

ORGANIZATION:
PROGRAM/LETTER:

Independent Living, Inc	
B	Home Share

PROGRAM BUDGET

1. 2010 BUDGETED

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	0	0	0	0	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	0	0	0	0	0
MADISON-CDBG	9,471	8,623	623	225	0
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0
USER FEES	2,500	2,276	164	60	0
OTHER	0	0	0	0	0
TOTAL REVENUE	11,971	10,899	787	285	0

2. 2011 PROPOSED BUDGET

REVENUE SOURCE	SOURCE TOTAL	PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	0	0	0	0	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	0	0	0	0	0
MADISON-CDBG	30,000	27,314	1,973	713	0
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT*	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0
USER FEES	5,000	4,552	328	120	0
OTHER**	0	0	0	0	0
TOTAL REVENUE	35,000	31,866	2,301	833	0

*OTHER GOVT 2011

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

**OTHER 2011

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

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2012 PROGRAM CHANGE EXPLANATION

Complete only if you are requesting more than your 2011 request.

Note: Additional funding should only be requested where services or programming will change or expand in the second year.

3. PROGRAM UPDATE: If requesting more than 2011, describe any major changes being proposed for the program/service in 2012, i.e., expansions or narrowing in target population, scope and level of services, geographic area to be served, etc.).

200 characters (w ith spaces) N/A

4. 2012 COST EXPLANATION

Complete only if significant financial changes are anticipated between 2011-2012.

Explain specifically, by revenue source, any significant financial changes that you anticipate between 2011 and 2012.

For example: unusual cost increases, program expansion or loss of revenue.

200 characters (w ith spaces) N/A

5. 2012 PROPOSED BUDGET

REVENUE SOURCE	BUDGET TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	0	0	0	0	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	0	0	0	0	0
MADISON-CDBG	30,900	28,133	2,032	735	0
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT*	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0
USER FEES	5,150	4,689	338	123	0
OTHER**	0	0	0	0	0
TOTAL REVENUE	36,050	32,822	2,370	858	0

*OTHER GOVT 2012

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

**OTHER 2012

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

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PRIORITY STATEMENT:	CDBG: A. Housing - Owner-occupied housing (CDBG)

DESCRIPTION OF SERVICES

6. **NEED FOR PROGRAM:** Please identify local community need or gap in service that the proposed program will address.

Independent Living, Inc. (ILI) Home share Program promotes living arrangements in which people share a residence based on common needs, interests and preferences. Each arrangement is carefully matched and custom made. The intent of the program is not only to contribute to the individuals involved, but also to the community by preserving home ownership as well as promote alternative housing solutions. Numerous housing options exist for those that can afford rental or property ownership. Independent Living's Home Share program is the only low, or no cost, solution in the community that works to support minimal wage employment, provision of affordable housing, as well as promotes upward mobility and an individual's self-sufficiency.

7. **SERVICE DESCRIPTION -** Describe the service(s) provided including your expectations of the impact of your activities.

Home Share is a program that supports seniors and adults with disabilities, helping them remain in their own homes by matching them with a younger adult (seeker) to provide live-in companionship and household assistance. The program is mutually beneficial to both the home sharer (client) as well as the home seeker (live in). Independent Living screens all potential seekers and sharers that are interested in the program, as well as conducts an assessment and interview of any potential matches. When matched, the relationship is carefully monitored and regularly reassessed to ensure satisfaction on the part of both parties. Home Share Plus is very similar to the Home Share program, however it has a home health component added. This program is for clients that are in need of "hand's on" care in addition to companionship and household assistance. The live-in seeker would, in this case, be a trained employee of Independent Living. Clients typically are in need of general household assistance in exchange for free rent in the regular Home Share program, or in need of personal care assistance in Home Share Plus.

8. **PROPOSED PROGRAM CONTRACT GOALS:** Include clearly defined service goals and process objectives: number of unduplicated clients to be served, number of service hours to be provided etc.

