



2013 Annual Report
Port Washington Adult Community Senior Center
City of Port Washington

Submitted by Catherine Kiener, Director
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Attachment: Fiscal Summary Report for 2013



**Celebrating 40 + Years as the Gem of Strength for Active Aging: The Port Washington
Adult Community Senior Center**

Port Washington Adult Community Senior Center Annual Report 2013

With Explanation of Operation of the Senior Center

The City Commission on Aging makes external policy for the Center: preparing the budget, overseeing building maintenance and repairs, overseeing Senior Board decisions which affect the budget, and administering a program of services to the Senior Citizens throughout the City. The Mayor appoints the seven members.

The participants of the Center elect nine members to serve as the *Board of Directors*. They set internal policy with the Director dealing with members, programs, classes, trips, social events and revenue enhancing projects policies.

The City works with the Senior Center Director and Commission on Aging through the position of the City Administrator & the Finance Committee to establish a budget for salaries, building maintenance and repair, as well as utilities. The Senior Citizens finance daily activities and special projects through program and class fees, fundraising, and membership dues. The Senior Membership funds currently provide funding for 98% of office supplies, 100% of program supplies, and 15% of housekeeping supplies. The Senior Center Membership funds maintain accounts from the above financing methods and donations to offset classes, programs, trips, volunteer recognition, and social events.

The City budgets for revenue, which comes from the membership dues (City and Town), building use by organizations, clubs, card parties, and the fair share tax fee from users outside the city & town tax base. Participants who are not members or live outside of the City or Town of Port Washington are assessed an additional cost for programs, trips, and classes or a weekly fee.

The current membership cost in 2013 was \$15.00 per individual, \$20.00 per couple, or \$10.00 for a newsletter only subscription per year. The weekly fee for non-residents is \$2.00 per week. Additionally, for guests or non-members who register for some trips and programs, as a one-time participant, there is an established price, which is at least 20-30% more than the member price.

Membership Table Comparing Recent Year & Two Previous Years

Year	2011	2012	2013
City and Town	496	503	513
Number Receiving Newsletter only	13 41 Complimentary	8 33 Complimentary	11 30 Complimentary
Totals	550	544	550
<i>Non-renewals</i>	76 (60% increase)	43 (60% decrease)	37 (14% decrease)
Deceased Members	17	13	20 (54% increase)

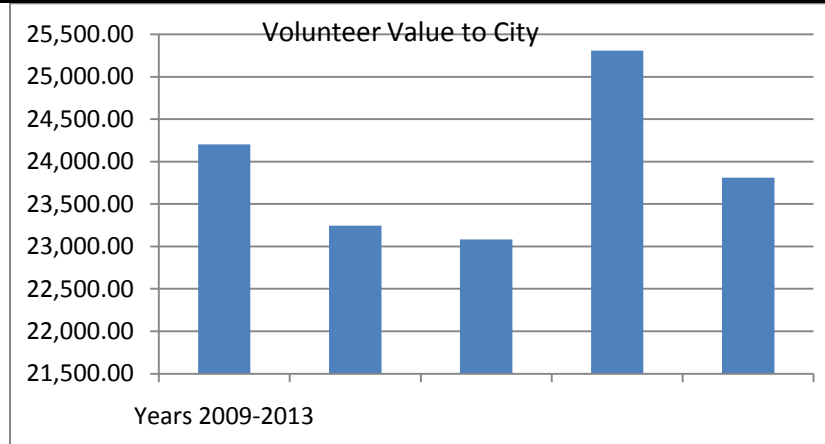
Senior Center Regular Volunteers

Volunteers for Office & Newsletter: 38 increase of 1 from prior year

Program & Other Volunteers: 37 (non-recorded hours)

Office Volunteer Hours

Volunteer Hours Contributed in the Office: Total recorded hours were 1075.50 or an average 89.63 hours per month or 20.68 hours per week. Decrease of 2 per week. In addition to the office, program volunteers have weekly hours that are not recorded but are vital to the activities offered.



