

## Older Adult Services



### PART 1 – ORGANIZATION NARRATIVE FORM

Submit Application to: [cddapplications@cityofmadison.com](mailto:cddapplications@cityofmadison.com)

**Deadline: 4pm July 1<sup>st</sup>, 2024**

*Official submission date and time will be based on the time stamp from the CDD Applications inbox. Late applications will not be accepted.*

The intent of this application and subsequent contract is for all organizations to present a set of opportunities within the umbrella of one contracted program for each service area, i.e. Case Management services, Culturally Relevant services, Information, Outreach and Referral services and Independent Living Support services. Only programs that involve different participants for that service area, separate staff, a different schedule and are not an activity occurring during or as part of another program should be considered a stand-alone program with a separate application.

Responses to this RFP should be complete but succinct. Materials submitted in addition to Part 1 - Organization Narrative, Part 2 - Program Narrative(s) and Part 3 - Budget Narrative will not be considered in the evaluation of this proposal. *Do not attempt to unlock/alter this form.* Font should be no less than 11 pt.

If you need assistance related to the **content of the application** or are unclear about how to respond to any questions, please contact CDD staff: Yolanda Shelton-Morris, Community Resources Manager [yshelton-morris@cityofmadison.com](mailto:yshelton-morris@cityofmadison.com) or Garrett Tusler, Community Development Specialist [gtusler@cityofmadison.com](mailto:gtusler@cityofmadison.com). We are committed to assisting interested organizations understand and work through this application and funding process.

If you have any questions or concerns that are related to **technical aspects** of this document, including difficulties with text boxes or auto fill functions, please contact Garrett Tusler, [gtusler@cityofmadison.com](mailto:gtusler@cityofmadison.com)

#### **A NOTE REGARDING APPLICANT TYPE**

Every agency applying for funding must submit an organizational history narrative per program detailing their agency's background, mission, and vision. If your agency is applying for multiple programs, each program application must be submitted separately with all the required submission documents (See RFP Guidelines 1.2 Required Information and Content of Proposals)

#### **Joint/Multi-agency Applicants**

For those choosing to submit a joint/multi-agency proposal, only the designated 'lead agency' is required to complete and submit responses to questions 5-9 pertaining to partnership history, rationale for partner selection, division of roles and responsibilities, anticipated challenges, and any previous collaborations or partnerships. All other agencies participating in the joint application, listed in application as 'joint/partner agency', are still required to submit their organizational history narrative, as stated above.

Legal Name of Organization:	NewBridge Madison, Inc.	Total Amount Requested:	\$ 352,394
All program(s) connected to your organization:	Program Name: Case Management Services Applicant Type: Single Agency Application Program Type: Case Management Services List Program Partner(s) (if applicable): Choose an item., , Choose an item., , Choose an item.	Amount Requested: \$	352,394
	Program Name: Applicant Type: Choose an item. Program Type: Choose an item. List Program Partner(s) (if applicable): , Choose an item., , Choose an item., , Choose an item.	Amount Requested: \$	
	Program Name: Applicant Type: Choose an item. Program Type: Choose an item. List Program Partner(s) (if applicable): Choose an item., Choose an item., Choose an item.	Amount Requested: \$	
	Program Name: Applicant Type: Choose an item. Program Type: Choose an item. List Program Partner(s) (if applicable): Choose an item., Choose an item., Choose an item.	Amount Requested: \$	
	➤ <i>If you are applying for more than four programs please contact Garrett Tusler          gtusler@cityofmadison.com</i>		
	Contact Person for application (Joint Applications - Lead Org):	Jim Krueger	Email: jimk@newbridgemadison.org
Organization Address:	1625 Northport Dr. #125, Madison, WI 53704	Telephone:	608-512-0000, Ext. 3005
501 (c) 3 Status:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Fiscal Agent (if no)	

## Organizational Qualifications – All Applicants:

### 1. Organization History and Mission Statement

NewBridge is a non-profit organization established in 2019, the result of four senior coalitions merging. The East Madison Monona Coalition of the Aging, North/East Side Senior Coalition, South Madison Coalition of the Elderly and West Madison Senior Center each existed for over 40 years prior to the merger. The coalitions received 501c3 status beginning in the mid 1970's and were initially established to promote loosely organized social activities for the elderly across the city. It soon became apparent older adults needed assistance with health issues, accessing benefits, and receiving hot meals so additional services were added. The missions of each coalition were similar: *to help older adults remain active and independent to remain in their homes*. Each coalition had a designated service area and offered most of the same services. In the 1980's one of the coalitions was awarded a grant to initiate a program for African American and Hispanic older adults in Dane county and another received funding to begin a home chore assistance program in Madison. These programs are still in existence today. Our current mission is *to provide older adults a bridge to successful aging*. In 2020, we received a 5-year grant to pilot a county-wide older adult mental health resource program. This program has been very successful in combating the growth of mental health needs among older adults. NewBridge services have been a staple in this community for a long time. Next year, we celebrate our 50<sup>th</sup> anniversary!

### 2. Describe your organization's experience implementing programming described in the Older Adult Services Policy Paper and Older Adult RFP Guidelines relevant to the programs you propose in this application. List all current older adult programs with their inception date.

For over 40 years NewBridge has provided case management services across the City of Madison for our most frail and vulnerable older adults. Our case managers help connect lower-income and marginalized residents with community resources and help them access services designed to avoid homelessness or other crisis situations, promote household stability, and maintain personal independence. Many of our clients live in low-income neighborhoods and are BIPOC or Hispanic individuals. Our agency has shown a commitment to providing case management services that are accessible and responsive to the diverse needs of our community.

We eliminate the issue of accessibility for receiving case management services because we meet with our clients in their homes, or instances of homelessness someplace close to where they reside. Our agency keeps a running list in our database of the many community resources and services available for older adults so more readily connect them and help meet their essential needs. Our case managers are able to provide most of our clients with long-term stability to help them remain independent. Over the past decade, housing has been a primary issue for lower-income older adults in Madison. Our case managers have become experts at assisting clients, an increasing number who are homeless, to obtain affordable housing. Food security and accessibility is another significant issue affecting older adults in the community. In collaboration with the NewBridge food box delivery service, our case managers are able to secure food for our clients so they have enough to eat.

Over the last 30+ years, we have developed partnerships with numerous housing developments and community centers to provide case management services. This has allowed us to reach lower-income older adults in concentrated areas of Madison. In 2019 NewBridge began a partnership with The Hmong Institute (THI), funded by Dane County, to provide training and oversight so THI could hire staff to provide case management services for Southeast Asian older adults that meet county standards. With limited funding for case management services, we don't have the capacity to reach everyone in need of our services. We currently collaborate with a handful of older

adult housing developments on the west, south, and northside as well as downtown and at community centers. A goal of this proposal is to expand our reach and increase our collaborations in/near the equity priority neighborhoods identified by the city.

We have a number of practices in place to address cultural and language barriers that impact potential clients. The NewBridge case management staff is racially, culturally, and linguistically reflective of the communities we serve. For over 20 years there have been two Bilingual, Spanish-speaking case managers on our staff with at least one being Hispanic. During the last five years, we adapted our hiring materials and qualifications to be more culturally relevant, and sensitive to gender identities, to further increase the diversity of our agency and case management staff. We have assessed the language used in our case management materials and our process of communicating and developing service plans with clients to ensure they are both culturally relevant and inclusive. Our case managers often read and explain benefit papers and forms to clients who do not read English or are at lower comprehension levels. We arrange language translation services in instances when we are not present. An example of our ability to adapt occurred in our partnership with THI. The case management services conducted in the Hmong community were different from what our agency was providing for other clients so we made adaptations on our end to reflect important cultural differences. These are all important elements we consider in providing quality case management services.

Our case management staff use a client-centered approach that has been very effective with clients. We meet them where they are at. Time is spent building relationships with clients and learning about and understanding the client's beliefs, values, customs and social practices that shape their personality. In some instances, additional time is needed to develop trust with a client before they will open up. From experiences working with BIPOC and LGBTQ+ older adults, our case managers can acknowledge the disparities and unique challenges these individuals face and the sensitivity of each client's situation. All our clients complete an assessment developed by Dane County that assesses their psychosocial and functional needs. Our staff have conversations with clients to help them recognize and assess current areas of their life, past and present, related to their physical and mental health. The client then identifies areas of concern they want to address and staff helps them write an individualized service plan, and set personal goals based on their current situation, using the client's own words. NewBridge is well-known among service providers in the community and has established many long-term working relationships.

Our case managers empower clients with information and help them navigate the resources and services they need to guide them to address the challenges they face. We serve as advocates, assisting clients in accessing essential resources and coordinating various aspects of their care, and follow-up on the quality of services received. Our staff provide clients the tools to handle their needs on their own the next time and many of them have been able to do so. Our case management staff has vast experience and we bring our lived insight, generational wisdom, community knowledge, and learnings from previous client cases into all aspects of our work. They are provided extensive training to ensure they have the knowledge and skills to competently serve our clients. Each year case managers are required to attend an ethics and boundaries training. Our case management program takes great pride in meeting the standards for case management services as defined by the Area Agency on Aging. NewBridge staff was involved in the development of these standards. The standards are part of case management staff orientation and the program supervisor conducts an annual review to ensure everyone is following them.

3. Describe any significant changes or shifts at your agency since 2022 or anticipated changes in the next two years. For example, changes in leadership, turnover of management positions, strategic planning processes, expansion or loss of funding. What, if any affects have or will these changes make regarding the agency's ability to provide proposed services? If there are no changes, write "No changes".

In the last two years, our grant funding has increased by over \$189,000. NewBridge has received program budget increases and a cost of living adjustment (COLA) from Dane County for the past two years and a COLA from the City of Madison this year. These increases have helped us raise the level of pay for our staff but we struggle to remain competitive with salary and benefit packages. In the past two years we have experienced turnover at two management positions (case management, and culturally relevant services) because we could no longer meet their salary requirements. We are in the process of completing a strategic plan for 2025-2027, our second one as NewBridge. All staffing changes are setbacks because it takes time and resources to hire and train new staff but we do not expect these changes to affect our ability to provide our proposed services in those areas.

4. Describe your organization’s experience, education, and training requirements for management and older adult services program staff. Include how you support these requirements and other professional development opportunities.

Management staff is required to have a Bachelor’s Degree or equivalent experience and two years’ experience in the older adult field. Previous management experience is preferred. Our current management team has from 4-16 years of experience in the management of older adult services programming. The qualifications vary for older adult services program staff. Case managers are required to have an Associate’s Degree in a field related to health and human services. Preferred requirements are a Bachelor’s or Master’s Degree. All members of our case management team have a Bachelor’s or Master’s degree in social work. Full-time positions for our other service areas require an Associate’s Degree or equivalent experience. A Bachelor’s Degree is preferred. For our part-time positions for our other service areas, the minimum requirements are two years’ relevant experience, no degree required. Preferred requirements are a Bachelors or Associates Degree. Management staff are provided training by one of the two agency directors. Program staff are trained by their program manager. Additional training opportunities are offered for all managers. Depending on a manager’s prior experience they may be required to attend additional leadership training. A couple of our programs require additional training to maintain certification or meet funder requirements. Staff are encouraged to seek and request training opportunities related to their program work or for professional development. NewBridge has an annual staff training budget, be it limited, to support training requirements. There is also a budget, be it limited, for all-staff Diversity Equity Inclusion training. Staff are permitted to pursue a degree or advanced degree as long as it does not hinder their ability to effectively do their job.