Independent Living, Inc (ILI) goal is to add 15 matches (15 homeowners/sharer and 15 home seekers for each year of the 2011/2012 contract) as well as maintain 10 households, resulting in 90% of new share clients (13 clients each in 2011 and 2012) the ability to continue to live in their home one year after a match is made.

9. **SERVICE HOURS:** Frequency, duration of service and hours and days of service availability.

Home Share offers 24 hour a day / 365 day support for seniors in our program. Program staff are not only available Monday through Friday 8 - 5PM but also "on call" for any emergency situations.

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10. POPULATION SERVED: Please describe in terms of age, income level, LEP, literacy, cognitive or physical disabilities or challenges).

Participants in the Home Share and Home Care Plus model come from a variety of areas within Madison, with an array of educational, income and language levels. As with all our client and workers, these participants are chosen without regard to race, gender, age, religious belief, or ethnic background. Most clients are moderate to low-income older and / or disabled adults who live in their own homes and have a spare room to accommodate an additional person.

11. LOCATION: Location of service and intended service area (Include census tract where service is tract specific).

Independent Living's Home Share and Home Share plus program is available to any homeowner within the city limits of Madison.

12. OUTREACH PLAN: Describe your outreach and marketing strategies to engage your intended service population.

We will provide information to our current referral sources, which includes senior centers and discharge planners. We are in the process of contacting other home share program coordinators in the midwest to ask about their most successful outreach activities and will implement those that are most appropriate for Madison and the most effective use of our resources. These include use of online resources such as the UW off campus living site and Craig's List, as well as community presentations to groups that have participated as matches for seniors in the program such as graduate student organizations. We will also use Twitter to communicate when a match is needed for a senior client. We participate in expos throughout the year and will continue to provide information about the program at these events. Finally, we will continue our media efforts to highlight the need the program addresses and how to participate.

13. COORDINATION: Describe how you coordinate your service delivery with other community groups or agencies.

Numerous referrals come from coalitions, senior centers, and discharge planners. We will be considering collaborative efforts with Moving out, perhaps matching home share seekers with their disabled clients.

14. VOLUNTEERS: How are volunteers utilized in this program?

Volunteers are not typically utilized in this program

15. Number of volunteers utilized in 2010?	0
Number of volunteer hours utilized in this program in 2010?	0

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16. BARRIERS TO SERVICE: Are there populations that are experiencing barriers to the service you are proposing, i.e., cultural differences, language barriers and/or physical or mental impairments or disabilities? Describe the ability of proposed program to respond to the needs of diverse populations.

As the demographics of Madison change, so must our marketing efforts to allow diverse cultures access to our home share program. The barrier to services is currently lack of information and promotion of the services we provide. This can be overcome with strategies that include 1) Adaption of our brochures in other languages and 2) working with case managers with organizations such as La Sup, Central Hispano and Southern Wisconsin Lao-Hmong Association.

17. EXPERIENCE: Please describe how your agency, and program staff experience, qualifications, and past performance will contribute to the success of the proposed program?

Independent Living (IL) has been serving older adults and persons with disabilities in the Dane County area for over 37 years. Our organization also provides a unique array of in-home services as well as conventional housing options which includes the management of 3 affordable senior housing communities. Direct client contact through our Evening Meals on Wheels, Home Safety Modification, Home Chore, Financial Management and Counseling and Home Care and Respite, has helped us establish relationships that we can build upon to assess appropriate clients for the Home Share and Home Share Plus Programs. We can use our 400 volunteer base to help identify matches for clients. Home Share is a unique economic enterprise facilitating an extremely low cost exchange between an older adult and the person sharing the home allowing both housing and service support.

