

**PART ONE – NARRATIVE**

1. **What is the mission of the organization?** The mission of PrimeLife Enrichment, Inc. is to provide services that help the older residents of Hamilton County to live with dignity and independence

2. **Present an overview of your organization: summarize history, long-term goals and current priorities of your nonprofit.** Senior Citizens Services of Hamilton County was founded in 1977. In 1993, to avoid confusion with a senior citizens club, the name was changed to Hamilton County Senior Services. We again changed our name in 2002 – *this* time to better reflect our belief that the senior years are not an end but a beginning – of the second half of life. We carefully chose our new name and logo to salute and honor the indelible spirit of the clients we are honored to serve; and to signal our intention to do everything within our power to enrich the second half of their circle of life. The uplifting figure in our new logo expresses the fact that it is always possible to reach higher – to strive for and to experience greater and well being. Though many of our clients are very active and fit, of course some are frail dependent on assistance as depicted in our old logo. (Figure walking with a cane, leaning on the arm of another figure.) But that’s only on the outside. Inside, they dance!



Our organization is distinguished by its ongoing efforts to meet any identified need. We continuously evaluate and adjust programming to the evolving needs of the rapidly growing senior population. An example of the agency’s proactive approach to changing needs is the senior activity program which we began to develop in 1996 to accommodate the “new senior’s” focus on wellness and prevention. Today’s senior is typically an independent spirit, with a strong sense of self worth and a desire to live optimally, regardless of hindering circumstances. They are aware of the need to remain physically and mentally active, and have the desire to stay involved and connected with their community. Though it has, by no means replaced other services, the activity program *has* become a primary focus for our agency. We believe this program is essential to our mission of helping seniors to live independently. Our long-term vision is that adults age 55 and older will experience aging as a vital and productive time, with access to resources that stimulate intellectual, physical, and emotional well-being provided through the continuing work and relevancy of PrimeLife Enrichment, Inc.

3. **General Fiscal Information:** Please see two charts on attached application form

4. **Category Selection: Why did you choose this specific category to compete for an Indiana Achievement Award?** Since our organization first began to experience the fall-out from being the only senior services organization in the fastest growing county in the state, sustainability has been the major issue confronting the agency. The decision to keep pace with the growing need by increasing agency services was easy – we could not otherwise fulfill our mission and honor our purpose. Developing the resources to fund and manage resultant growth was more difficult. In fact, Hamilton County Senior Services (our former name) was chosen for honorable mention in the Indiana Achievement Awards Sustainability Category in 2001 for its successful “Crisis Recovery Plan” – implemented in 1996 after conditions created by growing too rapidly threatened the agency. By diversifying resources, modifying programs, expanding staff responsibilities to compensate for a temporary reduction in staff, consolidating operations in one location, and sheer dogged determination from the agency’s leadership, we survived – *without cutting services to clients*. We successfully recovered, having grown stronger, more capable, and alert to preventative rather than restorative measures. Between the 1990 and 2000 censuses, Hamilton County’s age 55 and older population increased by 57.4%, compared to 1.1% in Marion County, and an average of 24.5% in the seven surrounding counties. During this period, the number of clients served by the agency increased by 169%, achieved as the agency developed greater capacity to respond to growing need.

PrimeLife Enrichment, Inc.  
**HISTORICAL GROWTH CHART – Figure A**

YEAR	# CLIENTS	Percentage Change			# UNITS	Percentage Change		
		3 YR	5 YR	10 YR		3 YR	5 YR.	10 YR
1990	597				15,004			
1991	626				18,709			
1992	686				24,927			
1993	872	46%			30,479			
1994	847	35%			32,068	71%		
1995	913	33%	53%		33,045	33%		
1996	948	9%	51%		33,195	9%	77%	
1997	1,092	29%	59%		40,095	25%	61%	
1998	1,076	18%	23%		41,017	24%	35%	
1999	1,468	55%	73%		45,907	38%	43%	
2000	1,608	47%	76%	169%	53,726	34%	63%	258%
*2001-2002	1,971	83%	108%	215%	54,309	32%	64%	190%
2002-2003	2,077	41%	90%	203%	64,620	41%	61%	159%

The development of the PrimeLife Enrichment Center, which opened February 10, 2003, has greatly accelerated this growth. Please see **Part Two, Figure B** for before and after comparison.