**JOINT/MULTI-AGENCY APPLICATIONS ONLY – Lead Agency Applicant responses**

**Program name:**

**Program type:** Choose an item.

**List All Joint/Partner Applicants for this Program:**

5. Provide a brief overview of your partnership history with the collaborating agency/agencies. When and how did this partnership begin, and what collaborative initiatives have you undertaken together in the past?
6. Explain the rationale behind choosing to partner with the specific agency/agencies identified in this application. What unique strengths or resources does each organization bring to the partnership, and how do these complement one another?
7. Describe the division of roles and responsibilities between your organization and the collaborating agency within the proposed program. How will each partner contribute to program design, implementation, and evaluation?

8. Outline any challenges or barriers you anticipate encountering as a result of the partnership, and how you plan to address these collaboratively.
  
9. Detail any previous collaborations or partnerships with other organizations serving older adults, if applicable. What lessons or insights have you gained from these experiences that will inform your approach to this partnership?



# Older Adult Services

## 2024 Request for Proposals

Submit Application to: [cddapplications@cityofmadison.com](mailto:cddapplications@cityofmadison.com)

**Deadline: 4:30 p.m. (CDT) on July 1st**

*Official submission date and time will be based on the time stamp from the CDD Applications inbox. Late applications will not be accepted*

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Part 2 – Program Narrative Form MUST be completed for EACH PROGRAM for which you are asking for funds.

Responses to this RFP should be complete but succinct. Materials submitted in addition to Part 1 - Organization Narrative, Part 2 - Program Narrative(s) and Part 3 - Budget Narrative will not be considered in the evaluation of this proposal. *Do not attempt to unlock/alter this form.* Font should be no less than 11 pt.

### **Joint/Multi-Agency Applicants**

Only the designated 'lead agency' is required to submit the Program Narrative form on behalf of all identified partners listed in the application for applicants choosing to apply through a joint application.

If you need assistance related to the **content of the application** or are unclear about how to respond to any questions, please contact CDD staff: Yolanda Shelton-Morris, Community Resources Manager [yshelton-morris@cityofmadison.com](mailto:yshelton-morris@cityofmadison.com) or Garrett Tusler, Community Development Specialist [gtusler@cityofmadison.com](mailto:gtusler@cityofmadison.com). We are committed to assisting interested organizations understand and work through this application and funding process.

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Program Name:	Case Management	Total Amount Requested for this Program:	\$ 352,395
Legal Name of Organization:	NewBridge Madison, Inc.	Total amount Requested for Lead/Single Applicant	\$ 352,395
Legal Name of Partner(s) (Joint/Multi-Agency Applicants only):		Total Amount Requested for Partner 1:	\$
		Total Amount Requested for Partner 2:	\$
		Total Amount Requested for Partner 3*:	\$
Program Contact:	Jim Krueger	Email:	jimk@newbridgemadison.org
		Phone:	608-512-0000, Ext. 3005
Program Type: Select <b>ONE</b> Program Type for this form.			
<input checked="" type="checkbox"/> <b>Case Management Services</b> <input type="checkbox"/> <b>Culturally Relevant Services</b> <input type="checkbox"/> <b>Independent Living Support Services</b> <input type="checkbox"/> <b>Outreach, Information, and Referral Services</b>			
<p><b>PLEASE NOTE:</b> Separate applications are required for each distinct/stand-alone program. Programs are considered distinct/stand-alone if the participants, staff and program schedule are separate from other programs, rather than an activity or pull-out group.</p>			

\*Click or tap here to enter text.

## 1. PROGRAM OVERVIEW

- A. Need: Briefly describe the need in the City of Madison for the programs included in this application, including the source of the data used in your response.

Several factors support an increased need for case management services for older adults, such as the rise in the aging population, chronic conditions, substance use disorder, mental health and disability. It's estimated there are over 50,000 people aged 55+ in the City of Madison. The U.S. Census Bureau estimates that nearly 26% of Wisconsin's population will be 60 and older by 2030, an increase of over 36% from 2012.

Case management services are needed in Madison to help older adults navigate the complex systems and numerous forms required for them to age successfully. NewBridge continuously has older adults calling for help because they are in crisis. They feel frustrated and confused, unable to access resources or services on their own, and have no one to help them. They are overwhelmed by the number of options available or the enormous amount of paperwork both of which they have difficulty understanding. As we age it becomes more difficult for older adults to manage their basic needs and daily living. Many older adults in our case management program have experienced different levels of cognitive impairment that impact their ability to make decisions and keep organized. Some are unable to sign up for benefits because it is computerized, even though many older adults get overwhelmed trying to use a computer or smartphone. Disparities such as education level, physical disabilities, language barriers, lack of understanding of cultural differences,



or acceptance of sexual orientation are also major obstacles that discourage individuals. Without someone to assist them many low-income and less-educated older adults will not make ends meet. Many older adults will simply give up. They won't be able to pay their bills and fall into financial debt. Those without family or care partners to help, or who have lower incomes, will lose their medical benefits and some will even lose their homes. For eight years NewBridge had a waitlist for older adults wanting case management services. That has ended, for now, but only because we received additional funding to hire another case manager. With a rising older adult population has come an increased demand for services.

Case managers are trained experts who facilitate client wellness and autonomy through advocacy, assessment, planning, education, resource management and service facilitation. They are often the only contact an older adult has and are instrumental in connecting the older adult to community resources and services. Our case managers help clients navigate those complex systems and access essential resources such as food and housing to improve their well-being. They help clients decipher medical and utility bills and ensure clients have transportation to doctor's appointments. Our case managers work with the client to set and achieve personal goals to address their critical needs. The person-centered care approach we use involves managing the care coordination of services to address a client's specific needs and preferences in a cost-effective, safe manner to promote optimal outcomes.

Case management services are necessary because it improves our older adult clients' access to services, drives better outcomes, lowers their costs, and provides smoother transitions of care across the various social service systems. NewBridge case managers are skilled at building relationships with other service providers and networks. We help remove barriers for clients in obtaining essential resources such as housing, benefits assistance, medical care, financial and legal resources and life skills acquisition. We provide clients the tools that empower them to handle the issue themselves in the future. But if that doesn't work, or they don't have the capacity to do so, we are there to help with their needs as long as necessary.

The sources of data we referred to for the program overview

Statistical Atlas – Age and Sex in Madison, WI

<https://statisticalatlas.com/place/Wisconsin/Madison/Age-and-Sex>

Case management models: 4 Unique evidence-based approaches

<https://www.bonerratech.com/blog/case-management-models>

What is case management in social work: A complete guide

<https://www.societ.com/blog/nonprofit-resources/what-is-case-management-in-social-work-a-complete-guide/>

EQT by Design Final Report

- B. Goal Statement: What is the goal of your program and how does it align with the scope of work described in the RFP guidelines?

Our case management program provides eligible older adults in Madison the support they need to achieve and maintain optimum independence. For almost 50 years NewBridge, and the four senior coalitions prior to our merger, have connected lower-income older adults to resources and services that meet their immediate or basic needs. Our case managers' role is to advocate for our clients, assist with the coordination and monitoring of the

services received, teach them how to advocate for themselves, and support them in accessing services on their own the next time.

The next three years, our goal is to increase the number of BIPOC, immigrant, and LGBTQ+ older adults we serve who reside in or around the equity priority areas of Madison. These individuals have had to overcome many disparities in life. We help clients address conditions (social determinants of health) that affect a wide range of health, functioning, and quality-of-life outcomes and risks. Our goal is to help them to increase economic stability, improve personal health by increasing health literacy, get access to quality health care, develop social/community connections, and address other needs that will allow them to live safely, independently, and with dignity.

C. Program Summary (3-5 sentences):

The NewBridge case management program provides lower-income older adults the support, resources, and community services they need to safely remain in their homes. Our case managers conduct home visits to assess the individual's needs and together with the client complete a service plan, and help them set goals. We provide referrals to help meet their needs (housing, food, financial assistance, health insurance, home assistance) and follow up with each client regularly. There are three bilingual case managers on our staff (Spanish speaking) and we partner with The Hmong Institute to serve Southeast Asian older adults living in Madison.

**2. POPULATION SERVED**

A. Proposed Participant Population: Describe the intended service population that will be impacted by this program (e.g., location, ages, race/ethnicities, income ranges, English language proficiency, if applicable etc.) AND how this population was involved in the development of this program proposal.

Our case management program serves lower-income older adults age 60+, or 50+ with Medical Assistance (MA) benefits. To be eligible, the client's income must be no greater than 300% of the federal poverty level. For almost 50 years we have provided case management services for individuals all across the city of Madison, including BIPOC, immigrant, and LGBTQ+ older adults. In 2023, about 79% of our clients were Caucasian (10% of those were Hispanic), 15% of clients served were African American/Black and 5% Southeast Asian. We expect the number of African American/Black, Hispanic, Southeast Asian and LGBTQ+ case management clients to grow substantially in the next few years. Clients are asked to give feedback about the structure and services provided by case management as part of their annual goal review. One recent suggestion was more contact with clients using social media applications.

B. 2023 Participant Demographics (if applicable):

Race	# of Participants	% of Total Participants
White/Caucasian	854	79%
Black/African American	167	15%
Asian	54	5%
American Indian/Alaskan Native	5	0.5%
Native Hawaiian/Other Pacific Islander	2	0.25%
Multi-Racial	0	0%
Balance/Other	2	0.25%
Total:	1084	
Ethnicity		
Hispanic or Latino	112	10%
Not Hispanic or Latino	972	90%
Total:	1084	
Gender		

Man	434	40%
Woman	648	60%
Non-binary/Gender/Queer	0	0%
Prefer Not to Say	0	0%
Total:	1084	

Comments (optional): none

- C. Language Access and Cultural Relevance: Please describe how the proposed program will serve non-English speaking older adults. Describe how the proposed program will be culturally relevant to the population served.

For over 35 years NewBridge has provided case management services for Hispanic older adults in Madison. We have three case managers fluent in Spanish on our staff. The last four years we have partnered with The Hmong Institute (THI) to provide case management for Southeast Asian older adults. THI has four bilingual case managers who speak Hmong, Laotian, Thai, Tai Dam, Nepalese. THI Case Managers also provide written material to the clients in the language choice for the client.

Our staff is racially, culturally and linguistically reflective of the communities we serve. Staff use a client-centered case management approach and assist individuals to develop their own service plan and set personal goals. Time is spent building relationships with clients and learning about and understanding the client’s beliefs, values, customs and social practices that shape their personality. In some instances, additional time is needed by case managers to develop trust with a client or to understand and acknowledge the individual’s cultural customs and the disparities they have faced. These are important elements in the development of a client’s service plan.

