

**OWLS CLUB  
ACTIVE AGING CENTER**



# 2023 ANNUAL REPORT



# CHAIRMAN'S LETTER

On behalf of the Board of Directors, I'm pleased to share the progress and challenges of Owls Club, our innovative not-for-profit organization dedicated to enhancing the lives of adults aged 55 and older in Elkhart and surrounding areas. Since our inception in May 2023, following two years of careful planning, we've focused on providing enriching experiences through service, lifelong learning, active engagement, and social connections.

By the end of 2023, our membership soared to 859, reflecting an unmistakable demand for our services. This growth, while encouraging, aligns with the trends seen in our neighboring state of Michigan, where senior centers are thriving. Unlike Indiana, Michigan assesses millage property taxes to fund specific local services or projects, including senior centers. Owls is banking its future on the private sector's willingness to underwrite the funding gap.

Our journey, while promising, is not without its challenges:

- **Unique Partnership:** As an independent 501(c)(3), we've partnered with Trinity on Jackson, with the church's facilities becoming our campus on weekdays. This arrangement, while immeasurably beneficial in terms of function and cost, requires continuous adaptation by both parties.
- **Financial Sustainability:** Our board has committed to funding Owls through 2024. We anticipate attracting longer-term financial support from private foundations and individuals.
- **Volunteer Dependency:** Our operations heavily rely on volunteers. Their continued involvement is crucial for maintaining our culture and enhancing our appeal to potential investors (donors).
- **Affordability:** In our commitment to access for all, membership is free. While noble and inclusive, this approach relies on members' willingness to volunteer and the commitment of private foundations and individuals to play a significant role in underwriting a large portion of the Club's operating costs.



- **Replicable Model:** Part of our strategic plan is to develop a business model that can be licensed to others. However, it's still uncertain whether our model will be applicable broadly or attract the necessary funding.

Despite these hurdles, the leadership remains confident and committed. We're a community partnership, where each member's investment of time, talent, and resources is invaluable. Our focus isn't only on overcoming early-stage risks but also on demonstrating the effectiveness of a private-sector approach to fulfilling the needs of our senior community.

As this report unfolds, we will delve deeper into the critical aspects of our journey – member engagement and program success. The preliminary results are promising and indicative of our potential impact. We stand poised to meet the challenges ahead, driven by our mission and the support of our community.

*Frank K. Martin*

## Board of Directors

Art Bowers  
Connie Fulmer  
Richard Heiss  
Karen Koelsch  
Frank Martin  
Marsha Martin  
Cyneatha Millsaps  
Bill Reith  
Dave Rowley  
Susan Rowley

## Executive Director

Maggie Okponobi



# OWLS CLUB

Active Aging

www.owlsclub.org

## YEAR IN REVIEW

In its inaugural year, Owls Club — Older, Wiser, Life-loving Seniors — quickly emerged as a vital community asset in Elkhart County and neighboring communities. The mission to foster wellness, socialization, and active aging is confirmed by the rapid growth in Owls membership. Owls' ever-expanding commitment to diverse programs, including fitness, lifelong learning, health, and recreational activities, manifested itself in a total of 1,410 hours of classes, programs, activities and events.

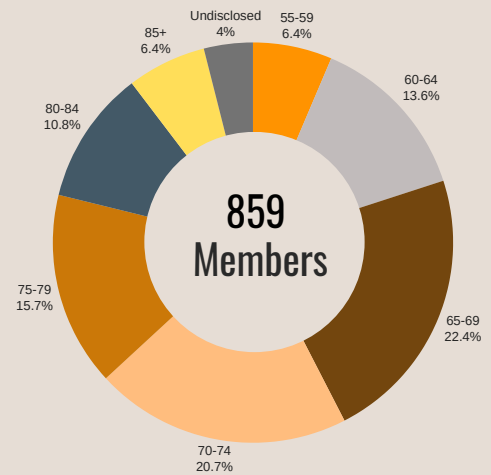
At the heart of Owls' success are dedicated volunteers who, with a collective contribution of 2,250 hours, played a crucial role in hosting classes, supporting activities, and assisting in administrative tasks. Additionally, strategic partnerships with community organizations broadened class offerings each week, aligning with the organization's goal of providing diverse and accessible opportunities for active aging.

We think it's reasonable to expect continued growth in membership in 2024. The ongoing challenge for Owls in its second year of operations is to hone its programs and services so that the member participation rate increases noticeably from the national average of 25%. In a constructive feedback loop, engaged members are the Club's best advertisement.

