

**1. AGENCY CONTACT INFORMATION**

Organization	East Madison / Monona Coalition of the Aging		
Mailing Address	4142 Monona Drive, Madison, WI 53716		
Telephone	608-223-3100		
FAX	608-223-3102		
Admin Contact	Sonya Lindquist, executive director		
Financial Contact	Sonya Lindquist, executive director and Barb Samdahl, bookkeeper		
Website	www.emmca.org		
Email Address	SonyaL@emmca.org		
Legal Status	Private: Non-Profit		
Federal EIN:	39-1211331		
State CN:			
DUNS #			

**2. CONTACT INFORMATION**

A	Case Management			
	Contact:	Sonya Lindquist	Phone:	233-3103
			Email:	SonyaL@emmca.org
B	Focal Point			
	Contact:	Sonya Lindquist	Phone:	233-3103
			Email:	SonyaL@emmca.org
C	Program C			
	Contact:		Phone:	
			Email:	
D	Program D			
	Contact:		Phone:	
			Email:	
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	143,615	143,785	153,379	82,974	0	0	0
DANE CO CDBG		0	0	0	0	0	0
MADISON-COMM SVCS	53,509	57,069	64,062	52,578	11,484	0	0
MADISON-CDBG		0	0	0	0	0	0
UNITED WAY ALLOC	25,202	12,012	12,371	0	0	0	0
UNITED WAY DESIG	5,836	5,158	5,313	0	0	0	0
OTHER GOVT	78,136	78,407	86,015	38,906	0	0	0
FUNDRAISING DONATIONS	17,946	26,972	39,836	10,539	0	0	0
USER FEES	127,324	140,700	151,921	0	0	0	0
OTHER	427	252	252	0	0	0	0
TOTAL REVENUE	451,995	464,355	513,149	184,997	11,484	0	0

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.						
	L						Non-City
DANE CO HUMAN SVCS	0						70,405
DANE CO CDBG	0						0
MADISON-COMM SVCS	0						0
MADISON-CDBG	0						0
UNITED WAY ALLOC	0						12,371
UNITED WAY DESIG	0						5,313
OTHER GOVT	0						47,109
FUNDRAISING DONATIONS	0						29,297
USER FEES	0						151,921
OTHER	0						252
TOTAL REVENUE	0						316,668

## AGENCY ORGANIZATIONAL PROFILE

## 4. AGENCY MISSION STATEMENT

The East Madison/Monona Coalition of the Aging (EMMCA) devotes itself to providing services to assist our elderly neighbors so they may remain in their own homes while living a healthy, productive, and dignified life. EMMCA is an independent, non-profit, neighborhood organization. Its goal is to maintain the highest possible quality of service.

## 5. AGENCY EXPERIENCE AND QUALIFICATIONS

The East Madison/Monona Coalition of the Aging has over 35 years of experience serving seniors in east Madison and Monona. EMMCA began in 1973 when a group of neighborhood church leaders and older adults organized themselves to coordinate all of the activities available for local senior citizens and to address common needs and goals. EMMCA incorporated April 30, 1974 as a private, nonprofit organization providing community based services. From 1975-1980 funding was granted to seed EMMCA's initial programs: senior nutrition and outreach. Four senior coalitions were formed in Madison providing service for the entire city of Madison and the city of Monona. From 1980-1990 outreach evolved into case management as staff worked with older adults on an individual basis, helping them to connect with and manage the services which kept them independent. Case management continues to be a primary service that EMMCA provides for seniors in east Madison. EMMCA staff has developed collegial working relationships with many social service agencies in the Madison area. The three case managers have the following educational and professional backgrounds: A) BA in Sociology and an MS in Social Work, 18 years with EMMCA, prior work with Catholic Charities; B) BA in Psychology, completed classes for Social Work Certification and is preparing for the tests, 2 years with EMMCA, prior work with developmentally disabled adults; and C) BS in Psychology with an emphasis in Gerontology, 6 months with EMMCA, prior work with a nursing home, a day care and with disabled adults. To keep current on issues related to case management and to network with area colleagues, the EMMCA case managers attend the monthly Case Manager Training Sessions. Because of their education and experience, the case management staff has a strong knowledge of the issues facing seniors and of the services available for seniors in east Madison. In 1987 after much planning and assessment, EMMCA started a volunteer-based Home Chore Program designed to match volunteers with low-income older adults needing help with basic home chores, enabling them to continue living at home. In the early 2000's EMMCA purchased a building and established an Adult Day Center that provides services in a unique homelike setting. This service provides much needed respite for caregivers, and socialization and gentle exercise activities for seniors in Dane County. The Day Center has three primary staff members with the following educational and professional backgrounds: A) Bachelor's degree in Music Therapy, 6 years with EMMCA, prior work with Madison Area Rehabilitation Centers and with disabled adults; B) Associate's degree in marketing from MATC, 4.5 years with EMMCA, prior work with disabled adults; and C) Bachelor's degree in Nursing, 3 months with EMMCA, prior work as a nurse at several area hospitals and with an ambulance service. As EMMCA evolved and the older adult population grew and needs changed, additional services were added including: the monthly newsletters, Caregiver's Support group, the toe nail clinics, the Lending Library and the Equipment Loan Closet. These all support seniors in our community and help keep them independent. The executive director of EMMCA has over 20 years of experience with administration, and program development and management. The executive director also has experience with recruitment, outreach and fundraising and so will be a resource for the proposed outreach and program development staff person. The EMMCA Board of Directors has 10 members many of whom are small business owners or insurance agents, in addition one board member is a retired nursing professor, another board member is a bank executive with human resource knowledge, and the board treasurer is an accountant. In the past two years, the board of director's reviewed and revised EMMCA's personnel policy, position descriptions, by-laws, and fiscal manual. The board has begun discussing strategic planning, development, and outreach as work to focus on for the next two years.

## 6. AGENCY GOVERNING BODY

How many Board meetings were held in 2009?

12

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

12

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

15

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

<b>Name</b>	<b>Daniel (Dan) Pechauer - board president</b>				
Home Address	4445 Beale Street, Madison, WI 53711				
Occupation	insurance agent				
Representing	faith community				
Term of Office	board member - 3rd term	From:	06/2004	To:	06/2013
<b>Name</b>	<b>Robert (Bob) Di Loreto - board vice-president</b>				
Home Address	P.O. Box 6032, Madison, WI 53716				
Occupation	owner White Knight Carpet Rescuers, Inc.				
Representing	small/community businesses				
Term of Office	board member - 2nd term	From:	06/2005	To:	06/2011
<b>Name</b>	<b>Robert (Bob) Gannon - board secretary</b>				
Home Address	732 Foxfield Road, Oregon, WI 53575				
Occupation	owner Gannon Graphics				
Representing	small/community businesses				
Term of Office	board member - 3rd term	From:	06/2004	To:	06/2013
<b>Name</b>	<b>Michael (Mike) McHugh - board treasurer</b>				
Home Address	714 Eagle Crest Drive, Madison, WI 53704				
Occupation	CPA, Bremser Group				
Representing	financial sector				
Term of Office	board member - 3rd term	From:	06/2001	To:	06/2011
<b>Name</b>	<b>Peter (Pete) Gunderson</b>				
Home Address	4899 Enchanted Valley, Middleton, WI 53562				
Occupation	president, Gunderson Funeral Homes				
Representing	small/community businesses				
Term of Office	board member - 6th term	From:	06/1996	To:	06/2012
<b>Name</b>	<b>Jeff Gunderson</b>				
Home Address	1806 Tower Valley Road, Stoughton, WI 53589				
Occupation	president, Acryfab				
Representing	small/community businesses				
Term of Office	board member - 3rd term	From:	06/2004	To:	06/2013
<b>Name</b>	<b>Julie Bass</b>				
Home Address	2001 W. Broadway, Monona, WI 53713				
Occupation	insurance agent				
Representing	women in business				
Term of Office	board member - 1st term	From:	06/2009	To:	06/2012
<b>Name</b>	<b>Kim Lengfeld</b>				
Home Address	2384 Westlawn Ave., Madison, WI 53711				
Occupation	bank branch manager				
Representing	financial sector				
Term of Office	board member - 1st term	From:	06/2010	To:	06/2013

## AGENCY GOVERNING BODY cont.

<b>Name</b>	<b>Bill Kneebone</b>			
Home Address	6213 Fredericksburg Lane, Madison, WI 53718			
Occupation	owner BK Home Inspection			
Representing	small/community			
Term of Office	board member - 1st term	From:	06/2008	To: 06/2011
<b>Name</b>	<b>Bernice (Bunny) Owen</b>			
Home Address	1001 Pflaum Road, Madison, WI 53716			
Occupation	retired professor of nursing from UW-Madison			
Representing	health care professionals and senior citizens			
Term of Office	board member - 3rd term	From:	06/2003	To: 06/2012
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
<b>Name</b>				
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

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

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Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	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
<b>TOTAL</b>	11	100%	10	100%	143	100%
<b>GENDER</b>						
MALE	0	0%	7	70%	48	34%
FEMALE	11	100%	3	30%	95	66%
UNKNOWN/OTHER	0	0%	0	0%	0	0%
TOTAL GENDER	11	100%	10	100%	143	100%
<b>AGE</b>						
LESS THAN 18 YRS	0	0%	0	0%	22	15%
18-59 YRS	10	91%	9	90%	87	61%
60 AND OLDER	1	9%	1	10%	34	24%
TOTAL AGE	11	100%	10	100%	143	100%
<b>RACE*</b>						0
WHITE/CAUCASIAN	10	91%	10	100%	138	97%
BLACK/AFRICAN AMERICAN	0	0%	0	0%	2	1%
ASIAN	1	9%	0	0%	1	1%
AMERICAN INDIAN/ALASKAN NATIVE	0	0%	0	0%	0	0%
NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER	0	0%	0	0%	0	0%
MULTI-RACIAL:	0	0%	0	0%	2	1%
Black/AA & White/Caucasian	0	0%	0	0%	1	50%
Asian & White/Caucasian	0	0%	0	0%	1	50%
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	0	0%	0	0%	0	0%
TOTAL RACE	11	100%	10	100%	143	100%
<b>ETHNICITY</b>						
HISPANIC OR LATINO	0	0%	0	0%	0	0%
NOT HISPANIC OR LATINO	11	100%	10	100%	143	100%
TOTAL ETHNICITY	11	100%	10	100%	143	100%
<b>PERSONS WITH DISABILITIES</b>	0	0%	1	10%	5	3%

\*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
<b>A. PERSONNEL</b>			
Salary	280,247	302,107	334,593
Taxes	22,989	24,169	26,767
Benefits	34,735	31,268	34,798
<b>SUBTOTAL A.</b>	<b>337,971</b>	<b>357,544</b>	<b>396,158</b>
<b>B. OPERATING</b>			
All "Operating" Costs	58,837	57,665	59,382
<b>SUBTOTAL B.</b>	<b>58,837</b>	<b>57,665</b>	<b>59,382</b>
<b>C. SPACE</b>			
Rent/Utilities/Maintenance	15,724	14,646	15,085
Mortgage (P&I) / Depreciation / Taxes	34,495	34,500	35,524
<b>SUBTOTAL C.</b>	<b>50,219</b>	<b>49,146</b>	<b>50,609</b>
<b>D. SPECIAL COSTS</b>			
Assistance to Individuals	0	0	0
Subcontracts, etc.	0	0	0
Affiliation Dues	0	0	0
Capital Expenditure	35,997	0	7,000
Other:	0	0	0
<b>SUBTOTAL D.</b>	<b>35,997</b>	<b>0</b>	<b>7,000</b>
<b>SPECIAL COSTS LESS CAPITAL EXPENDITURE</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>TOTAL OPERATING EXPENSES</b>	<b>447,027</b>	<b>464,355</b>	<b>506,149</b>
<b>E. TOTAL CAPITAL EXPENDITURES</b>	<b>35,997</b>	<b>0</b>	<b>7,000</b>

## 9. PERSONNEL DATA: List Percent of Staff Turnover

15.0%

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.

600 characters (with spaces)



## 10. PERSONNEL DATA: Personnel Schedule

List each individual staff position by title. Seasonal Employees should be entered at the bottom.

Indicate if the position meets the Living Wage Exception with an asterisk (\*).

Indicate the number of 2011 Proposed Full-Time Equivalents (FTEs) in each staff position, across all agency programs.

Indicate the total salaries for all FTEs in that staff position. Do NOT include payroll taxes or benefits in this table.

Staff Position/Category	2010		2011					
	Est.	Est.	Proposed	Proposed	Hourly Wage	A	B	C
	FTE	Salary	FTE	Salary		FTE	FTE	FTE
Executive Director	1.00	50,000	1.00	51,500	0.00	0.25	0.13	0.00
Administrative Assistant	1.00	28,080	1.00	28,922	0.00	0.35	0.23	0.00
Lead Case Manager	0.80	28,362	1.00	34,195	0.00	1.00	0.00	0.00
Case Manager	1.00	32,885	1.00	31,054	0.00	0.90	0.10	0.00
Case Manager	0.60	16,760	0.50	18,086	0.00	0.50	0.00	0.00
Home Chore/Outreach & Program Dev	0.70	21,533	1.00	31,684	0.00	0.50	0.00	0.00
Nutrition Manager	0.50	11,034	0.50	11,365	0.00	0.00	0.00	0.00
Adult Day Center Manager	1.00	32,864	1.00	33,850	0.00	0.00	0.00	0.00
Adult Day Center Assistant Manager	1.00	29,702	0.80	24,475	0.00	0.00	0.00	0.00
Adult Day Center Assistant	0.40	11,034	1.00	28,413	0.00	0.00	0.00	0.00
Adult Day Center Assistant	0.30	6,621	0.30	6,820	0.00	0.00	0.00	0.00
Caring for the Caregiver Manager	0.80	33,232	0.80	34,229	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
TOTAL	9.10	302,107	9.90	334,593		3.50	0.46	0.00

<b>TOTAL PERSONNEL COSTS:</b>	<b>334,593</b>
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	Nbr of Weeks	Total Hours	Hourly Wage	Seasonal Earnings		A	B	C
Seasonal/Project Employee ONLY	Weeks	Hours	Wage	Earnings		# HRS	# HRS	# HRS
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
TOTAL	0	0		0		0.00	0.00	0.00

### 2011 PROPOSED FTEs DISTRIBUTED BY PROGRAM

[illegible][illegible]

ORGANIZATION:

East Madison / Monona Coalition of the Aging

## PROGRAM BUDGET

## 1. 2010 BUDGETED

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	68,354	66,598	1,590	166	0
DANE CO CDBG	0	0	0	0	0
UNITED WAY ALLOC	12,012	8,795	1,201	2,016	0
UNITED WAY DESIG	5,158	3,777	1,092	289	0
OTHER GOVT	45,760	33,504	4,576	7,680	0
FUNDRAISING DONATIONS	16,740	14,186	954	1,600	0
USER FEES	140,700	103,021	14,070	23,609	0
OTHER	252	186	25	41	0
TOTAL REVENUE	288,976	230,067	23,508	35,401	0

## 2. 2011 PROPOSED BUDGET

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	70,405	68,596	1,638	171	0
DANE CO CDBG	0	0	0	0	0
UNITED WAY ALLOC	12,371	9,058	1,237	2,076	0
UNITED WAY DESIG	5,313	3,890	1,125	298	0
OTHER GOVT*	47,109	34,509	4,700	7,900	0
FUNDRAISING DONATIONS	29,297	26,666	983	1,648	0
USER FEES	151,921	106,112	14,492	24,317	7,000
OTHER**	252	186	25	41	0
TOTAL REVENUE	316,668	249,017	24,200	36,451	7,000

\*OTHER GOVT 2011

Source	Amount	Terms
City of Monona	5,262	annual allocation from the City of Monona for Home Chore program
W Madison Home Chore	27,641	annual allocation for Home Chore program
S Madison SHC	11,654	annual allocation for Supportive Home Care program
Madison Trust	2,552	Brittingham Grant 2nd year of 3 year grant
	0	
TOTAL	47,109	

\*\*OTHER 2011

Source	Amount	Terms
Interest	252	
	0	
	0	
	0	
	0	
TOTAL	252	

**1. AGENCY CONTACT INFORMATION**

Organization	Irwin A and Robert D Goodman Community Center		
Mailing Address	149 Waubesa St.		
Telephone	241-1574		
FAX	241-1518		
Admin Contact	Becky Steinhoff		
Financial Contact	Mary Smith		
Website	www.goodmancenter.org		
Email Address	becky@goodmancenter.org		
Legal Status	Private: Non-Profit		
Federal EIN:	39-1919172		
State CN:			
DUNS #	825816002		

**2. CONTACT INFORMATION**

A	Program A- Elementary School Childcare		
	Contact: Angela Tortorice	Phone: 241-1574	Email: angela@goodmancenter.org
B	Program B- Parents leading Parents		
	Contact: Amy Bennett	Phone: 241-1574	Email: amy@goodmancenter.org
C	Program C- Preschool Childcare		
	Contact: Angela Tortorice	Phone: 241-1574	Email: angela@goodmancenter.org
D	Program D- Middle School Achievement		
	Contact: Meme Kintner	Phone: 241-1574	Email: meme@goodmancenter.org
E	Program E-TEEN (Teen Education and Empliment Network)		
	Contact: Norma Jean Simon	Phone: 241-1574	Email: normajeane@goodmancenter.org
F	Program F- Neighborhood Center Support		
	Contact: Becky Steinhoff	Phone: 241-1574	Email: becky@goodmancenter.org
G	Program G- Girls Inc		
	Contact: Meme Kintner	Phone: 241-1574	Email: meme@goodmancenter.org
H	Program H- High School Achievement		
	Contact: Meme Kintner	Phone: 241-1574	Email: meme@goodmancenter.org
I	Program I- Senior Services		
	Contact: Marlene Storms	Phone: 241-1574	Email: marlene@goodmancenter.org
J	Program J Supporting Successful Employment		
	Contact: Tanya Martinez Knauer	Phone: 241-1574	Email: tanyamk@goodmancenter.org
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	8,900	17,121	17,566	0	0	0	9,345
DANE CO CDBG		0	0	0	0	0	0
MADISON-COMM SVCS	228,326	228,011	271,758	91,772	10,000	41,770	22,989
MADISON-CDBG	43,965	43,965	55,000	0	0	0	0
UNITED WAY ALLOC	85,670	78,303	104,243	29,925	10,000	0	7,035
UNITED WAY DESIG	42,138	45,667	59,532	9,450	0	9,450	4,200
OTHER GOVT	406,051	489,250	504,263	100,000	45,000	17,010	57,750
FUNDRAISING DONATIONS	835,597	818,128	827,198	69,300	15,000	118,003	40,880
USER FEES	524,470	623,900	654,595	115,500	0	77,490	0
OTHER	220,811	35,000	36,750	0	0	0	0
TOTAL REVENUE	2,395,928	2,379,345	2,530,905	415,947	80,000	263,723	142,199