\* Change from calendar to fiscal accounting year

Please note that the agency survived the crisis of 1996 *while continuing to increase services*. Though it certainly created hardship for the agency’s leadership and staff, services to clients did not diminish in 1996, and resumed significant growth in 1997. Having successfully recovered by 1999, our focus changed from day-to-day survival, to working to ensure the agency’s future viability. Demographic projections commissioned by the Hamilton County Alliance made it clear that the senior population in our county would continue to grow rapidly, doubtless creating a greater need for agency services. And, the fastest growing segment of the US population is age 85 and older – those most likely to be frail and in need of assistance. We began to assess our vulnerability, and plan to meet those unprecedented future needs. Despite the daunting weaknesses of an inadequate, outgrown, and imperiled facility, antiquated computer equipment and a reduced and aging transportation fleet, we prevailed! It is this focus on mission coupled with leadership’s deep commitment and determination to overcome all obstacles and meet all challengers that qualify the agency for sustainability recognition.

**5. General Description:**

**a. What is the purpose of the program, system or organization being nominated?**

PrimeLife Enrichment provides a continuum of care for individuals aged 55 and older at all stages from frail to strong. Though our minimal goal is to help maintain the current level of functioning, agency services often generate significant improvements in living conditions and personal circumstances, including improved mental and physical health. It is our experience that some degree of personal growth and enjoyment are possible at any age, regardless of circumstance. Programs and services provided are:

- **Information and Referral:** PrimeLife is the primary information hub for Hamilton County seniors.
- **Transportation:** Reliable drivers transport seniors to important destinations – medical appointments, volunteer activities, beauty or barber shops, senior centers, grocery, bank, or place of employment – in vehicles that accommodate wheelchairs, if needed.
- **Community Outreach:** Seniors receive one-on-one help to obtain vital services such as energy assistance, housing, or medical attention, and emergency intervention in crisis situations.
- **Senior Health Insurance Information Program (SHIIP):** Volunteer counselors, trained by the Indiana Department of Insurance, help evaluate policies and file claims.
- **Caregiver Support:** Group meetings and individual support, including caregiver respite and education.
- **Assistance to the Homebound:** Trained volunteers offer support, companionship and assistance to those who are alone or in need of help.
- **Homemaking:** Trained staff members help with house cleaning, laundry, meal preparation, shopping, errands, and other household tasks.
- **Respite and Attendant Care:** Trained aides provide relief for the full-time caregiver. Non-medical assistance is also provided to those who live alone, but need help with activities of daily living.

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- **PrimeLife Enrichment Center:** Featuring an indoor pool and walking track, and focusing on wellness, lifelong learning, and peer interaction, the Center offers exercise programs, dancing, computer instruction, art and other classes, games and social events, seminars, health screenings, and more for seniors in Hamilton and contiguous counties.
- **Recycling Center, Craft & Re-Sale Shop/Art Exhibit:** These programs serve community needs, generate operating support, and offer volunteer opportunities for seniors.

The range of potential benefits accruing to seniors receiving agency services is significant:

- Reduced social isolation
- Improved mental health
- Improved living conditions
- Increased skills and/or knowledge
- Enhanced self-esteem and pride
- Improved health/endurance/flexibility
- Improved mobility outside the home
- Economic Assistance

**b. Identify both the problem the agency is working to alleviate and the intended audience for this program.** Most services are provided to Hamilton County residents aged 55 and older, though a secondary activity center membership is available for out-of-county residents or those aged 50-54. While Hamilton County has a rapidly growing affluent population, it's important to recognize that our initiatives reach seniors representing *all* socio-economic strata. Approximately one third of our clients live at or below 150% of the federal poverty level and need base assistance and advocacy. Agency services help seniors live in their chosen environment longer, prevent premature or unnecessary institutional placement, and minimize the depression that results from loss and isolation. Our programs – especially the effective, structured program of educational, fitness and social activities offered at the senior activity center – are designed to address Hypokinetic Syndrome – the cycle of reduced activity followed by decreased strength and flexibility and increasingly sedentary lifestyle (often exacerbated by social isolation) that is common among older adults.