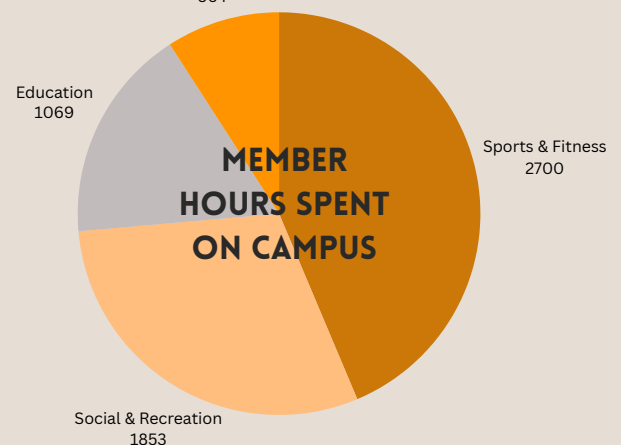
### COMMUNITY ENGAGEMENT ONLINE

- 4,700 People visited our website
- Our website calendar was viewed 3,200 times
- 54,000 Facebook Users saw our FB posts (incl. ads)
- Facebook Users interacted with our content 3,000 times

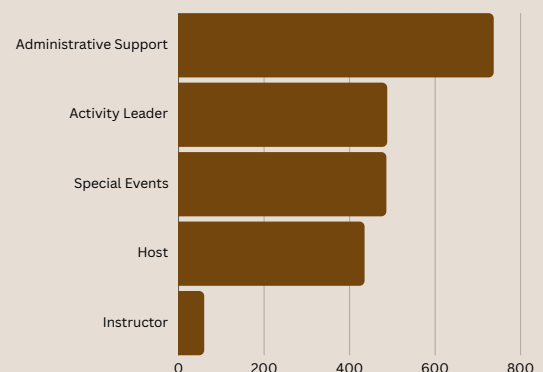
### MEMBERS BY AGE



### MEMBER HOURS SPENT ON CAMPUS



### VOLUNTEER HOURS







# PROGRAM HIGHLIGHTS



Owls Club's array of programs in 2023 is a testament to the importance of member input, community partnerships, and the dedication of our volunteer instructors. From educational courses to health and wellness activities, social gatherings, and special events, each program was shaped by the voices and contributions of those we proudly serve.

## *Education*

In 2023, Owls Club's educational offerings showcased a diverse range of subjects, catering to the varied interests of our members. Our programs included extensive 12-week lecture series on topics like *Propaganda and Persuasion* and the *U.S. Constitution*, as well as informative *Lunch and Learn* presentations covering essential subjects such as Medicare. The richness of our educational content was made possible thanks to the incredible contributions of instructors from both within our community and our own membership, who collectively dedicated over 490 hours to teaching.

## *Health & Wellness*

Our members enjoyed staying physically active and mentally sharp through diverse Health and Wellness activities. Highlights included seasonal walks on and off campus, engaging exercises like Cardio Drumming and Pickleball, and relaxing options such as Pilates and Chair Yoga. Holistic well-being was also emphasized through mindfulness workshops, outdoor activities, and classes on emotional wellness. Members spent 2,902 hours enhancing their physical and mental health in 2023.

## *Social and Recreation*

Social connections flourished in 2023 with our Coffee and Conversation sessions, creative outlets in Knitting and Art Classes, stimulating Book Club and Trivia, and community-building games like Euchre. These programs not only entertained but strengthened our community bonds. Members signed in to 388 social and recreation classes in 2023.

## *Special Events and Trips*

Our inaugural year featured memorable events like a two-day opening celebration and an open house in October. Exciting trips like the visit to Meijer Gardens and communal Thanksgiving celebrations enriched our members' experiences. We also showed appreciation for our dedicated volunteers with several social events, emphasizing our commitment to the members that make Owls Club possible. These types of events require a tremendous amount of volunteer support and our members stepped up, providing 486 hours of their time.





# FINANCIAL OVERVIEW

The Owls Club, deeply committed to its mission and vision, has strategically financed its startup phase internally with the founders' capital. As we transition from this initial phase, our focus shifts towards expanding and diversifying our funding base. With our nonprofit status now affording tax-deductible contributions, we are poised to appeal to other private sector benefactors ("investors"), including foundations and individual donors.