Over the last few years we have reviewed the inclusivity of our case management process. Case management services being conducted in the Hmong community were different from what our agency was providing for other clients and some adaptations were made on our end. Our staff have reviewed the questions (and the wording used) asked during the intake process and frequently discuss how to make the functional assessment more client friendly. We continually assess the language used in our program materials and in the facilitation of activities that are inclusive of all members of the community. Our staff search for educational materials that are written in Spanish and are friendly for all levels of learning. Our case managers read benefit papers/legal forms to clients who are illiterate or at lower reading levels. Staff arrange for language translators for clients at doctors’ appointments or in other instances when we cannot be present. On occasion we have assisted clients speaking other languages and used the language line and translator services available in Madison.

- D. Recruitment, Engagement, Intake and Assessment: Describe your plan to recruit, engage and address barriers to participation for the identified service population. Explain the intake and/or assessment procedure you will use for this program.

When we had a waitlist of referrals we didn’t want to recruit people because most individuals contact us when they’re in a crisis situation. For the first time in almost a decade, we can actively recruit clients. Our plan for recruiting and engaging potential case management clients involves a couple of different methods. In 2025, NewBridge staff, representing all of our service areas, will increase our presence in neighborhoods throughout Madison. Staff will join Neighborhood Resource Teams (NRT) throughout the city and promote our case management services to both team members and residents. We will reach out to neighborhood centers, lower-income housing units, churches, clinics, community leaders, and other providers who service the area to develop or strengthen partnerships. Special emphasis will be placed on enhancing collaborations with agencies that serve the African/American, Hispanic, and LGBTQ+ older adult communities in Madison. NewBridge will be training a number of older adults in leadership skills that they will use to promote our various services and encourage their peers to become engaged in the programs beneficial to them.

Our case management program will face a few barriers when recruiting potential clients. The first will be a resistance to the federal requirement of gathering personal, confidential information from clients in order for us to help them access services and resources. There may be a hesitancy among some individuals to answer our intake process questions and disclose their personal/ financial information because of a general mistrust of the government. Many individuals are resistant to providing such information, especially if they are unfamiliar with our agency. Clients may get frustrated by all the initial paperwork and the functional assessment which are necessary but time-consuming. Some individuals get frustrated with all the assessment questions, or they hit too close to home and decide they no longer want help. In other instances, the individual needs immediate help with something that may take time to access. These can be deterrents for potential clients.

Our agency uses the following intake and assessment procedures for case management:

All older adults who receive our case management services must be self-referrals. The process begins with the individual contacting our intake line staffed by our case management team. The first step of intake is to confirm their eligibility: Name, Age, rule out if they are working with LTC, CCS, or other Medicaid-funded programs, income/finances, address or current location - do they reside in our Madison service area? Exception: Bilingual Hispanic and Hmong Case Management which is Dane County residency. The individual must be on the call or the caller must have permission to refer the client. Next, we find out why they are seeking case management services and ask them to identify their areas of concern. The intake case manager then writes a detailed note describing the conversation and mails an "Intake Confirmation" letter to the individual. Once the individual is accepted as a client, they are assigned a case manager. The case manager schedules an appointment to meet with the client that typically takes place at the client's home. At the introductory meeting, the client receives a welcome packet with a handout about NewBridge services, materials explaining the case management services and initial client forms to be completed. The case manager reviews these items with the client. Upon completion, the case manager conducts a functional assessment of the client. This tool measures instrumental activities of daily living such as bathing, eating, mobility, meal prep, home chores, and medication management. It also measures the individual's communication and cognition levels, mood status, mental health behaviors, substance use, and suicide risk. The results of the assessment help to determine and prioritize a client's area(s) of need.

### **3. PROGRAM DESCRIPTION AND STRUCTURE**

- A. Activities: Describe your proposed program activities. If applicable, describe any evidence, research, proven curriculum, standards, or documentation of promising practice that supports the programming or service proposed.

Our client-centered case management services begin with the identification and engagement of clients and continue through the assessment and care planning steps, culminating in monitoring the action steps described in the care plan and ultimately achieving the targeted outcomes in a measurable manner. Here is an outline of how the case management process works. Program activities include:

- Individual requests case management assistance.
- Client Intake: Case manager gathers initial information to verify eligibility and determine what assistance is needed.
- The older adult is assigned a case manager.
- Assessment: Case manager conducts a functional assessment and information is gathered to determine whether the person needs on-going case management services.
- Case manager work with a client and their family, if applicable, to assess that person's unique needs and the issue(s) to address.
- Case manager provides information to help the client in developing a service plan and know what resources are available.
- The client works with the case manager to develop a client-centered service plan.
- A course of action for service is initiated.

- Case manager helps connect the client to resources and services and advocates for the client as needed.
- Case manager writes case notes to reflect the work completed on the service plan developed with the client.
- Case manager works with the client, their family, and other professionals to monitor the client’s changing needs and adjust services accordingly.
- Client maintains continued contact with the case manager.
- An annual reassessment is conducted.
- Reports are completed as specified in the City of Madison contract.
- Closed Case: The client withdraws from the program or longer needs client-centered case management services.

NewBridge uses a client-centered, community-based approach and works with individuals to develop a service plan and set personal goals to meet their immediate and basic needs. Our case managers make home visits and phone calls, attend appointments, serve as authorized representatives, refer clients to community resources providing specific or higher levels of care, and encourage clients to be proactive in caring for themselves. Because our case managers visit older adults in their own homes, they can monitor the home environment and encourage activities such as medication reviews, self-advocacy with doctors and pharmacists, compliance with doctors'; and pharmacists' orders, and safe home modifications. Our case managers are there to assist, offer support, guide, advocate (and intervene if needed) as clients work through the complex social service and health care systems to seek assistance. We also suggest resources to family members or care partners to address their own needs.

Here are some resources on the client-centered model used by NewBridge for case management.

Case management models: 4 Unique evidence-based approaches

<https://www.bonterratech.com/blog/case-management-models>

What is case management in social work: A complete guide

<https://www.societ.com/blog/nonprofit-resources/what-is-case-management-in-social-work-a-complete-guide/>

- B. Program/Service Schedule: If you are proposing to provide a program at more than one location and the program schedule is the same for all locations, please list all of the locations in the “Location(s)” cell in Table 1 below. If the program schedules vary amongst locations, please complete Table 2 and the question following the tables.

Table 1

Day of the Week	Start Time	End Time
Monday	8:00 am	4:00 pm
Tuesday	8:00 am	4:00 pm
Wednesday	8:00 am	4:00 pm
Thursday	8:00 am	4:00 pm
Friday	8:00 am	4:00 pm
Saturday		
Sunday		

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Table 2 (optional)

Day of the Week	Start Time	End Time
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday		
Sunday		

If applicable, please list the third location and any subsequent locations. Include the specific program schedule(s) differences as compared to the programs included in the tables above.  
n/a

**4. ENGAGEMENT COORDINATION AND COLLABORATION**

- A. Family Engagement: Describe how your program will engage caregivers, guardians, and/or family of participants in the development of this proposal, and how they will be involved in the implementation and assessment of the program activities.

The case management client must give permission for a caregiver, guardian or family member to be involved in the implementation or assessment of the services provided. In some instances, there is no caregiver or family involved in the older adult’s life. If permission is granted to involve others it is still up to the client to decide the level of their involvement. There are a variety of things individuals can do to help the older adult complete their service plan. When families/others are involved our staff is in regular communication with them. Through the process of assisting their spouse/parent/grandparent we regularly receive unsolicited feedback on the structure of our program and the type of assistance we provide. This information is shared with the program supervisor and changes that are within state mandated guidelines, are sensible/realistic and we have resources to support, get implemented.

- B. Neighborhood/Community Engagement: Describe how your program will engage neighborhood residents or other relevant community stakeholders in the development of this proposal, and how they will be involved in the implementation and assessment of the program activities.

Case management staff host regular office hours at various locations across the City of Madison. During these sessions, residents are informed about our services and ask questions and provide feedback. When possible, we integrate their suggestions for change into our services. Neighborhood residents would not have a role in implementing case management services because of confidentiality rules and HIPAA Law. They can however continue to help assess what is being provided and how services are being delivered during office hours. We partner with numerous service providers to help our clients meet their needs. As we go through the implementation process

we identify the things that work well and what doesn't. Our case management leadership are continually seeking feedback from community partners on ways we can make our services even better. In 2025, we will resume semi-annual meetings with our CDA housing partners that stopped the COVID-19 pandemic.

- C. **Collaboration:** Please complete the table below and respond to the narrative questions regarding program collaboration with community partners.

**Note:** Agencies listing a partner/collaborator below in addition to any 'joint/partner applicant' (if applicable) for their program should include a letter of commitment/support from the agency partner highlighting the ways in which the agency will support the program. List any additional partners, their role & responsibilities, contract person and MOU information (if applicable):

Partner Organization	Role & Responsibilities	Contact Person	Signed MOU (Yes/No)?
Goodman Community Ctr	Goodman Community Center: provides older adults with meals & activities and socialization. NB provides a monthly office hour at the center. NB and Goodman staff collaborate on providing referrals, information, and support to and for the older adults.	Gayle Laszewski	No
CommonBond Communities – Point Place Apartments	CommonBond Communities: NB assists in filling the supportive housing units at Point Place and supports those tenants including eviction prevention.	Jamila Fisher	Yes
SSM Health	SSM Health: provides Home Delivered Meals/Meals on Wheels to older adults living in Madison. NB conducts the required assessments which certify the eligibility for the older adult to receive the meals. NB and SSM Health collaborate closely on reaching these vulnerable older adults and ensuring their nutritional needs are met and maintained.	Sarah Karleskint	No
City of Madison - CDA	Romnes Apartments (CDA) provides subsidized housing to disabled and/or older adults. NB provides monthly case management outreach at Romnes. NB CM works closely with Romnes staff, with client's permission, to provide supportive services.	Michelle Schwartz	No
The Hmong Institute	THI provides Case Management services to clients of SE Asian descent in a culturally and linguistically sensitive manner. NB CM works with THI to provide CM	Peng Her	Yes

	training, support, oversight and guidance.		
--	--	--	--

How do these partnerships enhance this proposal?

The partnered agencies enhance the quality of life for older adults. The safety, well-being, and housing status of an older adult may be impacted without the intervention of this program. Our partnerships increase resources like staffing, expertise, building space, and more. Our services are improved and expanded with our partnerships. Older adults learn about our organization through our partnerships and we have a higher level of trust with older adults because of our partnerships.

What are the decision-making agreements with each partner?

Both the partners and NewBridge work collaboratively with each other to provide supportive services to the mutual clients we serve. Open communication is a key component between the agencies and NewBridge. NewBridge case managers both receive and make referrals to the agencies for client services; with the client's approval, NewBridge case managers keep open communication with the agency regarding the client. For THI, NewBridge provides the oversight and training for their case manager. These case managers are natives or grew up in the cultures served by THI so are able to communicate effectively and in a supportive and culturally respectful manner with the THI clients.

- D. Resource Linkage and Coordination: What resources are provided to participants and their families/loved ones by your proposed program/service? How does the program coordinate and link participants to these resources?

Our case management program has a comprehensive list of resources that we use to help connect clients to essential needs such as food assistance, clothing, furniture, home chore services, medical equipment, housing assistance, financial assistance, Medicare/Medicaid, utility bill relief, treatment, support groups and much more. Our list is updated regularly. When a client (or a caregiver) needs a resource the case manager informs them of what is available. Then either the client/caregiver or case manager makes the necessary arrangements to access the resource(s).