Additionally, in our highly mobile community, many elders have moved here to live near children. As this transition is most likely to occur after the death of a spouse, these individuals particularly need our Center to help them integrate into their new community and find friends and interests of their own. This program, along with our transportation service, helps keep them independently active, while addressing their grief and alienation. Older adults need and deserve resources which enable them to maintain independence, improve quality of life, and optimize their role as family and community assets. After all, senior citizens are one of the few increasing natural resources available to us. Through programs and services that address their changing physical, emotional, intellectual, social, and economic needs, we can ensure that seniors are empowered, productive, and valued.

**6. Strategic Plan: Tell how the program or system you have nominated advanced the strategic plan of your organization.** In 1999, the board and staff recognized that long-term fulfillment of our mission was simply not possible given existing conditions. There was a clear disconnect between the expanding senior population and subsequent need for services alongside the inadequacies of our equipment, transportation fleet and facility. We organized a community transportation cooperative in 1999, and secured a grant from Lilly Endowment for \$275,000 to increase transportation options. At that time, PrimeLife had a significant wait list for service – partially because of an insufficient number of vehicles (often out of service for repair) and partially because we then served younger adults with disabilities. The grant provided vehicles for two other organizations to begin providing transportation to this population. This allowed PrimeLife to concentrate exclusively on its mission clients – correcting another weakness identified in the strategic plan. Transportation for younger disabled had begun to cause mission drift, but our plan required that we find an alternative resource before discontinuing these services. With the grant, two such resources were established.

This empowering grant also made it possible for PrimeLife to replace two antiquated vehicles and add two to expand its transportation fleet from five to seven. Other donations and grants (INDOT Section 5310 and Title III) replaced three other agency vehicles. Thus we began the new millennium with a brand new fleet! Though one of these vehicles was totaled in an accident (not the fault of our driver) at the end of last year, we were recently granted a new INDOT Section 5310 wheelchair lift-equipped vehicle, again bringing our fleet to 7.

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Computer equipment was updated by the end of 2000, and in 2003 we added a custom designed data base that allows Center clients to sign in via touch screen, and tallies *all* agency statistics, measures outputs and outcomes, tracks donor and volunteer activity, and generates reports and mailing labels by category. This program has greatly reduced staff time previously devoted to statistical reporting. In December, 2002, we moved into our new PrimeLife Enrichment Center in Carmel – with all new computer equipment and furnishings. From this location, we are poised to better serve the rapidly growing senior population of our county today and in the future. The new Enrichment Center has provided permanent headquarters, increased revenue, more volunteer opportunities, and allowed us to greatly expand and modernize the senior activity program.

### **7. Partnerships and Replication:**

#### **a. Identify partners who were instrumental in implementing and sustaining this nominated project.**

Equipment Upgrade: 1999 and 2000, *United Way of Central Indiana Technology Fund*. After a 2002 fire that destroyed all office equipment, computers and software were replaced with the insurance settlement. Fortunately, we had not yet purchased our new copier at the time of the fire! A new copier was funded by the *UWCI Technology fund* and the *Legacy Fund Community Endowment of the Legacy Fund Community Foundation*.

Transportation Fleet Upgrade: *Lilly Endowment, Indiana Department of Transportation (INDOT), The Legacy Fund Community Endowment of the Legacy Fund Community Foundation* and private donor. *Janus Developmental Services* and the *American Red Cross of Hamilton County* each received two vehicles to provide community transportation.

PrimeLife Enrichment Center: *The Hamilton County Board of Commissioners and the Hamilton County Council* first endorsed the PrimeLife Enrichment Center project by setting aside \$25,000 in the year 2000 to be used for the acquisition and development of a permanent home for our organization. Once plans were actually underway, the allocated an additional \$25,000 for the project. *Clay Township* also contributed \$25,000 to the project. This \$75,000 from our local governing bodies was a wonderful endorsement of our work, and a clear indication of the excellent reputation we enjoy in our community. We received a grant from *United Way of Central Indiana's Capital Projects Fund* for 60% of the project cost - \$1,593,155. A grant from the *Blowitz-Ridgeway Foundation*, and various private and corporate donations helped, though it was necessary to borrow \$830,000 to complete the project. *The Indiana Department of Environmental Management (IDEM)* granted \$28,678 for the purchase of a cardboard bailer and forklift for the recycling program.