REVENUE SOURCE	2011 PROPOSED PROGRAMS CONT.						
	E	F	G	H	I	J	K
DANE CO HUMAN SVCS	0	0	8,221	0	0	0	0
DANE CO CDBG	0	0	0	0	0	0	0
MADISON-COMM SVCS	12,000	0	12,364	60,344	7,000	13,520	0
MADISON-CDBG	0	55,000	0	0	0	0	0
UNITED WAY ALLOC	10,000	0	0	21,593	13,690	0	0
UNITED WAY DESIG	11,832	0	6,300	13,300	5,000	0	0
OTHER GOVT	45,000	22,131	17,500	40,453	0	6,000	0
FUNDRAISING DONATIONS	66,355	21,420	81,060	108,184	54,846	6,200	0
USER FEES	0	231,550	0	5,250	10,605	0	0
OTHER	0	0	0	0	0	0	0
TOTAL REVENUE	145,187	330,101	125,445	249,124	91,141	25,720	0

REVENUE SOURCE	2011 PROPOSED PROGRAMS CONT.						
	L						Non-City
DANE CO HUMAN SVCS	0						0
DANE CO CDBG	0						0
MADISON-COMM SVCS	0						0
MADISON-CDBG	0						0
UNITED WAY ALLOC	0						12,000
UNITED WAY DESIG	0						0
OTHER GOVT	0						153,419
FUNDRAISING DONATIONS	0						245,950
USER FEES	0						214,200
OTHER	0						36,750
TOTAL REVENUE	0						662,319

## AGENCY ORGANIZATIONAL PROFILE

## 4. AGENCY MISSION STATEMENT

We strengthen lives in our community

In fulfilling its mission GCC creates and coordinates space, programs, and services that reflect the community's ethnic and economic diversity: builds a sense of community; Provides activities, education, social development and nourishment to at-risk children, parents and seniors; Provide emergency food; Organizes community events for education, socializing and celebration; Organize volunteer opportunities; Provide community space ; Provides information about community issues, people and events; Refers people requesting assistance to appropriate agency

## 5. AGENCY EXPERIENCE AND QUALIFICATIONS

Goodman Community Center (GCC) was founded in 1954 and today GCC is the largest community center in Madison, offering the most diverse range of programming to people of all ages. GCC has always targeted programs to serve lower-income individuals who do not have the resources and supports needed to reach their maximum potential. The majority of the focus of the agency has been on children and adolescents with higher risk factors and multiple barriers impeding their track to success, although in recent years, programming for seniors, parents and the broader community has taken on a central role. GCC has a diverse workforce with 43% of the employees being of color. GCC has long term retention of staff with nine staff having more than 10 years with the agency and eighteen having more than five years.

GCC is in an excellent position to provide both the programmatic and fiscal oversight for the programs in this application. GCC has a solid reputation in the community for developing high quality programs and for being accountable to both stakeholders and participants. In the last 20 years, the organization has grown more than 600% from a \$200,000 budget supporting 3 FTE to a \$2.4M budget supporting 44 FTE. The reputation and history of the organization and long retention of Directing/Coordinating staff resulted in this tremendous growth and the need for a bigger facility. In 2008 the Staff and Board completed a highly successful capital campaign raising \$12.5M to renovate a historic manufacturing building into a 47,000 square foot, state of the art community center. The GCC has a strong history of doing what needs to be done and involving the correct team of experts to do a phenomenal job with maximum impact. The success of programming and partnerships at the new facility is impressive. In 2009 GCC saw 39,775 unduplicated participants and 144,000 visitors come through the doors (compared with 11,000 unduplicated individuals in 2008).

GCC has had the pleasure of participating in several large scale local and national evaluations in addition to the ongoing measurements that occur within every program. Through participation in regular evaluation, Staff and Board know that the programs make a difference in the lives of the participants. For example, GCC adolescents are in school more often, they do better academically, they have positive connections to peers and adults and self report feeling connected to the community. Because of the focus on service and leadership, adolescents report feeling valued in the community and that they have made their community a better place. In the last 2 years, GCC has been 100% successful in preparing our preschoolers to succeed at school. The elementary programs have forged new relationships with the primary schools and are beginning to see remarkable results in kids behaviors, academic progress and parent participation.

GCC is now in a position of offering expanded resources to parents and other adults to assist with their skill development. GCC parent group has grown tremendously and parents are reporting that the program relieves their stress and gives them better coping skills.

GCC has successfully moved into the youth employment arena and is excited about being able to play a role in the success of adult employment.

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GCC has successfully moved into the youth employment arena and is excited about being able to play a role in the success of adult employment.

## 6. AGENCY GOVERNING BODY

How many Board meetings were held in 2009?

7

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

7

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

up to 15

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

<b>Name</b>	<b>Peter Vogel</b>				
Home Address	1135 Cty Hwy BB Deerfield WI				
Occupation	President and CEO, Vogel Brothers Bldg.				
Representing	President of the Board				
Term of Office	3 years	From:	03/2009	To:	03/2012
<b>Name</b>	<b>Michael Goodman</b>				
Home Address	2314 Sommers Ave				
Occupation	Associate Director UW-Madison's Center for the Humanities				
Representing	Vice President of the Board				
Term of Office	3 years	From:	03/2010	To:	03/3013
<b>Name</b>	<b>Ann Brickson</b>				
Home Address	2226 Lakeland Ave				
Occupation	Program Coordinator WI Coalition Against Domestic Violence				
Representing	Secretary of the Board				
Term of Office	3 years	From:	03/2009	To:	03/2012
<b>Name</b>	<b>David Seligman</b>				
Home Address	520 Miller Ave				
Occupation	Retired Budget Analyst for the State of WI				
Representing	Treasurer				
Term of Office	3 years	From:	03/2008	To:	03/2011
<b>Name</b>	<b>Bonnie Anderson</b>				
Home Address	3034 Atwood				
Occupation	Dept. of Justice Director of Budget and Finance				
Representing					
Term of Office	3	From:	03/2008	To:	03/2011
<b>Name</b>	<b>Gil de Las Alas</b>				
Home Address	910 Mayer Ave				
Occupation	Director of Human Resources, Kraft Foods				
Representing	business				
Term of Office	3	From:	05/2010	To:	03/2013
<b>Name</b>	<b>John Givens</b>				
Home Address	4216 Mandrake				
Occupation	Director, Crossroads Youth Mentoring and Support				
Representing					
Term of Office	3	From:	03/2009	To:	03/2012
<b>Name</b>	<b>Tom Hecht</b>				
Home Address	1349 Jennifer				
Occupation	CEO, Givemoney.com				
Representing					
Term of Office	3	From:	03/2010	To:	03/2013

## AGENCY GOVERNING BODY cont.

<b>Name</b>	<b>Ernie Martinez</b>			
Home Address	2730 Lakeland Ave			
Occupation	Division Chief, Madison Fire Dept			
Representing				
Term of Office	3	From:	03/2009	To: 03/2012
<b>Name</b>	<b>Judy Olson</b>			
Home Address	518 Clemons			
Occupation	Grant Writer/Executive Assistant, Operation Fresh Start			
Representing				
Term of Office	3	From:	03/2009	To: 03/2012
<b>Name</b>	<b>Jenny Pressman</b>			
Home Address	1133 Rutledge			
Occupation	President of Pressman Consulting			
Representing				
Term of Office	3	From:	03/2009	To: 03/2012
<b>Name</b>	<b>Mary Lang Sollinger</b>			
Home Address	1206 Sherman Ave			
Occupation	Finance Director, Demographic Party of WI			
Representing				
Term of Office	3	From:	03/2009	To: 03/2012
<b>Name</b>	<b>Lee Thomas</b>			
Home Address	4836 Starker			
Occupation	retired, East High Principal			
Representing				
Term of Office	3	From:	03/2009	To: 03/2012
<b>Name</b>	<b>Luis Yudice</b>			
Home Address	23 Sturbridge Cir			
Occupation	Safety Director, Madison Metropolitan School District			
Representing				
Term of Office	3	From:	03/2009	To: 03/2012
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
<b>Name</b>				
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

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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

## 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
<b>TOTAL</b>	74	100%	14	100%	600	100%
<b>GENDER</b>						
MALE	28	38%	9	64%	192	32%
FEMALE	46	62%	5	36%	408	68%
UNKNOWN/OTHER	0	0%	0	0%	0	0%
TOTAL GENDER	74	100%	14	100%	600	100%
<b>AGE</b>						
LESS THAN 18 YRS	16	22%	0	0%	127	21%
18-59 YRS	51	69%	12	86%	389	65%
60 AND OLDER	7	9%	2	14%	84	14%
TOTAL AGE	74	100%	14	100%	600	100%
<b>RACE*</b>						0
WHITE/CAUCASIAN	42	57%	11	79%	377	63%
BLACK/AFRICAN AMERICAN	26	35%	2	14%	123	21%
ASIAN	2	3%	1	7%	12	2%
AMERICAN INDIAN/ALASKAN NATIVE	0	0%	0	0%	2	0%
NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER	0	0%	0	0%	0	0%
MULTI-RACIAL:	4	5%	0	0%	0	0%
Black/AA & White/Caucasian	3	75%	0	0%	0	0%
Asian & White/Caucasian	1	25%	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	0	0%	0	0%	86	14%
TOTAL RACE	74	100%	14	100%	600	100%
<b>ETHNICITY</b>						
HISPANIC OR LATINO	2	3%	2	14%	18	3%
NOT HISPANIC OR LATINO	72	97%	12	86%	582	97%
TOTAL ETHNICITY	74	100%	14	100%	600	100%
<b>PERSONS WITH DISABILITIES</b>	3	4%	0	0%	unknown	#VALUE!

\*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
<b>A. PERSONNEL</b>			
Salary	1,310,522	0	0
Taxes	100,474	0	0
Benefits	188,879	0	0
<b>SUBTOTAL A.</b>	<b>1,599,875</b>	<b>1,554,229</b>	<b>1,653,847</b>
		ERROR	ERROR
<b>B. OPERATING</b>			
All "Operating" Costs	660,103	0	0
<b>SUBTOTAL B.</b>	<b>660,103</b>	<b>635,575</b>	<b>678,517</b>
		ERROR	ERROR
<b>C. SPACE</b>			
Rent/Utilities/Maintenance	201,930	0	0
Mortgage (P&I) / Depreciation / Taxes	0	0	0
<b>SUBTOTAL C.</b>	<b>201,930</b>	<b>189,541</b>	<b>198,542</b>
		ERROR	ERROR
<b>D. SPECIAL COSTS</b>			
Assistance to Individuals	0	0	0
Subcontracts, etc.	0	0	0
Affiliation Dues	0	0	0
Capital Expenditure	0	0	0
Other:	0	0	0
<b>SUBTOTAL D.</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>SPECIAL COSTS LESS CAPITAL EXPENDITURE</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>TOTAL OPERATING EXPENSES</b>	<b>2,461,908</b>	<b>2,379,345</b>	<b>2,530,905</b>
<b>E. TOTAL CAPITAL EXPENDITURES</b>	<b>0</b>	<b>0</b>	<b>0</b>

## 9. PERSONNEL DATA: List Percent of Staff Turnover

13.0%

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.

600 characters (with spaces)

The turnover rate of regular adult employees in 2009 is 13%.

The turnover rate for youth employees is significantly higher, but in most cases they are expected to be in the program only for 3-9 months for the training period.

**10. PERSONNEL DATA: Personnel Schedule**

List each individual staff position by title. Seasonal Employees should be entered at the bottom.

Indicate if the position meets the Living Wage Exception with an asterisk (\*).

Indicate the number of 2011 Proposed Full-Time Equivalents (FTEs) in each staff position, across all agency programs.

Indicate the total salaries for all FTEs in that staff position. Do NOT include payroll taxes or benefits in this table.

Staff Position/Category	2010		2011		Hourly Wage	2011 P			
	Est. FTE	Est. Salary	Proposed FTE	Proposed Salary		A	B	C	D
						FTE	FTE	FTE	FTE
Executive Director *	1.00	72,000	1.00	75,600	36.35	0.10	0.05	0.10	0.05
Assistant Director *	1.00	52,000	1.00	54,600	26.25	0.10	0.05	0.05	0.05
Director of Finance *	1.00	50,000	1.00	52,500	25.24	0.10	0.05	0.05	0.05
Financial Assistant *	0.75	20,280	1.00	21,294	13.65	0.10	0.05	0.05	0.05
Director of Development *	1.00	46,000	1.00	48,300	23.22	0.05	0.05	0.05	0.05
Donor Relations Assist *	0.50	20,000	1.00	21,000	20.19	0.05	0.05	0.05	0.05
Facility Manager *	1.00	40,000	1.00	42,000	20.19	0.00	0.00	0.00	0.00
Facilities Admin Assistant *	1.00	27,040	1.00	28,392	13.65	0.00	0.00	0.00	0.00
Child and Family Advocate Social Worker *	0.75	32,760	1.00	34,398	22.05	0.00	1.00	0.00	0.00
Senior Services Coordinator *	0.75	24,180	1.00	25,389	16.28	0.00	0.00	0.00	0.00
Middle and HS Program Director *	1.00	48,000	1.00	50,400	24.23	0.00	0.00	0.00	0.25
Job Club Coordinator *	1.00	32,000	1.00	33,600	16.15	0.00	0.00	0.00	0.00
Girls Inc Coordonator *	0.80	22,464	1.00	23,587	14.21	0.00	0.00	0.00	0.00
MAP Coordinator *	0.80	22,464	1.00	23,587	14.18	0.00	0.00	0.00	0.80
Okeeffe YRC Coordinator *	0.75	24,180	1.00	25,389	16.28	0.00	0.00	0.00	1.00
Youth Worker *	1.00	23,920	1.00	25,116	12.08	0.00	0.00	0.00	0.25
HS Program Coordinator *	1.00	32,000	1.00	33,600	16.15	0.00	0.00	0.00	0.00
Childcare Director *	1.00	35,500	1.00	37,275	17.92	0.75	0.00	0.25	0.00
5 lead teachers *	5.00	130,000	1.00	136,500	13.13	0.60	0.00	0.40	0.00
5 Assistant Teachers *	3.25	77,740	1.00	81,627	12.08	0.60	0.00	0.40	0.00
PS Coordinator *	1.00	33,280	1.00	34,944	16.80	0.00	0.00	1.00	0.00
Elementary School Coordinator *	1.00	31,533	1.00	33,109	15.92	1.00	0.00	0.00	0.00
Program Chef *	1.00	28,000	1.00	29,400	14.13	0.00	0.00	0.00	0.00
Assist Program Chef	1.00	23,000	1.00	24,150	11.61	0.00	0.00	0.00	0.00
IW Café Manager *	1.00	30,000	1.00	31,500	15.14	0.00	0.00	0.00	0.00
Working Class Catering Manager *	1.00	30,000	1.00	31,500	15.14	0.00	0.00	0.00	0.00
2 Adult Café/catering staff *	1.50	37,440	1.00	39,312	12.60	0.00	0.00	0.00	0.00
15 youth employees	5.00	75,690	1.00	75,690	7.25	0.00	0.00	0.00	0.00
Front Desk Staff*	2.50	58,760	1.00	61,698	11.87	0.00	0.00	0.00	0.00
Office Manager *	1.00	32,240	1.00	33,852	16.28	0.05	0.05	0.05	0.05
Admin Assist *	0.50	11,700	1.00	12,285	11.81	0.05	0.05	0.05	0.05
<b>TOTAL</b>	<b>40.85</b>	<b>1,224,171</b>	<b>31.00</b>	<b>1,281,595</b>		<b>3.55</b>	<b>1.40</b>	<b>2.50</b>	<b>2.70</b>

**TOTAL PERSONNEL COSTS: 1,281,595**

Seasonal/Project Employee ONLY	Nbr of Weeks	Total Hours	Hourly Wage	Seasonal Earnings		A	B	C	D
						# HRS	# HRS	# HRS	# HRS
	0	0	0.00	0		0.00	0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00	0.00
<b>TOTAL</b>	<b>0</b>	<b>0</b>		<b>0</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

**PROPOSED FTEs DISTRIBUTED BY PROGRAM**

E	F	G	H	I	J	K	L	Non-City
FTE	FTE	FTE	FTE	FTE	FTE	FTE	FTE	FTE
0.10	0.10	0.05	0.05	0.05	0.05	0.00	0.00	0.30
0.05	0.10	0.05	0.05	0.05	0.10	0.00	0.00	0.35
0.10	0.05	0.05	0.05	0.05	0.05	0.00	0.00	0.40
0.10	0.05	0.05	0.05	0.05	0.05	0.00	0.00	0.40
0.05	0.05	0.05	0.05	0.05	0.05	0.00	0.00	0.50
0.05	0.05	0.05	0.05	0.05	0.05	0.00	0.00	0.50
0.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00
0.25	0.00	0.25	0.25	0.00	0.00	0.00	0.00	0.00
1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.20	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.25	0.50	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00
0.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.05	0.05	0.05	0.05	0.05	0.05	0.00	0.00	0.50
0.05	0.05	0.05	0.05	0.05	0.05	0.00	0.00	0.50
1.80	3.50	1.90	2.35	1.40	0.45	0.00	0.00	9.45

[illegible]

ORGANIZATION:

Irwin A and Robert D Goodman Community Center

## 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
UNITED WAY ALLOC	8,000	8,000	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT	153,419	61,419	92,000	0	0
FUNDRAISING DONATIONS	234,238	234,238	0	0	0
USER FEES	204,000	54,000	100,000	50,000	0
OTHER	35,000	0	35,000	0	0
TOTAL REVENUE	634,657	357,657	227,000	50,000	0