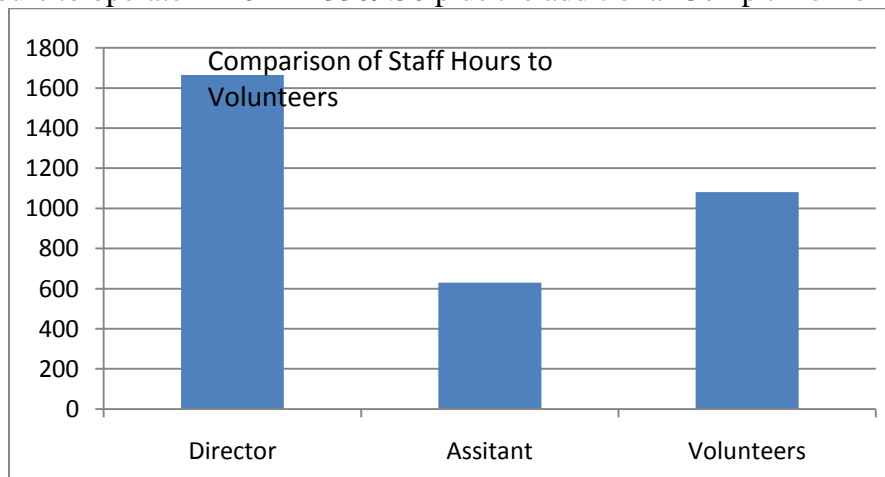
5 Year graph of Volunteer Economic Value to the City

With this number of volunteer hours, there is more Director time guiding, task delegation, and coordinating of office volunteers. The National Volunteer Center, using the Independent Sector, calculates the average wage & benefits of volunteers at \$22.14 per hour. **Using the average dollar per hour cost, Senior Center volunteers contribute “in kind wages” to the City Senior Center budget of \$23,811.57, a positive impact.** Many volunteers bring skills from their work life and some are entry level. The evaluation of the cost per hour stands as it is the “average” wage. The office volunteers are essential to the building & office remaining open throughout the day Monday – Friday and during meetings, staff lunch & vacations/days off which is unique among city departments.

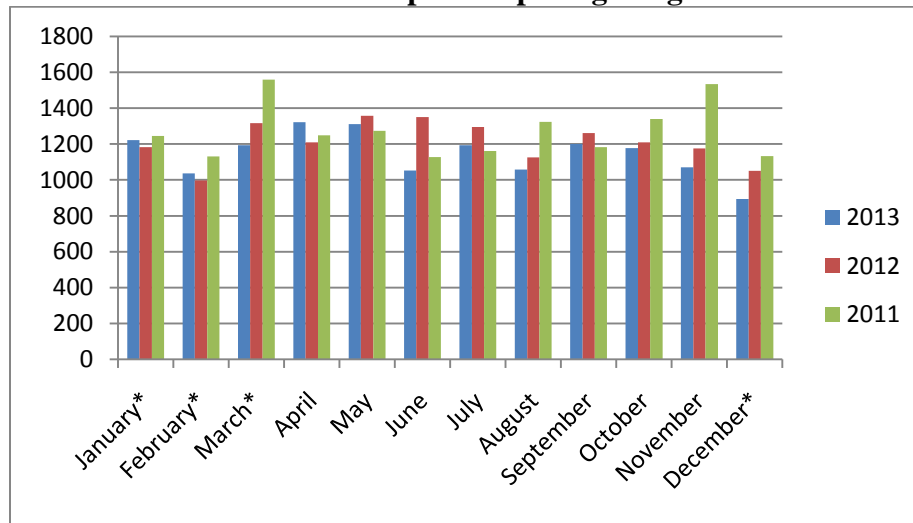
Comparison of Hours Staff & Volunteers

Director hours per year 1664	Assistant hours budgeted 599	Volunteer hours per year 1075.50
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Total hours to operate in 2014 = 3369.50 plus the additional Comp time from Director



