WELCOME BACK!

In 2021, NewBridge resumed our most critical in-person services. Older adults and staff were so happy to return congregate dining sites, case management home visits, home chore assistance, exercise classes and other activities that started back up. Other older adults were not ready to be in groups quite yet and continued with our virtual programming. Not to worry, our virtual programming is here to stay! We gave over 100 computers to older adults who wanted one and will give away many more in 2022.

Thank you to our generous donors, Friends of NewBridge, government funders, community foundations and business sponsors! It is because of you that we were able to meet the most critical needs of older adults in our community in 2021. We appreciate your continued support.

<table>
<thead>
<tr>
<th>Program</th>
<th># Served</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case Management Clients</td>
<td>1,151</td>
</tr>
<tr>
<td>Case Management Hours</td>
<td>10,742</td>
</tr>
<tr>
<td>Mental Health Resource Clients (May-Dec)</td>
<td>36</td>
</tr>
<tr>
<td>Home Chore Clients</td>
<td>281</td>
</tr>
<tr>
<td>Food Bridge Clients</td>
<td>253</td>
</tr>
<tr>
<td>Bridge Buddy Clients</td>
<td>70</td>
</tr>
<tr>
<td>Guardian &amp; Rep. Payee Clients</td>
<td>72</td>
</tr>
<tr>
<td>Diversity &amp; Inclusion Participants *</td>
<td>3,620</td>
</tr>
<tr>
<td>Activity Participants *</td>
<td>6,119</td>
</tr>
<tr>
<td>Congregate &amp; Take Out Meals</td>
<td>42,705</td>
</tr>
<tr>
<td>Friends of NewBridge</td>
<td>439</td>
</tr>
<tr>
<td>Volunteers</td>
<td>580</td>
</tr>
<tr>
<td>Volunteer Hours</td>
<td>9,500</td>
</tr>
<tr>
<td>Value of Volunteer Time at $28.54/hour</td>
<td>$271,130</td>
</tr>
</tbody>
</table>

*Duplicated Count
Mission Statement
Providing older adults a bridge to successful aging.

Vision Statement
A Community Where All Older Adults Live Their Best Life.

Bridge Buddies: Offers weekly friendly chats or daily reassurance calls for Case Management clients.

Case Management: Provides older adults support needed to live independently by identifying resources and coordinating services. Information, referrals, and advocacy provided through case management home visit assessments of each older adult’s individual needs.

Classes & Activities: Social, educational, and exercise classes at various community sites.

Diet Consultations & Healthy Aging Workshops: Meet with a registered dietitian to discuss ways to manage newly prescribed diets, poor appetite, unintended weight loss, or other areas of concern.

Diversity & Inclusion Activities: Activities for Black and Hispanic older adults to help reduce isolation. Activities focus on socialization, health education and support groups.

Food Bridge: Offers monthly food pantry delivery for Case Management clients at nutritional risk throughout Madison and Monona.

Home Chore: Matches Case Management clients who need basic household chore help with individual volunteers/volunteer groups who provide assistance and friendly visitation.

Medical Equipment Loan Closet: Provides health equipment items to check out. Equipment available may include wheelchair, walkers, canes, shower chairs, and more.

Mental Health Resources: Supports older adults in the case management program with mental health issues and help access community resources to address their needs.

Nutrition Sites: Serves nutritious weekday meals and provides socialization for older adults at multiple Madison/Monona locations.

Volunteer Guardian & Representative Payee: Connects vulnerable older adults with trained volunteers who serve as payees or guardians. The volunteers may make health care decisions, or manage social security benefits, and much more.
Meet Bernice *

Bernice called NewBridge needing help with housing. Her husband passed away and their home sold shortly after. Bernice had two dogs that she loved dearly but made the housing search more difficult. Her fear was that she was going to end up living in her car. Bernice and her NewBridge Case Manager called apartments and found an opening in Beaver Dam that would accept her dogs. Bernice applied and got accepted. She was ready for her next chapter and was very appreciative of the services and diligence case management services through NewBridge.

Meet Kathy*

Kathy was looking for group to help her out with a few projects around her apartment she had recently moved to. She was very anxious and excited about having others come to help her, and she called me multiple times about when the volunteers would be coming, and what they would be helping with. Kathy’s case manager met with her to make a list of things the group could do when they came. The group of volunteers helped reorganize a closet, clean her kitchen, and set up her stereo system. As the day went on, you could see Kathy becoming more relieved at all of the work that was being done, and that her apartment was becoming a home. Kathy was so grateful for the help of the volunteer group, and that they were able to make her more comfortable in her new home.