Programs and Services: In addition to those previously mentioned, we regularly work with community partners such as *St. Vincent Hospital and Health Services, St. Vincent Carmel Hospital, Easter Seals Crossroads Rehabilitation Center, Hamilton County Council on Aging, Martin Center, the City of Carmel, Township trustees, police and fire departments, the Alzheimer's Association of Central Indiana, the Arthritis Association, Indiana Department of Environmental Management, Good Samaritans, People Helping People, Community Caring Foundation, Adult Guardianship Services, Adult Protective Services, Habitat for Humanity, American Red Cross, Janus Developmental Services, Social Security Administration, SHIP (AARP & Indiana Department of Insurance), UWCI, Youth As Resources, Hamilton County Office of Family & Children, CICOA Aging & In-Home Solutions, Midwest Bone Analysis, Provider Path Consulting, AmeriCare of Westfield, Interlude Travel,* and various area churches and schools to better serve our clients.

**b. What is the future of this program?** PrimeLife Enrichment will continue to be the premier senior services organization in Hamilton County, growing and changing as need dictates, and the PrimeLife Enrichment Center will be a vital, innovative center for social, wellness and educational programs for the senior citizens of our community.

**c. What should be in place for this nominated program to be successfully replicated by another?** Every organization needs a dedicated team, capable of leading during good times and pulling together during times of difficulty. Without such a proactive, creative, tenacious team – willing to sacrifice for the agency – the PrimeLife Enrichment Center would still be a dream. The design concept for the Center is original to PrimeLife, and was developed to satisfy the preferences of our clients (input via survey) and to house new revenue generating programs to diminish our dependence on one time yearly fund raising activities and help ensure future sustainability. The Center has already drawn the attention of another organization

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planning future development, and will be visited by several senior center directors attending the Indiana Association of Senior Centers (IASC) spring conference in April.

Though our design is unique to the needs of PrimeLife, it could easily be adapted by another organization. Our building houses agency offices, a thrift shop, recycling center (for this industrial zoning would be required), and a senior activity center with an indoor walking track around the perimeter of all other rooms including a community room equipped with a built-in PA system, kitchen, dance/exercise room, computer lab, game room, fitness equipment room and indoor pool.

**8. Statement by the program's leadership: Address lessons learned by the leadership worth sharing with others.** We have learned that we are capable of surviving any eventuality, and that even the most difficult problem has a solution. Surviving our 1996 financial crisis taught us to grow responsibly – not increasing staff, however desperately needed, until funding is secured. (Staff size was increased in 1995 before guaranteed funding was in place.) Soon after opening the Enrichment Center, we received multiple requests for early morning and late evening hours. Though we recognized the importance of expanding hours to serve seniors still employed, we couldn't afford additional staff coverage. Having learned our lesson, we developed an interim solution by mobilizing volunteers to work at the reception desk before 8:00 a.m. and after 4:30 p.m., with management staff alternating coverage at those times. Though an inconvenience for staff, they are willing to endure it for the sake of the Center and its clients. (The volunteers love having a purposeful place to spend what might otherwise be a lonely evening, and will continue to assist even after an evening receptionist is hired.) This is the same staff that donned masks and spent four days sorting through the filthy rubble of a burned out building to salvage agency records, and then worked from home or in crowded office conditions with make-shift equipment for 10 months – with willing hearts and without complaint. A dedicated team is not a luxury, but a necessity. Staff and board members should always be selected, not just for talent and experience, but for their passion and dedication to the organization's mission.