## 2. 2011 PROPOSED BUDGET

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
UNITED WAY ALLOC	12,000	12,000	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT*	153,419	61,419	92,000	0	0
FUNDRAISING DONATIONS	245,950	245,950	0	0	0
USER FEES	214,200	56,700	105,000	52,500	0
OTHER**	36,750	0	36,750	0	0
TOTAL REVENUE	662,319	376,069	233,750	52,500	0

\*OTHER GOVT 2011

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	ERROR	

\*\*OTHER 2011

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	ERROR	

**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.						
	L						Non-City
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

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

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

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

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Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

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

**AGENCY GOVERNING BODY cont.**

<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office	From:	mm/yyyy	To:	mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office	From:	mm/yyyy	To:	mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office	From:	mm/yyyy	To:	mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office	From:	mm/yyyy	To:	mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office	From:	mm/yyyy	To:	mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office	From:	mm/yyyy	To:	mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office	From:	mm/yyyy	To:	mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office	From:	mm/yyyy	To:	mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
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
<b>TOTAL</b>	108	100%	10	100%	734	100%
<b>GENDER</b>						
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%
<b>AGE</b>						
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%
<b>RACE*</b>						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%
<b>ETHNICITY</b>						
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%
<b>PERSONS WITH DISABILITIES</b>	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
<b>A. PERSONNEL</b>			
Salary	1,360,279	1,317,817	1,432,226
Taxes	157,595	157,186	170,832
Benefits	157,377	175,093	190,295
<b>SUBTOTAL A.</b>	<b>1,675,251</b>	<b>1,650,096</b>	<b>1,793,353</b>
<b>B. OPERATING</b>			
All "Operating" Costs	405,901	406,353	421,297
<b>SUBTOTAL B.</b>	<b>405,901</b>	<b>406,353</b>	<b>421,297</b>
<b>C. SPACE</b>			
Rent/Utilities/Maintenance	194,282	209,966	222,962
Mortgage (P&I) / Depreciation / Taxes	14,303	8,729	10,074
<b>SUBTOTAL C.</b>	<b>208,585</b>	<b>218,695</b>	<b>233,036</b>
<b>D. SPECIAL COSTS</b>			
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
<b>SUBTOTAL D.</b>	<b>76,088</b>	<b>85,015</b>	<b>76,271</b>
<b>SPECIAL COSTS LESS CAPITAL EXPENDITURE</b>	<b>76,088</b>	<b>85,015</b>	<b>76,271</b>
<b>TOTAL OPERATING EXPENSES</b>	<b>2,365,825</b>	<b>2,360,159</b>	<b>2,523,957</b>
<b>E. TOTAL CAPITAL EXPENDITURES</b>	<b>0</b>	<b>0</b>	<b>0</b>

## 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%.

## 10. PERSONNEL DATA: Personnel Schedule

List each individual staff position by title. Seasonal Employees should be entered at the bottom.

Indicate if the position meets the Living Wage Exception with an asterisk (\*).

Indicate the number of 2011 Proposed Full-Time Equivalents (FTEs) in each staff position, across all agency programs.

Indicate the total salaries for all FTEs in that staff position. Do NOT include payroll taxes or benefits in this table.

Staff Position/Category	2010		2011					
	Est.	Est.	Proposed	Proposed	Hourly Wage	A	B	C
	FTE	Salary	FTE	Salary		FTE	FTE	FTE
OTA*	0.7	23,763	1.0	33,946	16.32	0.4	0.0	0.0
COTA*	0.7	20,792	1.0	29,700	14.28	0.2	0.0	0.0
In-Home Services Manager*	1.0	39,140	1.0	40,500	19.47	0.0	0.2	0.0
In-Home Services Coordinator*	1.0	24,960	1.0	25,709	12.36	0.0	0.4	0.0
Human Resource Manager*	1.0	32,760	1.0	32,760	15.75	0.0	0.1	0.0
Community Outreach/Ed Director*	1.0	65,535	1.0	65,535	31.51	0.0	0.0	0.4
Volunteer Service Manager*	1.0	30,000	1.0	30,900	14.86	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
TOTAL	6.4	236,950	7.0	259,050		0.6	0.7	0.4

<b>TOTAL PERSONNEL COSTS:</b>	<b>259,050</b>
-------------------------------	----------------

	Nbr of Weeks	Total Hours	Hourly Wage	Seasonal Earnings		A	B	C
Seasonal/Project Employee ONLY	Weeks	Hours	Wage	Earnings		# HRS	# HRS	# HRS
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
TOTAL	0	0		0		0.00	0.00	0.00

### 2011 PROPOSED FTEs DISTRIBUTED BY PROGRAM

[illegible][illegible]



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	

**1. AGENCY CONTACT INFORMATION**

Organization	Mental Health Center of Dane County, Inc. - Kajsab House		
Mailing Address	625 West Washington Ave.; Madison, WI 53703		
Telephone	(608) 280-4760		
FAX	(608) 280-4769		
Admin Contact	Linda Keys		
Financial Contact	Margie Afifi		
Website	www.mhcdc.org		
Email Address	linda.keys@mhcdc.org		
Legal Status	Private: Non-Profit		
Federal EIN:	39-080=6445		
State CN:	1596		
DUNS #	76172543		

**2. CONTACT INFORMATION**

A	Hmong Youth Cultural Learning		
	Contact:	Doua Vang	Phone: 280-4761 Email: doua.vang@mhcdc.org
B	Southeast Asian Senior Services		
	Contact:	Doua Vang	Phone: 280-4761 Email: doua.vang@mhcdc.org
C	Program C		
	Contact:		Phone: Email:
D	Program D		
	Contact:		Phone: Email:
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	698,033	698,033	698,033	0	0	0	0
DANE CO CDBG	0	0	0	0	0	0	0
MADISON-COMM SVCS	0	0	27,832	13,432	14,400	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	10,000	10,000	14,000	2,000	2,000	0	0
USER FEES	0	0	0	0	0	0	0
OTHER	0	0	0	0	0	0	0
TOTAL REVENUE	708,033	708,033	739,865	15,432	16,400	0	0

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.						
	L						Non-City
DANE CO HUMAN SVCS	0						698,033
DANE CO CDBG	0						0
MADISON-COMM SVCS	0						0
MADISON-CDBG	0						0
UNITED WAY ALLOC	0						0
UNITED WAY DESIG	0						0
OTHER GOVT	0						0
FUNDRAISING DONATIONS	0						10,000
USER FEES	0						0
OTHER	0						0
TOTAL REVENUE	0						708,033

## AGENCY ORGANIZATIONAL PROFILE

## 4. AGENCY MISSION STATEMENT

Kajsiab House's mission is to create a culturally and safe environment to promote well-being in the Southeast Asian community.

## 5. AGENCY EXPERIENCE AND QUALIFICATIONS

The Mental Health Center of Dane County, Inc. (MHCDC) is a private non-profit agency that contracts with the Dane County Department of Human Services to provide mental health and substance abuse treatment to Dane County residents, both single individuals and complex family units, ranging in age from infants to elderly. MHCDC has been the recipient of numerous national, state and county grants aimed at system change and coordination of service models. It also receives third party revenues and fee payments. Its centralized management structure routinely handles and reports on complex programmatic, fiscal and budgetary activities. The administration and Board of Directors of the MHCDC view the proper use of grants money as high priority and assures the supports necessary to correctly use and protect public and grant funds. MHCDC's ability to handle and report on fiscal and budgetary activity is demonstrated in previous projects, and through an exemplary history of providing services with public monies since 1946.

Kajsiab House (KH), founded in January 2000, is a program of the MHCDC. It was developed by and for the SEA community. KH offers mental health treatment within a cultural context, connects families with primary physicians and other providers, and assists refugees with job training and placement. Hmong families can connect, feel safe, express and experience their culture, and increase their ability to live successfully within the American cultural context. KH employs eleven bicultural/bilingual staff, one part-time psychiatrist, and one part-time psychologist. The Participants (Consumers) Advisory Group and the Community Leaders Advisory Group help design and develop culturally appropriate and effective program services. KH's holistic approach helps Hmong families and seniors assimilate and integrate into mainstream American society. Program activities include comprehensive social services, advocacy, psychiatric assessments and treatment, services linkages, meals, and transportation. It offers English, citizenship and Hmong classes, helps obtain citizenship and government benefits, and operates youth cultural programs, all of these helping refugees integrate into American mainstream.

KH has received numerous Federal, State, County, United Way, and local and national foundation grants since its inception in January 2000. Kajsiab House received three separate multi-year grant awards from the Substance Abuse and Mental Health Services Administration (SAMHSA) totaling more than \$1.6 million, a \$450,000 multi-year grant award from the Office of Refugee Resettlement (ORR), and a three-year grant from the University of Wisconsin Medical School's Wisconsin Partnership Fund that totaled \$450,000.

## 6. AGENCY GOVERNING BODY

How many Board meetings were held in 2009?

10

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

12

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

13

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

<b>Name</b>	<b>Mary Wright</b>				
Home Address	2591 Norwich St. Madison WI 53711				
Occupation	Bank Vice President				
Representing	Johnson Bank				
Term of Office	2 terms	From:	08/2005	To:	12/2011
<b>Name</b>	<b>Robert Mohelnitzky</b>				
Home Address	6208 Westgate Road.; Madiison, WI 53716				
Occupation	Non Profit Consultant				
Representing	Mental Health and Non Profit Administration				
Term of Office	2 terms	From:	03/2006	To:	12/2012
<b>Name</b>	<b>Cheryl Porior-Mayhew</b>				
Home Address	6289 Onwentsia Trail.; Oregon, WI 53575				
Occupation	Principal Consultant				
Representing	Sanchill Group				
Term of Office	2 terms	From:	03/2006	To:	12/2012
<b>Name</b>	<b>Greg Blum</b>				
Home Address	5210 Forge Drive.; Madison, WI 53716				
Occupation	Insurance Broker				
Representing	Hemb Insurance Group				
Term of Office	2 terms	From:	08/2005	To:	12/2011
<b>Name</b>	<b>James Christensen</b>				
Home Address	6409 Old Sauk Road.; Madison, WI 53705				
Occupation	Principal				
Representing	StatOrg Services, LLC				
Term of Office	1 term	From:	12/2009	To:	12/2010
<b>Name</b>	<b>Gayle Galston</b>				
Home Address	446 Woodside Terrance.; Madison, WI 53710				
Occupation	Real Estate Broker				
Representing	Restaino & Associates Ste 102				
Term of Office	2	From:	03/2006	To:	12/2012
<b>Name</b>	<b>Elena Golden</b>				
Home Address	7842 Twinflower Drive. Madison, WI 53719				
Occupation	Director of Residential Services				
Representing	Goodwell Industries				
Term of Office	1	From:	03/2007	To:	12/2010
<b>Name</b>	<b>Paige Goldner</b>				
Home Address	4309 Yuma Drive. Madison, WI 53711				
Occupation	Executive Recruitment Manager				
Representing	QTI Professional Staff				
Term of Office	2	From:	04/2009	To:	12/2012

## AGENCY GOVERNING BODY cont.

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

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Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

<b>Janathan Lipp</b>				
1 Chequamegon Bay.; Madison, WI 53719				
Business Executive				
Full Compass Systems Ltd.				
2	From:	05/2005	To:	12/2011
<b>Tally Moses</b>				
603 Russel Street.; Madison, WI 53704				
Assist. Professor of Social Work				
UW Madison School of Social Work				
1	From:	03/2007	To:	12/2010
<b>Kristi Packe-Benson</b>				
4519 Greengrass Road.; Madison, WI 53718				
Nursing Instructor				
Madison Area Technical College				
1	From:	01/2010	To:	12/2013
<b>Mary Thornton</b>				
3728 Orin Road.; Madison, WI 53704				
Page State of Wisconsin				
State of Wisconsin				
2	From:	03/2006	To:	12/2012
<b>Judy Wilcox</b>				
202 N Blount St. #22				
Retired				
Ind.				
2	From:	03/2006	To:	12/2012
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy

## AGENCY GOVERNING BODY cont.

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

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Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	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
<b>TOTAL</b>	10	100%	13	100%	7	100%
<b>GENDER</b>						
MALE	6	60%	5	38%	4	57%
FEMALE	4	40%	8	62%	3	43%
UNKNOWN/OTHER	0	0%	0	0%	0	0%
TOTAL GENDER	10	100%	13	100%	7	100%
<b>AGE</b>						
LESS THAN 18 YRS	0	0%	0	0%	0	0%
18-59 YRS	10	100%	11	85%	4	57%
60 AND OLDER	0	0%	2	15%	3	43%
TOTAL AGE	10	100%	13	100%	7	100%
<b>RACE*</b>						0
WHITE/CAUCASIAN	2	20%	11	85%	5	71%
BLACK/AFRICAN AMERICAN	0	0%	2	15%	2	29%
ASIAN	8	80%	0	0%	0	0%
AMERICAN INDIAN/ALASKAN NATIVE	0	0%	0	0%	0	0%
NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER	0	0%	0	0%	0	0%
MULTI-RACIAL:	0	0%	0	0%	0	0%
Black/AA & White/Caucasian	0	0%	0	0%	0	0%
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	0	0%	0	0%	0	0%
TOTAL RACE	10	100%	13	100%	7	100%
<b>ETHNICITY</b>						
HISPANIC OR LATINO	0	0%	0	0%	0	0%
NOT HISPANIC OR LATINO	10	100%	13	100%	7	100%
TOTAL ETHNICITY	10	100%	13	100%	7	100%
<b>PERSONS WITH DISABILITIES</b>	0	0%	0	0%	0	0%

\*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
<b>A. PERSONNEL</b>			
Salary	0	549,747	567,659
Taxes	0	0	0
Benefits	0	0	0
<b>SUBTOTAL A.</b>	<b>0</b>	<b>549,747</b>	<b>567,659</b>
<b>B. OPERATING</b>			
All "Operating" Costs	0	155,066	158,066
<b>SUBTOTAL B.</b>	<b>0</b>	<b>155,066</b>	<b>158,066</b>
<b>C. SPACE</b>			
Rent/Utilities/Maintenance	0	3,220	3,220
Mortgage (P&I) / Depreciation / Taxes	0	0	0
<b>SUBTOTAL C.</b>	<b>0</b>	<b>3,220</b>	<b>3,220</b>
<b>D. SPECIAL COSTS</b>			
Assistance to Individuals	0	0	
Subcontracts, etc.	0		10,920
Affiliation Dues	0	0	
Capital Expenditure	0	0	0
Other:	0	0	0
<b>SUBTOTAL D.</b>	<b>0</b>	<b>0</b>	<b>10,920</b>
<b>SPECIAL COSTS LESS CAPITAL EXPENDITURE</b>	<b>0</b>	<b>0</b>	<b>10,920</b>
<b>TOTAL OPERATING EXPENSES</b>	<b>0</b>	<b>708,033</b>	<b>739,865</b>
<b>E. TOTAL CAPITAL EXPENDITURES</b>	<b>0</b>	<b>0</b>	<b>0</b>

## 9. PERSONNEL DATA: List Percent of Staff Turnover

6.6%

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.

600 characters (with spaces)

## 10. PERSONNEL DATA: Personnel Schedule

List each individual staff position by title. Seasonal Employees should be entered at the bottom.

Indicate if the position meets the Living Wage Exception with an asterisk (\*).

Indicate the number of 2011 Proposed Full-Time Equivalents (FTEs) in each staff position, across all agency programs.

Indicate the total salaries for all FTEs in that staff position. Do NOT include payroll taxes or benefits in this table.

	2010		2011					
Staff Position/Category	Est.	Est.	Proposed	Proposed	Hourly Wage	A	B	C
	FTE	Salary	FTE	Salary		FTE	FTE	FTE
Clinical Team Manager	1.00	64,000	1.00	64,000	30.77	0.00	0.00	0.00
Cultural Brokers/Social Workers	6.80	278,800	7.20	295,200	19.71	0.00	0.40	0.00
Mental Health Aides	1.30	37,700	1.30	37,700	13.94	0.00	0.00	0.00
Psychiatrist	0.18	37,440	0.18	37,440	100.00	0.00	0.00	0.00
Psychologist	0.10	6,000	0.10	6,000	28.85	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
TOTAL	9.38	423,940	9.78	440,340		0.00	0.40	0.00

<b>TOTAL PERSONNEL COSTS:</b>	<b>451,260</b>
-------------------------------	----------------

	Nbr of Weeks	Total Hours	Hourly Wage	Seasonal Earnings		A	B	C
Seasonal/Project Employee ONLY	Weeks	Hours	Wage	Earnings		# HRS	# HRS	# HRS
Contract For Services	12	624	17.50	10,920		624.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
TOTAL	12	624		10,920		624.00	0.00	0.00

### 2011 PROPOSED FTEs DISTRIBUTED BY PROGRAM

[illegible][illegible]

ORGANIZATION:

Mental Health Center of Dane County, Inc. - Kajsia House

## PROGRAM BUDGET

## 1. 2010 BUDGETED

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	698,033	539,747	155,066	3,220	0
DANE CO CDBG	0	0	0	0	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	10,000	10,000	0	0	0
USER FEES	0	0	0	0	0
OTHER	0	0	0	0	0
TOTAL REVENUE	708,033	549,747	155,066	3,220	0

## 2. 2011 PROPOSED BUDGET

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	698,033	539,747	155,066	3,220	0
DANE CO CDBG	0	0	0	0	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	10,000	10,000	0	0	0
USER FEES	0	0	0	0	0
OTHER**	0	0	0	0	0
TOTAL REVENUE	708,033	549,747	155,066	3,220	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	

## 1. AGENCY CONTACT INFORMATION

Organization	North/Eastside Senior Coalition		
Mailing Address	1625 Northport Drive, #125		
Telephone	(608) 243-5252		
FAX	(608) 243-5259		
Admin Contact	Cheryl Batterman		
Financial Contact	Drew Simonsen		
Website	www.nescoinc.org		
Email Address	info@nescoinc.org		
Legal Status	Private: Non-Profit		
Federal EIN:	39-1217221		
State CN:	ES 14097		
DUNS #			

## 2. CONTACT INFORMATION

A	Case Management					
	Contact:	Cortney Doescher-Hino	Phone:	243-5252	Email:	chino@nescoinc.org
B	Community Assistance					
	Contact:	Jim Krueger	Phone:	243-5252	Email:	jkueger@nescoinc.org
C	Senior Activities					
	Contact:	Jim Krueger	Phone:	243-5252	Email:	jkueger@nescoinc.org
D	Cultural Diversity/Latino					
	Contact:	Jim Krueger	Phone:	243-5252	Email:	jkueger@nescoinc.org
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	213,674	206,468	206,468	76,503	0	0	38,533
DANE CO CDBG	5,000	0	0	0	0	0	0
MADISON-COMM SVCS	133,344	137,184	151,844	103,349	21,724	19,669	7,102
MADISON-CDBG		0	0	0	0	0	0
UNITED WAY ALLOC	86,134	80,100	86,100	20,000	0	16,100	24,000
UNITED WAY DESIG	2,254	2,341	2,403	0	0	0	0
OTHER GOVT	50,807	50,803	50,803	0	0	0	0
FUNDRAISING DONATIONS	131,679	88,222	89,739	0	0	0	0
USER FEES		0	0	0	0	0	0
OTHER		7,834	0	0	0	0	0
TOTAL REVENUE	622,892	572,952	587,357	199,852	21,724	35,769	69,635

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.						
	L						Non-City
DANE CO HUMAN SVCS	0						91,432
DANE CO CDBG	0						0
MADISON-COMM SVCS	0						0
MADISON-CDBG	0						0
UNITED WAY ALLOC	0						26,000
UNITED WAY DESIG	0						2,403
OTHER GOVT	0						50,803
FUNDRAISING DONATIONS	0						89,739
USER FEES	0						0
OTHER	0						0
TOTAL REVENUE	0						260,377

## AGENCY ORGANIZATIONAL PROFILE

## 4. AGENCY MISSION STATEMENT

To enhance the quality of life for all senior adults by providing programs, advocacy, and resources to assist them to remain independent, active, and influential in the community.