**5. PROGRAM QUALITY, OUTPUTS, OUTCOMES AND MEASUREMENT**

- A. Program Outputs - Unduplicated Older Adults and/or Program Hours

Total Annual Unduplicated Older Adults served through proposed program/service: Our goal is to serve 1,600 unduplicated older adults annually in our case management program.

Total program/service hours annually: We anticipate providing 14,705 direct service/case note hours annually for our case management clients.

- B. Program Outcomes

Please describe the data and the data source used to choose your outcome objectives.

The program outcomes for case management were predetermined by the city of Madison as part of the RFP.

Using the drop-down menu, please select the Program Outcome #2 for your proposed program(s), listed under each respective funding priority found in RFP Guidelines 1.6 Measurements of Success, that you will track and measure. Complete the table(s) below.



<b>Outcome Objective #1:</b> 75% of clients receiving case management services will report that the services/assistance they receive help them achieve the quality of life that they desire.				
<b>Performance Standard</b>	<b>Targeted Percent</b>	75%	<b>Targeted Number</b>	120
<b>Measurement Tool(s) and Comments:</b> In past years, Dane County Human Services has conducted a county-wide case management program evaluation. They randomly choose 10-15% of our clients to participate in the survey. The survey measures the quality of services received and the satisfaction level of assistance received from case management staff. In the odd years, NewBridge will conduct a similar survey of 160 unduplicated clients. Out of 160 client reviews, 120 will agree that the case management programs helped them achieve the quality of life that they desire.				

<b>Outcome Objective #2:</b> 75% of clients receiving case management services will access two or more of the resources identified in their Individual Service Plan (ISP).				
<b>Performance Standard</b>	<b>Targeted Percent</b>	75%	<b>Targeted Number</b>	120
<b>Measurement Tool(s) and Comments:</b> NewBridge will conduct random case reviews of 160 unduplicated clients. Out of 160 client reviews, 120 will have accessed 2 or more resources. The case review will be done through our client database, PERKS.				

<b>Outcome Objective #3 (optional):</b>				
<b>Performance Standard</b>	<b>Targeted Percent</b>		<b>Targeted Number</b>	
<b>Measurement Tool(s) and Comments:</b>				

If necessary, add additional outcome objectives, performance standards, targeted percent, targeted number, and measurement tools:

- C. Data Tracking: What data tracking systems are in place or will be in place to capture the information needed to document demographics, program activities, outcome measures and expenses?

We use a database system that we refer to as PERKS. It's a cloud-based system that was designed specifically for our organization. It captures demographic information, intake, case notes, service plan, referral details, which services they are accessing, areas of concern, living situation, and more. This database allows us to pull specific data and reports from PERKS such as trends of services needed, case note hours, and client demographics.

## 6. PROGRAM LOCATION

- A. Address(es) of the site where programs/services will occur:

Our case managers provide services across the entire City of Madison. The majority of the time appointments are scheduled in the client's home or at other mutually agreed upon locations (library, senior center, etc) if the client is homeless or the home environment is not conducive for a client meeting. Occasionally appointments occur at one of our three offices (Northport Drive, Raymond Road, Cottage Grove Road). NewBridge is currently providing services in some of the equity priority areas but has not reached everyone who could benefit from our services. Now that our case management program is adequately staffed we can be more proactive and conduct more targeted outreach.

- B. Drawing upon the insights outlined in RFP Guidelines 1.5 Equity Priority Areas, please elaborate on your agency's strategies for integrating this information into the development of your proposed program/service. Furthermore, please explain how your program/service will effectively reach and support individuals residing within or in close proximity to Equity Priority Areas. If applicable, please list any collaborations with existing agencies dedicated to serving and/or operating within the identified areas.

NewBridge will designate 1-2 of our 16 case managers to work in the neighborhoods of each equity priority area: Madison west, southwest, near west, south, downtown, near east, north, and northeast. Case managers will serve on the Neighborhood Resource Teams (NRT's) in those areas to promote our services, and learn about the needs of older adults in the neighborhoods, where they live and places they frequent. We will develop partnerships with entities such as clinics, local businesses, neighborhood centers, churches, older adult housing apartments, and other groups serving those areas and cross-promote one another's services. A designated case manager will conduct regular office hours at locations in close proximity to the neighborhood. We will staff informational tables at neighborhood events and present to local groups.

NewBridge currently hosts regular office hours at various locations and will expand our reach to more neighborhoods. This has created good opportunities to get to know residents and build trust. Case managers listen to their needs, provide information, education, and community resources about issues affecting them. We follow up with them about information requests and demonstrate our commitment to help. Staff conduct our case management visits with clients in their homes or at a location close to eliminate transportation barriers. Our diverse case management staff assists older adults from various socioeconomic backgrounds, cultures, and ethnicities. Our client-centered approach to case management allows us to provide services that are culturally and linguistically responsive to the specific needs of each person. Staff will be more physically present, participate in neighborhood events, and communicate with older adults in an informal manner to establish rapport and get to know one another.

We have a few existing collaborations in the equity priority areas. Our staff currently serve older adults at the Point Place apartments near the Oakbridge Condominiums. NewBridge conducts monthly outreach at Romnes Apartments (CDA) where a case manager is available to answer residents' questions, conduct intake, provide assistance with aging needs, and provide resource information. Our case managers work closely with the CDA staff at Romnes as partners in providing supportive services for the residents. We have partnered with the Allied Drive food pantry to deliver food boxes to older adults in the area. NewBridge is renting space at the Madison Labor Temple, located near Brams Addition and Burr Oak, as a location to meet with clients. Our staff will soon begin collaborations with Fisher/Taft and Southridge Apartments and provide services in those areas.

NewBridge case managers will provide client-centered case management services with a culturally sensitive and linguistically appropriate approach. Case managers have training in culturally sensitive service delivery including being respectful of generational trauma and how this can impact an individual.

Our case managers assess needs and work with the client/family/natural support system to identify and develop the client-centered service plan. Case managers explore, refer, and connect older adults to services that are not only available but also culturally appropriate for the individual client, in order to help meet their identified needs. Such resources include but are not limited to: home care agencies that provide Spanish speaking employees, churches or faith-based organizations that are willing to work with undocumented persons for financial assistance, Black-owned or led organizations that focus on providing services to Black older adults, etc. Case managers monitor the effectiveness of the referral or services and adjust accordingly. The case manager also works with the older adult as an advocate.

## **7. PROGRAM STAFFING AND RESOURCES:**

- A. Program Staffing: Full-Time Equivalent (FTE) – Include employees, AmeriCorps Senior members, and Interns with direct program implementation responsibilities. FTE = % of 40 hours per week.

\*Use one line per individual employee

Position Title	Qualifications or Required Training	Location(s)
Case Manager Supervisor	associate, bachelor, or master's degree in health or human services	Citywide
Case Manager Associate Supervisor	associate, bachelor, or master's degree in health or human services	Citywide
Case Manager	associate, bachelor, or master's degree in health or human services	Citywide
Case Manager	associate, bachelor, or master's degree in health or human services	Citywide
Case Manager	associate, bachelor, or master's degree in health or human services	Citywide
Case Manager	associate, bachelor, or master's degree in health or human services	Citywide
Case Manager	associate, bachelor, or master's degree in health or human services	Citywide
Case Manager	associate, bachelor, or master's degree in health or human services	Citywide
Case Manager	associate, bachelor, or master's degree in health or human services	Citywide
Case Manager	associate, bachelor, or master's degree in health or human services	Citywide
Bilingual Case Manager	associate, bachelor, or master's degree in health or human services	Citywide
Bilingual Case Manager	associate, bachelor, or master's degree in health or human services	Citywide
Bilingual Case Manager	associate, bachelor, or master's degree in health or human services	Citywide
Intern	associate, bachelor, or master's degree in health or human services	Citywide

Volunteers: If volunteers will have direct contact with program participants, how are they vetted, trained and supervised?

NewBridge collaborates with UW-Madison, UW-Whitewater and Edgewood College to provide internships in our case management program. The school vets the interns. The interns receive an orientation to our case management program and shadow our staff for a few weeks. One of our case managers, with a masters in social work, is assigned their supervisor. The intern is assigned a number of clients to work with and have weekly meetings with their supervisor to review their work with the client, educate and provide feedback.

- B. Other program Resources/Inputs (such as program space, transportation or other resources necessary for the success of your program):

Additional resources necessary for the ultimate success of this program would include transportation funds for clients. Examples of transportation needs include viewing apartments when needing/changing housing and last-minute appointments when RSVP services are not available. Discretionary funding is needed to help clients with basic household needs, toiletries, mattresses and to pay security deposits. Case managers staff need additional

funds to cover the cost of work cell phones and a cell phone plan with internet access. Many of our clients don't have a computer or internet access. This would make it easier to look up resources and submit online applications, to access benefits and services for clients, while meeting with them at their homes.

## **8. BUDGET**

- A. The budget should be submitted with the proposal using the template provided in an Excel document or a PDF. There are five tabs within the Excel spreadsheet: Cover Page, Organization Overview and one sheet for the Program Budget for each program. The Cover Page, Organizations Overview and relevant Program Budgets must be submitted with this document for a proposal to be complete.

### Joint/Multi-Agency Applications

- B. All Joint/Partner Agencies listed on page 2 of this Program Narrative form must also complete a Budget Narrative form to be submitted alongside all required materials.

The budget template and budget narrative can be found on the [CDD Funding Opportunities website](#).

## **9. If applicable, please complete the following:**

- A. Disclosure of Conflict of Interest  
Disclose any potential conflict of interest due to any other clients, contracts, or property interests, e.g. direct connections to other funders, City funders, or potentially funded organizations, or with the City of Madison.
- B. Disclosure of Contract Failures, Litigations  
Disclose any alleged significant prior or ongoing contract failures, contract breaches, any civil or criminal litigation.

**APPLICATION FOR 2024 OLDER ADULT SERVICES PROGRAMS**

**1. ORGANIZATION CONTACT INFORMATION**

Legal Name of Organization	NewBridge Madison Inc
Mailing Address	1625 Northport Drive #125, Madison, WI 53704
Telephone	608-512-0000
FAX	608-299-0700
Director	Jim Krueger
Email Address	jimk@newbridgemadison.org
Additional Contact	Katie Gallagher
Email Address	katieg@newbridgemadison.org
Legal Status	Private: Non-Profit
Federal EIN:	39-1211331

**2. PROPOSED PROGRAMS**

Program Name:	2025		If currently City funded	
	Letter	Amount Requested	2024 Allocation	Joint/Multi Application - SELECT Y/N
Case Management	A	\$352,394	\$352,394	
Contact:	Jim Krueger			
	B			
Contact:				
	C			
Contact:				
	D			
Contact:				
	E			
Contact:				
<b>TOTAL REQUEST</b>		\$352,394		

**DEFINITION OF ACCOUNT CATEGORIES:**

**Personnel:** Amount reported should include salary, taxes and benefits. Salary includes all permanent, hourly and seasonal staff. Taxes/benefits include all payroll taxes, unemployment compensation, health insurance, life insurance, retirement benefits, etc.