2013 Attendance Numbers
Attendance 3 Year Graph Comparing Usage of Services



2013 Attendance Chart

<u>Month</u>	<u>Monthly total</u>	<u>Unduplicated Members/with guests</u>	<u>Daily Average</u>	<u>New Members</u>
January*	1221	244/266	56	7
February*	1036	208/267	52	5
March*	1193	239/283	60	8
April	1322	204/229	60	6
May	1310	200/230	60	3
June	1053	182/237	53	9
July	1193	178/221	54	4
August	1057	238/269	48	6
September	1200	183/277	60	4
October	1178	202/235	51	7
November	1070	192/229	56	5
December*	894	199/217	47	3
Sub-total	13,727			
Aqua Ex Use**	1850			
Bowling	792			
Bocce & Horseshoes	466			
Book Talk	156			
Volunteers for Home Delivered Meals & Driver	1136			
Total Use of Center Programs & Services	18,127		Yearly Daily Average 55	Total New Members 67

*Attendance affected by the weather (snow & Ice days Jan-7, Feb -8, March – Dec -6)

**TJ POOL problems canceled class 8 times and 2 due to weather; 3 Holidays

TESTIMONIALS: *The center regularly receives comments on the service provided which are periodically shared with the Board, Commission, Mayor, & City Administrator.*

Here are five examples: 1. *“Lift to Live is a fabulous exercise program, very affordable, plus knowledgeable instructor”- Sharon* 2. *“I do not know what I would do without this place, it keeps me going.” - Cathy* 3. *I like the variety of people, programs and opportunities provided by the Center –various members.* 4. *“Thank you for the newsletter, it keeps me informed” – Rosemary* 5. *“If you do not feel like cooking, you come to the Center for a meal. It is a place to go to get you off the couch.”-Joan*

DAY TRIPS Total:

Total Participants:

22 Scheduled Trips only 3 cancelled

Fireside Sizzling 60's 1-24-13	54
That's Italian 2-15-13	19
Fireside Footloose 3-6-13	40
High Rollers 3-15-13	35
Admirals Game - Cancelled	0
Chicago's Ethnic Salad Bowl 5-23-13	47
Annie Get Your Gun 4-18-13	48
Drury Lane Dinner 5-14-13	6
The Lettermen 5-17-13	48
Brewers VS Dodgers 5-22-13	52
Little Shop of Horrors - Cancelled	0
Packers Heritage Trail - Cancelled	0
Fireside Run For Your Wife 8-1-13	52
Arlington Race 8-15-13	6
Brewers VS Cardinals 8-21-13	54
Once Upon a Mattress 9-12-13	23
Vines to Wine 9-18-13	24
Ho-Chunk 10-1-13	49
Mystery Trip 10-17-13	47
Fireside Christmas 11-21-13	37
Appleton Shopping Trip 11-25-13	32
Fireside Christmas 12-11-13	51

Extended Trip Total: 4 offered

Celebration Belle Cruise	41
Sea Islands	6
Iceland	2
Branson-Ozark	2

Lunch Bunch

Individuals participated: 69 (Decrease of 27)

This program was held 9X's coordinated by the Senior Center where members sign up to experience new restaurants, new food trends and conversation. The 9 meetings were held

in and around the surrounding Port Washington communities. An additional two meetings were cancelled due to weather.

Classes and Clubs

There are a variety of clubs and classes offered at the senior center. To name a few: Multiple Card Clubs, Green Felt (8 Ball), Friday Book Talk, Chicks with Sticks, Senior Singers, Lakeside Tea Society, Enrichment and Wellness Classes. These meet weekly, monthly, or as scheduled.

Regular Classes with frequency and average number participating:

Frequency listed as x per or x / – Example 1x per week or 2x/month

- **Enrichment Activities:**

Ceramics (1x per week) - 5 participants

Chicks with Sticks (1x per week) Group numbers 30 with 20 regular participants

Friday Book Club meets at Library (1x/month) 30 members –average 13

members/month

NEW Delta Kappa Gamma Book Club (1x per month) – Average 8 participants

Board Games (2x/month) – 3-5 participants

Lakeside Tea Society (1x/month) – 31 participants

Piano Lessons by Appointment 10 possible students – 8 time slots per week

Extended Travel Shows – Costa Rica - 3

- Texas and Blue Danube- 12

- Iceland -10

- Continental Breakfast - 12

Senior Singers – (Perform community service by singing at local senior homes/venues) **6 performances in 2013:** in senior living -15 members