The importance of a strong, dedicated, professional team became even more apparent throughout the process of developing the PrimeLife Enrichment Center. Our project manager, construction manager, architect, designers, and engineers were all from established, reputable firms, and uniquely dedicated to our project. Not surprisingly, we encountered some unexpected problems during the renovation of the building we purchased. If the problem was with a sub-contractor, our team enforced a satisfactory solution. When we encountered a major structural flaw (not detected in the pre-purchase inspection), this team worked diligently to develop a solution, and to value engineer all aspects of the project to help us afford the required correction. We definitely learned that, when purchasing an existing building for renovation, the inspection process should include a detailed evaluation by a structural engineer! We are still dealing with some troublesome pool issues – with the full support and participation of our team – all of whom expected full completion of the project months ago. But, they are still working for us, treating our problems like their own.

We learned why capital campaigns are traditionally completed *before* a project begins. This was, of course, our intention before the loss of our facility by fire. The two years we had planned to dedicate to raising all necessary funds became a luxury we could not afford, as we needed to get the agency into a permanent home as soon as possible. We discovered that a capital case is much less compelling after the building is completed, and that most funding sources will not consider helping to retire debt. Though we can manage the mortgage – and still have contribution hopes – it would certainly have been preferable to have opened the Center without debt. However, it is our new Center that will enable us to generate revenue for future program expansion; and our mortgage payments are less than we would have paid to renew the lease on our old space – which we had outgrown! So, no regrets – just a great deal of pride in all that we have been able to survive and accomplish – despite very challenging circumstances.

## PART TWO – NARRATIVE

### **a. What were the organizational conditions in place prior to the initiative that threatened sustainability?**

PLE's staff and board first identified the need to secure a site for the agency in the long-range strategic plan completed in 1999, when renewal of our expiring lease was uncertain. The building where we leased space was listed for sale, and located in the "Old Meridian Corridor" – an area targeted for development by the city of Carmel. We were eventually able to negotiate a new lease, though it involved moving the agency to a different suite to accommodate another (better paying) tenant. We then held a lease at a rate far below market (\$5.21 per square foot), with the understanding that it could only be renewed at market rate – expected to be \$10 to \$12 per square foot. Leaving Carmel was not an option because this is where our target market is primarily located. According to the 2000 census, 41.7% of all Hamilton County residents aged 55 and older reside in Clay Township – followed most closely by Noblesville with 21.2%, with other townships ranging from 1.8% to 9.8% concentration of seniors.

This experience with our vulnerability as tenants convinced the board that, given the township's volatile growth environment, ownership was the only way to secure the agency's future. A decision was made to sign a three-year lease (instead of the previous five year), with the goal of occupying an agency owned facility before the lease expired in 2003. This lease was signed January 1, 2001. Having successfully upgraded the computer equipment and transportation fleet, we turned our attention to the development of a permanent home for the agency.

One year later, on January 24, 2002, a fire destroyed the leased facility and most of the agency's property, with the happy exception of its new vehicles. Though this could scarcely be viewed as tragedy, as no one was injured and most of the agency's records (protected by metal filing cabinets) and computer hard drives were salvaged, it did add a considerable burden as we struggled to relocate the agency; deal with insurance issues while sifting through rubble to recover as much as possible; continue uninterrupted service to our clients; *and* develop and fund the new facility. This was, in many ways, the most challenging period in the history of our agency. The fact that plans for the new facility were well underway mitigated the emotional devastation of the event, though the tasks associated with the capital project contributed significantly to the recovery workload.

### **b. What steps were taken to improve the situation: Tell how the mission statement was influenced by the changes made to sustain the organization.**

We dealt with the destruction of the agency's home as we had previously dealt with the financial and equipment crisis – superbly! – with our mission and the welfare of our clients uppermost in our minds and focus. With the loss of our headquarters, we proved that the agency was not defined by its home, but by its staff, volunteers and clients. PrimeLife Enrichment (then Hamilton County Senior Services) was not destroyed – merely the building that housed its staff, furnishings and equipment. Our commitment to our mission was stronger than ever; our community responded beautifully to our need, and we gained tremendous respect as we refused to allow the fire to interfere with our mission.

According to an article in the March 2002 edition of Hamilton County Business magazine, the agency "rolled over the fire like a small speed bump in the road." Not exactly, but the achievement of that perception by our community was a great triumph. The Noblesville Ledger's, January 31, 2002 headline proclaimed "Senior services keep pace despite fire" and reported that the agency "did not drop the ball on its clients after its offices were destroyed" and The Indianapolis Star reported two days after fire that the agency "is up and running again at a nearly full schedule."