**Operating:** Amount reported for operating costs should include all of the following items: insurance, professional fees and audit postage, office and program supplies, utilities, maintenance, equipment and furnishings depreciation, telephone, training and conferences, food and household supplies, travel, vehicle costs and depreciation, and other operating related cost

**Space:** Amount reported for space costs should include all of the following items: Rent/Utilities/Maintenance: Rental costs for office space; costs of utilities and maintenance for owned or rented space. Mortgage Principal/Interest/Depreciation/Taxes: Costs with owning a building (excluding utilities and maintenance).

**Special Costs:** Assistance to Individuals - subsidies, allowances, vouchers, and other payments provided to clients.

Payment to Affiliate Organizations - required payments to a parent organization. Subcontracts - the organization subcontracts for service being purchased by a funder to another agency or individual. Examples: agency subcontracts a specialized counsel service to an individual practitioner; the agency is a fiscal agent for a collaborative project and provides payment to other agency

3. SIGNATURE PAGE

AFFIRMATIVE ACTION

If funded, applicant hereby agrees to comply with City of Madison Ordinance 39.02 and file either an exemption or an affirmative action plan with the Department of Civil Rights. A Model Affirmative Action Plan and instructions are available at cityofmadison.com/civil-rights/contract-compliance.

CITY OF MADISON CONTRACTS

If funded, applicant agrees to comply with all applicable local, State and Federal provisions. A sample contract that includes standard provisions may be obtained by contacting the Community Development Division at 266-6520. If funded, the City of Madison reserves the right to negotiate the final terms of a contract with the selected agency.

INSURANCE

If funded, applicant agrees to secure insurance coverage in the following areas to the extent required by the City Office of Risk Management: Commercial General Liability, Automobile Liability, Worker's Compensation, and Professional Liability. The cost of this coverage can be considered in the request for funding.

4. SIGNATURE

Enter name: Jim Krueger

By entering your initials in the box you are electronically signing your name and agreeing to the terms listed above.

DATE 7/1/2024

INITIALS: JK

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**5. BOARD-STAFF DEMOGRAPHICS**

Indicate by number the following characteristics for your agency's current board and staff. Refer to application instructions for definitions. You will receive an "ERROR" until you finish completing the demographic information.

DESCRIPTOR	BOARD		STAFF		MADISON*		
	Number	Percent	Number	Percent	GENERAL Percent	POVERTY Percent	R/POV** Percent
	<b>TOTAL</b>		<b>100%</b>		<b>100%</b>		
<b>GENDER</b>							
MAN	1	17%	8	22%			
WOMAN	5	83%	28	78%			
NON-BINARY/GENDERQUEER	0	0%	0	0%			
PREFER NOT TO SAY	0	0%	0	0%			
TOTAL GENDER	6	100%	36	100%			
<b>AGE</b>							
LESS THAN 18 YRS	0	0%	0	0%			
18-59 YRS	6	100%	26	72%			
60 AND OLDER	0	0%	10	28%			
TOTAL AGE	6	100%	36	100%			
<b>RACE</b>							
WHITE/CAUCASIAN	6	100%	27	75%	80%	67%	16%
BLACK/AFRICAN AMERICAN	0	0%	7	19%	7%	15%	39%
ASIAN		0%	1	3%	8%	11%	28%
AMERICAN INDIAN/ALASKAN NATIVE		0%	0	0%	<1%	<1%	32%
NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER		0%	0	0%	0%	0%	0%
MULTI-RACIAL		0%	1	3%	3%	4%	26%
BALANCE/OTHER		0%	0	0%	1%	2%	28%
TOTAL RACE	6	100%	36	100%			
<b>ETHNICITY</b>							
HISPANIC OR LATINO	2	33%	3	8%	7%	9%	26%
NOT HISPANIC OR LATINO	4	67%	33	92%	93%	81%	74%
TOTAL ETHNICITY	6	100%	36	100%			
<b>PERSONS WITH DISABILITIES</b>	0	0%	0	0%			

\*REPORTED MADISON RACE AND ETHNICITY PERCENTAGES ARE BASED ON 2009-2013 AMERICAN COMMUNITY SURVEY FIGURES.

AS SUCH, PERCENTAGES REPORTED ARE ESTIMATES. See Instructions for explanations of these categories.

\*\*R/POV=Percent of racial group living below the poverty line.

**6. Does the board composition and staff of your agency represent the racial and cultural diversity of the residents you serve? If not, what is your plan to address this? (to start a new paragraph, hit ALT+ENTER)**

**7. AGENCY GOVERNING BODY**

How many Board meetings were held in 2023	7
How many Board meetings has your governing body or Board of Directors scheduled for 2024?	7
How many Board seats are indicated in your agency by-laws?	9

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

<b>Name</b>	<b>Tim Conroy</b>				
Home Address	1006 Stonebriar Dr, Verona, WI 53593				
Occupation	Director, Capitol Lakes				
Representing	at-large				
Term of Office		From:	01/2023	To:	01/2025
<b>Name</b>	<b>Amy Devine</b>				
Home Address	4912 Winnequah Rd, Monona, WI 53716				
Occupation	Attorney				
Representing	at-large				
Term of Office		From:	01/2024	To:	01/2026
<b>Name</b>	<b>Erin Fabrizius</b>				
Home Address	2 W. Gorham St #300, Madison, WI 53703				
Occupation	Governmental Relations				
Representing	at-large				
Term of Office		From:	01/2023	To:	01/2025
<b>Name</b>	<b>Stephanie Muñoz</b>				
Home Address	2886 Humes Ln, Fitchburg, WI 53711				
Occupation	Kids Forward, Project and Community Engagement Associate				
Representing	at-large				
Term of Office		From:	01/2024	To:	01/2026
<b>Name</b>	<b>Laura Stein</b>				
Home Address	330 Meadow Crest Trl Cottage Grove, WI 53527				
Occupation	Self-Employed				
Representing	at-large				
Term of Office		From:	01/2023	To:	01/2025
<b>Name</b>	<b>Sara Camacho</b>				
Home Address	904 Walnut St. Verona, WI 53593				
Occupation	GHC-SCW, Community Care Manager				
Representing	at-large				
Term of Office		From:	01/2024	To:	01/2026
<b>Name</b>	<b>Jennifer Vohs</b>				
Home Address	6884 Valiant Dr, Windsor, WI 53598				
Occupation	Supervisor of Care Coordination Services at UnityPoint Health -Meriter				
Representing	at-large				
Term of Office		From:	01/2024	To:	01/2026
<b>Name</b>					
Home Address					
Occupation					
Representing					
Term of Office		From:	mm/yyyy	To:	mm/yyyy







**\*\*Instructions: Complete this workbook in tab order, so the numbers will autofill correctly. Only fill in the yellow cells. Only use whole numbers, if using formulas or amounts with cents, convert to whole number before submitting to CDD.**

Please fill out all expected revenues for the programs you are requesting funding for in this application. All programs not requesting funding in this application, should be combined and entered under NON APP PGMS (last column)

REVENUE SOURCE	AGENCY 2025	PROGRAM A	PROGRAM B	PROGRAM C	PROGRAM D	PROGRAM E	NON APP PGMS
DANE CO HUMAN SVCS	1,468,749	1,192,364					276,385
UNITED WAY DANE CO	352,395	352,395					
CITY CDD (This Application)	0						
City CDD (Not this Application)	0						
OTHER GOV'T*	56,993	56,993					
FUNDRAISING DONATIONS**	417,246	4,814					412,432
USER FEES	0						
TOTAL REVENUE	2,295,383	1,606,566	0	0	0	0	688,817

\*OTHER GOVERNMENT: Includes all Federal and State funds, as well as funds from other counties, other Dane County Departments, and all other Dane County cities, villages, and townships.

\*\*FUNDRAISING: Includes funds received from foundations, corporations, churches, and individuals, as well as those raised from fundraising events.



**\*\*List all staff positions related to programs requesting funding in this application, and the amount of time they will spend in each program.**

Title of Staff Position*	2025 FTE**	2025 FTE**	2025 FTE**	2025 FTE**	2025 FTE**	2025 Total FTE	2025 Salary	2025 Taxes and	2025 Amount	2025 Wage***	2025 Requested
Executive Director	0.06					0.06	92,680	23,600	116,280	39.75	9,337
Assistant Director	0.11					0.11	82,680	22,780	105,460	44.56	18,023
Administrative Assistant (.7 FTE)	0.14					0.14	23,296	7,510	30,806	16.00	6,007
Administrative Assistant (.85 FTE)	0.11					0.11	45,172	11,704	56,876	25.55	7,474
Case Manager	0.57					0.57	52,000	12,264	64,264	25.00	64,264
Case Manager	0.28					0.28	26,200	9,225	35,425	19.00	35,425
Case Manager	0.28					0.28	41,600	11,411	53,011	20.00	50,069
Case Manager	0.28					0.28	40,560	11,326	51,886	19.50	29,422
Case Manager	0.20					0.20	54,080	12,435	66,515	26.00	18,449
Case Manager	0.23					0.23	58,240	12,910	71,150	28.00	7,115
Case Manager	0.31					0.31	22,880	5,876	28,756	22.00	16,379
Case Manager	0.31					0.31	58,240	12,776	71,016	28.00	20,151
Case Manager	0.17					0.17	54,080	12,435	66,515	26.00	18,665
Case Manager	0.28					0.28	34,944	9,465	44,409	28.00	12,648
Case Manager	0.29					0.29	49,920	12,093	62,013	24.00	12,175
Case Manager - 6 positions	0.30					0.30	62,400	13,117	75,517	30.00	17,271
						0.00	45,760	11,752	57,512	22.00	17,934
						0.00	45,760	11,752	57,512	22.00	17,848
						0.00	55,120	12,520	67,640	26.50	11,298
						0.00	50,960	12,179	63,139	24.50	17,981
						0.00	47,840	11,923	59,763	23.00	17,610
						0.00	227,600	59,894	287,494	21.50	84,897
<b>SUBTOTAL/TOTAL:</b>	3.92	0.00	0.00	0.00	0.00	3.92	1272012.00	320947.10	1592959.10	560.86	510442.00

**CONTINUE BELOW IF YOU NEED MORE ROOM FOR STAFF POSITIONS**

\*List each staff position separately. Indicate number of weeks to be employed if less than full year in parentheses after their title.

\*\*Full Time Equivalent (1.00, .75, .60, .25, etc.) 2,080 hours = 1.00 FTE

**\*\*List all staff positions related to programs requesting funding in this application, and the amount of time they will spend in each program.**

Title of Staff Position*	2025 FTE**	2025 FTE**	2025 FTE**	2025 FTE**	2025 FTE**	2025 Total FTE	2025 Salary	2025 Taxes and	2025 Amount	2025 Wage***	2025 Requested
						0.00			0	0.00	0
						0.00			0	0.00	0
						0.00			0	0.00	0

						0.00			0	0.00	0
						0.00			0	0.00	0
						0.00			0	0.00	0
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						0.00			0	0.00	0
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						0.00			0	0.00	0
						0.00			0	0.00	0
						0.00			0	0.00	0
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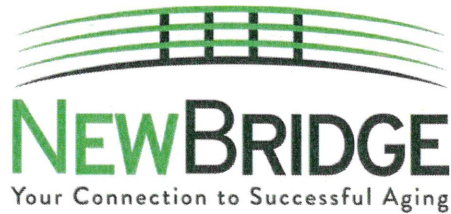
\*List each staff position separately. Indicate number of weeks to be employed if less than full year in parentheses after their title.