## 5. AGENCY EXPERIENCE AND QUALIFICATIONS

Cheryl Batterman (Executive Director): Masters Degree in Public Administration, BA in Sociology/Anthropology, 16 years experience with non-profit agencies (7 years with NESCO) and 11 years active duty Air Force Officer  
Cortney Doescher-Hino (Lead Case Manager): Masters Degree in Science, 8 years experience in human services  
Jim Krueger (Programs Director): Bachelors Degree in Social Welfare, 10 years experience as program coordination and management.  
Andrew Simonsen (Office Manager): Bachelors Degree in Finance, 2 years experience in non-profit agencies  
Pamela Bracey (Cultural Diversity Specialist/African American Program): 10 years experience in social work  
Amy Elske (Case Manager): Certified Advanced Practice Social Worker, 9 years experience in social work  
Katie Kluesner (Volunteer Coordinator): Bachelors Degree in Journalism, 2 years experience in advertising & public relations  
Elizabeth Mensing (Bilingual Case Manager): Bachelors Degree in Social Work, a year Internship with Disability Rights Wisconsin, one year experience with NESCO  
Yolanda Salazar (Cultural Diversity Specialist/Latino Program): 16 years experience with NESCO

## 6. AGENCY GOVERNING BODY

How many Board meetings were held in 2009?

12

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

12

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

11

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

<b>Name</b>	<b>Paul Van Rooy</b>			
Home Address	113 Sauthoff Road, Madison, WI 53704			
Occupation	Retired/City of Madison			
Representing	Community at Large			
Term of Office		From:	05/2009	To: 04/2011
<b>Name</b>	<b>Mary Hill</b>			
Home Address	3517 N. Sherman Avenue, Madison, WI 53704			
Occupation	Retired			
Representing	Community at Large			
Term of Office		From:	05/2009	To: 04/2011
<b>Name</b>	<b>Lesleigh Luttrell</b>			
Home Address	1906 Kropf Avenue, Madison, WI 53704			
Occupation	Bookkeeper/Studio Jewelers			
Representing	Community at Large			
Term of Office		From:	05/2009	To: 04/2011
<b>Name</b>	<b>Jan Somerfeld</b>			
Home Address	1505 Comanche Glen, Madison, WI 53704			
Occupation	Executive Director/Bunbury & Associates			
Representing	Community at Large			
Term of Office		From:	05/2010	To: 04/2012
<b>Name</b>	<b>Teri Kinney</b>			
Home Address	5117 Comanche Way, Madison, WI 53704			
Occupation	Retired/Nurse			
Representing	Community at Large			
Term of Office		From:	05/2010	To: 04/2012
<b>Name</b>	<b>Carol Peterson</b>			
Home Address	514 Woodward Drive, Madison, WI 53704			
Occupation	Retired/Teacher			
Representing	Community at Large			
Term of Office		From:	05/2010	To: 04/2012
<b>Name</b>	<b>Carolina Gonzalez Schlenker</b>			
Home Address	318 Robin Parkway, Madison, WI 53705			
Occupation	Post Graduate Doctorate Student/UW-Madison			
Representing	Community at Large			
Term of Office		From:	05/2009	To: 04/2011
<b>Name</b>	<b>Walter Sego</b>			
Home Address	121 Metro Terrace #209, Madison, WI 53718			
Occupation	Branch Manager/Associated Bank			
Representing	Community at Large			
Term of Office		From:	05/2010	To: 04/2011



## AGENCY GOVERNING BODY cont.

<b>Name</b>	<b>Diane Walder</b>			
Home Address	926 Nancy Lane, Madison, WI 53704			
Occupation	Consultant			
Representing	Community at Large			
Term of Office		From:	05/2009	To: 04/2011
<b>Name</b>	<b>Charles Warner</b>			
Home Address	702 Lorillard Court #209, Madison, WI 53703			
Occupation	Residential Services Specialist/Madison Gas and Electric			
Representing	Community at Large			
Term of Office		From:	05/2010	To: 04/2012
<b>Name</b>	<b>Rick Webster</b>			
Home Address	1223 Virgin Lake Drive, Stoughton, WI 53589			
Occupation	Pricing & Performance Administrator/American Family Insurance			
Representing	Community at Large			
Term of Office		From:	05/2010	To: 04/2012
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
<b>Name</b>				
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

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

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Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	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
<b>TOTAL</b>	14	100%	11	100%	286	100%
<b>GENDER</b>						
MALE	2	14%	4	36%	79	28%
FEMALE	12	86%	7	64%	207	72%
UNKNOWN/OTHER	0	0%	0	0%	0	0%
TOTAL GENDER	14	100%	11	100%	286	100%
<b>AGE</b>						
LESS THAN 18 YRS	0	0%	0	0%	0	0%
18-59 YRS	10	71%	6	55%	86	30%
60 AND OLDER	4	29%	5	45%	200	70%
TOTAL AGE	14	100%	11	100%	286	100%
<b>RACE*</b>						0
WHITE/CAUCASIAN	12	86%	9	82%	251	88%
BLACK/AFRICAN AMERICAN	1	7%	0	0%	24	8%
ASIAN	0	0%	1	9%	0	0%
AMERICAN INDIAN/ALASKAN NATIVE	0	0%	0	0%	0	0%
NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER	0	0%	0	0%	0	0%
MULTI-RACIAL:	0	0%	0	0%	0	0%
Black/AA & White/Caucasian	0	0%	0	0%	0	0%
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	1	7%	1	9%	11	4%
TOTAL RACE	14	100%	11	100%	286	100%
<b>ETHNICITY</b>						
HISPANIC OR LATINO	1	7%	1	9%	11	4%
NOT HISPANIC OR LATINO	13	93%	10	91%	275	96%
TOTAL ETHNICITY	14	100%	11	100%	286	100%
<b>PERSONS WITH DISABILITIES</b>	0	0%	0	0%	0	0%

\*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
<b>A. PERSONNEL</b>			
Salary	323,627	327,284	339,180
Taxes	24,805	26,747	27,657
Benefits	43,703	38,450	39,730
<b>SUBTOTAL A.</b>	<b>392,135</b>	<b>392,481</b>	<b>406,567</b>
<b>B. OPERATING</b>			
All "Operating" Costs	101,794	96,867	97,186
<b>SUBTOTAL B.</b>	<b>101,794</b>	<b>96,867</b>	<b>97,186</b>
<b>C. SPACE</b>			
Rent/Utilities/Maintenance	25,011	25,727	25,727
Mortgage (P&I) / Depreciation / Taxes	0	0	0
<b>SUBTOTAL C.</b>	<b>25,011</b>	<b>25,727</b>	<b>25,727</b>
<b>D. SPECIAL COSTS</b>			
Assistance to Individuals	0	0	0
Subcontracts, etc.	58,663	56,867	56,867
Affiliation Dues	1,360	1,010	1,010
Capital Expenditure		0	0
Other: Special Programs	36,486	0	0
<b>SUBTOTAL D.</b>	<b>96,509</b>	<b>57,877</b>	<b>57,877</b>
<b>SPECIAL COSTS LESS CAPITAL EXPENDITURE</b>	<b>96,509</b>	<b>57,877</b>	<b>57,877</b>
<b>TOTAL OPERATING EXPENSES</b>	<b>615,449</b>	<b>572,952</b>	<b>587,357</b>
<b>E. TOTAL CAPITAL EXPENDITURES</b>	<b>0</b>	<b>0</b>	<b>0</b>

## 9. PERSONNEL DATA: List Percent of Staff Turnover

18.0%

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.

With the help of a Human Resources Director with a local business, our Personnel Committee recently revised our Employee Handbook--aligning it with non-profit industry standard HR policies/practices. It was then shared with the other non-profit senior focal point directors for their use.

## 10. PERSONNEL DATA: Personnel Schedule

List each individual staff position by title. Seasonal Employees should be entered at the bottom.

Indicate if the position meets the Living Wage Exception with an asterisk (\*).

Indicate the number of 2011 Proposed Full-Time Equivalents (FTEs) in each staff position, across all agency programs.

Indicate the total salaries for all FTEs in that staff position. Do NOT include payroll taxes or benefits in this table.

Staff Position/Category	2010		2011					
	Est.	Est.	Proposed	Proposed	Hourly Wage	A	B	C
	FTE	Salary	FTE	Salary		FTE	FTE	FTE
Executive Director	1.00	48,950	1.00	49,440	0.00	0.11	0.02	0.01
Office Manager	1.00	31,060	1.00	31,370	0.00	0.13	0.02	0.01
Lead Case Manager	1.00	36,180	1.00	36,540	0.00	0.49	0.00	0.00
Case Manager	0.75	28,010	1.00	40,620	1.00	0.68	0.00	0.00
Bilingual Case Manager	1.00	32,090	1.00	30,150	0.00	0.33	0.00	0.00
Bilingual Case Manager	1.00	31,160	1.00	31,470	0.00	0.39	0.00	0.00
Programs Director	1.00	39,340	1.03	39,730	0.00	0.00	0.26	0.29
Cultural Diversity Specialist (African American P	0.69	24,220	0.63	24,690	0.00	0.00	0.00	0.00
Cultural Diversity Specialist (Latino Program)	0.63	20,190	0.63	20,580	0.00	0.00	0.00	0.00
Volunteer Coordinator	1.00	27,140	1.00	29,150	0.00	0.00	0.00	0.00
Nutrition Site Manager Substitute	0.10	2,236	0.10	2,387	10.85	0.00	0.00	0.00
Nutrition Site Manager Substitute	0.10	2,236	0.10	2,387	10.85	0.00	0.00	0.00
Nutrition Site Manager Substitute	0.10	2,236	0.10	2,387	10.85	0.00	0.00	0.00
Nutrition Site Manager Substitute	0.10	2,236	0.10	2,387	10.85	0.00	0.00	0.00
		0	0.00	0	10.85	0.00	0.00	0.00
		0	0.00	0	10.85	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
TOTAL	9.47	327,284	9.69	343,288		2.13	0.30	0.31

<b>TOTAL PERSONNEL COSTS:</b>	<b>343,288</b>
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	Nbr of Weeks	Total Hours	Hourly Wage	Seasonal Earnings		A	B	C
Seasonal/Project Employee ONLY	Weeks	Hours	Wage	Earnings		# HRS	# HRS	# HRS
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
TOTAL	0	0		0		0.00	0.00	0.00

### 2011 PROPOSED FTEs DISTRIBUTED BY PROGRAM

[illegible][illegible]

ORGANIZATION:

North/Eastside Senior Coalition

## PROGRAM BUDGET

## 1. 2010 BUDGETED

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	91,432	33,524	752	264	56,892
DANE CO CDBG	0	0	0	0	0
UNITED WAY ALLOC	26,000	24,061	1,923	16	0
UNITED WAY DESIG	2,341	2,341	0	0	0
OTHER GOVT	50,803	43,434	4,113	3,197	59
FUNDRAISING DONATIONS	88,222	38,278	41,020	8,342	582
USER FEES	0	0	0	0	0
OTHER	0	0	0	0	0
TOTAL REVENUE	258,798	141,638	47,808	11,819	57,533

## 2. 2011 PROPOSED BUDGET

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	91,432	33,558	718	264	56,892
DANE CO CDBG	0	0	0	0	0
UNITED WAY ALLOC	26,000	24,196	1,788	16	0
UNITED WAY DESIG	2,403	2,403	0	0	0
OTHER GOVT*	50,803	43,360	4,205	3,179	59
FUNDRAISING DONATIONS	89,739	38,298	42,444	8,415	582
USER FEES	0	0	0	0	0
OTHER**	0	0	0	0	0
TOTAL REVENUE	260,377	141,815	49,155	11,874	57,533

\*OTHER GOVT 2011

Source	Amount	Terms
West Madison Senior Coalition	38,822	Home Chore Program
South Madison Coalition of the Elderly	11,981	Supportive Home Care Program
	0	
	0	
	0	
TOTAL	50,803	

\*\*OTHER 2011

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

## 1. AGENCY CONTACT INFORMATION

Organization	Neighborhood House Community Center, Inc.		
Mailing Address	29 S. Mills Street Madison, WI 53715		
Telephone	608-255-5337		
FAX	608-255-5937		
Admin Contact	Zanna Majerle		
Financial Contact	Nick Curran		
Website	www.neighborhoodhousemadison.org		
Email Address	zanna@neighborhoodhousemadison.org		
Legal Status	Private: Non-Profit		
Federal EIN:	39-1930073		
State CN:			
DUNS #	171537400		

## 2. CONTACT INFORMATION

A	Neighborhood Center Support - Reimagining Neighborhood House			
	Contact:	Zanna Majerle	Phone:	608-255-5337
			Email:	zanna@neighborhoodhousemadison.org
B	Seniors			
	Contact:	Zanna Majerle	Phone:	608-255-5338
			Email:	zanna@neighborhoodhousemadison.org
C	Summer Day Camp			
	Contact:	Zanna Majerle	Phone:	608-255-5337
			Email:	zanna@neighborhoodhousemadison.org
D	Restorative YouthWorks			
	Contact:	Zanna Majerle	Phone:	608-255-5337
			Email:	zanna@neighborhoodhousemadison.org
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		0	0	0	0	0	0
DANE CO CDBG		0	0	0	0	0	0
MADISON-COMM SVCS	59,788	29,375	47,474	0	5,500	29,974	12,000
MADISON-CDBG	37,048	0	84,016	84,016	0	0	0
UNITED WAY ALLOC	15,320	16,933	5,500	0	0	5,500	0
UNITED WAY DESIG	2,941	0	0	0	0	0	0
OTHER GOVT		67,023	0	0	0	0	0
FUNDRAISING DONATIONS	51,512	117,886	63,751	634	10,201	14,672	38,244
USER FEES	5,795	0	11,200	8,200	0	3,000	0
OTHER	38,455	44,352	44,352	44,352	0	0	0
TOTAL REVENUE	210,859	275,569	256,293	137,202	15,701	53,146	50,244

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.						
	L						Non-City
DANE CO HUMAN SVCS	0						0
DANE CO CDBG	0						0
MADISON-COMM SVCS	0						0
MADISON-CDBG	0						0
UNITED WAY ALLOC	0						0
UNITED WAY DESIG	0						0
OTHER GOVT	0						0
FUNDRAISING DONATIONS	0						0
USER FEES	0						0
OTHER	0						0
TOTAL REVENUE	0						0

## AGENCY ORGANIZATIONAL PROFILE

## 4. AGENCY MISSION STATEMENT

Neighborhood House Community Center provides a safe and collaborative environment and promotes a strong community through educational, recreational, and cultural enrichment programs and events.

## 5. AGENCY EXPERIENCE AND QUALIFICATIONS

Neighborhood House has been providing programs, assistance and gathering space to the community for 94 years. Beginning as a response by immigrants to their American experience, NH has been responsive to the changing needs of our neighborhood over that time. Neighborhood House has consistently met or exceeded our contract goals for service hours, unduplicated patrons, low-income participation and service to our neighborhood.

NH Board of Directors are professional, mature volunteers who take seriously their financial and legal responsibility, as well as providing supervision of the Executive Director. Regular monthly meetings are subsidized by emergency meetings when a need arises. The BOD is committed to meeting its fundraising goals and a balanced budget, as well as fulfilling debt obligations. The BOD is excited to work with a consultant and the ED to complete a needs assessment and strategic planning process to determine the best location for NH, the appropriate programs for the community we serve, the optimal organizational structure and a vigorous mission and vision for the future. The analysis and strategic planning skills that a number of our BOD members bring will help us be successful in this process. But it is the overall commitment by the BOD to preserving the role of Neighborhood House in the future of our community that will best serve us.

Our Executive Director (Zanna Majerle) has 20 years experience directing agencies and community programs in nonprofit organizations. Her skill set matches the demands of her current position. She has a B.S. Degree in both Education and Sociology and an M. Div. Degree. Zanna began her career as an elementary teacher and has many years' experience developing programs and curriculum to meet the needs of the youth population she serves. Her wide array of experiences in community organizing and community building make her an ideal leader for this new phase of Neighborhood House as we move through a needs assessment and strategic planning process to make us current and to better serve our neighborhood. Her experience as a Restorative Justice Trainer and facilitator bring a much needed skill of dispute resolution to the workplace, as well as to the community that is challenged by juvenile involvement in criminal offenses. Zanna's public speaking abilities engage and educate audiences, and will be used well as NH puts its ear to the ground to hear from our stakeholders, funders, local business owners, neighbors, parents, user groups and others about their needs and how NH can best serve them in the future. Zanna is committed to working with the BOD to explore all options for the future of NH, and to create and implement an action plan that will secure our future financially and in terms of our location, who we serve and their needs.

