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June 10, 2010

Ms. Laura Noel  
Office of Community Services  
City of Madison  
P.O. Box 2627  
Madison WI 53701-2627

Dear Laura:

Enclosed is the report of my site visit to the meeting of the Board of Directors, East Madison/Monona Coalition of the Aging. I gave Ms. Tammy Peters copies of my two previous site visit reports. I prefer written reports rather than verbal because they save Committee time.

If you wish, you may send copies of my reports to EMCA Executive Director Sonya Lindquest, Monona Senior Center Director Diane Mikebank, and EMCA Board of Directors President Dan Pechauer. They may be interested in the reports.

Each site visit was pleasant, and my feeling that social agencies are grossly underfunded was reinforced. Another observation was that too much may be asked for budget justification purposes. I believe in accountability for expenditure of public and other funds, but more information may be required than is needed to meet transparency and fund-expenditure accountability.

Since many social agencies receive funds from city, county, state, United Way, municipality, and other sources, some effort should be taken to develop a set of minimal data for submittal by agencies. Data elements should be uniformly defined and require the least amount of staff time for periodic reporting.

Developing statistical data for disparate program areas will require considerable expertise; therefore, either in-house experts or outside consultants should be assigned responsibility to develop not only a usable taxonomy but also a computer-oriented system.

This suggestion might be reviewed when long-range plans and budget development are being considered.

Sincerely yours,

*Paul*

Enclosure  
c. Mr. Charles Bunge

JUN 21 2010

Noel, Laura

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From: helen aarli [h.aarli@earthlink.net]  
Sent: Sunday, June 20, 2010 9:45 AM  
To: Noel, Laura; Peters, Tammy  
Subject: My report on Wil-Mar Center visit

Greetings, Laura and Tammy:

You asked for my Wil-Mar site report via email, so here it is!

I visited with Gary Kallas, Center director, on April 29, 2010, so we could talk before the Board meeting, which I also attended. Here are the responses to the "On-Site Report" for the SCAC.

The City of Madison gives funds for the Summer Camp -- a senior program which includes meals and actiities. They also help with Wil-Mar's rental of the facility... the City supports the idea (at a low cost).

They are able to serve seniors within the context of their programs. They cannot help with rent assistance, but they do refer out. There is a waiting list for the Summer Camp.

They spread word about the agency and its progams via: word of mouth, the Marquette Gazette, and a monthly calender, sent to a few hundred seniors.

If people do not show up, a staff person calls. They spread word via the Gazette and through leaflets which they distribute.

Services are equally available to all the area seniors. They are looking for ways to pull in a wider range of seniors (i.e. with varying income levels) via a wider range of activities... (Incidentally, Laura and Tammy, I live not too far from the neighborhood where Wil-Mar is located, and it does cover a wide economic range of housing!)

To try to attract under-served seniors... once a year the staff goes out to try to engage people who don't get out. They leave literature when necessary. They use election polls for names.

Yes, there probably are seniors who "fall through the cracks". Mental illness is a problem and the Center is trying to improve their comfort level so they can participate. Gary also said that sometimes when a mentally ill person comes in, other participants have a hard time in dealing with their behaviors.

In the future, one weekend a year they want to go out and greet all the seniors in the community in their own homes. Senior check-up: twice a year if possible, instead of once.

Yes, last year's progams were successful. They judge that by the fact that participants return for the programs and by their feedback.

Improvements since January 1,2009? They raise more money privately..... they are stretched to capacity in this connection! They drafted renovation plans for the building.. Brought East Side Farmers' Market to Wil-Mar. Have maintained level of participation even with the opening a larger facility close by.

600 volunteers a year; 10,000 hours. They do special events, deserts for senior lunches, food pantry, clean-up; board participation.

I found the agency reception area and reception staff welcoming when I visited. I was made to feel comfortable. There is a very informal and welcoming tone to Wil-Mar Center.

Would clients feel comfortable? Probably. As Gary and I discussed, the nature of some of the clients (mental illness) ... their reception would be dependent on which other participants were present and THEIR level of comfort with visitors with mental illnesses.

BOARD MEETING....

I stayed for most of the Board meeting. The members of the Board are friendly to each other and to visitors and set an informal, welcoming tone. I found the members to be VERY participatory and creative. They were building on a program that they are working on by brainstorming ideas and open discussion and offering suggestions and volunteering to do chores and tasks. Some of the ideas: La Fete Marquette and Acoustic Cafe; mini-film festival; flea market (via donations).

The proposed renovation: \$1,613,700. The space will be user-friendly, spacious and more rentable when completed.

