault	\$50,000
Fashions on Central	\$55,000
Contribution/Donations	\$3,500
Funeral Escort	\$8,250
Fund raising	\$6,000
Membership fees	\$25,000
Trips	\$1,000
Rental income	\$14,000
Rice County	\$6,000
SEMCAC income	\$13,500
Program Income	\$10,000
Def. Driving	\$6,500
Dividend income	\$15,000
<b>Total Income</b>	<b>\$217,600</b>
<b>Expense</b>	
Advertising	\$1,000
Bank charges	\$50
Depreciation	\$18,500
Dues & subscriptions	\$300
Insurance	\$8,000
Janitorial	\$12,000
Legal & accounting	\$5,600
Mileage & meal	\$100
Miscellaneous	\$200
Office supplies	\$2,000
Postage & shipping	\$2,500
Printing	\$3,750
Program supplies	\$6,700
Defensive Driving	\$5,000
Repairs & maintenance	\$2,000
Simple IRA Match	\$2,700
Taxes - real estate	\$3,500
Taxes - payroll	\$9,414
Telephone	\$2,600
Utilities	\$15,000
Wages-staff	\$116,525
<b>Total Expense</b>	<b>\$217,439</b>
<b>Net Income</b>	<b>\$161</b>

# 2017 Balance Sheet

	<u>Dec 31, 17</u>
<b>ASSETS</b>	
Current Assets	
Checking/Savings	
101 · Checking	14,877.26
105 · Petty Cash	200.00
Total Checking/Savings	<u>15,077.26</u>
Other Current Assets	
187 · Edward Jones - Mutual Funds	233,428.19
103 · American Funds	47,718.57
120 · Accounts receivable	5,643.34
Total Other Current Assets	<u>286,790.10</u>
Total Current Assets	<u>301,867.36</u>
Fixed Assets	
150 · Building & Equipment	1,085,652.41
151 · Accumulated Depreciation	(389,496.44)
Total Fixed Assets	<u>696,155.97</u>
Other Assets	
179 · Building Endowment - American	239,865.89
186 · Checking Endowment	765,139.59
Total Other Assets	<u>1,005,005.48</u>
<b>TOTAL ASSETS</b>	<u><u>2,003,028.81</u></u>
<b>LIABILITIES &amp; EQUITY</b>	
Liabilities	
Current Liabilities	
Other Current Liabilities	
210 · FICA/Fed Withholding	3,368.92
211 · MN Withholding	502.00
213 · MN U/C Payable	28.00
Total Other Current Liabilities	<u>3,898.92</u>
Total Current Liabilities	<u>3,898.92</u>
Total Liabilities	3,898.92
Equity	
292 · Temp Rest Bldg Net Assets	755,270.20
290 · Unrestricted Net Assets	397,131.50
291 · Temp Restricted Net Assets	249,735.28
Net Income	596,992.91
Total Equity	<u>1,999,129.89</u>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<u><u>2,003,028.81</u></u>

# 2017 Profit and Loss Statement

	Jan - Dec 17	Budget	\$ Over Budget
<b>Income</b>			
300 · Advertising income	3,066.00	3,500.00	(434.00)
305 · City of Faribault - income	53,058.60	53,000.00	58.60
306 · Fashions on Central sales	54,779.65	55,000.00	(220.35)
307 · Contributions	3,518.80	6,000.00	(2,481.20)
308 · Escort Service	4,800.00	5,000.00	(200.00)
309 · Endowment-Bequests & Memorials	1,696.00	0.00	1,696.00
310 · Fund raising income	3,340.25	20,000.00	(16,659.75)
311 · Fundraising - Building	554,593.29	0.00	554,593.29
320 · Interest income	641.62	0.00	641.62
325 · Membership fees	19,968.00	24,000.00	(4,032.00)
326 · Miscellaneous income	135.00	0.00	135.00
331 · Trips	0.00	600.00	(600.00)
333 · Kwik Trip Income	2.20	0.00	2.20
340 · Rental income	14,596.41	14,000.00	596.41
341 · Rice County revenue	5,151.00	5,700.00	(549.00)
345 · SEMCAC income	6,567.58	6,000.00	567.58
357 · Program Income	7,938.08	8,700.00	(761.92)
358 · Defensive Driving Income	4,850.00	6,500.00	(1,650.00)
398 · Dividend Income	21,875.42	5,000.00	16,875.42
397 · Gain(loss) on investment sales	(169.61)		
399 · Inc in Market Value of Invest	44,255.87	0.00	44,255.87
<b>Total Income</b>	<b>804,664.16</b>	<b>213,000.00</b>	<b>591,664.16</b>
<b>Expense</b>			
501 · Advertising	925.86	2,000.00	(1,074.14)
506 · Bank charges	2,243.02	50.00	2,193.02
510 · Depreciation	18,755.51	17,725.00	1,030.51
511 · Dues & subscriptions	378.00	250.00	128.00
525 · Insurance	7,928.00	8,000.00	(72.00)
530 · Janitorial service	12,989.22	12,000.00	989.22
535 · Legal & accounting	4,895.00	5,500.00	(605.00)
536 · License & permits	870.00	0.00	870.00
539 · Management fee - rental	650.00	0.00	650.00
540 · Mileage & meal reimbursement	67.53	100.00	(32.47)
541 · Miscellaneous	256.80	100.00	156.80
550 · Office supplies	2,912.52	3,500.00	(587.48)
555 · Postage & shipping	2,268.75	2,000.00	268.75
556 · Printing	3,429.40	4,000.00	(570.60)
557 · Program expense	6,406.09	7,000.00	(593.91)
558 · Defensive Driving expense	4,031.00	5,000.00	(969.00)
566 · Repairs & maintenance	1,379.11	2,000.00	(620.89)
573 · Simple IRA Match	2,553.22	2,500.00	53.22
574 · Taxes - real estate	3,410.00	3,500.00	(90.00)
575 · Taxes - payroll	8,222.67	9,000.00	(777.33)
577 · Telephone	2,596.03	2,500.00	96.03
578 · Training/seminars/continuing ed	30.00	0.00	30.00
585 · Utilities	15,131.42	15,000.00	131.42
591 · Wages	105,342.10	109,500.00	(4,157.90)
<b>Total Expense</b>	<b>207,671.25</b>	<b>211,225.00</b>	<b>(3,553.75)</b>
<b>Net Income</b>	<b>596,992.91</b>	<b>1,775.00</b>	<b>595,217.91</b>