Neighborhood House has a long history of recruiting mature, responsible, experienced and educated volunteers to help in all manners of our operations from custodial/maintenance to program implementation to IT support for our office. We maintain strong relationships with volunteer organizations on campus and in the community at large to meet our needs for staffing when our budget can't provide for it. We have an application process that includes a stringent background check, orientation and training and supervision to assure that we offer the best experience for our patrons. We also show appreciation for our volunteers with appreciation dinners, gifts, acknowledgement, etc. to maintain our strong base and ease in recruitment.

Neighborhood House staff have many years' experience working at NH and in their field. Our maintenance and custodial staff have 45 years of combined experience in maintaining operations. They work efficiently and contribute to low maintenance costs because of their expertise. The Administrative Assistant/Volunteer Coordinator will have multiple years experience in a similar context, working with the public and volunteers to provide strong, quality programming that meets the needs of our patrons.

Neighborhood House's longevity in the community means we have historical relationships with local business owners, agencies and organizations that we call on for collaborations, partnerships and delivery of service. It is rare to speak to anyone anywhere in Madison without them having had an experience at NH, in our programs, with our staff, or having read about us in the new paper. This tradition of community involvement contributes to our stability and commitment to a strong future.

## 6. AGENCY GOVERNING BODY

How many Board meetings were held in 2009?

11

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

13

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

14

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

<b>Name</b>	<b>Nate Warnke</b>			
Home Address	1302 Chandler Street, Madison, WI 53715			
Occupation	Sr. Analyst, American Family Insurance			
Representing	Neighborhood			
Term of Office		From:	10/2009	To: 03/2012
<b>Name</b>	<b>Colleen Cleary</b>			
Home Address	2121 Madison Street, Madison, WI 53711			
Occupation	Retired			
Representing	Neighborhood			
Term of Office		From:	11/2006	To: 03/2012
<b>Name</b>	<b>Tehmina Islam</b>			
Home Address	201 N. Few Street #4, Madison, WI 53703			
Occupation	Home Midwife			
Representing				
Term of Office		From:	02/2007	To: 03/2012
<b>Name</b>	<b>Bill Kessler</b>			
Home Address	4937 Hammersley Road, Madison, WI 53711			
Occupation	Business Owner			
Representing				
Term of Office		From:	07/2008	To: 03/2012
<b>Name</b>	<b>Jeff Ford</b>			
Home Address	2015 Adams Street, Madison, WI 53711			
Occupation	Sr. Analyst, MG&E			
Representing	Neighborhood			
Term of Office		From:	10/200/	To: 03/2012
<b>Name</b>	<b>Adetunji Lesi</b>			
Home Address	4409 Wakefield Street, Madison, WI 53711			
Occupation	Accountant			
Representing	User Groups			
Term of Office		From:	07/2008	To: 03/2012
<b>Name</b>	<b>Stephanie Johnson</b>			
Home Address	700 S. Park Street, Madison, WI			
Occupation	Community Liaison, St. Mary's Hospital			
Representing				
Term of Office		From:	09/2009	To: 03/2012
<b>Name</b>	<b>Kate MacCrimmon</b>			
Home Address	920 Emerald Street, Madison, WI 53711			
Occupation	Business Owner			
Representing	Neighborhood			
Term of Office		From:	08/2009	To: 03/2012

## AGENCY GOVERNING BODY cont.

<b>Name</b>	Lauren Meyers			
Home Address	2018 Jefferson Street, Madison, WI 53711			
Occupation	Social Worker			
Representing	Neighborhood			
Term of Office		From:	11/2008	To: 03/2012
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
<b>Name</b>				
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

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From:

mm/yyyy

To:

mm/yyyy

**Name**

Home Address

Occupation

Representing

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
<b>TOTAL</b>	10	100%	9	100%	94	100%
<b>GENDER</b>						
MALE	5	50%	4	44%	42	45%
FEMALE	5	50%	5	56%	52	55%
UNKNOWN/OTHER	0	0%	0	0%	0	0%
TOTAL GENDER	10	100%	9	100%	94	100%
<b>AGE</b>						
LESS THAN 18 YRS	0	0%	0	0%	0	0%
18-59 YRS	10	100%	7	78%	94	100%
60 AND OLDER	0	0%	2	22%	0	0%
TOTAL AGE	10	100%	9	100%	94	100%
<b>RACE*</b>						0
WHITE/CAUCASIAN	6	60%	7	78%	52	55%
BLACK/AFRICAN AMERICAN	2	20%	1	11%	15	16%
ASIAN	1	10%	1	11%	20	21%
AMERICAN INDIAN/ALASKAN NATIVE	0	0%	0	0%	0	0%
NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER	0	0%	0	0%	0	0%
MULTI-RACIAL:	1	10%	0	0%	7	7%
Black/AA & White/Caucasian	0	0%	0	0%	7	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	1	100%	0	0%	0	0%
BALANCE/OTHER	0	0%	0	0%	0	0%
TOTAL RACE	10	100%	9	100%	94	100%
<b>ETHNICITY</b>						
HISPANIC OR LATINO	0	0%	0	0%	0	0%
NOT HISPANIC OR LATINO	10	100%	9	100%	94	100%
TOTAL ETHNICITY	10	100%	9	100%	94	100%
<b>PERSONS WITH DISABILITIES</b>	0	0%	0	0%	0	0%

\*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
<b>A. PERSONNEL</b>			
Salary	117,397	117,067	107,861
Taxes	9,763	8,956	8,952
Benefits	15,427	13,055	12,130
<b>SUBTOTAL A.</b>	<b>142,587</b>	<b>139,078</b>	<b>128,943</b>
<b>B. OPERATING</b>			
All "Operating" Costs	46,500	47,791	40,600
<b>SUBTOTAL B.</b>	<b>46,500</b>	<b>47,791</b>	<b>40,600</b>
<b>C. SPACE</b>			
Rent/Utilities/Maintenance	25,029	39,600	36,600
Mortgage (P&I) / Depreciation / Taxes	22,828	21,600	22,650
<b>SUBTOTAL C.</b>	<b>47,857</b>	<b>61,200</b>	<b>59,250</b>
<b>D. SPECIAL COSTS</b>			
Assistance to Individuals	0	0	0
Subcontracts, etc.	0	0	0
Affiliation Dues	0	0	0
Capital Expenditure	0	0	0
Other: Gus Macker	0	27,500	27,500
<b>SUBTOTAL D.</b>	<b>0</b>	<b>27,500</b>	<b>27,500</b>
<b>SPECIAL COSTS LESS CAPITAL EXPENDITURE</b>	<b>0</b>	<b>27,500</b>	<b>27,500</b>
<b>TOTAL OPERATING EXPENSES</b>	<b>236,944</b>	<b>275,569</b>	<b>256,293</b>
<b>E. TOTAL CAPITAL EXPENDITURES</b>	<b>0</b>	<b>0</b>	<b>0</b>

## 9. PERSONNEL DATA: List Percent of Staff Turnover

28.6%

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.

Both youth program coordinator and youth worker resigned. 1 moved on to another position at other agency; one returned to college.

## 10. PERSONNEL DATA: Personnel Schedule

List each individual staff position by title. Seasonal Employees should be entered at the bottom.

Indicate if the position meets the Living Wage Exception with an asterisk (\*).

Indicate the number of 2011 Proposed Full-Time Equivalents (FTEs) in each staff position, across all agency programs.

Indicate the total salaries for all FTEs in that staff position. Do NOT include payroll taxes or benefits in this table.

<b>Staff Position/Category</b>	<b>2010</b>		<b>2011</b>					
	<b>Est.</b>	<b>Est.</b>	<b>Proposed</b>	<b>Proposed</b>	<b>Hourly</b>	<b>A</b>	<b>B</b>	<b>C</b>
	<b>FTE</b>	<b>Salary</b>	<b>FTE</b>	<b>Salary</b>	<b>Wage</b>	<b>FTE</b>	<b>FTE</b>	<b>FTE</b>
Executive Director	1.00	43,260	1.00	43,260	0.00	0.60	0.05	0.10
Administrative Assistant/Vol. Coordinator	0.00	0	1.00	25,376	12.20	0.20	0.15	0.15
Maintenance	1.00	18,663	0.75	16,315	12.20	0.75	0.00	0.00
Sr. Cook	0.00	807	0.00	950	12.20	0.00	0.00	0.00
Youth Program Coordinator	1.00	32,960	0.00	0	12.20	0.00	0.00	0.00
Assistant Youth Coordinator	0.50	14,000	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
TOTAL	3.50	109,690	2.75	85,901		1.55	0.20	0.25

<b>TOTAL PERSONNEL COSTS:</b>	<b>107,861</b>
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	Nbr of Weeks	Total Hours	Hourly Wage	Seasonal Earnings		A	B	C
Seasonal/Project Employee ONLY						# HRS	# HRS	# HRS
Summer Camp Counselor	9	360	12.20	4,392		0.00	0.00	360.00
Summer Camp Counselor	9	360	12.20	4,392		0.00	0.00	360.00
Summer Camp Counselor	9	360	12.20	4,392		0.00	0.00	360.00
Summer Camp Counselor	9	360	12.20	4,392		0.00	0.00	360.00
Summer Camp Counselor	9	360	12.20	4,392		0.00	0.00	360.00
TOTAL	45	1,800		21,960		0.00	0.00	1,800.00



### 2011 PROPOSED FTEs DISTRIBUTED BY PROGRAM

[illegible][illegible]

ORGANIZATION:

Neighborhood House Community Center, Inc.

## 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
UNITED WAY ALLOC	16,933	16,933	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT	67,023	25,349	15,000	26,674	0
FUNDRAISING DONATIONS	48,671	771	0	20,400	27,500
USER FEES	0	0	0	0	0
OTHER	44,352	33,162	11,190	0	
TOTAL REVENUE	176,979	76,215	26,190	47,074	27,500

## 2. 2011 PROPOSED BUDGET

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
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	0	0	0	0	0
OTHER**	0	0	0	0	0
TOTAL REVENUE	0	0	0	0	0

\*OTHER GOVT 2011

Source	Amount	Terms
Community Services	0	Program funded in 2010; not applying in 2011
CDBG	0	Facility Use Money, not applying in 2011
	0	
	0	
	0	
TOTAL	0	

\*\*OTHER 2011

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

**1. AGENCY CONTACT INFORMATION**

Organization	RSVP of Dane County, Inc.		
Mailing Address	517 N. Segoe Road #300		
Telephone	(608) 238-7787		
FAX	(608) 238-7931		
Admin Contact	David Tetzlaff		
Financial Contact	Krishna Sijapati		
Website	http://rsvpdane.org		
Email Address	dtetzlaff@rsvpdane.org		
Legal Status	Private: Non-Profit		
Federal EIN:	39-1273164		
State CN:	250508		
DUNS #	804319838		

**2. CONTACT INFORMATION**

A	Community Connections		
	Contact: Jan Karst	Phone: 441-7891	Email: jkarst@rsvpdane.org
B	Program B		
	Contact:	Phone:	Email:
C	Program C		
	Contact:	Phone:	Email:
D	Program D		
	Contact:	Phone:	Email:
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	362,627	363,567	369,477	17,698	0	0	0
DANE CO CDBG	12,786	0	0	0	0	0	0
MADISON-COMM SVCS	56,590	56,590	58,084	58,084	0	0	0
MADISON-CDBG		0	0	0	0	0	0
UNITED WAY ALLOC	573,928	500,000	522,070	0	0	0	0
UNITED WAY DESIG		0	0	0	0	0	0
OTHER GOVT	342,274	315,316	314,914	60,583	0	0	0
FUNDRAISING DONATIONS	107,512	143,396	147,260	25,483	0	0	0
USER FEES	31,500	31,500	31,500	0	0	0	0
OTHER	136,465	0	0	0	0	0	0
TOTAL REVENUE	1,623,682	1,410,369	1,443,305	161,848	0	0	0

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.						
	L						Non-City
DANE CO HUMAN SVCS	0						351,779
DANE CO CDBG	0						0
MADISON-COMM SVCS	0						0
MADISON-CDBG	0						0
UNITED WAY ALLOC	0						522,070
UNITED WAY DESIG	0						0
OTHER GOVT	0						254,331
FUNDRAISING DONATIONS	0						121,777
USER FEES	0						31,500
OTHER	0						0
TOTAL REVENUE	0						1,281,457

## AGENCY ORGANIZATIONAL PROFILE

## 4. AGENCY MISSION STATEMENT

RSVP's mission is to make a positive impact in the community by recruiting volunteers 55 and older to help deliver priority services to people of all ages, providing Dane County with a valuable resource. At our Annual Meeting of June 24, 2010, RSVP's Board adopted a new vision statement that states "RSVP aspires to build and expand a community-wide network of volunteers and organizations that unites compassionate, experienced adults with meaningful and fulfilling service opportunities, which enrich the lives of the volunteers while enhancing support for people in need."

## 5. AGENCY EXPERIENCE AND QUALIFICATIONS

RSVP of Dane County, Inc. has been incorporated since 1977 as a nonprofit agency and is self-sponsored. It is governed by a seventeen member Board of Directors with 67% of the board members age 55 or older. A cross section of community members serve on the Board. Board members serve a three-year term. RSVP of Dane County has a strong committee structure with an emphasis on community participation. The following committees also include many community members: Agency Assessment, Personnel, Marketing, Financial Oversight and Planning, Development, Corporate Relations, and Recognition. RSVP staff and volunteers participate in many community Boards and Committees such as the Wisconsin Intergenerational Network, United Way Program, Wisconsin Rural and Para transit Providers, Dane County Administrators of Volunteer Services, Elderly Services Network, Triad of Wisconsin, and Community Service Center, Inc. RSVP became the first United Way of Dane County funded agency to participate in the Institute for Non-Profit Leadership and Innovation Certificate for Organizational Excellence. The purpose of this certification program is to ensure best practices and a culture of continuing improvement. The program required evaluations of best practices assessment tools, board assessment, leadership self-assessment and leadership performance feedback and one of our volunteer coordinator's participation in Points of Light 6 part Volunteer Management Training Series.

RSVP of Dane County will celebrate its 38th anniversary in 2010. It has successfully maintained a base of approximately 2,000 volunteers over the past 10 years. Recruitment is ongoing, and each year between 200-300 new volunteers are enrolled. Some of the volunteers have been active for 20 years or more. RSVP volunteers are recognized at RSVP's annual volunteer appreciation event and in newsletter articles. RSVP has two awards that are presented at the annual volunteer appreciation event: President's Lifetime Achievement Awards for volunteers serving 4,000 or more hours, and the RSVP Length of Service Awards for volunteers serving 20 or more consecutive years with RSVP of Dane County.

RSVP maintains a twelve member staff, eight full time. Two staff members are dedicated to our intergenerational programs and three to our driver escort/home delivered meal program. RSVP also has the Foster Grandparent Program to offer as an option for volunteers. The Executive Director has eight years of experience with RSVP of Dane County and six years affiliation with Points of Light Foundation. The Assistant Director and a former Executive Director who is currently serving as a program coordinator each have over 30 years of experience with RSVP. In addition, several program and administrative staff have over 15 years of experience.

RSVP uses Quick Books for its accounting system and has an accountant who has been with the organization for 8 years. In addition, two volunteers help with some accounting duties: one volunteer assists staff with deposits, and another volunteer issues the volunteer transportation and Driver Services reimbursement checks using Quicken software. RSVP has an annual independent audit and relies on advice from the auditors for any fiscal management related questions. The Financial Oversight & Planning Committee of the Board meets with the auditors to review the audit. In addition, this committee meets bi-monthly to prepare the budget and help oversee RSVP's finances. The audit results have been consistently clean and accepted by other government funders.

RSVP has employed a customized Access-based database created by a professional database designer for several years. The database allows RSVP staff and volunteers to input and track such critical information as numbers of volunteers enrolled; hours reported; locations of volunteer sites; volunteer racial, ethnic, geographical and age demographics; number of volunteers claiming disability; and other valuable data. The program was conceived largely on the reporting requirements of the Corporation for National and Community Service. It includes customized reports which meet the needs of the City of Madison and other funding agencies.

## 6. AGENCY GOVERNING BODY

How many Board meetings were held in 2009?

6

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?