At our request, Firemen rescued vehicle keys and the day's transportation schedule so we were able to provide transportation *as our facility burned*. In-home aides and volunteers continued to provide homemaking, respite/attendant care and assistance to the homebound, and agency phone lines were moved to the Hamilton County United Way office before the day ended. While most staff worked from home, our receptionist and transportation coordinator were headquartered at United Way. Within the month, we were offered a small office suite at the St. Vincent Carmel Hospital Professional Building – free of charge. There we were headquartered

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for the next ten months, though three management staff continued to work from home due to lack of space in the donated office suite.

December 1, 2002, executive and program management staff moved into the administrative portion of the new facility, though the senior activity center was not completed until February 10, 2003. Throughout this challenging time, the only program that diminished in *existing* clients served and units provided was senior activities, as activities were conducted in borrowed space – The Legacy Fund Community Foundation and St. Vincent Carmel Hospital. Though both organizations were exceedingly generous, their own space requirements meant that established activities often had to be canceled, and no new activities could be added. Overall clients served took a slight downturn, as fewer new clients were added due to the diminished activity program and, despite the fact that we received extensive newspaper coverage of the fire, relegation to the 6<sup>th</sup> floor of a medical building significantly reduced agency visibility during this time. However, all that changed February 10, 2003 with the grand opening of the PrimeLife Enrichment Center!

**c. How do you know that the organization is now sustainable and will be in the future? Since achieving sustainability, tell how this new fiscal priority has influenced your organization?**

The acquisition of the tremendous asset of the PrimeLife Enrichment Center has not only ensured the future viability of the agency by providing a secure home, but has created several new revenue opportunities including: a craft and resale shop, walking track art exhibit with commission sales, recycling center, kitchen concessions, increased activity fees and memberships, facility rentals and ongoing facility sponsorships. Though some of these are embryonic, all have great future potential. In addition, the increased visibility has attracted more donations – hopefully, just the beginning. Though always respected for our work, we have now developed a great asset for our community. The PrimeLife Enrichment Center has been featured on the City of Carmel’s TV station and will soon be a permanent feature on the city’s website.

As significant as the dramatic change in assets is, the essence and heart of the agency eclipses even the PrimeLife Enrichment Center. The true reason that we can attest to our long term sustainability is the creative, pro-active, deeply committed leadership and quality of the staff and volunteers. We have amply demonstrated our ability to do anything necessary to recover from threats with disaster potential, react to our clients’ changing needs and ensure the long-term viability of our agency. Of course, one might argue that the best leadership can and must change, but it is unlikely that every member of the board, executive staff and program staff would change at the same time. As long as enough remain to sustain the essential character of the agency, new board and staff will be chosen by those who have already demonstrated their commitment to excellence. Only new leaders who share these qualities will be chosen. The legacy will continue.

**d. Give a synopsis of before and after data that verifies both periods. Include financial data, data on volunteers and staff; and program statistics for both periods.**

For service statistics, it is useful to compare the past six months, 7/01/03 – 12/31/03, with the same period the two preceding years. (This six month period is selected as it is the only full six months of continuous operation at the new site.) 2002 statistics reflect the lack of growth that was possible without a facility for the senior activity program, but are a proud reflection of the agency’s ability to sustain operations during disaster recovery, with small temporary quarters, some staff working from their homes, and activities located off site and subject to frequent cancellations (due to hosts’ needs) and no growth possibility.

**OUTPUT COMPARISON BEFORE & AFTER FIRE & NEW FACILITY – Figure B**

Six month period	Clients	Units	Volunteers (full year)	Vol. Hours (full year)	Notes
7/01/01 – 12/31/01	1,170	29,451	150	7,029	Last year in old facility
7/01/02 – 12/31/02	800	27,077	115	7,140	“Homeless” period after fire
7/01/03 – 12/31/03	1,967	39,012	158	9,606	First full six months in new facility

Revenue/expense changes *directly attributable to the PrimeLife Enrichment Center* are detailed in Figures C & D.

