



Application

20380 - Project 2020-I (Arts In Education, Dance, Multidisciplinary Arts/Culture, Music, Theater, Visual Arts and Local History)

20474 - 2020 Summer Concert Series at Warner Park

Project

Status:	Awarded
Original Submitted Date:	02/01/2020 9:39 AM
Last Submitted Date:	05/30/2020 3:21 PM

Primary Contact

Name:*	Mr.	Jim		Krueger
	Salutation	First Name	Middle Name	Last Name
Title:	Executive Director			
Email:	jimk@newbridgemadison.org			
Address:	1625 Northport Dr., #125			

*	Madison	Wisconsin	53704
	City	State/Province	Postal Code/Zip
Phone:*	608-512-0000	3005	
	Phone	Ext.	
Fax:	608-299-0700		

Organization Information

Name:	NewBridge Madison, Inc.
Organization Type:	501(c)(3) federal tax-exempt
Organization Website:	www.newbridgemadison.org
Address:	128 E. Olin Avenue

*	Madison	Wisconsin	53713
	City	State/Province	Postal Code/Zip
Phone:*	608-512-0000		
		Ext.	
Fax:	608-299-0700		
Date when organization received 501(c)(3) federal tax-exempt status (mm/dd/yyyy)	11/01/1978		
Benefactor	No		

Project Information

Primary activities must fall within project period described in Funding Opportunity.

Project Start Date: 06/08/2020

Project End Date: 07/27/2020

Select category that best describes project (selection influences which advisory panel reviews application): Music

Date(s) during which community can attend and/or participate in project: June 8, 15, 22 and July 6, 13, 20. Raindate July 27th. Concerts are 6-7:30pm

Warner Park Shelter

Specific venue(s) or location(s) where community will attend and/or participate in project: 2930 N. Sherman Ave

Madison, WI

Estimate Number of Individuals Engaged or Served

2800

Estimate Primary Community/Population Served

Ethnicity:

Black/African American: 14.0%

American Indian: 0%

Asian American: 0%

Hispanic/Latino: 5.0%

White/Caucasian: 80.0%

Other: 1.0%

Combination of all ethnicities: 100.0%

Age Group(s):

Youth (less than 18): 5.0%

Adult (18 to 30): 5.0%
Adult (31 to 60) 30.0%
Older Adult (60 plus): 60.0%
Dane County Supervisory District: 18

Indicates the communities your project will serve. To look up your district(s):  

Community/Population Description:

Communities served includes: Madison, Waunakee, Middleton, DeForest, Sun Prairie and Monona. Populations who attend include senior adults (many whom are home-bound), families, adults with disabilities and other individuals who live in the NewBridge service area. In addition African American and Latino senior adults, served by NewBridge come from all over Dane County to attend.

Additional notes about community/population served that explain selections. (Max. length is 50 words)

Abstract:

Provide a one or two sentence summary that could be used in future press releases to describe your project. (Max. length is 50 words.)

Enjoy free, live music for the whole family at the Summer Concert Series at Warner Park Shelter, 2930 N. Sherman Avenue. Monday evenings, 6-7:30pm, June 8, 15 and 22 and July 6, 13, and 20. Bring a lawn chair or blanket and enjoy the NewBridge concessions stand. More information can be found at www.newbridgemadisoninc.org or Facebook <https://www.facebook.com/NewBridgeMadison>.

Fiscal Receiver / Secondary Contact Information

Use this section to enter the contact information for your Fiscal Receiver, if your organization is using one. If you are not, you may use this section to provide information for an additional project contact person, if appropriate.

Fiscal Receiver:

Contact Person: Ruth Hellenbrand
Title: Program and Event Coordinator
1625 Northport Dr #125
Mailing Address: Madison, WI 53704
Phone: 608-512-0000
Email: ruthh@newbridgemadison.org
How did you hear about this opportunity? Previous Applicant

Project Narrative

Applicant Info/Background

Provide a brief summary about you (for individual applicants) or your organization including history, programs, goals, major accomplishments, success stories. (400 words maximum)

NewBridge Madison was formed in January 2019 as the result of a merger of the four Madison senior coalitions (North/Eastside Senior Coalition, East Madison Monona Coalition, West Madison Coalition and South Madison Coalition). For over 45 years we have provided services in the city of Madison and some services throughout Dane county to empower older adults to access affordable resources to maintain their health, safety, independence and community connection. In practice, this is carried out through Case Management Services (in both English and Spanish), 12 nutrition sites, a Home Chore program, a Caregiver Support Program, a Guardianship program a Cultural Diversity program and a variety of support groups and programs specific to particular issues and cultural heritage. NewBridge Madison provides weekly informational and recreational programs and deliver food from the food pantry to home-bound older adults. One of the four coalitions the North/Eastside has been awarded state and national accreditation multiple times as an outstanding organization. NewBridge also serves the entire Latino and African American senior population in Dane county.