\*\*Full Time Equivalent (1.00, .75, .60, .25, etc.) 2,080 hours = 1.00 FTE

### Program Summary

This tab should be completely filled in by your previous answers.

Pgm Letter	Program Name	Program Expenses	2025 City Request
A	Case Management	PERSONNEL	293,680
		OTHER OPERATING	34,174
		SPACE	24,540
		SPECIAL COSTS	0
		<b>TOTAL</b>	<b>352,394</b>
B	0	PERSONNEL	0
		OTHER OPERATING	0
		SPACE	0
		SPECIAL COSTS	0
		<b>TOTAL</b>	<b>0</b>
C	0	PERSONNEL	0
		OTHER OPERATING	0
		SPACE	0
		SPECIAL COSTS	0
		<b>TOTAL</b>	<b>0</b>
D	0	PERSONNEL	0
		OTHER OPERATING	0
		SPACE	0
		SPECIAL COSTS	0
		<b>TOTAL</b>	<b>0</b>
E	0	PERSONNEL	0
		OTHER OPERATING	0
		SPACE	0
		SPECIAL COSTS	0
		<b>TOTAL</b>	<b>0</b>
<b>TOTAL FOR ALL PROGRAMS</b>			<b>352,394</b>



**2023 Letter of Agreement  
Bilingual, General & Targeted Case Management Services  
Between NewBridge Madison, Inc.  
and The Hmong Institute, Inc.**

**Parties to this Agreement:**

NewBridge Madison, Inc.  
The Hmong Institute, Inc.

NewBridge Madison, Inc. in its 2023 Case Management Contract with Dane County is responsible for conducting bilingual case management services in Dane County. It is the purpose of this Letter of Agreement to define the sub-contract relationship between NewBridge Madison, Inc. and The Hmong Institute. NewBridge and The Hmong Institute mutually and jointly agree to the following:

1. PROGRAM OPERATION. The Hmong Institute will comply with all requirements of the 2023 Dane County Purchase of Services Agreement for bilingual, targeted, and general case management.
  - The Hmong Institute will hire qualified case managers who will be trained by the NewBridge staff.
    - i. Alert the NewBridge contact of new hires and include a resume and fluent language/s spoken.
    - ii. Have an associate, bachelor, or master degree in a human services-related field from any country or possess equivalent experience.
  - The Hmong Institute will provide bilingual/general case management services for Asian American older adults age 60+ living in Dane County.
  - The Hmong Institute will provide targeted case management services for Asian American older adults age 50+ living in Dane County.
  - The Hmong Institute will adhere to the National Association of Social Workers Code of Ethics, Dane County Client-Centered Management Standards, Dane County Client-Centered Case Management Policy and Procedures, and Dane County Targeted Case Management Procedures.
  - The Hmong Institute case managers will complete a Dane County Functional Needs Assessment to determine if the clients need ongoing case management services. A case management service plan shall be developed for each client and a course of action for service initiated. A completed DHS 600 Client Registration form must be submitted for each client. Refer to The Hmong Case Manager's Handbook for specifics.



- The Hmong Institute case managers will provide proof of client services through case notes. All reportable activities, as outlined in the Dane County POS agreement, (POS agreement starts on page 5) shall be documented in the case notes and shall include the amount of time spent on the activity. A case will remain open as long as the needs of the client are being met with the service plan.
- The Hmong Institute case managers will attend Dane County coordinated case management training that is held monthly (except June, July, and August).
- The Hmong Institute case managers will attend an Ethics and Boundaries course each year hosted and funded by Dane County or an approved provider. If the course hosted and funded by Dane County is missed for whatever reason, The Hmong Institute will locate and purchase another National Association of Social Workers (NASW) accredited course approved by NewBridge and funded by The Hmong Institute.
- The Hmong Institute case managers will receive one additional training annually, planned in conjunction with the NewBridge case manager supervisor to discuss ethics and boundaries issues specific to working with SE Asian clients and develop written policies and procedures for handling various situations.
- NewBridge will provide training and case management program oversight for The Hmong Institute case managers and The Hmong Institute Program Director. NewBridge case manager supervisor will:
  - i. Monitor case notes for compliance in accordance with Dane County Case Management Standards, and Dane County Targeted Case Management requirements and communicate any issues directly with case managers and the program director.
  - ii. NewBridge case manager supervisor will meet individually, face-to-face with The Hmong Institute case managers on a monthly basis to assist with training, notes, program updates, and answer any questions, concerns, etc.
  - iii. NewBridge case manager supervisor will meet with The Hmong Institute program director monthly to go over any questions, concerns, issues, ect.
  - iv. NewBridge case manager supervisor will provide a monthly case management report to The Hmong Institute program director for review and will add any additional information.
  - v. Be available for case consultation.
- In the event of adverse weather or other emergencies where The Hmong Institute will be closed, the Hmong Institute will notify the NewBridge case manager supervisor no later than 8:00 am.

## 2. PROGRAM REPORTING

The Hmong Institute agrees to provide NewBridge with the following information once a month:

- The Hmong Institute shall report specific, identifiable services for each client served on the Dane County Monthly Client Service Report (610 Form). All data for the 610 Report must be entered into the NewBridge case management database by the 5<sup>th</sup> day of the succeeding month.

## 3. LIABILITY INSURANCE OF SITE. The Hmong Institute, during the term of this

contract described below, and during the entire term and any extension of this contract, will keep in full force a policy of commercial general liability aggregate insurance with limits of public liability not less than \$1,000,000 Combined Single Limits (CSL). This policy should name NewBridge as additional insured for activity conducted at the site. A copy of the policy or certificate of insurance shall be delivered to NewBridge prior to the start of this subcontract. The Hmong Institute will notify NewBridge and Dane County ten (10) days in advance of any liability insurance cancellation, failure to renew, or change in insurance carriers.

4. **WORKERS COMPENSATION INSURANCE.** The Hmong Institute agrees to maintain workers compensation insurance for all employees providing case management services during the term of this agreement. The Hmong Institute agrees to provide NewBridge with a copy of their Certificate of Workers Compensation Insurance and to keep such insurance in force throughout the term of this agreement.
5. **2023 PAYMENT RATE:**
  - NewBridge agrees to disperse to The Hmong Institute the amount of \$49,300 for providing bilingual/general case management services at The Hmong Institute site for 2023. Payments of \$4,108.33 will be made on a monthly basis, with adjustments determined after each quarter.
  - NewBridge agrees to disperse to The Hmong Institute up to \$12,000 for providing targeted case management services for Asian older adults aged 60+ in 2023. Payments will be on a monthly basis.
  - NewBridge agrees to disperse to The Hmong Institute the amount of \$25.68 for every allowable hour (**not to exceed 466 hours**) providing targeted case management services for Asian older adult clients in 2023. Payments will be on a monthly basis.
6. **2023 PROGRAM PERFORMANCE INDICATORS:**
  - The Hmong Institute will serve approximately 25 bilingual and general case management clients (age 60+) and provide a minimum of 250 service hours in 2023. All bilingual/general case management services will be offered to clients in non-English languages (i.e., Laotian, Cambodian, or Hmong).
  - The Hmong Institute will provide **no more** than 466 hours of targeted case management service in 2023. All targeted case management services will be offered to clients in non-English languages (i.e., Laotian, Cambodian, or Hmong).
  - NewBridge case management supervisor will provide tracking on performance indicators on monthly reports.
7. **FINANCIAL OVERSIGHT OF CASE MANAGEMENT PROGRAM.** NewBridge may withhold monthly payment in the event of contract non-compliance. NewBridge retains the right to review all financial records pertaining to The Hmong Institute Senior Case Management Program for the purpose of substantiating financial reporting. The Hmong Institute shall submit a copy of its annual audit to NewBridge within 180 days of the end of its fiscal year. The audit shall be performed by an independent certified public accountant and shall be conducted in accordance with the applicable state and federal

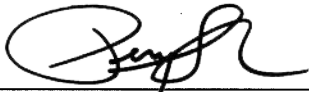
regulations and guidelines, including, but not limited to: The Wisconsin Department of Health and Social Services (DHSS) Provider Agency Audit Guide and the Wisconsin DHSS Allowable Costs Policy manual.

The audit shall include the following items:

- The auditor's opinion on the financial statements.
- A supplementary schedule identifying expenses and revenues by funding source and by program. This schedule shall be presented in worksheet format with programs and funding sources as columns, revenues, and expenses as line items, and an excess or deficit computed at the foot of each column.
- The auditor's opinion on the supplementary schedules.
- The auditor's Report on Compliance.
- A schedule of Questioned Costs, if any.
- The auditor's report on Internal Control.
- The auditor's Letter to Management.
- An unaudited supplementary schedule for the nutrition program showing expenses as reflected in the audit by account category compared to the most approved program budget.

This agreement shall be in effect from 1 January 2023 through 31 December 2023 if all conditions are met. This contract also may be amended through mutually agreed upon proposals or terminated by either party at any time with a written notice thirty (30) days in advance.

**The Hmong Institute, Inc.**

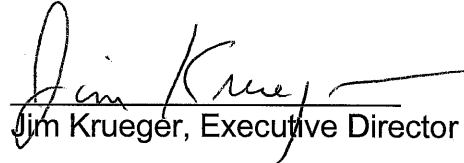


\_\_\_\_\_  
Peng Her, CEO

2-21-2023

\_\_\_\_\_  
Date

**NewBridge Madison, Inc**



\_\_\_\_\_  
Jim Krueger, Executive Director

2/16/2023

\_\_\_\_\_  
Date

**Attached Documents:**

- 2023 Dane County General/Bilingual Case Management Contract
- 2023 Dane County Targeted/MA Case Management Contract

# MEMORANDUM OF UNDERSTANDING

**CB Tree Lane Senior LLC,  
CommonBond Housing  
And  
CommonBond Communities  
at  
Point Place**

## I. PARTIES AND BACKGROUND AND INTENT

This Memorandum of Understanding entered into April 30, 2019 is between CB Tree Lane Senior LLC, CommonBond Housing and CommonBond Communities.

WHEREAS, the sole purpose of this Memorandum of Understanding is to encourage cooperation between CB Tree Lane Senior LLC (Owner), CommonBond Housing ( CB Housing) and CommonBond Communities ( CB Services) and to further detail the separate and distinct roles and responsibilities of each party;

WHEREAS, CB Tree Lane Senior LLC is constructing fifty-four (54) units of senior housing (55+), including 51 Low-Income Housing Tax Credit (LIHTC) units and 3 unrestricted units in Madison, WI. As part of this development, CB Tree Lane Senior LLC will set aside units for certain target populations (Homeless, Disabled, Veterans) that are likely to benefit from supportive services to maintain successful housing.