Meet Luis *

Luis grew up in Guatemala City, Guatemala. Though with civil unrest at his doorstep, he was forced to make the heart wrenching decision to leave him home. Unfamiliar with the culture and the language, he took a leap of faith and moved halfway across the world to be closer to his son here in Wisconsin. In search of friendship and support, Luis was introduced to NewBridge programming. It was at NewBridge that he discovered that there were many others here who share a similar story. He found a community that could empathize with the difficulty of leaving one’s family, culture, and customs behind.

*Names changed to protect identity.
LEADERSHIP

Board of Directors

Our organization benefits every day from the dedicated energies and time devoted by the members of our board. We recognize their contributions reflect a year-round commitment. NewBridge is very fortunate to have such thoughtful and dedicated community members guiding and supporting our organization.

SARAH VALENCIA - PRESIDENT
Director of Population Health
UnityPoint Health Meriter
Adjunct Instructor, UW School of Social Work

CEDRIC JOHNSON - VICE PRESIDENT
Community Relations Manager
Madison Gas & Electric

TIM CONROY - SECRETARY
Executive Director, Capitol Lakes Community

TIM RYAN - TREASURER
CFO, Monona Bank

AMY DEVINE
Attorney, Haskins Short & Brindley LLC

ERIN FABRIZIUS
Public Affairs Counselor
Blumenfeld and Associates

LAURA STEIN
Human Resources Advisor
American Family Insurance

SARA CAMACHO
Community Care Manager
Group Health Cooperative (GHC)

STEPHANIE MUNOZ
Project and Community Engagement Associate, Kids Forward

Management Team

JIM KRUEGER
Executive Director

KATIE GALLAGHER
Associate Director

CANDICE ALEXANDER
Nutrition Manager

DAVID WILSON
Marketing Manager

DEANA WRIGHT
Diversity & Inclusion Manager

DEB TEMERBEKOVA
Executive Assistant

JENNIFER BROWN
Case Manager Supervisor

JODIE CASTANEDA
Case Manager Supervisor

Friends of NewBridge Planning Committee

BARBARA ARNOLD
JANE DUNN
LESLEIGH LUTTRELL
AMY SCARR
## Financial Report

### Revenue by Source

<table>
<thead>
<tr>
<th>Source</th>
<th>Revenue</th>
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</thead>
<tbody>
<tr>
<td>Dane County</td>
<td>$1,260,248</td>
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<tr>
<td>City of Madison</td>
<td>$584,157</td>
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<tr>
<td>City of Monona</td>
<td>$57,109</td>
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<tr>
<td>United Way of Dane County</td>
<td>$33,793</td>
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<tr>
<td>Grants &amp; Sponsorships</td>
<td>$169,229</td>
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<tr>
<td>Friends of NewBridge</td>
<td>$15,565</td>
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<tr>
<td>Individual Donations</td>
<td>$36,002</td>
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<tr>
<td>Fundraising &amp; Other Revenue</td>
<td>$65,282</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>$2,221,385</strong></td>
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### Expense by Program

<table>
<thead>
<tr>
<th>Program</th>
<th>Expense</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration &amp; General</td>
<td>$211,878</td>
</tr>
<tr>
<td>Case Management/Mental Health</td>
<td>$1,167,029</td>
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<tr>
<td>Diversity &amp; Inclusion</td>
<td>$142,719</td>
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<tr>
<td>Home Chore</td>
<td>$118,744</td>
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<tr>
<td>Nutrition &amp; Dietitian</td>
<td>$346,512</td>
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<tr>
<td>Classes &amp; Activities</td>
<td>$129,197</td>
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<td>Volunteer Guardian &amp; Rep Payee</td>
<td>$43,602</td>
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<td>Fundraising</td>
<td>$6,686</td>
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<td>Other Program Expenses</td>
<td>$31,842</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>$2,198,209</strong></td>
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### Assets

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<th>Asset Type</th>
<th>Amount</th>
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<tr>
<td>Current Assets</td>
<td>$836,506</td>
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<tr>
<td>Fixed Assets</td>
<td>$160,653</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>$997,159</strong></td>
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</table>

### Liabilities & Net Assets

<table>
<thead>
<tr>
<th>Liability Type</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Current Liabilities</td>
<td>$191,489</td>
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<tr>
<td>Equity</td>
<td>$715,798</td>
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<tr>
<td><strong>Total Liabilities &amp; Equity</strong></td>
<td><strong>$997,159</strong></td>
</tr>
<tr>
<td><strong>Change in Net Assets</strong></td>
<td><strong>$25,097</strong></td>
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</tbody>
</table>