Project Description

Describe project's concept, design, artistic or historical merit, and how it will be presented to the community. (400 words maximum)

The Summer Concert Series began in 1974 as an small event (three concerts) for older adults on Madison's northeast side who were isolated from the community due to mobility and/or financial constraints. The concert series has grown to six summer concerts and is also attended regularly by younger persons with disabilities, younger adults and families from Madison and the surrounding communities. Many older adults are afraid to attend the larger outdoor community concerts in Madison, have poor mobility and/or do not have access to transportation. Participants may get dropped off right at the shelter to limit the amount of walking. For older adults living on the north east side the Summer Concert Series is the only alternative that provides free music and transportation. Our intent is to provide an outside venue where older adults and disabled individuals may enjoy outdoor musical entertainment in a smaller, less crowded setting. While the attendance at the concert series has grown some over the years it remains small enough for those intimidated by large crowds.

In our 26th year, the Summer Concert Series is an established community event. The setting is relaxed and friendly, with older adults in lawn chairs and families having picnics on blankets. Participants of all ages get up and dance.

Our philosophy is to schedule quality local bands to play a variety of music that appeals to multiple age groups. The concerts also provide a casual atmosphere for the NewBridge staff to reach out to seniors in the community and offer assistance. Concert attendance has increased 650 in our first year to 2600 individuals in 2019.

Each year's musical line-up includes a mix of returning crowd favorites and new groups to expose the audience to a variety of local bands. Musical groups are prescreened and selected based on the quality of their performance and audience appeal. A diverse genre of music is offered each week to increase audience exposure and appreciation for a variety of types of music. Ladies Must Swing, The Randy Kats, The Gomers, The North Westerns, Universal Sound and the Soggy Prairie Band will be performing for the 2020 season.

We invite local celebrities such as elected officials and community leaders, to emcee each concert. To promote the concerts, NewBridge distributes posters and flyers; posts notices on local websites and social media and sends press releases to local media.

This year we will be inviting local food carts to sell food at the concert series in place of the concessions stand we have been running for the past 15 plus years.

Significance, Primary Community/Population Served and Public Value

Explain significance of project to the community and/or organization (why and why now). Articulate the public value of your project as it relates to the size and characteristics of the community/population. Explain why your project benefits Dane County and merits tax-payer dollars. (400 words maximum)

Isolation among older adults is a growing concern in our community. Opportunities are extremely limited for home-bound older adults without means of transportation and more and more older adults who are unable to drive or move around very well are not interacting regularly in the community. Our Summer Concert Series gets older adults out of their homes and into a comfortable community setting for an evening of fun with others. NewBridge Madison staff will interact with older adults in a casual atmosphere and connect them with peers to develop friendships and get involved in other NewBridge programs. The concerts have tremendous therapeutic value for older adults and younger adults with disabilities.

Isolation impacts the onset of dementia and depression; two other concerns common among the older adults in our community. Music is a form of preventative medicine that can help soothe or stimulate, provide socialization, express a sense of fraternity, create a sense of happiness or help recall memorable experiences. Keeping older adults active and engaged has been shown to impact their physical and mental health in a positive manner. Having older adults living healthier lives can save tax payer dollars that currently are used to supplement the exorbitant medical bills of those who are not taking good care of themselves.

The concerts also provide a unique opportunity for people of all ages and ethnic backgrounds to interact. Many individuals and families go about their daily lives without knowing their neighbors or neighborhood. These concerts provide an opportunity for people in surrounding neighborhoods to socialize in a relaxed, intergenerational, safe environment; and help form and strengthen bonds as participants interact in a positive, fun manner. These connections are important in helping to curb problematic behavior that is of concern in the neighborhoods surrounding Warner Park during the summertime.

Our concert series provides an opportunity for low income individuals in the community to enjoy live music. Over 80% of the older adults NewBridge serves are low income and cannot afford to pay for a concert or the transportation to attend. NewBridge also provides free rides for African American and Latino older adults throughout Dane County.

Awarding NESCO \$2,000, equates to a cost of approximately \$1.50 per person (based on average attendance); a small price to pay to assist in reducing isolation, depression and strengthening our community.