18. LICENSING OR ACCREDITATION: Report program licensing, accreditation or certification standards currently applied.

NA

19. STAFF: Program Staff: Staff Titles, FTE dedicated to this program, and required qualifications for program staff.

Staff Title	FTE	City \$	Qualifications
In-Home Services Manager	0.2	Yes	2 year degree in human services or related field, 5 years experience
In-Home Services Coordinator	0.4	Yes	two years experience working with elderly
Human Resource Manager	0.1	Yes	two years experience human resources

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CDBG DESCRIPTION OF SERVICES SUPPLEMENT

Please provide the following information ONLY if you are applying for projects that meet the "CDD Community Development Program Goals & Priorities". If not applying for CDBG Office Funds, go to Community Resources Description of Services Supplement (p. 7), or go to Demographics (p. 8).

20. PARTICIPANT INCOME LEVELS:

Indicate the number of households of each income level and size that this program would serve in 2011-2012.

Income Level	Number of Households
Over 80% of county median income	1
Between 50% to 80% of county median income	3
Between 30% to 50% of county median income	4
Less than 30% of county median income	7
Total households to be served	15

21. If projections for 2012 will vary significantly from 2011, complete the following:

Income Level for 2012	Number of Households
Over 80% of county median income	0
Between 50% to 80% of county median income	0
Between 30% to 50% of county median income	0
Less than 30% of county median income	0
Total households to be served	0

22. AGENCY COST ALLOCATION PLAN: What method does your agency use to determine indirect cost allocations among programs?

ILI used a separate cost center, administration, to record shared (indirect) costs. On an annual basis, administrative staff allocate their time spent working with various program departments and this is the basis for allocating shared (indirect) costs. An overall allocation percentage to each program department is determined by using each administrative staff salary and his/her allocation percentage. Each month, actual shared (indirect) costs are charged to the program departments based on the allocation percentages.

23. PROGRAM ACTIVITIES: Describe activities/benchmarks by timeline to illustrate how your program will be implemented.

Activity Benchmark	Est. Month of Completion
brochures revised and marketing plan developed	2/1/2011
15 matches made between home owner and home seeker	12/31/2011
15 matches made between home owner and home seeker	12/31/2012

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COMMUNITY RESOURCES DESCRIPTION OF SERVICES SUPPLEMENT

Please provide the following information ONLY if you are applying for projects that meet the "Community Resources Program Goals & Priorities" If not applying for CR Funds, go to Demographics (p. 8).

24. CONTRIBUTING RESEARCH

Please identify research or best practice frameworks you have utilized in developing this program.

For a growing number of persons faced with losing their independence and struggling to keep housing costs within the budget, shared housing is an affordable and viable alternative. Studies have shown that people are happier, sleeping and eating better and feel safer in their home with someone around. Information from the 2009 World Home Share Conference reported only 65 formal Home Share match programs in the United States, however, many factors point toward an increase in the need for this type of homesharing. Recession, aging of the population, and high heating and housing costs will likely lead to this surge. Independent Living has long worked with the elderly and persons with disabilities and know of the dangers of social isolation and its affect on both physical and mental health. With families living farther apart, or working full-time and unable to meet the needs of aging parents, the need for a Home Share program is evident. Research indicates that people can remain in their own homes longer, before having to go into nursing facilities, if they receive the support they need to remain independent. Independent Living and the city of Madison were initial pioneers in this housing options model and we find that the current economic environment continues to need this type of program now more than ever.

25. ACCESS FOR LOW-INCOME INDIVIDUALS AND FAMILIES

What percentage of this program's participants do you expect to be of low and/or moderate income? 95.0%

What framework do you use to determine or describe participant's or household income status? (check all that apply)

Number of children enrolled in free and reduced lunch	
Individuals or families that report 0-50% of Dane County Median Income	X
Individual or family income in relation to Federal Poverty guidelines	X
Other	

26. HOW IS THIS INFORMATION CURRENTLY COLLECTED?

Upon intake assessment

27. PLEASE DESCRIBE YOUR USER FEE STRUCTURE AND ANY ACCOMMODATIONS MADE TO ADDRESS ACCESS ISSUES FOR LOW INCOME INDIVIDUALS AND FAMILIES.