### Financials

- **Revenue:** 57%
- **Expense:** 3%
- **Net Change:** 2%
## SPONSORS & DONORS

### 2021 Business Sponsors $500+
- All of Us Research Program - UW Madison
- Capitol Lakes
- CUNA Mutual Group Foundation
- Dane Arts
- Diversified Financial Consultants
- Evjue Foundation
- Gunderson Funeral & Cremation Care
- Kollath CPA’s
- Madison Arts Commission
- Madison Community Foundation
- Madison Gas & Electric
- Oscar Rennebohm Foundation
- TASC
- UnityPoint Health – Meriter
- UW Credit Union
- UW Health
- Wegner CPA’s

### 2021 Individual Donors $100+

#### $100-$249
- Tracy Aiello
- Susan Agee
- Jay Allen
- Marcus Allen
- Dennis Azuma
- Jane Bannerman
- Susan Barthel
- M. Jane Baszynski
- R. Baumler
- Blinda & Marshall Beason
- Kristi Betts
- Ginny Bores
- Quaries & Brady
- Tracey Brandt
- Julie Brockman
- Wesley & Joyce Brokopp
- Robert & Mary Macht-Brooks
- Jeffrey Burandt
- Jermaine Butler
- Stephen Carlton
- John Carrier
- Jodie Castaneda
- Kathleen Christoph
- Anthony Cooper
- Tim Conroy
- Keith Davis
- Peter Davis
- Diana Dineen
- Teresa Duschak-Dosher
- Shirley Dumas
- Therese Duranso
- Jon Fadness
- Dale Forsch
- Ann Freiwald
- Don & Mary Gaydos
- Mark Genin
- Lilian Genskow
- Barbara Gessner
- Royal & Joan Gibson
- Bernie & Linda Gorman
- Linda Grant
- Jeffrey Hamm
- John Heaphy
- Kathy Heimann
- Tom Heine
- Ray Hellmer
- Marcia Hendrickson
- Kathleen Howe
- Richard Ihlenfeld
- Margaret Jacoby
- Toya Johnson
- Michael Kimm
- Donald Klemstine
- Nancy Kosseff
- Judith Kruckman
- Thomas Krueger
- Alan & Linda Kubly

#### $250-$499
- Carrie Kulinski
- Eileen Labarre
- Steve Landkamer
- Mary Lang
- James Lewallen
- Lesleigh Luttrell
- Jane Masbruch
- Barbara McKinney
- Jayme Meier
- Jill Melville
- Carolyn Morgan
- Jon & Jane Moritz
- Cynthia Moy
- Carl Mueller
- Tim Mueller
- Joseph Neumaier
- Clare Nordman
- Robert Owens
- Carrol Paulson
- Merilee Pickett
- Anya Pirotwski
- Robert & Kathleen Poi
- James Rosenberger
- Nancy Ross
- Judith Bradshaw-Rousse
- Jeanette Rutschow
- John Ryan
- Tim Ryan
- Robert Shank
- Annie Sholar
- Sari Simer
- Melville Smith
- Rosemary Sorenson
- Gretchen Speerstra
- Bill Stacy
- Marlene Colver Storms
- Carol Strmiska
- Arlene Taylor
- Kari Temkin
- Thomas Thommesen
- Thomas & Beverly Tormey
- Greg Teofee
- Marilyn Tranchita
- Barbara Unger
- VanGuard
- Susan Watson
- James & Rosanne Weber
- Cari & Sandra Raley
- Paul & Sharon Weber
- Terrance Webster
- Karol Wendt
- Fan Wilcox
- Jim Wilson
- Daniel Wolf
- Richard Wolf
- George Zimmerman
- Margaret Zutter

#### $500-$999
- Barb Arnold
- Bruce Azuma
- Carlyle Scott Bush
- Charles Cook
- Amy Devine
- Mona Fuszard
- Daniel & Catherine Gronemus
- Johnny Herndon
- John & Nancy Hilliard
- Richard Johnson
- Alfred Jumper
- Faisal Kaud
- Dave & Teri Kinney
- Jim Krueger
- Marilyn Larson
- Annette Miller
- Stefanie Moritz
- Tyson Schmidt
- Michael & Paulette Siebers
- Geri Torti
- Michael Wolf

#### $1,000-$1,999
- Cheryl Battersman
- Christine Beatty
- Dawn Berney
- Dorothy Borchardt
- Grant Gelhar
- Christopher & Margaret Kleinhenz
- Richard Krock
- Dan Pechauer
- Shirley Raymakers
- Amy Scarr
- Laura Stein
- Walter Stewart
- Mae Hurtado-Thiele
- Sunil Vangara

#### $2,000+
- Richard Klaas
- George & Catherine Tesar

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We attempt to thank all of our business and individual donors. If you and/or your business was inadvertently omitted from this list, please accept our sincere apologies.