**PrimeLife Enrichment Center  
REVENUE COMPARISON TO PREVIOUS FACILITIES – Figure C**

REVENUE	TIME PERIOD		
SOURCE	2/10/03 – 1/31/04	2002 (borrowed space)	2001 (rented space)
Activity Fees	24,504	1,240	5,921
Aquatic Fees *	16,550	0	0
Donations †	10,880	1,752	5,242
Sponsorship	28,000	0	0
Art Exhibit (net)	389	0	0
Recycle Center ‡	0	0	0
Thrift Shop (net)	7,952	0	0
Kitchen Concession	820	0	0
Facility Rental	380	0	0
<b>TOTALS</b>	<b>89,475</b>	<b>2,992</b>	<b>11,163</b>

\* The aquatics program has not yet reached its expected potential due to construction problems which required the pool to be closed for repairs on three occasions – soon to be closed a fourth, and hopefully last time. Problems normally associated with an indoor pool – such as humidity and chlorine odor – have been beautifully circumvented with careful planning for containment. However, a leaky pool liner was not anticipated. After three attempts to repair it, the liner will be either replaced or the floor surface will be changed (at no cost to us.) Doubtless, the program suffers each time the pool is closed. Once permanently corrected, we expect increased revenue.

† Excluding Capital

‡ The community recycling center has not yet generated any revenue. Though well equipped and well situated, we have not been able to attract enough volume to make a profit. (Without sufficient volume, fees earned from sale of recyclables are negated by hauling fees charged for small quantity pick-ups.) However, we are currently negotiating with the City of Carmel to take over the city’s recycling – which should certainly solve our volume problem! The city will advertise and promote the service, and pay a yearly fee to the agency. Proceeds from contract fee and sales could equal \$40K per year.

**PrimeLife Enrichment Center  
EXPENSE COMPARISON TO PREVIOUS FACILITY– Figure D**

EXPENSE	TIME PERIOD	
SOURCE	2/10/03 – 1/31/04	2001 (rented space)
Activity Instructors	7,087	1,514
Aquatics Instructors	13,631	0
Occupancy*	43,598	49,440
Mortgage principal	12,123	0
Mortgage Interest	25,280	0
<b>TOTALS</b>	<b>101,719</b>	<b>50,954</b>

2002 data is omitted, as the agency was housed in donated space and relevant expenses (see figure C) were atypical. \*Occupancy expenses include \$25,868 electrical. As a result of findings from a recent energy audit, we are taking steps (changing from electric to gas pool heater; adding an every day pool

cover) expected to reduce this by \$6,142 per year. Though additional staff will be added as our financial situation continues to improve, to date, the only staff addition has been a part-time aquatics program coordinator/instructor – and, with the expanded program, we have incurred increased costs for activity free-lance instructors.

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<b>Conclusion to revenue/expense before and after new facility comparison:</b>	
Facility related expenses before	50,954
Facility related expenses after	101,719
<b>Difference</b>	<b>50,765 greater expense with new facility</b>
Facility related revenue before	11,163
Facility related revenue after	89,475
<b>Difference</b>	<b>78,312 greater revenue with new facility</b>

Clearly, PrimeLife Enrichment has been greatly empowered by the development of the Enrichment Center and other events outlined in this application. We have ensured our future relevancy by responding aggressively to the growing and changing needs of the seniors of our community. We are now serving, and will continue to serve more individuals more efficiently with more opportunities than was previously possible. The PrimeLife Enrichment Center has enhanced service options for our clients, and despite the debt incurred, has positively impacted the financial position of the agency as evidenced by this comparison of assets and liabilities before and after building ownership. We believe we have been responsible stewards of our resources, and of our current and future obligation to the senior citizens of our community.

	<b>7/1/02-6/30/03</b>	<b>1/1/01-12/31/01</b>
<b>Total Assets</b>	\$2,860,716	441,958
<b>Total Liabilities</b>	886,574	44,593
<b>Total Net Assets</b>	1,974,142	397,365
<b>Total Liabilities &amp; Net Assets</b>	2,860,716	441,958