Currently the Home Share program charges a \$50.00 application fee to cover a small portion of the initial assessment and interview process. An additional annual sliding scale match fee is charged to both home owner and seeker once match is made with trial period success. City funding could help defray the fee for low income individuals.

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28. DEMOGRAPHICS

Complete the following chart for unduplicated participants served by this program in 2009. Indicate the number and percentage for the following characteristics. For new programs, please estimate projected participant numbers and descriptors.

PARTICIPANT DESCRIPTOR	#	%	PARTICIPANT DESCRIPTOR	#	%
TOTAL	30	100%	AGE		
MALE	16	53%	<2	0	0%
FEMALE	14	47%	2 - 5	0	0%
UNKNOWN/OTHER	0	0%	6 - 12	0	0%
			13 - 17	0	0%
			18 - 29	4	13%
			30 - 59	8	27%
			60 - 74	6	20%
			75 & UP	12	40%
			TOTAL AGE	30	100%
			RACE		
			WHITE/CAUCASIAN	29	97%
			BLACK/AFRICAN AMERICAN	1	3%
			ASIAN	0	0%
			AMERICAN INDIAN/ALASKAN NATIVE	0	0%
			NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER	0	0%
			MULTI-RACIAL:	0	0%
			Black/AA & White/Caucasian	0	0%
			Asian & White/Caucasian	0	0%
			Am Indian/Alaskan Native & White/Caucasian	0	0%
			Am Indian/Alaskan Native & Black/AA	0	0%
			BALANCE/OTHER	0	0%
			TOTAL RACE	30	100%
			ETHNICITY		
			HISPANIC OR LATINO	0	0%
			NOT HISPANIC OR LATINO	30	100%
			TOTAL ETHNICITY	30	100%
			PERSONS WITH DISABILITIES	0	0%
			RESIDENCY		
			CITY OF MADISON	20	67%
			DANE COUNTY (NOT IN CITY)	10	33%
			OUTSIDE DANE COUNTY	0	0%
			TOTAL RESIDENCY	30	100%

Note: Race and ethnic categories are stated as defined in HUD standards

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29. PROGRAM OUTCOMES

Number of unduplicated individual participants served during 2009.	20
Total to be served in 2011.	30

Complete the following for each program outcome. No more than two outcomes per program will be reviewed.

If applying to OCS, please refer to your research and/or posted resource documents if appropriate.

Refer to the instructions for detailed descriptions of what should be included in the table below.

Outcome Objective # 1: 90% of new home owners (sharers) will be secure in their home share match and continue to live independently one year after the match is made.

Performance Indicator(s): 90% of new home owners will remain in their home, without transfer to a nursing facility, after 12 months of a successful match.

Proposed for 2011:	Total to be considered in	15	Targeted % to meet perf. measures	90%
	perf. measurement		Targeted # to meet perf. measure	13.5
Proposed for 2012:	Total to be considered in	15	Targeted % to meet perf. measures	90%
	perf. measurement		Targeted # to meet perf. measure	13.5

Explain the measurement tools or methods: contact will be made with home owner or family caregiver on a yearly basis to ensure match continues to be compatible.

Outcome Objective # 2:

Performance Indicator(s):

Proposed for 2011:	Total to be considered in		Targeted % to meet perf. measures	0%
	perf. measurement		Targeted # to meet perf. measure	0
Proposed for 2012:	Total to be considered in		Targeted % to meet perf. measures	0%
	perf. measurement		Targeted # to meet perf. measure	0

Explain the measurement tools or methods:

1. AGENCY CONTACT INFORMATION

Organization	Independent Living, Inc		
Mailing Address	815 Forward Drive		
Telephone	(608) 274-7900		
FAX	(608) 274-9181		
Admin Contact	Linda Lane		
Financial Contact	Joyce Behrend		
Website	www.indepenliving.com		
Email Address	llane@indepenliving.com		
Legal Status	Private: Non-Profit		
Federal EIN:	39-1186642		
State CN:	ES12144		
DUNS #	07-116-21-27		