If there is anything more you want me to cover, let me know, and I will follow up. Thanks.

Helen Aarli  
6/20/10

SITE VISIT: BOARD OF DIRECTORS, EAST MADISON/MONONA COALITION OF THE AGING  
Paul H. Kusuda, May 24, 2010

I attended the EMMCA Board Of Directors meeting, Dan Pechauer, President. A nominee for the Board being present and having the newly-appointed Executive present, Mr. Pechauer suggested that each person self introduce, including me.

Discussion before the meeting was called to order (I was about fifteen minutes early) was informal, friendly, and reflected good working relationships within the group. The Executive Director, appointed less than a month before, took part in the banter.

As soon as the meeting was called to order, the banter stopped, but the good atmosphere continued. The agenda was followed with participants involved in discussion and questions. During my part of the introduction process, I reviewed some of the items to be covered in my report. During the meeting, I participated a bit since I've known and participated in EMMCA activities years ago before current Board members were elected.

The Annual Meeting will be June 21 at 4:00 p.m. I volunteered to contact Barbara Quirk (Nurse Practitioner and Capital Times Columnist) as well as Dave deFelici (County Supervisor, District 16) to be participants. Also, if they accepted, I offered to ask Tom Bier (Station Manager, Channel 3, who lives in Monona) to assign a camera operator and reporter to cover the occasion since provision of adult daycare will be a burgeoning need in Dane County.

Unfortunately, I was not able to follow through because 1) that night I was served with a 95-page document making defendant in a law suit filed by United Asian Services of Wisconsin; 2) the following morning I had cataract surgery; 3) the following Sunday noon after delivering Meals on Wheels with my wife, I was in an ambulance hooked up to an IV and being administered oxygen because I had a chest pain that might have signaled a heart attack. An overnight stay with multiple blood draws and a different IV in the other arm, resulted in discharge with negative findings. The following Tuesday I had cataract surgery on my other eye. With all of the follow-up eyedrops and post-surgery examinations, my leisure time was reduced. Being a defendant is not enjoyable and so far has forced me to document reactions to 160 assertions and allegations.

1. Board members participate actively and are knowledgeable about all activities of EMMCA and East Shore Adult Day Services. At least one Board member actively provides handyman services both indoor and outdoor helping a volunteer who commits many hours of needed upkeep work. Members participate fully and feel free to raise questions relative to reports of the Treasurer or Committee Chairs, such as fundraising, program development, and long-range planning. Discussion revealed their involvement in recruiting volunteers for specific activities, including landscaping, constructing a backyard shed, fixing a washing machine to avoid purchasing a new one, improving circuit breakers, and carpentry work.
2. Board members clearly understand their roles as noted above in my introductory remarks and #1.

3. The board meeting was effective, well-run, and collegially run, enabling full and relevant discussion. The President referred to Agenda items when discussion flowed from one topic to a related second.
4. Copies of the Treasurer's Report were distributed as were the Meeting Agenda and the Executive Director's Report. The Treasurer reviewed salient points and responded to questions. As appropriate, the Executive Director reported on plans being carried out to meet questions about fiscal issues.
5. Board members are recruited through a variety of ways including notices in the Newsletter inviting participation, word of mouth, and active recruitment by current members (the newly-elected Board Member was recruited by the immediate Past President). As to diversity issues, a long-time member, who was African American and served many years, died. No person of color replaced her. At one time, members came from area churches and were mostly retired. The majority of current members are still employed, thus representing a diverse population group with few being retired. I pointed out to the Board that although diversity is looked upon as a good in itself, I believe a "front-office token minority person" is not necessarily as valuable as persons who are culturally competent. There is desirability to having racial/cultural diversity in a Board; however, cultural competence should be the goal.
6. Board meetings are published each month in the newsletter; but I do not think others attend. As is true with many meetings, non-members do not often attend regularly unless a meeting is a public hearing or is called to deal with a specific problem in which the general public has an interest.
7. I was impressed with the Board. It is more active than most previous Boards, and the interest level of each member is high. They arranged for a fund-raising golf tournament for the first time in EMMCA history. They also had a first-time fund-raising rummage sale that was successful. The Board plans to seek additional outside funding.

SITE VISIT: MONONA SENIOR CENTER  
Paul H. Kusuda, May 17, 2010

I met with Diane Mikelbank. Senior Center Director, who is the only full-time staff person. She has a half-time project assistant and a hundred or more volunteers. (My personal opinion is that more paid staff time could be used effectively to enhance programming.)