- **Wellness and Physical Activities:**

Aqua Exercise (3x per week) 133 classes- 25 per week average

Green Felt Club Leagues: Fall/Winter – 40

Summer (1x/week 12 weeks) – 20

Green Felt Club Drop in play (5x/week) – 12 -15 (an increase due to added table)

Yoga 1 (1x/week for 7 weeks) – 16

Yoga 2 (1x/week for 7 weeks) – 11.5

Bocce Ball (1x/week for 16 weeks) with 14 registered- number per week- 10-16

Horseshoes (1x/week for 14 weeks) – 20 per week

Arthritis Class 4 Sessions offered 2x/week – 7 average per session or 12 per week

Arthritis Tai Chi 2X/week 3 Sessions – 5 per session 10 per week

Bowling (with Harbor Hills) Sept – May League & June-Aug play: 792 –average 16/wk

WII Bowling- (1 x/week for 10 weeks 4 sessions per year) – 8 average participants

Lift to Live – Variation of Strong Women 5 sessions (2x/week for 12 weeks) –

9 per session- 15 per week

Tai Chi Beginning (4 sessions 1 x week/12 weeks) – 4.5 per session

Tai Chi continuing (4 sessions 1 x week/12 weeks) average 9 per session

Zumba Gold (5 sessions 2x week/ 8weeks) –average 14 per session

Flex and Balance (3 sessions 1 x week/5 weeks) average 5.25 per session
Strength with Bands (3 sessions 2 x week/5 weeks) average 7 per session

- **Demonstration Classes to kick off programs were offered in Hatha Yoga, Strength with Bands, Flex and Balance, Spinning, and Furniture Painting. - 38**

- **Craft Classes:**

Beginning Knitters (informal lessons throughout year) - 10
Make-n-Take Greeting Card Class (4 sessions) - 5 per session

- **Educational & Enrichment Classes:**

Painting all Media Class (1x/week/6 weeks) 5 sessions- 6.8
Adult Drawing & Watercolor Class 1 Session (1x/week/7 weeks) – 5
NEW Painting a Chair (1 session, 2 weeks) - 4
Computer Classes/Seminars – (1x/week /2 weeks for 6 sessions) – Total 20
NEW Unadvertised in Newsletter Facebook Class - 3
Volunteer Office Training (1x) – 9
AARP Safe Driving Course 1X – 10
Communication for Hearing – 3
NEW Kohl's Conversations for the Cure – Held in July – 4 & October- 9
Coping with Vision Change – 8
Coffee talk with the Mayor – 6 held - 93

- **Older Americans Month programs:**

Life's Transitions – 22
Helen on Accordion – 20-25

- **Card Clubs:**

Bridge (2x/week) – 20
Canasta (2x/month) – 8
Cribbage (1x/week) – 6-8
Pinochle (1x/week) – 4-6
Sheepshead (2x/week) -12 - 15
Public Sheepshead (1x/week) – 739 players for Monthly Average of 62 players
Beginning Sheepshead (1x/week – 4 weeks) – 3

DINING CENTER PROGRAMS

Averages: 16 participants per day (increase of 1);

18 home delivered meals leaving Port Senior Center (increase by 3)

The County Aging and Disability Resource Center, under the Older Americans Act, served 4051 (increase of 256) congregate meals at the Port Senior Center and delivered 4597 (increase of 731) meals in Port Washington.

The list below includes those programs where the Director, Assistant, or Volunteer was the leader or co-leader:

ACTIVITIES

Movies - 12x yr. with 3-12 participants monthly
Welcome Assistant Lunch - 17
Valentine's Day Party – 70
St. Patrick's Day Party - 24
Kentucky Derby Game – 6
Music with Helen Seidel. – 25 participants 1X a year
Senior Center Month 4 Lottery Lunches – 64
Oktoberfest with Helen's Music on CD's – 15 - 18
Halloween Party – 40
Bingo - 12x year/average 9 participants per month
FRIENDS sponsored 12 Monthly Birthday Parties – 18 – 36 per month

Health Topics

Blood Pressure Checks 11x yr. /avg. 4 -8 participants

Informational Topics

Safe Driving for seniors – 2
Medicare Updates for 2014 – 4
Decide, Discuss, Document - 11
Information & Assistance from Oz County ADRC 6x/year – number varies

FINANCIAL SUPPORT

The City Senior Center Department and the Senior Membership club provided the following support that has a positive financial impact for the Ozaukee County Senior Dining program:

Membership: Contribute prizes 16 times per year for door, bingo prizes, &/or seasonal parties

Contribute seasonal paper goods & party decorations/favors – 4-6xs yearly.