2. CONTACT INFORMATION

A	OT/Home Modification		
	Contact:	linda lane	Phone: 274-7900 Email: llane@indepenliving.com
B	Home Share		
	Contact:	linda lane	Phone: 274-7900 Email: llane@indepenliving.com
C	Case Management-Housing Options		
	Contact:	linda lane	Phone: 274-7900 Email: llane@indepenliving.com
D	Health Advocate		
	Contact:	linda lane	Phone: 274-7900 Email: llane@indepenliving.com
E	Program E		
	Contact:		Phone: Email:
F	Program F		
	Contact:		Phone: Email:
G	Program G		
	Contact:		Phone: Email:
H	Program H		
	Contact:		Phone: Email:
I	Program I		
	Contact:		Phone: Email:
J	Program J		
	Contact:		Phone: Email:
K	Program K		
	Contact:		Phone: Email:
L	Program L		
	Contact:		Phone: Email:

3. AGENCY REVENUE DETAILED BY PROGRAM

REVENUE SOURCE	2009 ACTUAL	2010 BUDGET	2011 PROPOSED	2011 PROPOSED PROGRAMS			
				A	B	C	D
DANE CO HUMAN SVCS	204,954	47,511	47,511	0	0	0	0
DANE CO CDBG	106,806	35,016	50,000	50,000	0	0	0
MADISON-COMM SVCS		0	43,000	0	0	35,000	8,000
MADISON-CDBG	50,471	50,471	87,000	57,000	30,000	0	0
UNITED WAY ALLOC	194,902	178,252	186,530	0	0	0	0
UNITED WAY DESIG	20,887	18,730	18,730	0	0	0	0
OTHER GOVT	12,851	4,557	0	0	0	0	0
FUNDRAISING DONATIONS	200,243	173,500	150,000	0	0	0	0
USER FEES	1,596,219	1,732,180	1,821,186	57,500	5,000	0	0
OTHER	141,028	119,942	120,000	0	0	0	0
TOTAL REVENUE	2,528,361	2,360,159	2,523,957	164,500	35,000	35,000	8,000

REVENUE SOURCE	2011 PROPOSED PROGRAMS CONT.						
	E	F	G	H	I	J	K
DANE CO HUMAN SVCS	0	0	0	0	0	0	0
DANE CO CDBG	0	0	0	0	0	0	0
MADISON-COMM SVCS	0	0	0	0	0	0	0
MADISON-CDBG	0	0	0	0	0	0	0
UNITED WAY ALLOC	0	0	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0	0	0
OTHER GOVT	0	0	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0	0	0
USER FEES	0	0	0	0	0	0	0
OTHER	0	0	0	0	0	0	0
TOTAL REVENUE	0	0	0	0	0	0	0

REVENUE SOURCE	2011 PROPOSED PROGRAMS CONT.						Non-City
	L						
DANE CO HUMAN SVCS	0						47,511
DANE CO CDBG	0						0
MADISON-COMM SVCS	0						0
MADISON-CDBG	0						0
UNITED WAY ALLOC	0						186,530
UNITED WAY DESIG	0						18,730
OTHER GOVT	0						0
FUNDRAISING DONATIONS	0						150,000
USER FEES	0						1,758,686
OTHER	0						120,000
TOTAL REVENUE	0						2,281,457

AGENCY ORGANIZATIONAL PROFILE

4. AGENCY MISSION STATEMENT

Independent Living, Inc. (ILI) enables adults and adults with disabilities throughout Dane County to live independent, safe and productive lives by providing a spectrum of services designed with the highest regard for their well-being and dignity.