Implementation

Describe strategy and timeline to be used in developing and implementing project (planning, promotion/marketing/media plan, education and awareness-building activities, opportunities for engagement, access and participation) (400 words maximum)

Activity Timeline

View Potential Music groups	July-Dec 2019
Create Marketing Plan	July - Dec 2019
Book Musicians	Jan-March 2020
Fundraising and Grant writing	Dec. 2019-May 2020
Implement Marketing Plan	Jan 2020-July 2020
Summer Concert Series	June 8, 15, 22 and July 6, 13 and 20 (Raindate July 27)
Concert Series Evaluation	June-July 2020
Final Report Submitted	October 2020

Additional promotion and marketing strategy information:

Notification of activities includes posting signs along streets on the north/eastside of Madison the week of each concert; a weekly message promotes each concert on Warner Park Community Recreation Center's outdoor marquee board on Northport Drive; distributing posters with the concert schedule at local businesses, community centers, churches, and senior living facilities on the north/eastside and throughout Madison; posting information on the NewBridge website and other local websites; PSA's sent to local TV/radio and other media outlets; advertisements in community newspapers, the Wisconsin State Journal and other avenues if we generate enough funds. We will send submissions in the *Isthmus and Eastside News*, post notices on the Wisconsin Department of Tourism website, send press releases to city media, Madison neighborhood associations, the Chamber of Commerce and Madison School Community Recreation. Support from *Dane Arts* will be acknowledged on all printed materials as well as on sandwich boards at the entrance to the Warner Park Shelter, on each concert program, and verbally at the beginning of each concert. Word of mouth is one of our most effective promotional tools. Opportunities for engagement include various volunteer opportunities. Volunteers help organize the event, distribute posters and flyers in the community, and hand out programs to greet people as they arrive at each concert. We invite local celebrities to be masters of ceremonies for each concert. NewBridge members and concert attendees are asked to provide feedback on bands or types of music they would like to see the next year.

The concerts are free. Parking is free and plentiful and transportation is provided, with wheelchair accessibility, for senior adults in our service area and for the Latino and African American seniors we serve throughout Dane county. These actions have increased access for those with low incomes or transportation needs, making it possible for them to attend the concerts. Many people in the neighborhood can walk to the concerts. Individuals with wheelchairs, walkers or other concerns can be dropped off right at the shelter.

Intended Outcomes and Evaluation

Highlight intended results, outcomes, and indicators of success. Describe your project evaluation process. (400 words maximum)

At the 2020 summer concert series at Warner Park we are expecting over 3,000 to attend the concerts this year. In addition we expect those in attendance will really enjoy the music and interaction with others. Our goals for 2020 are that 90% of concert attendees will rate the musicians very good or excellent and 90% of concert attendees will rate the whole experience at very good or excellent. Other indicators of a successful concert series this year will be that our average attendance will increase to 525 each concert and concert attendees will attend more than one concert.

The project evaluation process consists of two parts: Part one is counting the number of people in attendance at each concert; part two is handing out evaluations at the third and again at the last, concert. The evaluation asks participants the following: how many concerts did you attend, rate the musical groups, rate the overall experience, identify types and/or name of bands you would like to see in the future.

The results for the 2019 concert series was as follows:

A total of 82 surveys were returned. Of the 82 surveyed, 99% felt the concerts they attended were very good or excellent; 98% felt their overall experience was very good or excellent. The average person attended two of six concerts in 2019. All of the bands were well received. Our most requested band is Ladies Must Swing and they will be back in 2020. The feedback was very positive and participants are looking forward to 2020.

Do you believe the project fulfills the Special Award Criteria?

Special Award

No

Project Expenses (Cash)

Category	Explanatory Notes (25 char. limit)	Expense Covered by Grant	Cash Amount
Project-Specific Administrative Compensation			\$0
Artistic Honoraria 1	Band #1	No	\$600
Artistic Honoraria 2	Band #2	No	\$800
Artistic Honoraria 3	Band #3	No	\$1,300
Artistic Honoraria 4	Band #4	Yes	\$600
Artistic Honoraria 5	Band #5	Partial	\$700
Artistic Honoraria 6	Band #6	No	\$600
Supplies/Materials 1	Supplies	No	\$250
Supplies/Materials 2			\$0
Promotions/Publicity/Printing /Postage 1	ads in paper, poster, flyers	No	\$1,400
Promotions/Publicity/Printing /Postage 2	programs	Partial	\$650
Space/Equipment Rental 1	Shelter and PA permits	Partial	\$900
Space/Equipment Rental 2			\$0
Transportation 1	senior bus local	No	\$800
Transportation 2	rides for rural seniors	Partial	\$800
Other			\$0
Other			\$0
Other			\$0
Other			\$0
Totals			\$9,400

Project Income (Cash)

Category	Explanatory Notes (25 char. limit)	Status	Amount
Earned Income (Include specific details)			
Sales		Pending	\$0
Admissions			\$0
Other Revenues 1			\$0
Other Revenues 2			\$0
Sub-Total			\$0
Individual Contributions/Gifts (List source in notes)			

1	Donations at concert	Pending	\$2,500
2			\$0
3			\$0
4			\$0
5			\$0
6			\$0

Foundation/Corporate Support (List source in notes)