WHEREAS, CB Tree Lane Senior LLC and CB Housing and CB Services understand that individuals who have a history of homelessness and disability require a set of services, which are unique and specialized; and that residents of Point Place will be responsible for the provision of their own personal needs, i.e. meals, personal care in hygiene and health, etc.; and that the coordination of supportive services are critical to helping the residents of Point Place to live successfully;

WHEREAS, it is the belief of all parties that community resources sustain the ability of all residents to live independently and that coordination and provision of such resources increases accessibility and quality of life;

WHEREAS, CB Tree Lane Senior LLC and CB Housing desire to provide the coordination of services in a manner that supports the sound management of the property and that these services be provided through a MOU with CB Services . CB Services plans to provide supportive services coordination as defined in **Section III -- Definitions** for individuals who have experienced homelessness or are disabled at Point Place and has the professional expertise to provide these high-quality resident services;

WHEREAS, it is understood that CB Services does not plan to offer full-service case management (i.e., psycho-social, nursing), but they will assist those tenants in need of these and a variety of services by providing direct services and by linking tenants with appropriate providers;

WHEREAS, the residents of Point Place will be unique individuals with varying levels of service needs and the level of participation of each resident in supportive services will vary;

WHEREAS, CB Housing provides property and asset management services;

**THEREFORE, CB Tree Lane Senior LLC, CommonBond Housing, and CommonBond Communities agree that it is in the best interests of all concerned to enter into this Memorandum of Understanding (MOU).**

## **II. GUIDING PRINCIPLES**

WHEREAS, all parties under this Memorandum of Understanding jointly recognize that tenants with low incomes, a history of homelessness, and who may also have disabilities are diverse in terms of their strengths, motivation, goals, backgrounds, and needs;

- tenants with low incomes are members of the community with all the rights, privileges, opportunities accorded to the greater community;
- tenants with low incomes have the right to meaningful choices in matters affecting their lives; and
- in designing and implementing services, the input of the tenant will be sought;

## **III. DEFINITIONS**

For the purposes of this Memorandum of Understanding, "supportive services" means services provided for residents for the purpose of enhancing the residents' ability to maintain independent living. Supportive services must address the special needs of the residents to be served. These services may include advocacy, referral and linkage as described in Section VI. These supportive services may be provided directly or by arrangement with other service providers.

## **IV. ELIGIBILITY DETERMINATIONS AND TENANT SELECTION**

Eligibility for this project will be based on income, set aside definitions listed in **the Tenant Selection plan**.

Tenants will be selected by the management agent, CB Housing, based on screening criteria developed by CB Housing. Selection of tenants for Point Place will reflect a commitment to housing households as defined by the various funding sources for the development. The screening criteria will be in full compliance with all applicable laws and all project lenders' requirements.

Potential tenants will undergo a two-stage screening process: the prospective tenant will be evaluated by CB Services to determine and provide evidence that they meet the set aside requirements as outlined in the Tenant Selection plan.

Potential residents will be referred through Dane County Housing Authority waiting list and/or the Dane County by name list. If these sources do not have referrals we will also notify the Dane County Veterans Service Office (DCVSO), Dane County Aging and Disability Resource Center (ADRC), and Wisconsin Department of Human Services (WI DHS) of openings.

CB Housing will determine if s/he meets the income eligibility guidelines, and also run a credit, criminal and eviction check. CB Housing and CB Services will meet and jointly decide if the applicant meets the tenant selection criteria adopted by Point Place. While all parties will respect and seek input from each other, CB Housing will make the final determination.

**Eligibility Matrix:**

<b>Designated units</b>	<b>Funding Source/Eligibility</b>	<b>Funding Source Subsidizes Rent?</b>	<b>Income Limits</b>	<b>Rent Restrictions</b>
40 units	Tax Credit: general occupancy 55+.	No	50 and 60% MTSP	50 and 60% MTSP
3 units	Unrestricted.	No	None	None
8 units	Tax Credit: general occupancy 55+.  Dane County Housing Authority Project Based Vouchers.  Target population as identified in Tenant Selection Plan.  Dane County Housing Authority Waitlist first referral source, then move to "by name" list/Coordinated Entry.	Yes	60% MTSP	FMR
3 units	Tax Credit: general occupancy 55+.  Target population as identified in Tenant Selection Plan.  Dane County "by name" list/Coordinated Entry is primary referral source.	Yes	30% MTSP	30% MTSP

## **V. ROLES AND RESPONSIBILITIES**

It is understood that through this MOU, CB Tree Lane Senior LLC, CB Housing and CB Services staff must work together as a team to effectively meet the needs of the tenants. This level of collaboration will require exceptional, thorough and timely communication between all parties. Therefore, CB Services and CB Housing agree to collectively communicate any cause of concern pertaining to any and all items that affect the overall success of the residents and the supportive housing units in a timely manner. Monthly touch base meetings will occur between the Property Manager for CB Housing and the Service Coordinator for CB Services.

However, the parties to this Memorandum of Understanding understand their separate and distinct responsibilities. CB Services agrees in the performance of services, CB Housing agrees as the manager of the housing, and CB Tree Lane Senior LLC agrees as the owner of housing, that tenant and client rights are respected and complied with not only as a matter of principle but also as a matter of practice.

It is understood that CB Service's role will be that of advocate and service coordinator and CB Housing's role will be that of landlord dealing with tenant issues. CB Services and CB Housing agree to advise one another of highly pertinent matters in the referral and placement process and

understand that each is bound by confidentiality standards regarding the exchange of client information. Appropriate releases will be secured such that confidential client information can be shared between the parties.

CB Services will receive Supportive Service Payments associated with providing staffing for supportive services pursuant to this Memorandum of Understanding for up to 16 hours per week of staff time, 10 hours of which is payable in the operating budget and 6 hours payable from Net Cash Flow as described in the Owner's Operating Agreement. The Supportive Service Payments can increase 3% annually.

**Role of CommonBond Communities (CB Services), Advantage Services**

CB Services agrees to assign a minimum of one (.4) FTE to Point Place. This person will hold dedicated office hours at Point Place for sixteen (16) hours each week. This person will be available on-call for these individuals when not on site. This position will be called the Services Coordinator. The Services Coordinator will be responsible for coordinating the provision of direct services and coordination for delivery of services from other providers with the residents of Point Place meeting the set-aside definitions. The position will have a minimum of a bachelor's degree in social work or a related field and must have experience in serving individuals who have been homeless. CB Services will work with the by name list process to identify referrals for eligible households in need of supportive housing to the property manager, CB Housing.

**Role of CommonBond Housing (CB Housing), Property Management**

CB Housing will be responsible for the overall operations of Point Place including janitorial, maintenance, repairs, and other related services. Such activities and responsibilities will be carried out by an on-site manager employed by CB Housing in the position of Property Manager.

**Role of CB Tree Lane Senior LLC, Owner**

CB Tree Lane Senior LLC is strictly the owner of Point Place and will be responsible for asset management and overseeing the property management duties contracted to CB Housing and the supportive services provided by CB Services.

**VI. SCOPE OF SERVICES**

**CommonBond Communities (CB Services), Advantage Services**

In accordance with the Services Plan and the Property Management Plan, a Services Coordinator assigned by CB Services, will be responsible for coordinating the delivery of services for both the Advantage Services programs and other providers

- A. Collaborate with Dane County "by name" list, Dane County Housing Authority, and other potentially entities to identify individuals who meet the definition of homeless and are in need of and seeking permanent housing and refer to the property manager CB Housing;
- B. Screen potential tenants for eligibility under the set-aside definitions and assist CB Housing in screening the potential tenants.
- C. Provide and link residents with community and social services and resources upon request and/or as needed;
- D. Assist CB Housing, when requested, with residents who are not in compliance with the terms of their lease, and who may be in jeopardy of eviction by offering appropriate services;
- E. Perform the following program support services functions:

1. Provide direct services, which may include provision of and/or linkage with:
  - a) rehabilitation, vocational and employment assistance;
  - b) general health, mental health and dental services and resources;
  - c) income support and assistance with benefits;
  - d) financial literacy classes
  - e) substance abuse (alcohol, drugs) treatment; depending on the needs of the residents and services already being received, will provide information regarding sobriety through a safe environment and connections with appropriate substance abuse treatment and sobriety programs.
2. Advocate for and refer residents, when needed or upon request, to treatment services or other needed health, mental health or other services.
3. Provide crisis intervention as needed and when requested by CB Housing or provide consultation in the management of disputes or differences between residents and property management.
4. Assist CB Housing in household disputes and in conflict resolution.
5. Assist residents in maintaining their housing through collaboration with CB Housing and resident when lease issues arise.
6. Assist clients in understanding their rights and responsibilities under a tenant lease. This includes explaining the eviction and appeal process, in partnership with CB Housing.

Consistent with client rights principles, it is understood that referrals and other services will be made available to all Point Place residents. CB Services will take no action in making referrals or providing services without the agreement of the individual except when it appears, in their judgment, necessary to do so to protect the individual or others from serious harm.

F. Provide the following administrative services:

1. Keep all records regarding program supportive services as required by State of Wisconsin regulations and those of other funding sources.
2. Collection of required file documentation for implementation of the long term homelessness program including: verification of homeless status for all eligible households.
3. Provide annual reporting required submissions for the set-aside funding program.
4. Cooperate with CB Housing in monitoring and/or conducting audits or other reporting requirements with respect to project funders.

**CommonBond Housing (CB Housing), Property Management**

In accordance with the Support Services and Management Plan, CB Housing will provide the following property management activities:

- A. Ensure that all regulatory and funding requirements are met;



- B. Provides an accounting system in place to ensure all required reporting can be achieved and delivered in acceptable formats as required by the funding sources.
- C. Prepare all budgets and cost estimates related to Point Place;
- D. Arrange for liability and property insurance for Point Place;
- E. Pay all taxes associated with Point Place;
- F. Market building in accordance with the Marketing Plan to ensure a fully occupied building;
- G. Determine income eligibility of tenants, including verifying and documenting eligibility of households according to the Tenant Selection Plan; CB Housing will only take referrals for set-aside units from the required referral sources.
- H. Pay project bills;
- I. Provide monthly financial reports and any other required information to regulatory and funding agencies;
- J. Provide for the collection of required file documentation for the long term homelessness program including; Initial Occupancy statement, and Government Data Practices Act Disclosure Statement;
- K. Provide for the annual reporting requirements and submissions as required by the Wisconsin Housing and Economic Development Authority for all applicable funding sources;
- L. Develop and implement The Affirmative Fair Housing Marketing Plan that results in achieving outreach to those groups least likely to apply;
- M. Carry out rent collection and administration;
- N. Oversee tenant relations with management with respect to:
  - Notices
  - Evictions
  - Enforcement of house rules, policies and procedures;
  - Conflict Resolution – CB Housing and CB Services have policies and procedures in place to effectively deal with resident complaints, conflicts and compliance issues.
- O. Provide building and equipment maintenance and repair;
- P. Address safety concerns as needed;
- Q. Provide janitorial services (common areas only);
- R. Provide housing inspections on a schedule to ensure the development remains safe, sanitary and adequately meets applicable housing standards; and,
- S. Provide capital improvements including acquisition and maintenance of furnishings for common areas such as the lounge or dining room.
- T. Address training and professional development.