5. AGENCY EXPERIENCE AND QUALIFICATIONS

Established in 1973 as a 501(c)(3) organization, Independent Living (ILI) has remained committed to addressing the current and future needs of a growing, aging population in Madison and the broader Dane County community. We have carefully managed our program, service and housing growth over a 37-year span to balance the need for increased services and housing options while maintaining the financial security of the organization. Our experience working with local organizations, businesses, clients and community leaders has translated into key organizational strengths. Independent Living, Inc. owns and operates 213 units of service supported affordable housing for older adults. Our housing consists of 69 units of garden style condominiums in Sun Prairie, 42 units of HUD 202 Supportive Housing for seniors in Fitchburg, and 92 units of service supported apartments and assisted living units on Segoe Road in Madison. We evaluate our processes and systems for both quality assurance in order to implement changes that respond to our clients' evolving needs. For example, we recently implemented changes to our Financial Management and Counseling in-home record keeping system. Our system changes have significantly reduced panic calls from clients who communicated concern that they had missed paying a bill. In 2008-2009, ILI successfully secured funding to implement a caregiver respite initiative that provides subsidized in-home services or a five-day stay at ILI's Segoe Gardens Assisted Living to low-income caregivers who cannot afford to pay for alternate care when they need time for business, personal and social activities. ILI instituted new procedures for volunteer recruitment and retention with increased volunteer support for critical programs. During 2009 we had over 700 volunteers providing 19,942 hours of service through Home Care/Respite, Homechore, Evening Meals on Wheels / Kibble on Wheels, Telephone Reassurance, and Friendly Visitor. We have had a consistency in leadership at both the staff and board level. Rita Giovannoni, CEO, has led ILI since 1989 and holds a Masters in Health Care Fiscal Management. Joyce Behrend has been CFO since 2005 and in August, 2009, ILI hired Linda Lane as our COO. Current Board Chair John R. Habeck is retired from WHEDA. Board Member Carol Koby will complete her second nine-year term on the board in 2010, and has brought significant exposure to the resources we provide through her communications expertise. Board Member Ted Waldbillig, Director of Sales, Mid-West Family Broadcasting, secured substantial in kind promotions for our 2010 Evening Meals On Wheels March for Meals Campaign. ILI is currently in Phase One of a three-phase project to provide an aging in place options for seniors on the north side of Madison. This development, named Cherokee Prairie Senior Housing, will eventually include 97 independent service supported senior housing apartments, plus 24 assisted living and 24 memory care apartments.

6. AGENCY GOVERNING BODY

How many Board meetings were held in 2009?

	5
How many Board meetings has your governing body or Board of Directors scheduled for 2010?	6
How many Board seats are indicated in your agency by-laws?	5-15

How many Board meetings has your governing body or Board of Directors scheduled for 2010?

How many Board seats are indicated in your agency by-laws?

Please list your current Board of Directors or your agency's governing body.

Name	John R. Habeck			
Home Address	505 Glenview Drive, Madison, WI 53716			
Occupation	Retired, WHEDA			
Representing				
Term of Office		From:	mm/yyyy	To: 08/2011
Name	Michael Losenegger			
Home Address	509 Reid Drive, Mt. Horeb, WI 53572			
Occupation	COO			
Representing	First Business Bank			
Term of Office		From:	mm/yyyy	To: 08/2010
Name	Carol Koby			
Home Address	3457 Nappe Drive, Middleton, WI 53562			
Occupation	Owner			
Representing	Koby Communications Services, LLC			
Term of Office		From:	mm/yyyy	To: 08/2010
Name	Nancy Jackman			
Home Address	2758 Fitchburg, WI 53711			
Occupation	Vice President			
Representing	AAA Wisconsin			
Term of Office		From:	mm/yyyy	To: 08/2010
Name	Todd Becker			
Home Address	22 Pelham Court, Madison, WI 53713			
Occupation	Attorney			
Representing	Coyne, Schultz, Becker & Bauer			
Term of Office		From:	mm/yyyy	To: 08/2010
Name	Peter Christman			
Home Address	prefers not to disclose			
Occupation	EVP/COO			
Representing	UW Medical Foundation			
Term of Office		From:	mm/yyyy	To: 08/2011
Name	Jennifer Knudson			
Home Address	prefers not to disclose			
Occupation	Associate			
Representing	Neider & Boucher, SC			
Term of Office		From:	mm/yyyy	To: 08/2011
Name	Jean MacCubbin			
Home Address	3530 Heather Crest, Madison, WI 53715-3325			
Occupation	Engineering Consultant			
Representing	Wisconsin Department of Commerce			
Term of Office		From:	mm/yyyy	To: 08/2011

AGENCY GOVERNING BODY cont.