As Director and being the only full-time staff, Ms. Mikelbank has multiple responsibilities, including being volunteer coordinator to cover various services as toenail clinic, bridge and other games, reception-telephone response; record-keeper; finance manager; fund-raiser; case-management evaluator/referer to East Madison/Monona Coalition of the Aging and other agencies as appropriate; arranging program presenters for ROMEO (Retired Old Men Eating Out--an every-other-month breakfast group); and other Case Manager tasks.

A large part of the funding is from the City of Monona, none from the City of Madison or Dane County. Almost half of Monona Senior Center users are from Madison, slightly less from Monona, and the rest from Cottage Grove, McFarland, and nearby areas. Noted was the observation that participants also attend programs in other nearby facilities as Goodman Community Center, North/Eastside Senior Coalition, Madison Senior Center, and McFarland Senior Center.

The Center has a Newsletter, Monona Senior Connection, that is separate from EMMCA, the newsletter for the East Madison/Monona Coalition of the Aging; however, a collaborative arrangement exists (see Attachment A). That is also true with respect to home chores and nutrition sites.

We discussed briefly the possibility of future programming need for Hispanic and Southeast Asian clients and decided that most who would come to Monona would be of working age, so present planning was not needed. If non-English speaking Hispanic persons came to the Center, they would be referred to NESCO.

Having known Ms. Mikelbank for many years, discussion with her was easy. She is looking forward to meeting Sonya Lindquist; her relationships with EMMCA staff has been very good, and cooperation between the two agencies has been excellent.

ATTACHMENT A  
**Combined Efforts Between  
Monona Senior Center and EMMCA**

Annual Volunteer Appreciation Event

Newsletter Volunteers – prepare both our newsletters for mailing

Case Managers hold open office hours at our center monthly

Case Managers submit a monthly report to be included in our newsletter

We share resources whenever able

Senior Center refers seniors in need of case management to EMMCA

EMMCA refers seniors in need of social involvement to the Senior Center

We publicize our events and services at each other's facilities

Case managers/Day Center staff do occasional presentations at the Senior Center

SITE VISIT: EAST MADISON/MONONA COALITION OF THE AGING  
Paul H. Kusuda, May 4, 2010

I met with Sonya K. S. Lindquist, Executive Director as of May 1, 2010, and the staff of three case managers:: Molly Krause, Brighton Larson (part-time), and Judy Tegtman (part-time, but with longest tenure-14 plus years).

Ms. Krause and Ms. Lindquist provided me with a tour of the facility. Since I was familiar with EMMCA having known previous directors and served on an EMMCA long-range planning committee that recommended establishment of the older adult day care services, I was pleased to see the number of changes made to the structure itself. With volunteer help, a large porch was constructed to enable comfortable outdoor access and sitting area when weather conditions permit.

The area for provision of adult day care services provides space for group activities, socialization, and meals. I did not attend the two meal sites, Monona Meadows and Monona Hills, both about a mile or so away from EMMCA quarters. A few years ago, I attended meals at Monona Meadows and thought the food and food service were good.

Unfortunately, because of a schedule conflict, I was not able to attend the April meeting of the Board of Directors but plan to attend on May 24.

To add structure to the interview, I used the questions already prepared by SCAC staff.

There is no waiting list as such. Case managers assess each intake situation to determine urgency and fit follow-up accordingly. When immediate attention is not indicated, a first interview is usually scheduled within two weeks. Intake has doubled since last year, from about four per week to about eight. The caregiver library appeared to be sufficient to meet needs, consisting of books, videotapes, and pamphlets. About five persons per month raise questions, and about two check-out materials. Occasionally, donations are added to the collection. Insofar as long-range planning is concerned, Ms. Lindquist said that attention will be begun this Fall. Previous planning occurred in 2005.

Agency programs partially funded by the City of Madison include case management, care givers' library, outreach, information, and client assistance. EMMCA serves everyone who calls, generally within two weeks. When appropriate, referrals are made. This is especially true for people under 60 years of age who may be eligible for services from other agencies. Arrangements are such that Spanish-speaking persons are referred to North Eastside Coalition.

Clients learn about EMMCA through its marketing activities and through churches as well as word of mouth and the monthly newsletters. Further, information is provided by the Area Agency on Agency of Dane County, doctors' offices, nursing homes, and hospitals. Outreach services are made to enable independence of the elderly and accessibility to services in emergencies.



Clients learn about programs through a variety of ways: Newsletters, brochures, care-givers support group programs, word of mouth, listing of range of services and explanation by case managers, etc. The listing consists of 35 specific services including adult day care, caregiver, case management, congregate meals, elder abuse, food stamps, home chore, medical assistance, nursing, telephone reassurance, etc. (See Attachment A).