1	Associated Bank	Pending	\$500
2	TASC	Pending	\$500
3	Gunderson Funeral Home	Pending	\$1,000
4			\$0
5			\$0
6			\$0

Public Grants (List source in notes)

1	Madison Arts Commision	Pending	\$1,500
2	Evjue Foundation	Pending	\$1,000
3	Madison Community Foundation	Pending	\$1,000

Sub-Total **\$8,000**

Other

Other (Specify in Notes)	\$0
Other (Specify in Notes)	\$0
Other (Specify in Notes)	\$0
Other (Specify in Notes)	\$0

Totals **\$8,000**

In-Kind (Non-Cash)

Row	Explanatory Notes (25 char. limit)	Status	Amount
In-Kind 1	greeters	Pending	\$1,000
In-Kind 2	greeters	Pending	\$0
In-Kind 3			\$0
In-Kind 4			\$0
Totals			\$1,000

Budget Narrative

Additional explanation of budget figures. Be sure that any explanation of budget figures in this section matches the budget figures included above.

Budget Summary

Category	Total Cash Expenses	Total Cash Income	Total In-Kind (Non-Cash)	Total Request Amount	Total Request Percentage	Total Budget
Grant Request Amount	\$9,400	\$8,000	\$1,000	\$1,400	13.46	\$10,400

Attachments/Supplemental Materials

Attachment	Description	File Name	File Size	Type	
Required (for all applicants)				Current Letter of support #1 from the community at large (highlighting artistic quality/merit, public value, commitment, ability to implement successfully)*	
				Current Letter of support #2 from the community at large (highlighting artistic quality/merit, public value, commitment, ability to implement successfully)*	
	Ltr of support Dane Co supervisors Rusk and Ritt	Ltr of support Dane Co supervisors.pdf	15.8 MB	pdf	Current Letter of support #3 (optional)
	Ltr of support - Warner Park	Ltr of support WPCRC.pdf	15.8 MB	pdf	Short bios or resumes of key personnel*
Resumes of key staff Hellenbrand and Krueger	Staff resumes Hellenbrand and Krueger.pdf	15.8 MB	pdf		Logo/Image
			Logo or Image (to be used in listing project/program on a website if awarded a grant)*		NewBridge Madison logo
NewBridge Madison logo.pdf	15.8 MB	pdf		Required For Applicant (Non-Profit Organizations Only)	
		Mission statement	NewBridge Madison mission statement	NewBridge mission statement signed.pdf	
15.8 MB	pdf	List of officers/board members and primary staff involved in project	Board Members and Key Staff Summer Concert Series	Board of Directors and Key Staff Summer Concert Series.pdf	
15.8 MB	pdf	Year-end income/expense statement from immediate past fiscal year	2019 NewBridge Revenue and Expenses	2019 NewBridge Year End Financials.pdf	
15.8 MB	pdf	Income/expense statement from current fiscal year	2020 NewBridge Madison Budget	2020 NB Budget Board 122019.pdf	

15.8 MB	pdf	IRS federal tax-exempt 501(c)(3) determination for your organization or fiscal receiver	NewBridge Madison 501c3	NewBridge tax exempt.pdf
15.8 MB	pdf	Required for Applicants (Using a Fiscal Receiver Only)		
	Letter of Commitment from Fiscal Receiver			15.8 MB
	Required For Applicant (Individuals Only)			
Resume or professional biography			15.8 MB	

Other Attachments



audience 2019

45 KB



Band performing 2019 summer concert series

46 KB

File Name

Description

File Size

Summer Concerts 2020.pdf

2020 summer concert Flier

373 KB

Fields

Applicant/Authorized Official	James Krueger
Title	Executive Director
Date Signed	01/31/2020

Internal Data

Comments

Internal Attachments



January 24, 2020

Dane Arts
210 Martin Luther King Jr. Blvd.
Madison, WI 53703

Dear Committee Members:

We are happy to submit this letter of support to fund the 2020 Summer Concert Series at Warner Park. As regular participants of this wonderful, free community event we have continually been impressed by the quality of music and the diversity of the crowd at these concerts. These concerts have been a part of our community for 25 years!

As County Board Supervisors for the north side we greatly appreciate NewBridge Madison's commitment to enhance the quality of life for all senior adults, and their ongoing efforts to help seniors remain independent and active in the community. The summer concert series provides our elderly and other adults with disabilities, who are otherwise physically or socially isolated, an important opportunity to get out of their home and enjoy a beautiful outdoor setting and familiar music with others in the community.

The concert series also helps form and strengthen the bonds of our neighborhood and the larger community. The music brings pleasure to the ears of all ages and it brings total strangers, who find they do not live very far apart, together. Hundreds of people attend each concert, socializing with friends, families and others from the neighborhood that they don't see during the course of their daily lives.