Name	Ted Waldbillig			
Home Address	692 Tamarack Way, Verona, WI 53593			
Occupation	Director of Sales			
Representing	Mid-West Family Broadcasting			
Term of Office		From:	mm/yyyy	To: 08/2011
Name	Thomas Shorter			
Home Address	prefers not to disclose			
Occupation	Attorney			
Representing	Godfrey & Kahn, SC			
Term of Office		From:	mm/yyyy	To: 08/2012
Name	Carroll Heideman			
Home Address	518 Caldly Place, Madison, WI 53711			
Occupation	Retired, Public Educator; Editor			
Representing				
Term of Office		From:	mm/yyyy	To: 08/2011
Name				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
Name				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
Name				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
Name				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
Name				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy

AGENCY GOVERNING BODY cont.

Name

Home Address

Occupation

Representing

Term of Office

From: mm/yyyy

To: mm/yyyy

Name

Home Address

Occupation

Representing

Term of Office

From: mm/yyyy

To: mm/yyyy

Name

Home Address

Occupation

Representing

Term of Office

From: mm/yyyy

To: mm/yyyy

Name

Home Address

Occupation

Representing

Term of Office

From: mm/yyyy

To: mm/yyyy

Name

Home Address

Occupation

Representing

Term of Office

From: mm/yyyy

To: mm/yyyy

Name

Home Address

Occupation

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Term of Office

From: mm/yyyy

To: mm/yyyy

7. STAFF-BOARD-VOLUNTEER DEMOGRAPHICS

Indicate by number the following characteristics for your agency's current staff, board and volunteers.

Refer to application instructions for definitions. You will receive an "ERROR" until completing the demographic information.

DESCRIPTOR	STAFF		BOARD		VOLUNTEER	
	Number	Percent	Number	Percent	Number	Percent
TOTAL	108	100%	10	100%	734	100%
GENDER						
MALE	22	20%	5	50%	299	41%
FEMALE	86	80%	5	50%	435	59%
UNKNOWN/OTHER	0	0%	0	0%	0	0%
TOTAL GENDER	108	100%	10	100%	734	100%
AGE						
LESS THAN 18 YRS	2	2%	0	0%	20	3%
18-59 YRS	86	80%	4	40%	559	76%
60 AND OLDER	20	19%	6	60%	155	21%
TOTAL AGE	108	100%	10	100%	734	100%
RACE*						0
WHITE/CAUCASIAN	95	88%	10	100%	601	82%
BLACK/AFRICAN AMERICAN	4	4%	0	0%	15	2%
ASIAN	5	5%	0	0%	18	2%
AMERICAN INDIAN/ALASKAN NATIVE	0	0%	0	0%	2	0%
NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER	2	2%	0	0%	0	0%
MULTI-RACIAL:	0	0%	0	0%	3	0%
Black/AA & White/Caucasian	0	0%	0	0%	3	100%
Asian & White/Caucasian	0	0%	0	0%	0	0%
Am Indian/Alaskan Native & White/Caucasian	0	0%	0	0%	0	0%
Am Indian/Alaskan Native & Black/AA	0	0%	0	0%	0	0%
BALANCE/OTHER	2	2%	0	0%	95	13%
TOTAL RACE	108	100%	10	100%	734	100%
ETHNICITY						
HISPANIC OR LATINO	5	5%	0	0%	11	1%
NOT HISPANIC OR LATINO	103	95%	10	100%	723	99%
TOTAL ETHNICITY	108	100%	10	100%	734	100%
PERSONS WITH DISABILITIES	11	10%	0	0%	5	1%

*These categories are identified in HUD standards.