U. Prepare a Marketing and Management Plan

V. Manager will have 40 hours dedicated to Point Place. Office hours will be determined.

**CB Tree Lane Senior LLC, Owner**

CB Tree Lane Senior LLC will directly:

- A. Oversee the contract and duties of CB Housing
- B. Oversee the service contract/agreement with CB Services
- C. Ensure that all regulatory and funding requirements are met
- D. Oversee all budgets and cost estimates related to Point Place
- E. Provide Asset Management oversight to Point Place

**VII. FUNDING**

Funding will be provided to CB Services to meet the supportive service needs of the residents occupying the 11 set-aside units through the operating budget and Net Cash Flow as described in the Owner's Operating Agreement.

The Services Coordinator and supportive services identified in this Memorandum of Understanding will continue so long as the same level of funding is maintained.

**VIII. GENERAL TERMS**

**Terms.** This MOU is effective as of the date first appearing above and will continue through December 31, 2021. This Memorandum of Understanding will be automatically renewed with the same terms and conditions annually thereafter except where either party provides written notice of non-renewal three (3) months before the annual termination date. Otherwise, this Memorandum of Understanding may be terminated in accordance with the section on Termination below.

**Termination.** Any party may terminate this Memorandum of Understanding for any reason or no reason by giving the other parties ninety (90) days prior written notice. The party wishing to terminate this must provide notice and a written intent to terminate to the other parties.

**Confidentiality.** CB Housing and CB Services agree that by virtue of entering into this Memorandum of Understanding they will have access to certain confidential information regarding the other party's operations related to this project. CB Housing and CB Services agree that they will not at any time disclose confidential information and/or material without the consent of that party unless such disclosure is authorized by this Memorandum of Understanding or required by law. Unauthorized disclosure of confidential information shall be considered a material breach of this Memorandum of Understanding. Where appropriate, client releases will be secured before confidential client information is exchanged. Confidential client information will be handled with the utmost discretion and judgment.

All parties agree to comply with Title 45, Section 160-164 of the Code of Federal Regulations ("HIPAA"). All parties agree that when protected health information ("PHI"), as defined by HIPAA, is provided or made available to the other party for any purpose, the receiving party, and its agents or representatives will not use or disclose the PHI other than as permitted or required by this agreement or state and federal law. All parties shall take reasonable steps to prevent unauthorized disclosures by its employees, officers, directors, agents, contractors, or consultants.

**Indemnification.** CB Tree Lane Senior LLC, CB Housing and CB Services agree to indemnify the other parties against all liability or loss (including attorney's fees) and against all claims or actions based upon or arising out of damage or injury (including death) to persons or property caused by or sustained in connection with each party's negligent performance under this Agreement or by conditions created thereby, or based upon any violation of any statute, ordinance code or regulation or any defense of any such claims or actions.

**Nondiscrimination.** There shall be no discrimination of any person or group of persons on account of race, color, creed, religion, sex, marital status, sexual orientation, age, handicap, ancestry or national origin in the operation of the project or program at Point Place by CB Housing or CB Services.

**Severability.** In the event any provision of this Memorandum of Understanding shall be found to be invalid, illegal, or unenforceable in any respect, such invalidity, illegality or unenforceability shall not affect the validity, legality and enforceability of the remainder of the Memorandum of Understanding.

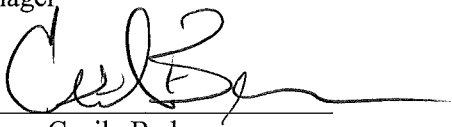
**Amendments.** This Memorandum of Understanding may be amended only in writing and authorized by the designated representative of Point Place, CB Housing and CB Services.

CB TREE LANE SENIOR LLC, a Wisconsin  
limited liability company

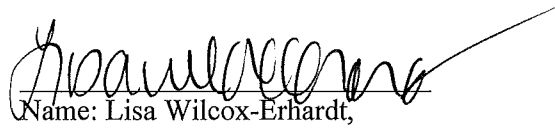
By: CB Tree Lane Senior Managing Member  
LLC, a Wisconsin limited liability company,  
its Managing Member

By: CB Tree Lane Senior Managing Member  
LLC, a Wisconsin limited liability company,  
Managing Member

By: CommonBond Communities, a  
Minnesota nonprofit corporation, its  
Manager

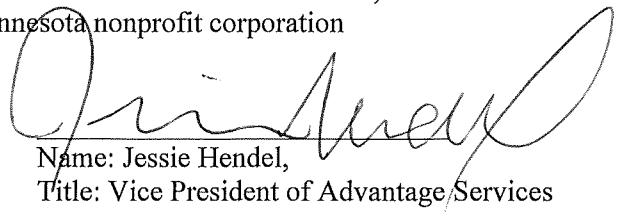
By:   
Name: Cecile Bedor  
Title: Executive Vice President of Real  
Estate

COMMONBOND HOUSING,  
a Minnesota nonprofit corporation

By:   
Name: Lisa Wilcox-Erhardt,  
Title: Executive Vice President of Housing and Services

COMMONBOND COMMUNITIES,  
a Minnesota nonprofit corporation

By:

A handwritten signature in black ink, appearing to read "Jessie Hendel", written over a horizontal line.

Name: Jessie Hendel,  
Title: Vice President of Advantage Services



June 19, 2024

City of Madison  
Community Development Division  
215 Martin Luther King Jr. Blvd., Suite 300  
Madison, WI 53703

Dear Grant Selection Committee,

We are writing this letter of joint support and commitment to continued partnership between Goodman Community Center and NewBridge Madison. Our organizations have enjoyed a long partnership, and we intend our collaborative work to continue throughout the Older Adult Services grant period.

Our organizations partner on many projects including Senior Meal Site oversight, Wellness Warriors mental health support groups, case management services for Goodman participants, and a recently formed coalition addressing social isolation among older adults. Our staff have a close working relationship, and we dialogue regularly about how to better coordinate and complement each other's service offerings.

Goodman and NewBridge value each other as partners and have a shared commitment to excellence in service provision. We support each other's applications for continued funding from the City's Older Adult Services RFP.

Thank you for your time and consideration.

A handwritten signature in black ink, appearing to read 'Jim Krueger', with a long horizontal stroke extending to the right.

Jim Krueger  
Executive Director  
NewBridge Madison

A handwritten signature in black ink, appearing to read 'Letesha Nelson', written in a cursive style.

Letesha Nelson  
Executive Director  
Goodman Community Center



**Community Development Authority**  
Madison Municipal Building, Suite 161  
215 Martin Luther King Jr Blvd, Madison, WI 53701  
mail P.O. Box 1785, Madison, WI 53701-1785  
email [housing@cityofmadison.com](mailto:housing@cityofmadison.com)  
ph (608)266.4675 fx (608)264.9291

June 24, 2024

City of Madison  
Community Development Division  
215 Martin Luther King Jr. Blvd., Suite 300  
Madison, WI 53703

Dear Grant Selection Committee,

We are writing this letter of support and commitment to a continued partnership between the Madison CDA Housing Authority and NewBridge Madison. For many years our organizations have partnered to provide subsidized housing units and supportive services for low-income older adults at the Romnes Apartments. We hope to continue our collaborative work throughout this next City of Madison Older Adult Services grant period.

NewBridge case managers work with residents who request assistance to set individual goals, help them access benefit assistance and monitor their progress. Our staff have a good working relationship and communicate regularly about how to best serve our older adult housing tenants. Madison CDA and NewBridge value our partnership and have a shared commitment to excellence in service provision. We support the NewBridge application for continued funding for case management services from the City of Madison Older Adult Services Unit. Thank you for your time and consideration.

Sincerely,

*Lauren Andersen*

Lauren Andersen

Property Operations Manager

Community Development Authority of the City of Madison

Email: [landersen@cityofmadison.com](mailto:landersen@cityofmadison.com)

June 24, 2024

City of Madison  
Community Development Division  
215 Martin Luther King Jr. Blvd., Suite 300  
Madison, WI 53703

Dear Grant Selection Committee,

We are writing this letter of support and commitment to a continued partnership between Common Bond Communities and NewBridge Madison. Since 2020 our organizations have partnered to provide affordable housing units and supportive services for older adults at the Point Place Apartments who have experienced homelessness, are veterans or have a disability. We hope to continue our collaborative work throughout the City of Madison Older Adult Services grant period.

A NewBridge case manager takes referrals for supportive housing openings at Common Bond and guide applicants through lease up process and work with our property management on eviction prevention. Their case managers work with assigned residents to set individual goals, help them access benefit assistance and monitor their progress. Our staff have a good working relationship and communicate regularly about how to best serve the supportive housing tenants. Common Bond Communities and NewBridge value our partnership partners and have a shared commitment to excellence in service provision. Common Bond Communities supports the NewBridge application for continued funding for case management services from the City of Madison Older Adult Services Unit.

Thank you for your time and consideration.

*Allison Linsmeyer*  
Director of Supportive Housing  
CommonBond Communities



4639 Hammersley Road  
Madison, WI 53711  
phone: 608-276-7598

June 25, 2024

City of Madison  
Community Development Division  
215 Martin Luther King Jr. Blvd., Suite 300  
Madison, WI 53703

Dear Grant Selection Committee,

We are writing this letter in support of the continued partnership between SSM Health at Home and NewBridge Madison. Our organizations have enjoyed a long history, and we intend our collaborative work to continue throughout the proposed City of Madison Older Adult Services grant period.

NewBridge case managers help lower income older adult clients access essential resources, one of which is fresh cooked nutritious meals. SSM Health provides home health services including a Meals on Wheels (MOW) program that provides older adults in Madison with such meals. Our areas of service complement one another very well as NewBridge connects those in need with MOW to get meals delivered to their homes. Our staff have a close working relationship, and we communicate regularly about how to best coordinate our services. SSM Health and NewBridge value each other as partners and have a shared commitment to excellence in service provision. SSM Health at Home supports the NewBridge application for continued funding for case management services from the City of Madison Older Adult Services Unit. Thank you for your time and consideration.

Sincerely,

**Sarah Karleskint | Manager-Business Operations – Infusion Pharmacy and  
Community Health Services**  
**SSM Health at Home**

4639 Hammersley Road, Madison, WI 53711

Phone: 608-223-7952

Cell: 608-843-5195

Fax: 877-301-5686

[sarah.karleskint@ssmhealth.com](mailto:sarah.karleskint@ssmhealth.com)

Through our exceptional  
health care services,  
we reveal the healing  
presence of God.





June 30, 2024

City of Madison

Community Development Division

215 Martin Luther King Jr. Blvd., Suite 300

Madison, WI 53703

Dear Grant Selection Committee,

We are writing this letter of joint support and commitment to the continued partnership between The Hmong Institute and NewBridge Madison. Our organizations have developed a strong collaboration over the past five years and intend to continue throughout the Older Adult Services grant period.

We currently partner providing case management services and a nutrition dining site for Southeast Asian older adults. Our staff have a close working relationship, and we dialogue regularly about how to better coordinate and complement each other's service offerings.

The Hmong Institute and NewBridge value each other as partners and have a shared commitment to excellence in service provision. We support each other's applications for continued funding from the City's Older Adult Services RFP.

Thank you for your time and consideration.

A handwritten signature in black ink, appearing to read "Jim Krueger", with a long horizontal line extending to the right.

Jim Krueger  
Executive Director  
NewBridge Madison

A handwritten signature in black ink, appearing to read "Peng Her", with a large circular flourish on the left side.

Peng Her  
CEO  
The Hmong Institute