Services are available to all 60 and over in the rather-widespread area of EMMCA. Staff expressed concern about persons under age 60 who are in need of services and who must be referred to other agencies. They were also concerned about the need for senior center availability in the EMMCA area. Local transportation is another concern. Although City of Monona, City of Madison problems (transportation among them) exist, they do not appear to be as strong as in past years. Cooperation with the Monona Senior Center is excellent, but public transportation continues to be a barrier to use by residents.

Special efforts to attract under-served seniors include making presentations to groups, participating in health fairs, staffing display tables, and being part of Monona Terrace activities targeted to the elderly.

Staff noted that seniors who "fell through the cracks" include those who were not willing or not ready to ask for or accept EMMCA-provided services, clients with extreme AODA or mental health problems, persons under age 60 who must be referred to other agencies, elderly with no family members living in the vicinity to report possible service needs, and persons sent by law enforcement officers in the cities of Monona or Madison. To meet the needs, more resources are needed to care for AODA, mental health, and dementia needs of seniors. Need was seen for Alcoholic Anonymous services specifically targeting the elderly who do not relate well to AA programs attended by younger folk. There is a definite need for transportation to enable better access to services. Expansion of paratransit may not suffice. Consideration might be included in long-range planning for some kind of van transportation capability jointly with a senior center in the EMMCA area.

EMMCA programs were successful last year, but staff felt measurement was difficult. It's like trying to give numeric measurement of prevention activities. They cited appreciation expressed both verbally and in writing by both participants and family members. Some have donated baked goods and cookies. The increase in intake from about two per week to 4 or more was seen as an indication of success. Also, caregiver support group participants number from eight to ten per session, and when special presentations are announced, the number doubles.

Changes/improvements that occurred since January 1, 2009, include hiring of the new Executive Director (the former ED having moved to other employment), increase in marketing and outreach efforts, staffing of exhibit tables (particularly at senior events) organization and maintenance of resource materials, increased networking with other coalitions and Focal Points, and ongoing surveys of client and family member opinions.

Estimated number of volunteers per year and hours: More than 250 volunteers and 13,000 hours per year. Volunteers provide services including toenail clinic, home chores (both indoor and outdoor), office tasks, information technology, landscaping, music, painting, rummage sale, nutrition site tasks, lawn mowing, snow removal, household repairs, and, this year, arranging a golf-outing fund-raiser.

The agency reception area is at the entrance, and the staff were welcoming, cordial, and open. The receptionist was helpful and efficient. I asked about a brochure and she quickly found a copy for me using a recently developed directory that showed the display-case slot in which the item was placed. I believe that clients would feel comfortable the first time they visited EMMCA.

All staff were cordial and spoke freely in response to my questions. They noted that some sort of uniformity should be developed to enable easier response to information requests by funding groups such as the City of Madison, City of Monona, United Way of Dane County, and Area Agency on Aging of Dane County. For example, the concept of client contact may not be uniformly used. Requested information varied from one funding source to another. When funds come from a variety of sources, and each asks for information in different ways, staff do their best; however, they have a feeling that time has to be taken from their providing client services. (My personal opinion is that each funding agency must be made more aware that its amount is partial, not total. I believe that accountability is necessary; however, questions should not overburden staff who must provide services and information to show that funds were spent in accord with budget requests.)

# ATTACHMENT A

## SERVICE PLAN

NAME: \_\_\_\_\_ DATE: \_\_\_\_\_

	Services	Agency	Date started	Dated finished
1	Adult Day Care			
2	Burial Trust			
3	Caregiver / Caregiver Funds			
4	Case Management			
5	Congregate Meals			
6	COP Referral / COP Waiting List funds			
7	Elder Abuse / Elder Abuse Funds			
8	Elder Friend			
9	Energy Assistance			
10	Food			
11	Food Stamps			
12	Friendly Visitor			
13	Golden Care			
14	Guardian			
15	Health Aid			
16	Home Chore			
17	Home Delivered Meals			
18	Homestead			
19	Housing			
20	Legal			
21	Lifeline			
22	Medical Assistance			
23	MOST			
24	Nursing			
25	POA Finances			
25	POA Health Care			
26	QMB			
27	S.O.S. Capitol Care			
28	SSI			
29	SSIE			
31	Support Groups			
32	Telephone Reassurance			
33	Transportation			
34	Weatherization			
35	Other			
36	Fall Study Referral			