8. AGENCY EXPENSE BUDGET

This chart describes your agency's total expense budget for 3 separate years.

Where possible, use audited figures for 2009 Actual. The 2010 Budget and 2011 Proposed Budget will autofill from information you provided elsewhere in the application.

Account Description	2009 ACTUAL	2010 BUDGET	2011 PROPOSED
A. PERSONNEL			
Salary	1,360,279	1,317,817	1,432,226
Taxes	157,595	157,186	170,832
Benefits	157,377	175,093	190,295
SUBTOTAL A.	1,675,251	1,650,096	1,793,353
B. OPERATING			
All "Operating" Costs	405,901	406,353	421,297
SUBTOTAL B.	405,901	406,353	421,297
C. SPACE			
Rent/Utilities/Maintenance	194,282	209,966	222,962
Mortgage (P&I) / Depreciation / Taxes	14,303	8,729	10,074
SUBTOTAL C.	208,585	218,695	233,036
D. SPECIAL COSTS			
Assistance to Individuals	73,544	82,780	73,871
Subcontracts, etc.	0	0	0
Affiliation Dues	2,544	2,235	2,400
Capital Expenditure	0	0	0
Other:	0	0	0
SUBTOTAL D.	76,088	85,015	76,271
SPECIAL COSTS LESS CAPITAL EXPENDITURE	76,088	85,015	76,271
TOTAL OPERATING EXPENSES	2,365,825	2,360,159	2,523,957
E. TOTAL CAPITAL EXPENDITURES	0	0	0

9. PERSONNEL DATA: List Percent of Staff Turnover

64.0%

Divide the number of resignations or terminations in calendar year 2009 by total number of budgeted positions.

Do not include seasonal positions. Explain if you had a 20% or more turnover rate in a certain staff position/category.

Discuss any other noteworthy staff retention issues, or policies to reduce staff turnover.

Independent Living's turnover for 2009 was 64%. An area of greater than normal turnover is at our Assisted Living Facility; we hire a good portion of nursing students who terminate over the summer and re-start every fall. One of our business work plan goals is to reduce turnover. Through employee initiatives and improvements our turnover rate for 1st quarter 2010 has decreased to 12.9%.

ORGANIZATION:

Independent Living, Inc

PROGRAM BUDGET

1. 2010 BUDGETED

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	47,511	42,411	1,566	3,534	0
DANE CO CDBG	0				
UNITED WAY ALLOC	178,252	99,956	66,989	6,452	4,855
UNITED WAY DESIG	18,730	11,320	7,029	381	0
OTHER GOVT	4,557	0	46	0	4,511
FUNDRAISING DONATIONS	171,000	87,020	56,887	3,626	23,467
USER FEES	1,674,939	1,269,912	216,340	188,687	0
OTHER	119,942	71,965	44,978	2,999	0
TOTAL REVENUE	2,214,931	1,582,584	393,835	205,679	32,833

2. 2011 PROPOSED BUDGET

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	47,511	42,411	1,566	3,534	0
DANE CO CDBG	0	0	0	0	0
UNITED WAY ALLOC	186,530	107,220	62,033	6,777	10,500
UNITED WAY DESIG	18,730	11,320	7,029	381	0
OTHER GOVT*	0	0	0	0	0
FUNDRAISING DONATIONS	150,000	88,475	57,838	3,687	0
USER FEES	1,758,686	1,333,408	227,157	198,121	0
OTHER**	120,000	72,000	45,000	3,000	0
TOTAL REVENUE	2,281,457	1,654,834	400,623	215,500	10,500

*OTHER GOVT 2011

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

**OTHER 2011

Source	Amount	Terms
	75,000	Property Management Fees
	25,000	Interest Income
	20,000	Miscellaneous Income
	0	
	0	
TOTAL	120,000	