Pays monthly movie rental

City: Staff time cleaning area 5 days a week; utilities during dining site use; party assistance 12x for birthday and 2-4 other party events

SPECIAL EVENTS: PARTIES AND DINNERS FOR SENIORS

- Italian Casino Night & Dinner – 37 participants
- Christmas Luncheon – 103 participants
- Senior Summer Picnic – 93 participants
- Chili Supper & Memorial Pool Tournament– 54 participants
- Spring Fling & Volunteer Recognition – 110 participants
- Library Book Fair – 4 volunteers (unknown participant number)
- Ice Cream Social – 110 participants
- Women's Wellness Afternoon - 15
- Craft and Bake Sale Fund Raiser -We have the Chick with Sticks, (21 members) making most of the items to sell; about 10 extra people donating and at least 12 members plus staff provide bakery which is also provided by community partners at BMO Harris Bank in Port.
- Volunteer Breakfast Training for Office – 19 participants

- Valentine's Party with music & recognition for long marriages – 70
- Halloween Party – 24
- Senior Center Month Promotion & Events
- Culver's Night during Senior Center Month as mini-fundraiser –unknown number from self-reports 24-40 attendees

Service and Cooperative Programs

This is an overview of programs coordinated with the community for the benefit of seniors and children or other age recipients. The numbers reflect how many seniors volunteered (service) or attended the event (cooperative):

- Port Washington City Tour Guide 4 tours 3/8/2013 Janesville -43; 06-08-11; Aug & Sept 120 participants
- Tax Assistance by AARP – 210 (all ages) people served & 166 age 60+; + 4 volunteer preparers, 1 Coordinator, & 1 Facilitator each of 10 weeks
- Consider the Conversation Panel discussion & video about end of life wishes - 9
- Library Materials Monthly at Center – approximately 116 users
- **NEW** Elder Abuse Display – at least 12 removed literature
- Senior Book Shelves for exchange/reading of paperback & hardcover books
- Sold Tickets for Parent Scholarship Group Kid's From Wisconsin – 15-20
- Chorus Performed at Westport Meadows, Cedar Grove Gardens, Harbor Club, Anita's Gardens, Belgium Gardens, Heritage, Ellen's Home –10 performances with 15 members.
- Ozaukee County Senior Games - (1x/year 75 registered) - from Port 38 participants with hosting of 5 events in Port.
- Promoted Free Senior Lighthouse Tours for Historical Society June-August
- 4-H Firehouse Friends – (Chicks with Sticks entering projects in the Ozaukee County Fair) 27 entries – 3 Merit Ribbons, 13 Blue ribbons, 12 red ribbons
- Ice Cream Social with Rotary Club, Columbia St. Mary's & Harris Bank at Rotary Park approximately 100 -125 participants and 6 volunteers
- FLU Clinic for Public Health – 76 plus 4 County staff
- Ozaukee Senior Conference – Conference Member, Booth Display – 225 +
- Posting Community Events: Bid District, School District Technology Classes, United Way, Legion, Senior Apartments, Senior Service Companies, etc.
- Resource redistribution such as books, craft materials, and magazines to the library, daycares, schools, church projects, and service groups
- VFW Meetings – 10x yr. with 10 participants
- Blood Pressure Checks – 1x mo./ 10 months– 5-8 participants
- Benefit Specialist bi-monthly on site – 1-15 participants per month
- Prizes, paper products, decorations for Ozaukee County Senior Dining Site & Ozaukee County Senior Dining Picnic
- Arthritis Foundation Exercise Program Partner
- Referral Source on senior health care, housing, day care, home health care, ADRC, and more to Port Washington and greater community.
- Women's Wellness Afternoon - 19