The Owls Club views contributions from individuals and foundations from the broader community as vital investments in our mission and our future. We acknowledge the responsibility to ensure our investors can evaluate the impact of and return on their contributions. Our commitment to transparency and results-oriented reporting underlines our dedication to honoring the trust and support of our community partners.

Our funding strategy is underpinned by two key strengths: minimal occupancy costs and a robust volunteer base providing much of our human capital needs. The in-kind contribution of Trinity for our 10,000 square foot campus is appraised to be \$54,965 per year. Although not a financial statement disclosure, monetizing the contribution of our volunteers at \$20 per hour resulted in significant human capital cost savings of \$85,000 in 2023. These factors create an attractive return on investment proposition for potential investors. (The in-kind donation of facilities by Trinity and the corresponding Owls Club expense is a required financial disclosure.)

The accompanying table presents salient financial information for members to evaluate our start-up organization. Although Owls Club began offering programs and services in May 2023, it incurred organizational and other startup costs beginning in October 2022. Accordingly, the Statement of Activity & Net Assets includes the fourth quarter of 2022 and calendar year 2023.

These disclosures provide an overview of our financial health and operational efficiency. For more detailed financial information, stakeholders are encouraged to refer to our comprehensive IRS 990 (IRS.gov/nonprofit), which will be available before the filing deadline on May 15, 2024.

## Statement of Activity & Net Assets

Calendar Year 2023 and Oct. 1, 2022 - Dec. 31, 2022

	2023	2022	Total
<b>REVENUES</b>			
Donations from Founders	\$171,180	\$29,480	\$200,660
In-Kind Donation of Facilities	\$41,224		\$41,224
Other Individual Donations	\$8,280		\$8,280
Total Contributed Income	\$220,684		\$250,164
Other Revenue	\$2,054		\$2,054
<b>Total Revenue</b>	<b>\$222,738</b>	<b>\$29,480</b>	<b>\$252,218</b>
<b>EXPENSES</b>			
<b>Building - Facilities</b>	<b>\$41,224</b>		<b>\$41,224</b>
<b>Gen Mgmt &amp; Admin</b>			
Advertising & Marketing	\$12,919		\$12,919
Salaries & Wages	\$60,315		\$60,315
Program Support	\$6,496		\$6,496
Other Administrative	\$17,405		\$17,405
<b>Total Gen Mgmt &amp; Admin</b>	<b>\$97,135</b>		<b>\$97,135</b>
<b>Total Facilities and Gen Mgmt &amp; Admin</b>	<b>\$138,359</b>		<b>\$138,359</b>
<b>Other Expenses - Start-Up Costs</b>	<b>\$38,965</b>	<b>\$39,935</b>	<b>\$78,900</b>
<b>Total Expenses</b>	<b>\$177,324</b>	<b>\$39,935</b>	<b>\$217,259</b>
<b>Net Revenue</b>	<b>\$45,414</b>	<b>-\$10,455</b>	<b>\$34,959</b>
<b>NET ASSETS</b>			
Beginning Net Assets	-\$10,455		
Net Revenue	\$45,414	-\$10,455	\$34,959
<b>Ending Net Assets</b>	<b>\$34,959</b>	<b>-\$10,455</b>	<b>\$34,959</b>



# COMMUNITY PARTNERS & INVESTORS

The commitment of time, talent, and treasures of our members is our lifeblood. The regular transfusions from our community partners infuses and invigorates us with new and often novel ideas, perspectives, and programs.

## *Real Services*

Real Services, a respected community non-profit partner, has played a pivotal role in the success of Owls Club's educational initiatives. Real Services, with its unwavering commitment to promoting nutrition, self-sufficiency, education, and protection, has seamlessly integrated these values into the fabric of the Owls Club initiative.

## *Purdue Extension*

Owls Club is honored to have Purdue University Extension as a valued community partner, significantly contributing to the well-being of our members since our inception. Embodying its mission to deliver practical, research-based information that enhances lives and livelihoods, Purdue University Extension has been instrumental in providing diverse and enriching classes at Owls Club.

## *Trinity on Jackson*

Trinity on Jackson has been instrumental in the success of Owls Club's mission. The church has graciously provided a dedicated portion of its building space to serve as the home for our non-profit active aging center, enabling Owls Club to swiftly open its doors to the community. Beyond the physical space, the church's staff have actively participated in supporting our program. It is important to note that while Owls Club benefits from Trinity on Jackson's support, our organization is not affiliated with any religious entity.