17

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

<b>Name</b>	<b>John (Jack) Anderson , President</b>				
Home Address	5736 Enchanted View Lane Waunakee, WI 53597				
Occupation	Retired				
Representing	University, Teaching				
Term of Office	1 Year	From:	07/2010	To:	07/2011
<b>Name</b>	<b>Kevin Gould, Vice President</b>				
Home Address	3601 Cascade Road Madison, WI 53704				
Occupation	Assistant Center Manager				
Representing	Alliant Energy Center of Dane County				
Term of Office	1 Year	From:	07/2010	To:	07/2011
<b>Name</b>	<b>Margaret (Peg) Davey, Secretary</b>				
Home Address	505 Merrill Crest Drive Madison, WI 53705				
Occupation	Retired				
Representing	UW-Madison				
Term of Office	1 Year	From:	07/2010	To:	07/2011
<b>Name</b>	<b>Geral (Jerry) Miller, Treasurer</b>				
Home Address	5014 Hardy Trail Waunakee, WI 53597				
Occupation	Retired				
Representing	Allian Energy				
Term of Office	1 Year	From:	07/2010	To:	07/2011
<b>Name</b>	<b>Tom Krauskopf, Immediate Past President</b>				
Home Address	657 Hilltop Drive Madison, WI 53711				
Occupation	Retired				
Representing	State of Wisconsin				
Term of Office	1 Year	From:	07/2010	To:	07/2011
<b>Name</b>	<b>Robert Ainsworth, Board Member</b>				
Home Address	7549 Widgeon Way Madison, WI 53717				
Occupation	Retired				
Representing	Social Security Administration				
Term of Office	1 Year	From:	07/2010	To:	07/2011
<b>Name</b>	<b>Kathryn Arndt, Board Member</b>				
Home Address	7610 Mid Town Road Madison, WI 53719				
Occupation	Lawyer & Owner				
Representing	Pre-emptive Solutions Leadership Consulting				
Term of Office	1 Year	From:	07/2010	To:	07/2011
<b>Name</b>	<b>Tammy Jelinek</b>				
Home Address	74 Winnebago Street Edgerton, WI 53534				
Occupation	Business Sales Manager				
Representing	Wells Fargo Bank				
Term of Office	1 Year	From:	07/2010	To:	07/2011

## AGENCY GOVERNING BODY cont.

<b>Name</b>	<b>James Jenkins, Board Member</b>				
Home Address	1134 Frisch Road				
Occupation	Retired				
Representing	State of Wisconsin				
Term of Office	1 Year	From:	mm/yyyy	To:	07/2011
<b>Name</b>	<b>Margaret Jensen, Board Member</b>				
Home Address	2901 Waunona Way Madison, WI 53713				
Occupation	Teacher				
Representing	Madison Metropolitan School District				
Term of Office	1 Year	From:	07/2010	To:	07/2011
<b>Name</b>	<b>Kent Klagos, Board Member</b>				
Home Address	17 Bishops Hill Circle Madison, WI 53717				
Occupation	Division Vice President - Marketing				
Representing	Rayovac				
Term of Office	1 Year	From:	07/2010	To:	07/2011
<b>Name</b>	<b>Mike Plautz, Board Member</b>				
Home Address	3921 Priscilla Lane Madison, WI 53705				
Occupation	Retired				
Representing	Director of Marketing, Rayovac				
Term of Office	1 Year	From:	07/2010	To:	07/2011
<b>Name</b>	<b>Pat Reidy, Board Member</b>				
Home Address	1805 Parmenter Street Middleton, WI 53562				
Occupation	Retired				
Representing	UW Foundation				
Term of Office	1 Year	From:	07/2010	To:	07/2011
<b>Name</b>	<b>Char Tortorice, Board Member</b>				
Home Address	1520 Drewry Lane Madison, WI 53704				
Occupation	Retired				
Representing	UW - Madiso				
Term of Office	1 Year	From:	07/2010	To:	07/2011
<b>Name</b>	<b>Carroll Heideman, Board Member</b>				
Home Address	518 Caldys Place Madison, WI 53711				
Occupation	Retired				
Representing	Educator				
Term of Office	1 Year	From:	07/2010	To:	07/2011
<b>Name</b>	<b>Gina Smith, Board Member</b>				
Home Address	6922 Windstone Drive Madison, WI				
Occupation	Producer/Researcher				
Representing	Triangle Media Works				
Term of Office	1 Year	From:	07/2010	To:	07/2011
<b>Name</b>	<b>David Tetzlaff, Ex-Officio</b>				
Home Address	3293 Prairie Glade Road Middleton, WI 53562				
Occupation	Executive Director				
Representing	RSVP of Dane County				
Term of Office	1 Year	From:	07/2010	To:	07/2011

## AGENCY GOVERNING BODY cont.

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

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Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	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
<b>TOTAL</b>	15	100%	17	100%	2,543	100%
<b>GENDER</b>						
MALE	6	40%	10	59%	700	28%
FEMALE	9	60%	7	41%	1,843	72%
UNKNOWN/OTHER	0	0%	0	0%	0	0%
TOTAL GENDER	15	100%	17	100%	2,543	100%
<b>AGE</b>						
LESS THAN 18 YRS	0	0%	0	0%	0	0%
18-59 YRS	8	53%	4	24%	421	17%
60 AND OLDER	7	47%	13	76%	2,122	83%
TOTAL AGE	15	100%	17	100%	2,543	100%
<b>RACE*</b>						0
WHITE/CAUCASIAN	13	87%	15	88%	2,463	97%
BLACK/AFRICAN AMERICAN	1	7%	2	12%	39	2%
ASIAN	1	7%	0	0%	40	2%
AMERICAN INDIAN/ALASKAN NATIVE	0	0%	0	0%	1	0%
NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER	0	0%	0	0%	0	0%
MULTI-RACIAL:	0	0%	0	0%	0	0%
Black/AA & White/Caucasian	0	0%	0	0%	0	0%
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	0	0%	0	0%	0	0%
TOTAL RACE	15	100%	17	100%	2,543	100%
<b>ETHNICITY</b>						
HISPANIC OR LATINO	1	7%	1	6%	11	0%
NOT HISPANIC OR LATINO	14	93%	16	94%	2,532	100%
TOTAL ETHNICITY	15	100%	17	100%	2,543	100%
<b>PERSONS WITH DISABILITIES</b>	2	13%	1	6%	246	10%

\*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
<b>A. PERSONNEL</b>			
Salary	0	555,476	571,537
Taxes	0	42,494	43,723
Benefits	0	101,166	104,876
<b>SUBTOTAL A.</b>	<b>0</b>	<b>699,136</b>	<b>720,136</b>
<b>B. OPERATING</b>			
All "Operating" Costs	0	147,712	150,594
<b>SUBTOTAL B.</b>	<b>0</b>	<b>147,712</b>	<b>150,594</b>
<b>C. SPACE</b>			
Rent/Utilities/Maintenance	0	47,686	47,686
Mortgage (P&I) / Depreciation / Taxes	0	0	0
<b>SUBTOTAL C.</b>	<b>0</b>	<b>47,686</b>	<b>47,686</b>
<b>D. SPECIAL COSTS</b>			
Assistance to Individuals	0	515,835	524,889
Subcontracts, etc.	0	0	0
Affiliation Dues	0	0	0
Capital Expenditure	0	0	0
Other:	0	0	0
<b>SUBTOTAL D.</b>	<b>0</b>	<b>515,835</b>	<b>524,889</b>
<b>SPECIAL COSTS LESS CAPITAL EXPENDITURE</b>	<b>0</b>	<b>515,835</b>	<b>524,889</b>
<b>TOTAL OPERATING EXPENSES</b>	<b>0</b>	<b>1,410,369</b>	<b>1,443,305</b>
<b>E. TOTAL CAPITAL EXPENDITURES</b>	<b>0</b>	<b>0</b>	<b>0</b>

## 9. PERSONNEL DATA: List Percent of Staff Turnover

6.3%

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.

600 characters (with spaces)

## 10. PERSONNEL DATA: Personnel Schedule

List each individual staff position by title. Seasonal Employees should be entered at the bottom.

Indicate if the position meets the Living Wage Exception with an asterisk (\*).

Indicate the number of 2011 Proposed Full-Time Equivalents (FTEs) in each staff position, across all agency programs.

Indicate the total salaries for all FTEs in that staff position. Do NOT include payroll taxes or benefits in this table.

Staff Position/Category	2010		2011					
	Est.	Est.	Proposed	Proposed	Hourly Wage	A	B	C
	FTE	Salary	FTE	Salary		FTE	FTE	FTE
Executive Director	1.00	65,149	0.31	67,103	0.00	0.31	0.00	0.00
Assistant Director	1.00	53,583	0.37	55,190	0.00	0.37	0.00	0.00
Office Support Administrator	1.00	35,752	0.49	36,825	0.00	0.49	0.00	0.00
Accountants	1.11	43,972	0.31	45,291	0.00	0.31	0.00	0.00
Program Coordinators	9.60	273,694	0.00	281,302	0.00	0.00	0.00	0.00
Development Director	0.90	49,693	0.00	51,184	0.00	0.00	0.00	0.00
Community Connections Coordinator - Prog A	1.00	33,633	1.00	34,642	0.00	1.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
TOTAL	15.61	555,476	2.48	571,537		2.48	0.00	0.00

<b>TOTAL PERSONNEL COSTS:</b>	<b>571,537</b>
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	Nbr of Weeks	Total Hours	Hourly Wage	Seasonal Earnings		A	B	C
Seasonal/Project Employee ONLY	Weeks	Hours	Wage	Earnings		# HRS	# HRS	# HRS
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
TOTAL	0	0		0		0.00	0.00	0.00

### 2011 PROPOSED FTEs DISTRIBUTED BY PROGRAM

[illegible][illegible]

ORGANIZATION:

RSVP of Dane County, Inc.

## PROGRAM BUDGET

## 1. 2010 BUDGETED

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	346,302	166,878	23,577	10,406	145,441
DANE CO CDBG	0	0	0	0	0
UNITED WAY ALLOC	500,000	160,689	56,265	9,548	273,498
UNITED WAY DESIG	0				
OTHER GOVT	256,247	172,642	21,074	11,864	50,667
FUNDRAISING DONATIONS	118,596	83,250	18,220	6,500	10,626
USER FEES	31,500	0	0	0	31,500
OTHER	0	0	0	0	0
TOTAL REVENUE	1,252,645	583,459	119,136	38,318	511,732

## 2. 2011 PROPOSED BUDGET

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	351,779	171,884	24,048	10,406	145,441
DANE CO CDBG	0	0	0	0	0
UNITED WAY ALLOC	522,070	165,510	57,390	9,548	289,622
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT*	254,331	177,846	21,425	11,864	43,196
FUNDRAISING DONATIONS	121,777	85,748	18,584	6,500	10,945
USER FEES	31,500	0	0	0	31,500
OTHER**	0	0	0	0	0
TOTAL REVENUE	1,281,457	600,988	121,447	38,318	520,704

\*OTHER GOVT 2011

Source	Amount	Terms
Corporation for Comm Service	149,846	
State of wisconsin	8,821	
State of Wisconsin Foster G Parent	54,161	
Other small grants & contributions	41,503	
TOTAL	254,331	

\*\*OTHER 2011

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

**1. AGENCY CONTACT INFORMATION**

Organization	South Madison Coalition of the Elderly		
Mailing Address	128 E. Olin Suite 110		
Telephone	608-251-8405		
FAX	608-251-9028		
Admin Contact	Kathleen E. Stoga		
Financial Contact	Kathleen Stoga		
Website	www.smcelder.com		
Email Address	stoga@smcelder.com		
Legal Status	Private: Non-Profit		
Federal EIN:	39-1222287		
State CN:	None		
DUNS #	None		

**2. CONTACT INFORMATION**

A	Case Management Services		
	Contact:	Kathleen Stoga/Beth Freeman	Phone: 251-8405 Email: stoga@smcelder.com
B	Focal Point Based - Community Assistance		
	Contact:	Kathleen Stoga	Phone: 251-8405 Email: stoga@smcelder.com
C	Neighborhood Senior Center Program		
	Contact:	Kathleen Stoga	Phone: 251-8405 Email: stoga@smcelder.com
D	Program D		
	Contact:		Phone: Email:
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	832,642	828,029	851,964	54,300	0	0	0
DANE CO CDBG		0	0	0	0	0	0
MADISON-COMM SVCS	89,686	94,600	96,643	71,889	21,739	3,015	0
MADISON-CDBG		0	0	0	0	0	0
UNITED WAY ALLOC	68,787	47,701	41,696	0	0	18,235	0
UNITED WAY DESIG	2,902	4,675	4,769	0	0	4,769	0
OTHER GOVT	29,055	0	0	0	0	0	0
FUNDRAISING DONATIONS	9,248	13,694	17,194	2,094	15,100	0	0
USER FEES	6,902	9,854	7,503	4,413	3,090	0	0
OTHER	43,629	49,088	49,731	0	11,523	0	0
TOTAL REVENUE	1,082,851	1,047,641	1,069,500	132,696	51,452	26,019	0

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.						
	L						Non-City
DANE CO HUMAN SVCS	0						797,664
DANE CO CDBG	0						0
MADISON-COMM SVCS	0						0
MADISON-CDBG	0						0
UNITED WAY ALLOC	0						23,461
UNITED WAY DESIG	0						0
OTHER GOVT	0						0
FUNDRAISING DONATIONS	0						0
USER FEES	0						0
OTHER	0						38,208
TOTAL REVENUE	0						859,333

## AGENCY ORGANIZATIONAL PROFILE

## 4. AGENCY MISSION STATEMENT

The purpose of the South Madison Coalition is to ensure the dignity and independence of older adults in our community by providing services that respond to their needs and by encouraging their participation in helping others. Our goals are

- to bring together individuals who have a concern for the needs of older adults;
- to provide services and programs that assist and enable older adults to prepare and live securely in their retirement years;
- to focus the attention and energies of the community on the needs of older adults;

## 5. AGENCY EXPERIENCE AND QUALIFICATIONS

Since 1975, SMCE has brought together people who care about older adults in our community. In this role, the agency provides a variety of services for older people that include four daily nutrition sites, case management services, outreach services, information and referral, volunteer home chore services, the Neighborhood Senior Center Program, health-screening services, and a wide variety of educational programs.

In addition to serving older adults in the diverse neighborhoods of South Madison, the agency has contracts to provide long-term support services to all of Dane County's older adults. One of SMCE's most significant services in this regard is providing case management for clients participating in the Community Options Program. Other services that the agency provides to residents throughout Dane County are the Southeast Asian Meal Program, quality assurance standards for group homes, and the Volunteer Guardianship Program.

Some of the services and programs that SMCE has either developed directly or helped to develop in partnership with other organizations include the Cultural Diversity Services program for minority older adults, volunteer home chore services for older adults, coordinated services for elderly low-income housing residents, the Volunteer Guardianship Program, quality standards for group homes, and a case management crisis team for clients with mental health needs.



## 6. AGENCY GOVERNING BODY

How many Board meetings were held in 2009?

10

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

10

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

11

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

<b>Name</b>	<b>Davis, Peter</b>			
Home Address	216 Westmorland Blvd Madison, WI 53705			
Occupation	Lawyer			
Representing				
Term of Office		From:	11/2009	To: 11/2012
<b>Name</b>	<b>Dieterle, Julie</b>			
Home Address	707 Ocean Road Madison, WI 53713			
Occupation	Physical Therapist			
Representing				
Term of Office		From:	11/2009	To: 11/2012
<b>Name</b>	<b>Fike, Alice</b>			
Home Address	755 Braxton Apt. A311 Madison, WI 53715			
Occupation	Retired			
Representing				
Term of Office		From:	11/2009	To: 11/2012
<b>Name</b>	<b>Guilfoil, Libby</b>			
Home Address	3706 Zwerg Dr. Madison, WI 53705			
Occupation	Director United Way			
Representing				
Term of Office		From:	11/2007	To: 11/2010
<b>Name</b>	<b>Heine, Tom</b>			
Home Address	5613 Varsity Hill Madison, WI			
Occupation	Retired			
Representing				
Term of Office		From:	11/2009	To: 11/2012
<b>Name</b>	<b>Keller, Kathy</b>			
Home Address	5301 Tower Lane Rd. Marshall, WI 53559			
Occupation	Retired			
Representing				
Term of Office		From:	11/2008	To: 11/2011
<b>Name</b>	<b>Kosseff, Nancy</b>			
Home Address	2306 Eton Ridge Madison, WI 53726			
Occupation	Social Worker			
Representing				
Term of Office		From:	11/2009	To: 11/2012
<b>Name</b>	<b>Montgomery, Lynn</b>			
Home Address	1548 Boulder Way Sun Prairie, WI 53590			
Occupation	Volunteer Coordinator			
Representing				
Term of Office		From:	11/2009	To: 11/2012

## AGENCY GOVERNING BODY cont.

<b>Name</b>	<b>Ressler, Petra</b>			
Home Address	1112 C Mound St Madison, WI 53715			
Occupation	Retired			
Representing				
Term of Office		From:	11/2009	To: 11/2012
<b>Name</b>	<b>Watson, Linda</b>			
Home Address	3102 Churchill Dr. Madison, WI 53713			
Occupation	Home Care Worker			
Representing				
Term of Office		From:	11/2009	To: 11/52012
<b>Name</b>	<b>Wilson, Juanita</b>			
Home Address	234 Randolph Dr. Apt.3185 Madison, WI 53713			
Occupation	Retired			
Representing				
Term of Office		From:	11/2008	To: 11/2011
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
<b>Name</b>				
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

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

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Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	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
<b>TOTAL</b>	26	100%	11	100%	489	100%
<b>GENDER</b>						
MALE	1	4%	2	18%	158	32%
FEMALE	25	96%	9	82%	331	68%
UNKNOWN/OTHER	0	0%	0	0%		0%
TOTAL GENDER	26	100%	11	100%	489	100%
<b>AGE</b>						
LESS THAN 18 YRS	0	0%	0	0%	0	0%
18-59 YRS	17	65%	3	27%	266	54%
60 AND OLDER	9	35%	8	73%	223	46%
TOTAL AGE	26	100%	11	100%	489	100%
<b>RACE*</b>						0
WHITE/CAUCASIAN	23	88%	10	91%	415	85%
BLACK/AFRICAN AMERICAN	1	4%	1	9%	46	9%
ASIAN	2	8%	0	0%	26	5%
AMERICAN INDIAN/ALASKAN NATIVE	0	0%	0	0%	0	0%
NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER	0	0%	0	0%	0	0%
MULTI-RACIAL:	0	0%	0	0%	2	0%
Black/AA & White/Caucasian	0	0%	0	0%	0	0%
Asian & White/Caucasian	0	0%	0	0%	0	0%
Am Indian/Alaskan Native & White/Caucasian	0	0%	0	0%	2	100%
Am Indian/Alaskan Native & Black/AA	0	0%	0	0%	0	0%
BALANCE/OTHER	0	0%	0	0%	0	0%
TOTAL RACE	26	100%	11	100%	489	100%
<b>ETHNICITY</b>						
HISPANIC OR LATINO	0	0%	0	0%	4	1%
NOT HISPANIC OR LATINO	26	100%	11	100%	485	99%
TOTAL ETHNICITY	26	100%	11	100%	489	100%
<b>PERSONS WITH DISABILITIES</b>	0	0%	1	9%	0	0%

\*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
<b>A. PERSONNEL</b>			
Salary	714,114	699,320	711,360
Taxes	60,056	53,498	54,419
Benefits	96,884	104,899	106,705
<b>SUBTOTAL A.</b>	<b>871,054</b>	<b>857,717</b>	<b>872,484</b>
<b>B. OPERATING</b>			
All "Operating" Costs	117,803	120,755	126,484
<b>SUBTOTAL B.</b>	<b>117,803</b>	<b>120,755</b>	<b>126,484</b>
<b>C. SPACE</b>			
Rent/Utilities/Maintenance	38,022	36,555	37,266
Mortgage (P&I) / Depreciation / Taxes	0	0	0
<b>SUBTOTAL C.</b>	<b>38,022</b>	<b>36,555</b>	<b>37,266</b>
<b>D. SPECIAL COSTS</b>			
Assistance to Individuals	0	0	0
Subcontracts, etc.	0	0	0
Affiliation Dues	0	0	0
Capital Expenditure	0	0	0
Other:	32,711	32,614	33,266
<b>SUBTOTAL D.</b>	<b>32,711</b>	<b>32,614</b>	<b>33,266</b>
<b>SPECIAL COSTS LESS CAPITAL EXPENDITURE</b>	<b>32,711</b>	<b>32,614</b>	<b>33,266</b>
<b>TOTAL OPERATING EXPENSES</b>	<b>1,059,590</b>	<b>1,047,641</b>	<b>1,069,500</b>
<b>E. TOTAL CAPITAL EXPENDITURES</b>	<b>0</b>	<b>0</b>	<b>0</b>

## 9. PERSONNEL DATA: List Percent of Staff Turnover

11.0%

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.