- Care for Your Feet- Toe Nail Trimmers- 6 times per year -4-7 per visit
- **NEW** Chicks with Sticks donations to Volunteer Center 39 items & about 12 to Food Pantry; and baby hats to St. Mary's Hospital

Assistant Activities in 2013 – New Assistant orientation Jan - March

Assistant follows up on the delegation from the Director of planning programs, implementing policies, and general office duties. Assistant helps Director lead programs for members and dining site participants and escorts some trips. **An overview includes:** fundraisers - 2x; special events -6x; assists at monthly tea club; assists with schedule for Senior Singers & Library Project; assists with typing of calendar page & designated sections for the Leisure Times (monthly newsletter). **Additional duties:** the Assistant is responsible for office work such as preparing weekly record of funds received, balancing checkbooks, entering data for monthly financial summary, collecting membership and activity fees, answering the telephone, preparing donation requests for 4 different events; typing thank you letters and other office or program correspondence, posting events, and other duties as assigned by the Director. (x means times)

This was done in an average of eleven and one-half (11 ½) hours per week

Director Summary of 2013

The year included the following highlights, in addition to financial responsibilities for City budget and Senior Center accounts for programs, overseeing the physical plant maintenance of the Center, carpet and window cleaning schedules, building repairs, and coordinating the schedules of two very part-time staff in addition to 3 weekly office volunteers; **23 on call & 37 program volunteers and 9 contract instructors**, the Director represented Port Washington Senior Center at area meetings such as the Ozaukee Aging Consortium, County Commission on Aging, Healthy Ozaukee Coalition, Wisconsin Association of Senior Centers (WASC) District 2, and Ozaukee Senior Conference as Secretary. The Director also participates with the Library, Park & Recreation, and School District. The Director works cooperatively with Cedarburg & Grafton Senior Centers. The Director plans events, speakers, trips, and programs in addition to overseeing senior implemented programs & activities.

An overview of Director duties:

Major descriptors, for the position, with many happening simultaneously or multi-tasked, are: Facilitator, Organizer, Volunteer Coordinator, Director, Sales/Marketing staff, Public Relations, Accountant/Bookkeeper, Program Leader, Advocate, Technology Coordinator, IT Trouble shooter, secretary, human resources, and communications manager.

- **Facilitate revenue** through marketing of ad space in the Leisure Times, increase in membership; partnerships for senior events
- **New Member & Prospective member** introductions, tours, explanations
- **Orientation for the new assistant**
- Developing written procedures for assistant
- Environmental Maintenance Position **weekly meetings on tasks, supplies, & seasonal items**

- **Monthly agenda and financial report** preparations for Commission on Aging & Senior Board Meetings
- **Coordination of** Friends of Senior Center Board meetings & project completion
- **Marketing & Press Releases** monthly for newspapers & web page; quarterly for city newsletter, bi-monthly for Transitions Magazine, seasonal cable updates, and internal events.
- **Marketing** materials reviewed and updated
- **Community Programs for Adults** Seasonal Flyers 4-6 per year
- **Facebook Page Postings approximately bi-weekly**
- **Accountant/ Bookkeeper with Budget work** such as invoices, bid solicitation, record keeping, banking, program expenditure calculations, and financial summaries. Prepare documents for Audit Committee of the Senior Center Board of Directors
- **Financial records management for Senior Center & City funds and coordination of Center Annual Audit**
- **Purchasing Manager** –assorted program & facility supplies
- Donation request follow up & pick up for program supplies – chili supper, spring fling, picnic, Italian Night, silent auction fundraiser, and Christmas Luncheon
- **Volunteer Coordinator: training for 2 new office volunteers**, new special event volunteer, and annually for all office assistants on program registration fee & payment collections, computer use, copy machine, telephone use, etc.
- Correspondence such as thank you letters and new member inquiries or citizen concerns
- **Human Resource Management: Contract Program Leaders & Volunteer Leaders** oversight – 2 new contract leaders in 2013 were added
- **Maintenance Position** Job Duties & Description reviewed for updates; and supervision
- **Develop procedures & create forms** to improve operations & work flow as needed with new forms or policies for members and/or staff
- **Plan & Facilitate Programs:** chorus schedule, tea club monthly, lunch bunch 6x year, 26 trips, 13 special events plus Ozaukee Senior Games, Ozaukee Senior Conference, Classes, Clubs, Ozaukee County Fair entries
- **Coordinate & Facilitate Coffee Talks with the Mayor 6x's in 2013**
- Seasonal Decorating of Main room with Assistant
- **Supervised 1 summer & fall youth volunteer**
- Work with County to host Senior Dining Site
- Speaking engagements
- **Building maintenance** –communication of repairs with owner
- **Technology Coordinator:** Ensure system scans are run on the computers
- **Social Media & Technology based publicity:** Facebook Page update bi-weekly & Patch.com postings bi-monthly, NEW in 2013 started a Pinterest Page update quarterly
- Update Information with other community groups such as COPE, ADRC
- Memorials – distribution/use per request
- Other assistance in field of expertise to peers
- Meetings: Professional, cooperative program planning, staff, & other City