## *Other Partners*

- Alzheimer's and Dementia Services
- Beacon Health Center
- Paul D. Eash Atty at Law
- Elkhart Symphony
- Forever Learning Institute
- Healthy URx Pharmacy
- Lael Nafziger Photography
- Dr. Elizabeth Nafziger
- Ruthmere Museum
- Senior1Care
- State Health Insurance Program (SHIP)
- Wellfield Botanic Gardens

## *Investors*

The following individuals and institutions made unsolicited contributions in December 2023.

### **\$100,000 +**

Board of Directors

### **\$1,000 - \$5,000**

Don & Mary Ellen Florea  
Heritage Financial Group  
National Christian Foundation  
Dave & Susan Rowley  
Brian Smith

### **\$500 - \$999**

Richard Heiss  
Loretta Hochstetler  
Bob & Pam Schultz

### **Up to \$500**

Betty J. Foltz  
Dave Geyer  
Mike Metz







# VOLUNTEERING AT OWLS CLUB

At the Owls Club, the transformative impact of volunteerism is a living testament to the power of selfless service. The act of giving time and talents by members not only enriches their own lives but also strengthens the club's culture.

Volunteer engagement clearly infuses retirement with purpose. Members immersed in various activities experience deep fulfillment, as every act of service goes beyond mere participation. This sense of accomplishment fosters a transformative energy, highlighting the importance of purposeful engagement.

The strength of community connections within the club is evident. Volunteering forges new friendships and bolsters existing bonds, creating a resilient support network. This shared sense of belonging and mutual support is the bedrock of a thriving community spirit.

The ripple effect of volunteer efforts extends beyond the club's boundaries. From mentoring to simple acts of kindness, these actions visibly uplift spirits, cultivating a collective pride and sense of achievement. The joy and gratitude present in these interactions underscore the club's positive impact.

Personal growth is a natural byproduct of volunteering, with individuals uncovering new passions and skills. This journey of self-discovery and improvement demonstrates the dual benefits of giving back.

A culture of gratitude pervades the club, where every contribution is valued and celebrated, promoting an inclusive and supportive environment. The mental and emotional uplift from volunteering is striking, providing a source of joy and purpose, especially important during retirement.

Volunteering is also seen as a pathway to building a lasting legacy, with members driven to create enduring, positive change. The alignment of these efforts with personal values reinforces the club's ethos, exemplifying a model of active, engaged retirement.

In summary, the Owls Club's volunteerism is the heartbeat of its community, enriching lives and weaving an inspiring fabric of communal spirit, demonstrating the profound impact of selfless service.

**82  
ACTIVE  
VOLUNTEERS**

**\*2,250 HOURS  
SERVED ON  
CAMPUS**

**\*\*2,000 HOURS  
SERVED  
OFF-CAMPUS**

**AGE 70  
AVERAGE  
VOLUNTEER AGE**

\*Includes time served as hosts, activity leaders, instructors, administrative support, and special event support.

\*\*Includes class preparation, off-site administrative support, and working hours of the Owls Club Board of Directors.



# THANK YOU!



## 2023 Volunteers



- Christina Aurand
- Dale Baldrige
- Jayne Barker
- Julianne Barth
- Mary Ann Bloomingdale
- Marie Blunt
- Dave Borneman
- Carl Bossung
- Susan Bossung
- Ann Bowers
- Art Bowers
- Ron Bowman
- Gale Burtch
- Randy Burtch
- Mary Carpenter
- Jacqueline Cusack
- Kelly Daugherty
- Connie Deuschle
- Bob Ellis
- Lois Fillio
- Don Florea
- Mary Ellen Florea
- Karin Frey
- Connie Fulmer
- David Geyer
- Violet Goodsene
- Barbara Heeter
- Louis Holbrook
- Edna Homan
- Brayden Johnson
- Donna Johnson
- Grace Johnson
- Rick Johnson
- Suzanne Johnson
- Terry Kaser
- Kathee Kiesselbach
- Jane Kopp
- John Krom
- Kathy Lantz
- Scott Lickteig
- Gary Mann
- Frank Martin
- Marsha Martin
- Stacy McColly
- Janet Lou McCraner
- Laurie Meyer
- Leslie Michael
- Barb Nifong
- Eldon Nifong
- Michael Okponobi
- Martha Perry
- Rose Marie Pickrell
- Lynn Pletcher
- Roger Pletcher
- Kristi Preyer
- Ethel Ramsey
- William Reader
- Sheela Reasoner
- Pat Rezutko
- Karleen Richter
- Deloris Rodde
- John Rodde
- Susan Rowe
- David Rowley
- Susan Rowley
- Dawn Singleton
- Kristen Smith
- Rebecca Steffen
- Susan Stone
- Dulee Testo
- Dave Tibbets
- Rebecca Troyer
- Julia Van Arsdale
- Marsha Watson
- David Weinland
- Pam Weinland
- Eunice Wenger
- Wade Wenger
- Sue Wilkins
- Shannon Wilson
- Patricia Yehle