The NewBridge staff and volunteers do a wonderful job of making people feel welcome and ensuring that everything at the concerts runs smoothly. This concert series is a very important event for the Northside and many people look forward to it each year. We encourage you to continue funding the concert series, as it is a tremendous value for the minimal financial cost to organize this special community event.

Sincerely yours,

Paul Rusk
Dane County Supervisor, District 12

Michele Ritt
Dane County Supervisor, District 18

January 24, 2020

Dane Arts
210 Martin Luther King Jr. Blvd.
Madison, WI 53703

Dear Committee Members:

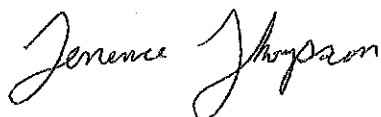
I am happy to submit this letter of support to fund the 2020 Summer Concert Series at Warner Park. As a regular participant of this wonderful, free community event I have continually been impressed by the quality of music and the diversity of the crowd at these concerts. These concerts have been a part of our community for 25 years!

As the Director of Warner Park Community Recreation Center, for the north side we greatly appreciate NewBridge Madison's commitment to enhance the quality of life for all senior adults, and their ongoing efforts to help seniors remain independent and active in the community. The summer concert series provides our elderly and other adults with disabilities, who are otherwise physically or socially isolated, an important opportunity to get out of their home and enjoy a beautiful outdoor setting and familiar music with others in the community.

The concert series also helps form and strengthen the bonds of our neighborhood and the larger community. The music brings pleasure to the ears of all ages and it brings total strangers, who find they do not live very far apart, together. Hundreds of people attend each concert, socializing with friends, families and others from the neighborhood that they don't see during the course of their daily lives.

The NewBridge staff and volunteers do a wonderful job of making people feel welcome and ensuring that everything at the concerts runs smoothly. This concert series is a very important event for the Northside and it's a great event to hold in our park. We encourage you to continue funding the concert series, as it is a tremendous value for the minimal financial cost to organize this special community event.

Sincerely yours,

A handwritten signature in cursive script that reads "Terrence Thompson".

Terrence Thompson, CPRP
Director
Warner Park Community Recreation Center

Ruth Hellenbrand

5881 Lupine Lane • Madison, WI 53718 • Phone: 608-838-1680 • E-Mail: ruthhellenbrand@yahoo.com



Experience

North/Eastside Senior Coalition, Madison WI

Sept. 2015- Current

Programs Manager responsible for the social and educational programs for senior adults at the North/Eastside Senior Coalition; supervises the cultural diversity program and staff; the senior dining site staff and volunteers; the home chore program coordinator; and all of the social networking channels for the agency.

Artisan Senior Living and Memory Care, Middleton WI

July 2013 - Sept. 2015

Life Enrichment Director working with memory care resident population in CBRF. Position includes staff supervision, department budget management, program development, volunteer supervision, and newsletter and calendar development.

United Cerebral Palsy of Greater Dane County

January 2009 - July 2013

Services Coordinator for the Birth to 3 Connections Program. Responsible for case management, providing individual assessments and treatment planning to a socio-culturally diverse population for children Birth - 3 and their families.

The Wellington Assisted Living, Minot, ND

December 2006 - December 2008

Activity Director responsible for program development and implementation of individual and group services to a diverse client base; managed budget; provided oversight of staff team members; oversight of day to day operations of gift shop; development and implementation of special events and programs; public relations and facility tours.

Girl Scouts of Northwest North Dakota

January 2004 - December 2006

Program Manager responsible for program development and implementation, data management, volunteer recruitment, training and supervision, customer service and public relations

Clark County Health Care Center, Owen WI

March 2001 - December 2003

Social Worker responsible for case management, family services and geriatric social work in a long term care facility.

Education

BS in Sociology and Human Services

1994 - 1997

Edgewood College, Madison, WI

Volunteer Work

Condominium Board Director

2011 - 2013

Board Director responsible for managing 75-unit building, including maintenance, repair, improvements and assisting in the resolution of issues with and between building tenants

AmeriCorps Volunteer

1997 - 1999

Lutheran Social Services Safe Passage Runaway Program, Youth Worker working with high-risk youth

James J. Krueger, BA

1046 Chandler Ln., Sun Prairie, WI 53590 - (608) 220-1380 - mrjameskrueger2003@yahoo.com

Executive Director

Summary

A result-driven and agile Executive Director with six years experience in all aspects of non-profit management. Proven record of fostering organizational growth.

Strengths

- Developing and monitoring organizational budgets
- Grant development and fund raising
- Creating excellent work environment
- Strategic planning and facilitation
- Advocacy and collaboration

PROFESSIONAL EXPERIENCE

NewBridge Madison, Madison, WI - Jan 2019 – Present

Fund Development Director—\$1.9 M nonprofit company providing essential services for older adults with 35 employees and 600 volunteers

Implementing a Fund Development plan for a newly merged non-profit company. Transitioning from nominal past fundraising practices to comprehensive fundraising/marketing plan.