- Cooperative promotion and development with Park & Rec for Summer Brochure & Seasonal Programs

Director's Professional Activities:

Completed Annual Certification as Certified Therapeutic Recreation Specialist;
Wisconsin Association of Senior Centers (WASC) District 2 Meetings

WASC 2013 Conference Auction Committee

Ozaukee County Senior Conference Committee with speaker & food sub-committee duties; elected Secretary in October 2013

Submitted photos for City & Senior Center web page

Participant in Webinars on Aging Issues

Peer assistance for program ideas

Completed professional surveys for Badger Aging Network, National Council on Aging, & International Council on Active Aging;

Senior Center Recognition and Community Participation:

Ozaukee Fair Friends of the Firehouse Participants

Lakeside Tea Society Listing in the national magazine Tea Time September/October 2013 issue

Publicity for Senior Center Month

Photo of Port Washington Senior Members in Transitions Older Adult publication by Oz Press

Older Americans Month (May) Event

Girl Scout Troop Partner Cookie Sale;

Volunteer recruitment & recognition event & annual office volunteer training

AARP Recognition – as host Site for tax assistance field phone calls averaging 25 per week from Feb- March with additional calls January and April

Increase visibility through Senior Center Month events in September & Culver's Fundraising Night

Book donations to WJ Niederkorn library approximately over 350 books donated for their sale and financial gain

Honored Producer Award level from the Fireside

Park & Recreation Department Summer Brochure information

District Aquatic Center – 3X per week Aqua Exercise Class

Senior Center as Community Focal Point:

Organizations & School District Postings for Events; Referrals of community members to appropriate City departments or agencies

Arthritis Foundation Quarterly Reports & Co-Sponsorship for Exercise Program

Members knit baby hats for St. Mary's Hospital

Update information on Senior Center for other non-profits such as COPE

Port Tourism Partner for City Motor Coach Step-On-Guide Tours March, June, Sept & Oct 2013

Donations to other agencies of over supply or non-usable donations such as St. Vincent De Paul

Senior Singers Assisted in planning performances in the community

Chicks with Sticks Food Pantry donations of hats & scarves & other items

New Chicks with Sticks Volunteer Center of Oz County 32 various items

Committees Responsible for Senior Center Member Operations:

City Commission on Aging Members:

David Owens, Chairman beginning 6/13

Edie Webb

Sally Schirk-Ehrlich

Doug Biggs, Alderman 5/12-4/13

Beth Smyth, Secretary 6/13

Senior Center Board Members:

Joe Millonzi, Chairman

Bob Clearwater, Secretary

Peggy Maynard

Marge Erlauer, term ended 5/13

Judy Hahn, Secretary, term ended 5/13

Ed Weyker

Sharon Swatek

Suzanne Bruner, Chairman to 5/13

JoAnn Stade, term ended 4/13

Steve Broyles

Bill Driscoll, Alderman beginning 5/13

Bev Schleg term ended 5/13

Marilyn Stone

Jackie Jushka

Ron Weiss term ended 5/13

Sandy Preisler

Roberta Blumenberg