# IMPACT

## IN THEIR OWN WORDS...



"I have been an Owl since the beginning. I am usually not a joiner, but a friend asked me to check out this new program. Well, I checked it out and I joined. I've been through many of the classes. I signed up to be a host because I thought they needed help. But it turned out it helped me. I got to know more people and it was gratifying to help new folks. I know it's a bit dramatic, but the Owls Club has been life altering for me. It got me off the couch and into a terrific supportive program. I have many new friends and I have tried many new things. I am most appreciative of this program. I might even try cardio drumming. Maybe."

Stacy McColly,  
Owls Club Member and Volunteer

"I enjoy volunteering as a hostess at Owls Club because I get to see many familiar faces and meet new people, too. It is exciting to see a new face when someone comes to an Owls event for the first time. And it's just as exciting when they come back again."

Edna Homan  
Owls Club Member and Volunteer

"I have enjoyed being a volunteer at Owls Club thus far because it has helped me to meet new people since I've retired. It is a safe place to meet new people and share my stories with others."

Suzanne Johnson  
Owls Club Member and Volunteer

"I would love to thank the Owls Club for the opportunity to exercise, and get involved, and meet new people. It's just been an amazing year so far with Owls Club."

Cathy Girard  
Owls Club Member

"I like to volunteer and do activities there. I am newly retired. All my friends work and this gives me the opportunity to make new friends. I love it there."

Dawn Singleton  
Owls Club Member and Volunteer

"My interpretation of the Owls acronym is "Older, Wiser, Life-long Learning Seniors." Owls Club offers the opportunity to investigate and discuss diverse topics such as finance and history, interaction with crafts and games, and to grow from the wisdom of others."

Sharon Stauffer  
Owls Club Member

"How lucky we are to have Owls Club in our community! A wonderful source of learning, sharing ideas and meeting new people. Please come join us!"

Mary Ann Bloomingdale  
Owls Club Member and Volunteer



"I am excited to be a part of Owls Club. I volunteer as a host and have attended several sessions. This is an idea that's long overdue in our area. There are activities and interests for everyone!"

Jane Kopp  
Owls Club Member and Volunteer





# LOOKING AHEAD

As we envision the future after only eight months of operations at the Owls Club, we find ourselves at a crossroads of challenges and opportunities. As outlined in the Chairman's letter, our journey so far has been both enlightening and demanding. Looking ahead, it is essential to reconcile our ambitious vision with our evolving capacity. Our experience has taught us the importance of balancing aspiration with practicality, ensuring that our growth and impact align seamlessly with our capabilities and the needs of our community.

## PROGRAMMING

As we move forward, the Owls Club is poised to impressively expand its program offerings, driven by the evolving needs and interests of our members. Our approach is to innovate and diversify, ensuring that our activities remain engaging and relevant to our senior community. This expansion is a reflection of our commitment to being a market-driven enterprise, responsive to the dynamic landscape of our members' needs.

## IMPACT

The upcoming year promises to showcase the increasing impact of our programs and services. As the depth and breadth of what we offer become more evident, our influence within the communities we serve will grow more apparent. This visibility will not only enhance our members' experiences but also demonstrate our effectiveness in addressing their diverse needs.

## GROWTH

Natural growth is anticipated as a result of our diligence and responsiveness to community and member needs. Our focus on sustainable development and attentiveness to feedback will guide our expansion. As we grow, our funding sources will witness the tangible return on their investments, reinforcing the value of their support and the viability of our initiatives.

In summary, the Owls Club is set on a path of thoughtful expansion, increased impact, and sustainable growth, ensuring our continued role as a vital contributor to the well-being and enrichment of our senior community.



# THANK YOU



We extend our deepest gratitude to everyone who played a part in the remarkable journey of Owls Club this year. It truly took a village: engaged club members, selfless volunteers, entrepreneurial board members, collaborative community partners, and responsive media. Each of you contributed significantly to the success of this startup, demonstrating the extraordinary spirit of cooperation and community that defines Elkhart County.

## CONTACT US :



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