- Developing comprehensive fundraising strategies (grants, corporate contributions, and individual donor programs). Goal is to raise \$200K.
- Implementing new fundraising database and tracking systems.
- Established a Friends Group with over 700 members.
- Prepare monthly financial reports, monitor agency spending and develop the annual budget.
- Provide leadership to senior activities staff and form collaborative partnerships with other service providers, organizations and businesses.

North/Eastside Senior Coalition (NESCO), Madison, WI - Feb 2012 - Dec 2018

Executive Director—\$700K nonprofit company providing essential services for older adults with 14 employees and 300 volunteers

- Increased annual budget by \$135K and agency reserves by \$62K. 15-20% of annual budget was non-governmental funding (grants, sponsorships, fundraising).
- Instrumental in planning and coordinating the merger of four non-profit organizations.
- Oversaw and coordinated all aspects of agency budgeting and financial management.
- Directed strategic planning process (2013-2018) for NESCO. Well-versed in translating missions and goals into operating plans with clear benchmarks and annual objectives.
- NESCO awarded both State and National Accreditation as a model senior center.
- Maintained relationships with funders and constituents. Served on committees to prioritize older adult needs.
- Testified annually at budget hearings. NESCO received funding increases for all but one of our major programs.
- Provided staff support to the Board and Board committees. Facilitated Board recruitment and updating of agency policy and procedure manuals.
- Built exceptional staffs and created an excellent work environment.
- Upgraded our website and increased our presence on Facebook. Showed a 123% increase in visitors on social media.

North/Eastside Senior Coalition (NESCO), Madison, WI - Jan 2008 - Feb 2012

Programs Manager — \$575K nonprofit company providing essential services for older adults with 14 employees and 300 volunteers.

Increased program participation by 27%, serving over 10,000 older adults annually.

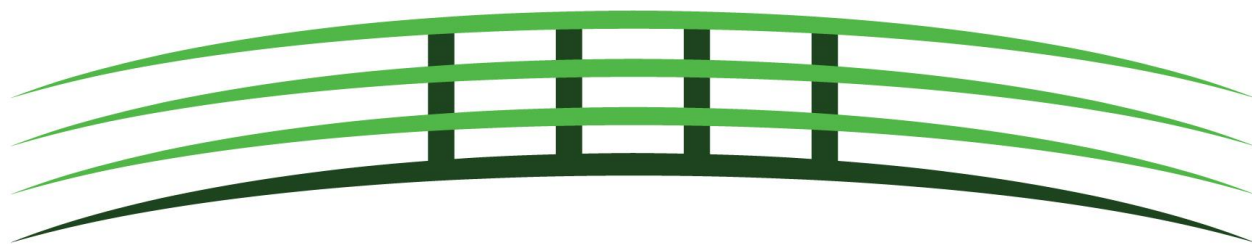
- Assessed program needs with input from older adults. Developed and implemented innovative programs (Food Pantry Delivery, Mending Repair Service).
- Worked collaboratively with over 50 agencies and community groups.
- Developed program evaluations and oversaw administration of program grants.
- Promoted agency programs and services in the community.
- Wrote grants and researched new funding opportunities. Raised \$186,700 in grant monies. Directed agency fundraisers that generated over \$30,000 annually.
- Assisted with the hiring, training, supervision, and recognition of staff and 300+ volunteers.

Education

University of Wisconsin -Madison - BA Social Welfare

Professional Affiliations

- Elderly Services Network - Board President
- National Institute of Senior Centers – Member
- Wisconsin Association of Senior Centers – Serve on Accreditation Review Panel
- United Way of Dane County- Agency Representative, Health Community Service Team



NEWBRIDGE

Your Connection to Successful Aging



NewBridge Mission Statement:

NewBridge empowers older adults to access affordable resources to maintain their health, safety, independence and community connection.

A handwritten signature in cursive script, reading "Sarah Valencia", written over a horizontal line.

Sarah Valencia
NewBridge Board President

A handwritten date "11/26/19" written over a horizontal line.

A handwritten signature in cursive script, reading "Jim Krueger", written over a horizontal line.

Jim Krueger
NewBridge Executive Director

A handwritten date "11/26/19" written over a horizontal line.