## 10. PERSONNEL DATA: Personnel Schedule

List each individual staff position by title. Seasonal Employees should be entered at the bottom.

Indicate if the position meets the Living Wage Exception with an asterisk (\*).

Indicate the number of 2011 Proposed Full-Time Equivalents (FTEs) in each staff position, across all agency programs.

Indicate the total salaries for all FTEs in that staff position. Do NOT include payroll taxes or benefits in this table.

Staff Position/Category	2010		2011		Hourly Wage	A	B	C
	Est. FTE	Est. Salary	Proposed FTE	Proposed Salary		FTE	FTE	FTE
			0.0					
			0.0					
			0.0					
			0.0					
			0.0					
			0.0					
			0.0					
			0.0					
			0.0					
			0.0					
			0.0					
			0.0					
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
	0.0	0	0.0	0	0.00	0.0	0.0	0.0
TOTAL	0.0	0	0.0	0		0.0	0.0	0.0

TOTAL PERSONNEL COSTS:	0
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	Nbr of Weeks	Total Hours	Hourly Wage	Seasonal Earnings		A	B	C
Seasonal/Project Employee ONLY	Weeks	Hours	Wage	Earnings		# HRS	# HRS	# HRS
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
TOTAL	0	0		0		0.00	0.00	0.00

### 2011 PROPOSED FTEs DISTRIBUTED BY PROGRAM

[illegible][illegible]

ORGANIZATION:

South Madison Coalition of the Elderly

## PROGRAM BUDGET

## 1. 2010 BUDGETED

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	778,274	655,381	60,584	29,695	32,614
DANE CO CDBG	0	0	0	0	0
UNITED WAY ALLOC	29,701	27,567	1,789	345	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	0	0	0	0	0
OTHER	37,565	31,503	5,957	105	0
TOTAL REVENUE	845,540	714,451	68,330	30,145	32,614

## 2. 2011 PROPOSED BUDGET

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	797,664	672,313	61,797	30,288	33,266
DANE CO CDBG	0		0	0	0
UNITED WAY ALLOC	23,461	21,363	1,746	352	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	0	0	0	0	0
OTHER**	38,208	32,132	5,971	105	0
TOTAL REVENUE	859,333	725,808	69,514	30,745	33,266

\*OTHER GOVT 2011

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

\*\*OTHER 2011

Source	Amount	Terms
West Madison Coalition	38,208	Volunteer Home Chore Program Reimbursement - City & United Way Funds
	0	
	0	
	0	
	0	
TOTAL	38,208	



## 10. PERSONNEL DATA: Personnel Schedule

List each individual staff position by title. Seasonal Employees should be entered at the bottom.

Indicate if the position meets the Living Wage Exception with an asterisk (\*).

Indicate the number of 2011 Proposed Full-Time Equivalents (FTEs) in each staff position, across all agency programs.

Indicate the total salaries for all FTEs in that staff position. Do NOT include payroll taxes or benefits in this table.

Staff Position/Category	2010		2011		Hourly Wage	A	B	C
	Est. FTE	Est. Salary	Proposed FTE	Proposed Salary		FTE	FTE	FTE
Executive Director*	1.2	64,990	1.00	59,615	29.39	0.1	0.1	0.0
Case Managers*	10.7	410,367	10.70	425,249	19.68	2.3		
Secretary*	1.0	29,412	1.00	30,000	14.79	0.0	0.1	0.0
Neighborhood Senior Center Coordinator*	0.5	15,190	0.50	15,392	14.80			0.5
Volunteer Coordinator	0.00	0	0.50	14,851	14.28			
Guardian Coordinator	0.00	0	0.30	12,414	20.41			
Clerk	0.00	0	0.50	13,621	13.10			
Nutrition Site Supervisor	0.00	0	0.50	15,360	14.76			
Nutrition Managers	0.00	0	1.90	41,618	10.67			
Register Nurses	0.00	0	1.20	59,995	24.04			
Assisted Living Quality Coordinator	0.00	0	0.62	23,245	18.62			
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
TOTAL	13.41	519,959	18.72	711,360		2.41	0.25	0.53

TOTAL PERSONNEL COSTS:	711,360
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	Nbr of Weeks	Total Hours	Hourly Wage	Seasonal Earnings		A	B	C
Seasonal/Project Employee ONLY	Weeks	Hours	Wage	Earnings		# HRS	# HRS	# HRS
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
TOTAL	0	0		0		0.00	0.00	0.00

2011 PROPOSED FTEs DISTRIBUTED BY PROGRAM									
D	E	F	G	H	I	J	K	L	Non-City
FTE	FTE	FTE	FTE	FTE	FTE	FTE	FTE	FTE	FTE
									0.8
									8.4
									0.9
									0.0
									0.5
									0.3
									0.5
									0.5
									1.9
									1.2
									0.6
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	15.53

D	E	F	G	H	I	J	K	L	Non-City
# HRS	# HRS	# HRS	# HRS	# HRS	# HRS	# HRS	# HRS	# HRS	# HRS
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

**1. AGENCY CONTACT INFORMATION**

Organization	Wil-Mar Neighborhood Center		
Mailing Address	953 Jenifer Street, Madison, WI 53703		
Telephone	608-257-4576		
FAX	608-257-1052		
Admin Contact	Gary Kallas		
Financial Contact	Gary Kallas		
Website	www.wil-mar.org		
Email Address	garyk@wil-mar.org		
Legal Status	Private: Non-Profit		
Federal EIN:	39-1796793		
State CN:	41148		
DUNS #			

**2. CONTACT INFORMATION**

A	After School			
	Contact:	Ken Hoerer	Phone:	257-4576
			Email:	kenh@wil-mar.org
B	Summer Camp			
	Contact:	Ken Hoerer	Phone:	257-4576
			Email:	kenh@wil-mar.org
C	SOAR-Youth Services			
	Contact:	Ken Hoerer	Phone:	257-4576
			Email:	kenh@wil-mar.org
D	Community Assistance			
	Contact:	Gary Kallas	Phone:	257-4576
			Email:	garyk@wil-mar.org
E	Senior Services			
	Contact:	Gary Kallas	Phone:	257-4576
			Email:	garyk@wil-mar.org
F	CORE			
	Contact:	Gary Kallas	Phone:	257-4576
			Email:	garyk@wil-mar.org
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	30,188	28,720	29,000	0	0	0	0
DANE CO CDBG	0	0	0	0	0	0	0
MADISON-COMM SVCS	16,103	16,103	18,427	1,500	4,945	1,667	500
MADISON-CDBG	149,424	149,926	154,425	0	0	0	0
UNITED WAY ALLOC	30,640	22,640	23,095	14,280	0	8,815	0
UNITED WAY DESIG	10,825	7,642	9,500	9,500	0	0	0
OTHER GOVT	9,706	9,000	9,500	5,545	3,955	0	0
FUNDRAISING DONATIONS	281,491	154,518	158,474	27,716	33,258	5,529	7,585
USER FEES	20,592	20,500	22,500	6,110	6,390	0	0
OTHER	154	0	0	0	0	0	0
TOTAL REVENUE	549,123	409,049	424,921	64,651	48,548	16,011	8,085

REVENUE SOURCE	2011 PROPOSED PROGRAMS CONT.						
	E	F	G	H	I	J	K
DANE CO HUMAN SVCS	29,000	0	0	0	0	0	0
DANE CO CDBG	0	0	0	0	0	0	0
MADISON-COMM SVCS	9,815	0	0	0	0	0	0
MADISON-CDBG	0	154,425	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	19,314	65,072	0	0	0	0	0
USER FEES	0	10,000	0	0	0	0	0
OTHER	0	0	0	0	0	0	0
TOTAL REVENUE	58,129	229,497	0	0	0	0	0

REVENUE SOURCE	2011 PROPOSED PROGRAMS CONT.						
	L						Non-City
DANE CO HUMAN SVCS	0						0
DANE CO CDBG	0						0
MADISON-COMM SVCS	0						0
MADISON-CDBG	0						0
UNITED WAY ALLOC	0						0
UNITED WAY DESIG	0						0
OTHER GOVT	0						0
FUNDRAISING DONATIONS	0						0
USER FEES	0						0
OTHER	0						0
TOTAL REVENUE	0						0

## AGENCY ORGANIZATIONAL PROFILE

## 4. AGENCY MISSION STATEMENT

The Wil-Mar Neighborhood Center is a community-directed non-profit based in the Williamson-Marquette area that enhances the neighborhood's quality of life by fostering community-building and partnerships; supporting enriching programs and providing opportunities and services. We deliver responsible, high-quality programs for people of all ages; increase Center availability to groups and neighborhood residents; respond to the neighborhood's changing needs and help neighborhood youth participate in enriching activities promoting positive self-images in a culturally diverse world.

## 5. AGENCY EXPERIENCE AND QUALIFICATIONS

For over 40 years, the Wil-Mar Neighborhood Center has offered a host of programs serving people of all ages and cultural/ethnic backgrounds. During this time, Wil-Mar has developed and operated quality programs that have continuously met their goals on an annual basis. Our youth programs are annually monitored by state and city licensing agencies to ensure that they continue to meet and exceed their licensing requirements and offer quality care. Wil-Mar is a focal point for community life in the Williamson Street/Marquette areas. Whether it is the summer Farmers Market, La Fete de Marquette and Willy Street Fair, which attract tens of thousands of residents and others each year or the Marquette Neighborhood Center and other neighborhood groups utilizing the facility, Wil-Mar is seen as a vital part of community life on Madison's near east side. Building on this rich experience, while keeping up-to-date with emerging trends and community needs, is a continuing priority of the current leadership. At the staff level, the executive director and youth director bring over 30 years of combined non-profit experience and corresponding academic credentials. In addition, staff working directly with youth bring over 15 years of combined experience. During the past three years, Wil-Mar has not experienced any staff turnover leading to continuity of programming and service for the youth, adults and seniors who depend on our programs. No less experienced and qualified is the Center's governing board. Comprised of fourteen dedicated and committed members, the Wil-Mar Board of Directors brings a wide range of professional experiences including teachers, financial managers, artists, social workers and business leaders to the basic policy-making about Wil-Mar's programming, personnel management and asset maintenance. Through our experience, training, education and skill levels, Wil-Mar Neighborhood Center has contributed greatly to the overall stability of Madison's near east side neighborhoods.

## 6. AGENCY GOVERNING BODY

How many Board meetings were held in 2009?

12

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

12

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

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

<b>Name</b>	<b>Paul Abramson</b>			
Home Address	1330 Morrison Street, Madison, WI			
Occupation	Insurance Representative			
Representing	N/A			
Term of Office		From:	08/2008	To: 08/2011
<b>Name</b>	<b>Christine Reichelderfer</b>			
Home Address	1046 Williamson Street, Madison, WI			
Occupation	Elementary School Teacher			
Representing	N/A			
Term of Office		From:	10/2009	To: 10/2012
<b>Name</b>	<b>Tracie Tudor</b>			
Home Address	1134 Spaight Street, Madison, WI			
Occupation	School Teacher			
Representing	N/A			
Term of Office		From:	08/2007	To: 08/2010
<b>Name</b>	<b>Rob Hetzel</b>			
Home Address	610 Hudson Street, Madison, WI			
Occupation	Middle School Teacher			
Representing	N/A			
Term of Office		From:	08/2008	To: 08/2011
<b>Name</b>	<b>Diane Coccari</b>			
Home Address	1238 Rutledge Street			
Occupation	School Teacher			
Representing	N/A			
Term of Office		From:	08/2007	To: 08/2010
<b>Name</b>	<b>Stacie Shields</b>			
Home Address	602 Cherrywood Court, Madison, WI			
Occupation	Loan Officer			
Representing	N/A			
Term of Office		From:	10/2009	To: 10/2012
<b>Name</b>	<b>Suzanna Valtierra</b>			
Home Address	3550 Anderson Street, Madison, WI			
Occupation	Student Services Counselor			
Representing	N/A			
Term of Office		From:	10/2009	To: 10/2012
<b>Name</b>	<b>Nick Schroeder</b>			
Home Address	213 S. Baldwin Street, Madison, WI			
Occupation	Engineer			
Representing	N/A			
Term of Office		From:	08/2007	To: 08/2010

## AGENCY GOVERNING BODY cont.

<b>Name</b>	<b>Juanita Ebert</b>			
Home Address	126 Lakewood Gardens, Madison, WI			
Occupation	Church Deaconess			
Representing	Immanuel Lutheran Church			
Term of Office		From:	08/2007	To: 08/2010
<b>Name</b>	<b>Shaun Abshere</b>			
Home Address	1038 E. Dayton Street, Madison, WI			
Occupation	Financial Planner			
Representing	N/A			
Term of Office		From:	08/2007	To: 08/2010
<b>Name</b>	<b>Dan Hacker</b>			
Home Address	1335 Spaight Street, Madison, WI			
Occupation	Carpenter			
Representing	N/A			
Term of Office		From:	08/2008	To: 08/2011
<b>Name</b>	<b>Matt Hofstede</b>			
Home Address	238 Dunning Street, Madison, WI			
Occupation	Food Service			
Representing	N/A			
Term of Office		From:	08/2007	To: 08/2010
<b>Name</b>	<b>Bruce Woods</b>			
Home Address	940 Spaight Street, Madison, WI			
Occupation	Landscape Architect			
Representing	N/A			
Term of Office		From:	10/2009	To: 10/2012
<b>Name</b>	<b>Mary Jo Yttri</b>			
Home Address	1346 Jenifer Street, Madison, WI			
Occupation	Elementary School Teacher			
Representing	N/A			
Term of Office		From:	10/2009	To: 10/2012
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
<b>Name</b>				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
<b>Name</b>				
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

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	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
<b>TOTAL</b>	12	100%	14	100%	396	100%
<b>GENDER</b>						
MALE	6	50%	7	50%	158	40%
FEMALE	6	50%	7	50%	238	60%
UNKNOWN/OTHER	0	0%	0	0%	0	0%
TOTAL GENDER	12	100%	14	100%	396	100%
<b>AGE</b>						
LESS THAN 18 YRS	2	17%	0	0%	32	8%
18-59 YRS	8	67%	12	86%	293	74%
60 AND OLDER	2	17%	2	14%	71	18%
TOTAL AGE	12	100%	14	100%	396	100%
<b>RACE*</b>						0
WHITE/CAUCASIAN	3	25%	13	93%	313	79%
BLACK/AFRICAN AMERICAN	8	67%	0	0%	38	10%
ASIAN	0	0%	0	0%	4	1%
AMERICAN INDIAN/ALASKAN NATIVE	0	0%	0	0%	4	1%
NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER	0	0%	0	0%	0	0%
MULTI-RACIAL:	0	0%	0	0%	28	7%
Black/AA & White/Caucasian	0	0%	0	0%	28	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	1	8%	1	7%	9	2%
TOTAL RACE	12	100%	14	100%	396	100%
<b>ETHNICITY</b>						
HISPANIC OR LATINO	1	8%	1	7%	9	2%
NOT HISPANIC OR LATINO	11	92%	13	93%	387	98%
TOTAL ETHNICITY	12	100%	14	100%	396	100%
<b>PERSONS WITH DISABILITIES</b>	0	0%	0	0%	0	0%

\*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
<b>A. PERSONNEL</b>			
Salary	201,799	204,088	210,839
Taxes	16,658	17,348	17,921
Benefits	22,570	23,643	24,344
<b>SUBTOTAL A.</b>	<b>241,027</b>	<b>245,079</b>	<b>253,104</b>
<b>B. OPERATING</b>			
All "Operating" Costs	245,193	108,953	114,800
<b>SUBTOTAL B.</b>	<b>245,193</b>	<b>108,953</b>	<b>114,800</b>
<b>C. SPACE</b>			
Rent/Utilities/Maintenance	31,320	35,000	37,000
Mortgage (P&I) / Depreciation / Taxes	20,017	20,017	20,017
<b>SUBTOTAL C.</b>	<b>51,337</b>	<b>55,017</b>	<b>57,017</b>
<b>D. SPECIAL COSTS</b>			
Assistance to Individuals	0	0	0
Subcontracts, etc.	0	0	0
Affiliation Dues	0	0	0
Capital Expenditure	0	0	0
Other:	0	0	0
<b>SUBTOTAL D.</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>SPECIAL COSTS LESS CAPITAL EXPENDITURE</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>TOTAL OPERATING EXPENSES</b>	<b>537,557</b>	<b>409,049</b>	<b>424,921</b>
<b>E. TOTAL CAPITAL EXPENDITURES</b>	<b>0</b>	<b>0</b>	<b>0</b>

## 9. PERSONNEL DATA: List Percent of Staff Turnover

0.0%

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.

Not Applicable

## 10. PERSONNEL DATA: Personnel Schedule

List each individual staff position by title. Seasonal Employees should be entered at the bottom.

Indicate if the position meets the Living Wage Exception with an asterisk (\*).

Indicate the number of 2011 Proposed Full-Time Equivalents (FTEs) in each staff position, across all agency programs.

Indicate the total salaries for all FTEs in that staff position. Do NOT include payroll taxes or benefits in this table.