Board of Directors - 2020

Name of Agency: NewBridge Madison, Inc. # of Seats Indicated in by-law 9

Names of Officers: President/Chair: Sarah Valencia
Vice Pres./Vice Chair: Cedric Johnson
Treasurer: Tim Ryan
Secretary: Tim Conroy

LIST ALL CURRENT MEMBERS OF THE BOARD OF DIRECTORS BELOW:

- | | |
|---|--|
| 1. Name: Tim Conroy
Home Address: 1006 Stonebriar Dr,
Verona, WI 53593
Phone: 283-2000
Occupation: Director, Capitol Lakes
Board seat representing: at-large | 7. Name: Sarah Valencia
Home Address: 213 Weald Bridge Rd
Cottage Grove, WI 53527
Phone: 417-5105
Occupation: Health care administrator
Board seat representing: at-large |
| 2. Name: Amy Devine
Home Address: 4912 Winnequah Rd
Monona, WI 53716
Phone: 237-6673
Occupation: Attorney
Board seat representing: at-large | 8. Name:
Home Address:

Phone:
Occupation:
Board seat representing: |
| 3. Name: Erin Fabrizius
Home Address: 2 W. Gorham St, #300
Madison, WI 53703
Phone: 257-1888
Occupation: Governmental relations
Board seat representing: at-large | 9. Name:
Home Address:

Phone:
Occupation:
Board seat representing: |
| 4. Name: Cedric Johnson
Home Address: 312 Norris Ct. #7
Madison, WI 53703
Phone: 252-7126
Occupation: External Affairs, MG&E
Board seat representing: at large | 10. Name:
Home Address:

Phone:
Occupation:
Board seat representing: |
| 5. Name: Tim Ryan
Home Address: 903 Ganser Dr
Waunakee, WI 53597
Phone: 223-2193
Occupation: VP & CFO, Monona Bank
Board seat representing: at-large | 11. Name:
Home Address:

Phone:
Occupation:
Board seat representing: |
| 6. Name: Laura Stein
Home Address: 330 Meadow Crest Trl
Cottage Grove, WI 53527
Phone: 242-4100
Occupation: HR advisor, Am.Fam. Ins.
Board seat representing: at-large | 12. Name:
Home Address:

Phone:
Occupation:
Board seat representing: |

Key NewBridge Staff for Summer Concert Series

Ruth Hellenbrand Program and Event Coordinator

Jim Krueger Executive Director

**2019 NewBridge Madison
Year-End Financial Statement**

		Dec- 19 Actual
Income		
Revenues		
Funding Agencies		
410 Dane County Human Services		931,581.89
420 City of Madison		609,158.00
421 United Way		110,539.92
425 City of Monona		54,600.00
Total Funding Agencies		1,705,879.81
Non-Agency Funding		
Grants & Sponsorships		80,322.44
Fundraising		128,772.66
Endowment/Interest		4,863.17
Total Non-Agency Funding		213,958.27
Total Revenues		1,919,838.08
Total Income		1,919,838.08
Expense		
Personnel		
Wages and Salaries		
Staff		1,237,821.18
Taxes		97,900.41
Benefits		151,811.61
Total Personnel		1,487,533.20
Operating Expenses		
Insurance		28,778.37
Professional Fees *		110,529.30
Audit		31,700.00
Technology/Data Processing		20,172.46

**2019 NewBridge Madison
Year-End Financial Statement**

Equipment Lease	19,121.87
Payroll Service	2,045.06
Office Supplies	66,051.76
Equipment & Furnishings	3,360.39
Depreciation Expenses	21,037.37
Telephone/Internet	12,006.64
Training/Conferences	3,379.78
Auto Allowance Expenses	29,197.11
Participant Transportation	37,308.50
Fundraising Expenses	18,430.81
Interest Paid	381.18
Total Operating Expenses	403,500.60
Rent	107,642.74
Mortgage	20,280.00
Mortgage Principal Payment	-14,092.13
Utilities/Repairs	10,902.32
Maintenance	5,221.36
Janitorial	12,125.88
Total Space Expenses	142,080.17
Total Expenses	2,033,113.97
Net Income *	-113,275.89

* \$110,529.30 in reserve funds was used to facilitate the merger of four agencies into NewBridge Madison

**2019 NewBridge Madison
Year-End Financial Statement**

**2019 NewBridge Madison
Year-End Financial Statement**

NewBridge 2020 Budget

					2020 Budget Board Approved 12/20/19
Income					
	Revenues	Funding Agencies			
		410 Dane County Human Services			1,051,480
		420 City of Madison			584,158
		421 United Way			34,000
		425 City of Monona			56,938
		Total Funding Agencies			1,726,576
		Non-Agency Funding			
		430 Grants			60,288
		431 Sponsorships			39,000
		434 Program Fees			600
		438 Fundraising Events			50,000
		440 Friends Group			14,500
		450 Memorials and Tributes			5,000
		455 Program Donations			63,500
		460 Endowment Donations			2,000
		470 Special One Time Programs			23,000
		491 Interest/Endowment			6,000
		499 Other Revenues			500
		Total Non-Agency Funding			264,388
		Total Revenues			1,990,964
		Total Income			1,990,964
		Gross Profit			1,990,964
Expense					
	Personnel				
		Wages and Salaries			
		512 Administrative Staff			258,904