	2010		2011					
Staff Position/Category	Est. FTE	Est. Salary	Proposed FTE	Proposed Salary	Hourly Wage	A FTE	B FTE	C FTE
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
TOTAL	0.00	0	0.00	0		0.00	0.00	0.00

TOTAL PERSONNEL COSTS:	0
------------------------	---

	Nbr of Weeks	Total Hours	Hourly Wage	Seasonal Earnings		A	B	C
Seasonal/Project Employee ONLY	Weeks	Hours	Wage	Earnings		# HRS	# HRS	# HRS
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
TOTAL	0	0		0		0.00	0.00	0.00

### 2011 PROPOSED FTEs DISTRIBUTED BY PROGRAM

[illegible][illegible]

ORGANIZATION:

Wil-Mar Neighborhood Center

## 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
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	0	0	0	0	0
OTHER	0	0	0	0	0
TOTAL REVENUE	0	0	0	0	0

## 2. 2011 PROPOSED BUDGET

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
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	0	0	0	0	0
OTHER**	0	0	0	0	0
TOTAL REVENUE	0	0	0	0	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	

## 10. PERSONNEL DATA: Personnel Schedule

List each individual staff position by title. Seasonal Employees should be entered at the bottom.

Indicate if the position meets the Living Wage Exception with an asterisk (\*).

Indicate the number of 2011 Proposed Full-Time Equivalents (FTEs) in each staff position, across all agency programs.

Indicate the total salaries for all FTEs in that staff position. Do NOT include payroll taxes or benefits in this table.

Staff Position/Category	2010		2011					
	Est.	Est.	Proposed	Proposed	Hourly Wage	A	B	C
	FTE	Salary	FTE	Salary		FTE	FTE	FTE
Executive Director	1.00	55,100	1.00	56,200	27.02	0.00	0.00	0.00
Administrative Assistant	1.00	24,336	1.00	27,040	13.00	0.00	0.00	0.00
Senior Program Coordinator	0.50	13,260	0.50	13,520	13.00	0.00	0.00	0.00
Cook/Maintenance	0.85	22,100	0.85	22,542	12.75	0.06	0.04	0.00
Maintenance	0.38	9,248	0.38	9,485	12.00	0.00	0.00	0.00
Senior Youth Leader	0.65	22,298	0.65	22,630	17.00	0.42	0.23	0.00
Youth Leader 1	0.48	11,925	0.48	12,230	12.00	0.31	0.17	0.00
Youth Leader 2	0.48	11,925	0.48	12,230	12.00	0.31	0.17	0.00
Youth Leader 3	0.48	11,925	0.48	12,230	12.00	0.31	0.17	0.00
Youth Leader 4	0.33	4,867	0.33	4,992	12.00	0.00	0.00	0.33
Youth Worker 1 *	0.40	4,992	0.40	5,200	6.25	0.26	0.14	0.00
Youth Worker 2 *	0.40	4,992	0.40	5,200	6.25	0.26	0.14	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
TOTAL	6.95	196,968	6.95	203,499		1.93	1.06	0.33

<b>TOTAL PERSONNEL COSTS:</b>	<b>210,839</b>
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	Nbr of Weeks	Total Hours	Hourly Wage	Seasonal Earnings		A	B	C
Seasonal/Project Employee ONLY	Weeks	Hours	Wage	Earnings		# HRS	# HRS	# HRS
Summer Youth Worker *	10	416	6.25	2,600		0.00	0.00	416.00
Summer Youth Assistant	10	395	12.00	4,740		0.00	0.00	395.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
TOTAL	20	811		7,340		0.00	0.00	811.00

### 2011 PROPOSED FTEs DISTRIBUTED BY PROGRAM

[illegible][illegible]

**1. AGENCY CONTACT INFORMATION**

Organization	West Madison Senior Coalition		
Mailing Address	517 N Segoe Road #309 Madison, WI 53705		
Telephone	(608) 238-7368		
FAX	(608) 238-1260		
Admin Contact	Ingrid Kunding, Executive Director		
Financial Contact	Ingrid Kunding, Executive Director		
Website	www.westmadisonseniorcoalition.org		
Email Address	ingridk@westmadisonseniorcoalition.org		
Legal Status	Private: Non-Profit		
Federal EIN:	39-1222036		
State CN:			
DUNS #			

**2. CONTACT INFORMATION**

A	Outreach/Case Management			
	Contact:	Ingrid A. Kunding	Phone:	238-7368
			Email:	ingridk@westmadisonseniorcoalition.org
B	Home Chore Volunteer Program			
	Contact:	Ingrid A. Kunding	Phone:	238-7368
			Email:	ingridk@westmadisonseniorcoalition.org
C	Focal Point-Based Community Assistance			
	Contact:	Ingrid A. Kunding	Phone:	238-7368
			Email:	ingridk@westmadisonseniorcoalition.org
D	Senior Activities			
	Contact:	Ingrid A. Kunding	Phone:	238-7368
			Email:	ingridk@westmadisonseniorcoalition.org
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	159,212	158,279	160,885	123,040	0	0	0
DANE CO CDBG		0	0	0	0	0	0
MADISON-COMM SVCS	230,250	230,250	234,853	33,313	108,572	15,650	77,318
MADISON-CDBG		0	0	0	0	0	0
UNITED WAY ALLOC	40,200	40,200	41,004	2,244	38,760	0	0
UNITED WAY DESIG	2,858	0	0	0	0	0	0
OTHER GOVT	9,856	13,514	11,300	11,300	0	0	0
FUNDRAISING DONATIONS	25,273	42,751	45,507	4,100	900	14,792	22,015
USER FEES	12,566	0	0	0	0	0	0
OTHER		0	0	0	0	0	0
TOTAL REVENUE	480,215	484,994	493,549	173,997	148,232	30,442	99,333

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.						
	L						Non-City
DANE CO HUMAN SVCS	0						37,845
DANE CO CDBG	0						0
MADISON-COMM SVCS	0						0
MADISON-CDBG	0						0
UNITED WAY ALLOC	0						0
UNITED WAY DESIG	0						0
OTHER GOVT	0						0
FUNDRAISING DONATIONS	0						3,700
USER FEES	0						0
OTHER	0						0
TOTAL REVENUE	0						41,545

## AGENCY ORGANIZATIONAL PROFILE

## 4. AGENCY MISSION STATEMENT

The mission of the West Madison Senior Coalition is to enhance the quality of life for older adults by providing programs and resources to allow older adults to remain active and independent members of the community.

## 5. AGENCY EXPERIENCE AND QUALIFICATIONS

The West Madison Senior Coalition was incorporated as a nonprofit agency in 1975. The mission, upon incorporation, was to enhance the quality of life for older adults, age 60+, by providing programs and resources to allow older adults to remain active and independent members of the Coalition. Funding of the West Madison Senior Coalition has remained consistent, increasing as the needs of older adults in the community increase. The primary funding sources are the City of Madison, Dane County and the United Way of Dane County. Public support and contributions are also solicited on an annual basis to further support the work of the Coalition in the community. The Coalition has established a reputation in the community as being a reliable, important and necessary in the community through its years of service. The Coalition has maintained a cohesive Board of Directors, responsible for oversight and direction of the Coalition in accordance with the by-laws and constitution of the agency. The Coalition has recruited, hired and trained quality staff members to serve in the various program positions. Additional training has been provided for all staff members to further develop professional development and invest in the future of the organization. Competitive salaries, per other similar sized non-profit agencies in Dane County, are offered to staff members. Staff retention is important and the percentage of turnover remains relatively low. Annual audits deem the agency financially stable, following Generally Accepted Principles. The agency is a part of many collaborations in the community, which a shared vision of providing the best service to clients. Referrals to the Coalition, primarily for case management services, often come from clinics in the area who are familiar with the work of the Coalition. Additionally, referrals come from other community agencies, faith-based organizations and the Mental Health Center of Dane County and MOST (Mobile Outreach to Seniors Team). The agency routinely retains volunteers while recruiting new volunteers for a variety of volunteer opportunities. The Annual Used Book Sale at the West Madison Senior Center, which has been in existence for nearly 20 years, remains a popular and eagerly anticipated event. There are participants in the exercise classes offered at the Senior Center, that have been coming to class 3 times per week for the last 30+ years. The longevity of our organization is a strong testament to the important work of the West Madison Senior Coalition in the city of Madison. The Coalition also holds a number of professional memberships with other local, state and national organizations, including AARP, the Coalition of Wisconsin Aging Groups, the Elderly Services Network of Dane County and the Wisconsin Association of Senior Centers, to name a few. The Coalition also participates, when necessary, in a variety of advocacy activities to keep issues facing older adults top of mind for elected officials, speaking at various public hearings, committee meetings and City Council and County Board meetings, in collaboration with other partner agencies in the aging network. With the things that have been learned in the last 35 years of service to the community, the West Madison Senior Coalition is continually making necessary changes to remain relevant as issues and needs change in the community the the demand for services increases. This flexibility in keeping client needs as the focus will allow the West Madison Senior Coalition to continue to provide quality programs and services to older adults for the next 35 years.

## 6. AGENCY GOVERNING BODY

How many Board meetings were held in 2009?

9

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

10

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

11

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

<b>Name</b>	<b>Gary Stebnitz</b>				
Home Address	915 Waban Hill Madison, WI 53711				
Occupation	Realtor				
Representing	Restaino & Associates				
Term of Office	Chairperson	From:	09/2009	To:	09/2011
<b>Name</b>	<b>Sonja Lee</b>				
Home Address	710 N High Point Road Madison, WI 53717				
Occupation	Attorney				
Representing	Lee & Associates				
Term of Office	First Vice Chairperson	From:	09/2009	To:	09/2011
<b>Name</b>	<b>Jean Stewart</b>				
Home Address	734 Huron Hill Madison, WI 53711				
Occupation	Retired				
Representing	Community Volunteer				
Term of Office	Second Vice Chairperson	From:	09/2008	To:	09/2010
<b>Name</b>	<b>Carol Stang</b>				
Home Address	10 Highgate Circle Madison, WI 53717				
Occupation	Lending Officer				
Representing	Wisconsin Community Bank				
Term of Office	Treasurer	From:	09/2009	To:	09/2011
<b>Name</b>	<b>John Brady</b>				
Home Address	106 Alden Drive Madison, WI 53705				
Occupation	Retired				
Representing	Community Volunteer				
Term of Office	Member At Large	From:	09/2008	To:	09/2010
<b>Name</b>	<b>Bill Genin</b>				
Home Address	2939 McKinley Street Madison, WI 53705				
Occupation	Retired				
Representing	Community Volunteer				
Term of Office	Member At Large	From:	09/2008	To:	09/2011
<b>Name</b>	<b>Judy Whipple</b>				
Home Address	317 Kensington Drive Madison, WI 53704				
Occupation	Retired				
Representing	Community Volunteer				
Term of Office	Member At Large	From:	09/2009	To:	09/2011
<b>Name</b>	<b>Dan Stappay</b>				
Home Address	5961 Woodcreek Lane Middleton, WI 53562				
Occupation	Retired				
Representing	Community Volunteer				
Term of Office	Member At Large	From:	09/2009	To:	09/2011

## AGENCY GOVERNING BODY cont.

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

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Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

<b>Cynthia B. Schaefer</b>				
5814 Suffolk Road Madison, WI 53711				
Retired				
Community Volunteer				
Member At Large	From:	09/2009	To:	09/2011
<b>Richard Ihlenfeld</b>				
7613 Sawmill Road Madison, WI 53717				
Retired				
Community Volunteer				
Member At Large	From:	09/2009	To:	09/2011
<b>Cindy Thomas</b>				
2106 Teal Drive Madison, WI 53711				
Retired				
Community Volunteer				
Member At Large	From:	09/2009	To:	09/2011
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy

## AGENCY GOVERNING BODY cont.

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

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Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

**Name**

Home Address

Occupation

Representing

Term of Office

	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	From:	mm/yyyy	To:	mm/yyyy
	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
<b>TOTAL</b>	8	100%	11	100%	412	100%
<b>GENDER</b>						
MALE	1	13%	5	45%	115	28%
FEMALE	7	88%	6	55%	297	72%
UNKNOWN/OTHER	0	0%	0	0%	0	0%
TOTAL GENDER	8	100%	11	100%	412	100%
<b>AGE</b>						
LESS THAN 18 YRS	0	0%	0	0%	16	4%
18-59 YRS	8	100%	2	18%	303	74%
60 AND OLDER	0	0%	9	82%	93	23%
TOTAL AGE	8	100%	11	100%	412	100%
<b>RACE*</b>						0
WHITE/CAUCASIAN	8	100%	11	100%	362	88%
BLACK/AFRICAN AMERICAN	0	0%	0	0%	25	6%
ASIAN	0	0%	0	0%	20	5%
AMERICAN INDIAN/ALASKAN NATIVE	0	0%	0	0%	2	0%
NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER	0	0%	0	0%	0	0%
MULTI-RACIAL:	0	0%	0	0%	3	1%
Black/AA & White/Caucasian	0	0%	0	0%	2	67%
Asian & White/Caucasian	0	0%	0	0%	1	33%
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	0	0%	0	0%	0	0%
TOTAL RACE	8	100%	11	100%	412	100%
<b>ETHNICITY</b>						
HISPANIC OR LATINO	0	0%	0	0%	18	4%
NOT HISPANIC OR LATINO	8	100%	11	100%	394	96%
TOTAL ETHNICITY	8	100%	11	100%	412	100%
<b>PERSONS WITH DISABILITIES</b>	0	0%	1	9%	47	11%

\*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
<b>A. PERSONNEL</b>			
Salary	254,401	259,489	264,679
Taxes	13,879	14,271	13,701
Benefits	13,880	14,272	13,701
<b>SUBTOTAL A.</b>	<b>282,160</b>	<b>288,032</b>	<b>292,081</b>
<b>B. OPERATING</b>			
All "Operating" Costs	58,514	61,419	62,889
<b>SUBTOTAL B.</b>	<b>58,514</b>	<b>61,419</b>	<b>62,889</b>
<b>C. SPACE</b>			
Rent/Utilities/Maintenance	24,736	24,594	24,894
Mortgage (P&I) / Depreciation / Taxes	0	0	0
<b>SUBTOTAL C.</b>	<b>24,736</b>	<b>24,594</b>	<b>24,894</b>
<b>D. SPECIAL COSTS</b>			
Assistance to Individuals	0	0	0
Subcontracts, etc.	0	0	0
Affiliation Dues	0	0	0
Capital Expenditure	0	0	0
Other: Passthrough Funds: Home Chore	106,076	110,949	113,685
<b>SUBTOTAL D.</b>	<b>106,076</b>	<b>110,949</b>	<b>113,685</b>
<b>SPECIAL COSTS LESS CAPITAL EXPENDITURE</b>	<b>106,076</b>	<b>110,949</b>	<b>113,685</b>
<b>TOTAL OPERATING EXPENSES</b>	<b>471,486</b>	<b>484,994</b>	<b>493,549</b>
<b>E. TOTAL CAPITAL EXPENDITURES</b>	<b>0</b>	<b>0</b>	<b>0</b>

## 9. PERSONNEL DATA: List Percent of Staff Turnover

22.0%

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.

In July, 2009 the Senior Center Director and Senior Center Assistant Director were terminated based on a decision made by the Board of Directors. In May of 2009, employees were given the opportunity to participate in a 401(k) program and a Section 125 Plan. A new employee handbook was unveiled in November of 2009, providing more specific guidance to all staff members regarding Coalition policies and procedures. In December of 2009 a monthly training program was implemented, providing training to all paid staff in areas such as Effective Teams, Customer Service, and Effective Communication.

## 10. PERSONNEL DATA: Personnel Schedule

List each individual staff position by title. Seasonal Employees should be entered at the bottom.

Indicate if the position meets the Living Wage Exception with an asterisk (\*).

Indicate the number of 2011 Proposed Full-Time Equivalents (FTEs) in each staff position, across all agency programs.

Indicate the total salaries for all FTEs in that staff position. Do NOT include payroll taxes or benefits in this table.

Staff Position/Category	2010		2011					
	Est.	Est.	Proposed	Proposed	Hourly Wage	A	B	C
	FTE	Salary	FTE	Salary		FTE	FTE	FTE
Executive Director	1.00	50,986	1.00	52,006	25.00	0.20	0.20	0.20
Administrative Assistant	0.73	22,575	0.73	23,030	15.27	0.24	0.00	0.24
Senior Center Program Coordinator	0.80	25,792	0.80	26,308	15.81	0.00	0.00	0.00
Nutrition Site Manager	0.75	23,010	0.75	23,470	15.05	0.00	0.00	0.00
Nutrition Site Coordinator	0.10	1,560	0.10	1,591	12.24	0.00	0.00	0.00
Home Chore Volunteer Coordinator	0.68	20,670	0.68	21,083	15.02	0.00	0.63	0.05
Case Manager	1.00	37,700	1.00	38,454	18.49	1.00	0.00	0.00
Case Manager	1.00	38,194	1.00	38,958	18.73	1.00	0.00	0.00
Case Manager	1.00	32,006	1.00	32,646	15.70	1.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00
TOTAL	7.05	252,493	7.06	257,546		3.44	0.83	0.49

<b>TOTAL PERSONNEL COSTS:</b>	<b>257,546</b>
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	Nbr of Weeks	Total Hours	Hourly Wage	Seasonal Earnings		A	B	C
Seasonal/Project Employee ONLY	Weeks	Hours	Wage	Earnings		# HRS	# HRS	# HRS
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
	0	0	0.00	0		0.00	0.00	0.00
TOTAL	0	0		0		0.00	0.00	0.00



### 2011 PROPOSED FTEs DISTRIBUTED BY PROGRAM

[illegible][illegible]

ORGANIZATION:

West Madison Senior Coalition

## PROGRAM BUDGET

## 1. 2010 BUDGETED

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	37,413	21,584	4,049	2,847	8,933
DANE CO CDBG	0	0	0	0	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	3,587	1,587	0	0	2,000
USER FEES	0	0	0	0	0
OTHER	0	0	0	0	0
TOTAL REVENUE	41,000	23,171	4,049	2,847	10,933

## 2. 2011 PROPOSED BUDGET

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	37,845	22,016	4,049	2,847	8,933
DANE CO CDBG	0	0	0	0	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	3,700	1,700	0	0	2,000
USER FEES	0	0	0	0	0
OTHER**	0	0	0	0	0
TOTAL REVENUE	41,545	23,716	4,049	2,847	10,933

\*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	