NewBridge 2020 Budget

	514 CM Staff		518,412
	516 Program Staff		463,250
	Total Wages and Salaries		1240566
	Taxes/Benefits		
	Taxes		
	520 FICA (7.5%)		96667
	521 Unemployment Insurance		2218
	Total Taxes		98885
	Benefits		
	Total of all benefits		134837
	Total Benefits		134837
	Total Taxes/Benefits		233722
	Total Personnel		1474288
	Operating Expenses		
	605 Insurance		24,500
	615 Professional Fees		45,000
	616 Audit		13,800
	617 Data Processing		9,000
	618 Equipment Lease		15,000
	619 Payroll Service		1,674
	621 Postage		6,000
	622 Office Supplies		13,000
	623 Program Supplies -SA		8,000
	624 Program Supplies -CD		3,600
	625 Nutrition Supplies		4,000
	626 Home Chore Reserves		16,200
	627 Employee Relations		2,000
	628 Advertising		3,000
	630 Equipment & Furnishings		2,000

NewBridge 2020 Budget

	635 Depreciation Expenses		20,513
	640 Telephone/Internet		9,400
	650 Training/Conferences		3,000
	665 Auto Allowance Expenses		30,000
	670 Transportation		35,217
	690 Fundraising Expenses		12,000
	Total Operating Expenses		276,904
Space Expenses			
	700 Rent		84,792
	710 Mortgage		20,280
	Principal		-14000
	720 Utilities/Repairs		9,000
	725 Maintenance		10,000
	730 Janitorial		12,000
	Total Space Expenses		122,072
Special Costs	805 Special Projects		1,000
	810 Special Programs		25,000
	815 Friends of New Bridge		2000
	820 Memberships in Org.		1,200
	850 Endowment Payments		-
	Total Special Costs		29,200
SubContract	921 Goodman Subcontract		10,920
	922 Cranberry Creek		10,120
	923 Lecheim		9,000
	924 Festival Foods		10,120
	925 Cucos Restaurant		10120
	926 Hmong Institute/nutrition		10,920
	927 Hmong Institute/case management		49,300
	Total Sub Contract		110,500
	Total Expense		2,012,964
	Net Income ***		-22,000

*** \$22,000 of 2020 expenses from revenue received from Madison Community Foundation at the end of 2019

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WISCONSIN DEPARTMENT OF REVENUE
PO BOX 8902
MADISON, WI 53708-8902

Contact Information:

2135 RIMROCK ROAD PO BOX 8902
MADISON, WI 53708-8902
ph: 608-266-2776 fax: 608-264-6884
email: DORBusinessTax@wisconsin.gov
website: revenue.wi.gov

Letter ID L0054461200

NEWBRIDGE MADISON, INC.
128 E OLIN AVE STE 110
MADISON WI 53713-1467

December 27, 2018

This is your Wisconsin Sales and Use Tax Certificate of Exempt Status (CES). Purchases made by your organization or entity are taxable unless you provide a properly completed Wisconsin Sales and Use Tax Exemption Certificate (Form S-211), listing the CES number shown below, to your supplier(s).

If your organization makes sales, they may be subject to sales tax collection and you may be required to obtain a Seller's Permit. Information regarding registration requirements can be found in our Publication 206, Sales Tax Exemption for Nonprofit Organizations.

Forms and Publications can be obtained through our website at revenue.wi.gov or through our forms ordering line at (608) 266-1961. Many questions can be answered by reviewing the FAQ pages on our website. You may also contact us by telephone at (608) 266-2776 or by email at DORBusinessTax@revenue.wi.gov.



**WISCONSIN SALES AND USE TAX
CERTIFICATE OF EXEMPT STATUS (CES)**
(Governmental, Religious, Charitable, Scientific or Educational Organization)

Sales to this organization or entity are exempt from Wisconsin sales and use tax under sec. 77.54(9a) and 77.55(1), Wis. Stats.

This certificate is valid unless cancelled by the Wisconsin Department of Revenue.

CES NUMBER
023177
DATE ISSUED
2/8/1982

IMPORTANT:

NEWBRIDGE MADISON, INC.
128 E OLIN AVE STE 110
MADISON WI 53713-1467

Purchases made by your organization are taxable unless you furnish your supplier with the CES number shown above. Sales by your organization may be subject to tax. If your organization makes taxable sales, it may be required to obtain a seller's permit and remit sales tax to the Department of Revenue.

Questions: Contact the Department of Revenue
by telephone at (608) 266-2776, FAX (608) 264-6884,
email DORBusinessTax@revenue.wi.gov,
or at our website revenue.wi.gov

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at Warner Park

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June 15: The Gomers

June 22: Ladies Must Swing

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July 13: Universal Sound

July 20: Soggy Prairie Bands



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