

Milwaukee County Department on Aging
2020 Purchase of Service Contract
Grant Supported Programs and Services
Alzheimer's Association

This Contract is made and entered between Milwaukee County, a Wisconsin municipal body corporate, represented by the Milwaukee County Department on Aging, 1220 West Vliet Street Suite 302, Milwaukee, WI 53205 (hereinafter called Department or County), and Alzheimer's Association, 620 S. 76th St., Milwaukee, WI 53214 (hereinafter called Contractor).

1. Dates of Performance

This Contract is made in an amount not to exceed \$797,033 for the period of January 1, 2020 through December 31, 2020 to provide family caregiving services in Milwaukee County. This contract may be extended for an additional year upon the agreement of the parties.

2. Scope of Service

Contractor shall specifically perform all of the services and achieve the objectives as set forth in the proposal submitted by Contractor to County, which is attached hereto as Exhibit I. Contractor shall perform all services provided under this Contract in the manner prescribed by the relevant Program/Service Guidelines or Specifications, which are herein incorporated by reference and made a part of this Contract as if physically attached hereto.

3. Staffing and Delivery of Programs/Services

- A. Contractor shall provide all personnel required to perform the programs or services under this Contract. Such personnel shall not be employees of County, or have any other contractual relationships with County. Any replacement of personnel listed in Contractor's proposal shall be by persons of like qualifications, which shall be attested to by Contractor. Whenever possible, notification of replacement of personnel shall be provided to County prior to replacement.
- B. Contractor will provide proper supervision to all employees providing programs or services under this Contract. Current job descriptions shall be kept on file for positions funded under this Contract, and each employee will be given a job description at the time of employment and whenever the job description is amended.
- C. Except as provided herein and relevant Program/Service Guidelines or Specifications, Contractor shall determine the methods, procedures, and personnel policies to be used in providing programs and services to eligible clients.
- D. This Contract in its entirety is at all times subject to such local, state, and federal laws and administrative regulations as exist at the time this Contract is executed and as shall become effective after execution but prior to termination of this Contract. Contractor shall comply with

all federal, state, and local laws and regulations and shall maintain in good standing all licenses, permits, and certifications relating to the programs and services referred to herein.

- E. All clients served by Contractor under this Contract must meet Department's eligibility requirements as described in the relevant Program/Service Guidelines or Specifications. It is understood that the final authority for determining client eligibility and the amount of services to be provided to individual clients rests with Department and that Contractor will not be reimbursed for services provided to ineligible clients.
- F. Contractor agrees that the programs and services described in Exhibit I will be available to eligible clients throughout the Term of this Contract and to accept all clients referred by Department as long as funds made possible through this Contract are available.
- G. Contractor shall maintain a log of complaints and provide Department a copy of any written complaint made to Contractor regarding any of the services furnished hereunder and will inform Department in writing of the actions taken by Contractor to resolve such complaints.
- H. Contractor shall complete all forms and documents requested by the Department within timeframes outlined by the Department.
- I. Contractor agrees to perform background checks on any Contractor employees, representatives, or agents hired on or after the Effective Date who may have or do have direct contact with clients or customers, to ensure such employees: (i) have not been convicted of a criminal offense related to the provision of services but have not yet been excluded; (ii) have not been convicted of any felony; (iii) as discovered through any background check or based upon Contractor's knowledge, have not been terminated from employment by any employer or contractor for theft, misappropriation of property, or any other potentially illegal or unethical acts. Vendor agrees not to use any employee or potential employee failing to meet the above criteria to provide direct client services to any under this Agreement. Any breach of this section shall give Department the right to terminate this Agreement immediately.

4. Equipment

- A. Contractor agrees that all items of equipment purchased with funds provided by Department under this Contract shall be used for the programs and services purchased through this Contract or as otherwise may be specified in Exhibit I. Contractor further agrees to provide to Department a copy of an invoice for all items of equipment purchased upon request, to annually inventory provide Department of a list of said equipment, and to maintain property and content insurance, including fire, vandalism, and theft, to cover the replacement value of said items.
- B. Should Department funding cease for the programs or services for which the equipment was purchased under this Contract, or if Contractor should cease using said equipment for the purposes for which it was originally purchased, Contractor agrees either to (1) turn over said equipment to Department for distribution to other approved programs or services for older persons; or (2) dispose of said equipment in such other fashion as may be mutually agreed by Contractor and Department.

5. Fiscal Administration and Program Income

Contractor shall observe the following policies and practices with regard to all funds received from Department pursuant to this agreement:

- A. Contractor agrees to identify the total cost of the program or service funded under this Contract.
- B. Contractor shall provide to Department an agency-wide budget, disclosing all of Contractor's anticipated revenues and expenditures for the period of this Contract.
- C. Funds received by the Contractor under this Contract may not be co-mingled with funds from other sources.
- D. Contractor shall maintain a uniform double entry accounting system and a management information system compatible with cost accounting and control systems.
- E. Contractor agrees to comply with the allowable cost policies and procedures as established by the Wisconsin Department of Health Services.
- F. Program Income. Per 45 CFR Part 75.307(e)(1), Program Income (as hereinafter defined) must be deducted from total allowable costs to determine the net allowable costs; Program Income must be used for current costs; and unanticipated Program Income must be used to reduce the federal award and non-federal entity contributions rather than increase the funds committed to the project. Program Income must be reported and spent within the contract year it is generated. "Program Income" is defined as Contractor revenue meeting one or more of the following descriptions: (1) Contributions/donations collected from participants for services provided (e.g., home-delivered meals, senior dining meals, caregiver services, etc.), (2) Contributions/donations from local civic groups, businesses, members of the community, or other organizations; (3) Proceeds from fundraising; (4) Revenue for meals provided to home and community based long-term care programs (Family Care, IRIS, COP, etc.); (5) Revenue from sales of services or property (e.g. meals, liquid nutritional supplements, etc.); (6) Interest income; (7) Usage or rental fees; or (8) Patent or copyright royalties. The definition of "Program Income" excludes revenues raised by a government grantee/provider under its governing powers (taxes, special assessments, levies, fines) and cash match.

6. Compensation

- A. Contractor shall be compensated for work performed as stated in Exhibit I, attached hereto and made a part of this Contract. Contractor recognizes that the total service needs of the community may not be met and shall provide programs and services within the specific amounts stated in Exhibit I. Department is unable to guarantee the volume of services funded by this Contract. Under no circumstances shall payments under this Contract exceed the amount(s) authorized for this Contract by the Milwaukee County Board of Supervisors. The parties agree that section 66.0135, Wisconsin Statutes, Prompt Pay Law, shall not apply to payment for programs and services provided hereunder.

- B. Funds may be advanced to Contractor as set forth in section 46.036 (3) (f) Wisconsin Statutes. The advance payment provision applies only when requested by Contractor. Advance payments are made at the discretion of Department. The advance payment shall be repaid to Department upon demand. If Contractor fails to repay the advance as described, Department shall have the right to withhold any payments due Contractor from Department sufficient to cover the amount of the advance payment.
- C. Advance payments by Department shall not exceed one-twelfth (1/12) of the Contract award. Advance payment amounts are at the discretion of the Department. Prior to the receipt of advance payment, Contractor shall provide Department with a surety bond for an amount equal to the amount of the advance payment as set forth in section 46.036 (3) (f) Wisconsin Statutes.
- D. Department shall recover from Contractor money paid in excess of the conditions of this Contract. Repayment shall be made in full within thirty (30) days after Department has made written demand to Contractor for repayment. Department may recover repayments due to Department from any subsequent payments due to Contractor now, or from future contracts, or any other service agreement with Department. Department shall charge interest on outstanding repayments due Department as set forth in section 46.09 (4) (d) General Ordinances of Milwaukee County.
- E. No funds within this Contract may be used to supplant Medical Assistance, Health Maintenance Organization (HMO), or Preferred Provider Organization (PPO) funded services.
- F. Department and Contractor acknowledge that funding of this Contract is completely dependent upon state and federal grants and contracts. The obligation of the Department to purchase the services described herein is contingent upon present state and federal grants and contracts continuing at their present levels. Should such funding sources terminate or be reduced, Department reserves the right, in its sole discretion, either to terminate this agreement or revise the scope of services being purchased to reflect any reduction in such funding. It is further recognized and agreed by Department and Contractor that the programs and services provided under this Contract are subject to all provisions of said federal and state grants and contracts, and Contractor agrees to comply with all such provisions for the period of this Contract, including all applicable provisions of the standard State/County contract.

7. Billing and Reporting

- A. Contractor shall provide Department with monthly billings and reports for programs and services provided under this contract by the seventh (7th) working day of the month following the month in which services are provided. Contractor shall submit billings and reports on the forms and according to the manner specified by Department.
- B. Department shall make payment only for those line items as are specified in the approved budget. Expenditures for any single line item may not exceed the amount in the approved program budget by more than \$500 without written authorization by Department and the submission of a revised budget by Contractor on the prescribed form.

- C. Within thirty (30) days of the receipt of all required billings and reports, Department shall make payment to Contractor of the net amount due. The 30 days does not start to run until all forms are accurate, complete, and include all revisions requested by Department.

8. Record Keeping and Access to Records

- A. Contractor shall maintain and, upon request, furnish to Department, at no cost to Department, any and all information requested by Department relating to the quality, quantity, and cost of services covered by this Contract and shall allow authorized representatives of Department and Department's funding sources to have access to all records necessary to confirm Contractor's compliance with law and the Program/Service Guidelines or Specifications for this Contract. Access to information shall include computerized data and/or other electronic information used by the Contractor, made available in formats suitable for data analysis, such as queries, using conventional software programs.
- B. Contractor shall maintain written verification of programs and services provided under this Contract, including the dates of programs and services performed for all of the purchased programs and services rendered, as specified by Department. Contractor shall maintain clearly identified and readily accessible documentation of costs supported by properly executed payrolls, time records, invoices, contracts, vouchers, or other official documentation evidencing in proper detail the nature and propriety of the programs and services provided. Contractor shall retain all such records for a period of at least four (4) years from the date of issuance of the certified financial and compliance audit. Records shall be retained beyond the four-year requirement if an audit is in progress or exceptions identified in prior audits have not been resolved.
- C. It is agreed that Milwaukee County representatives, including representatives of the Department on Aging or the Office of the Comptroller, or representatives of appropriate state or federal agencies, including the Wisconsin Department of Health Services, shall have the right of access to program, financial, and such other records of Contractor or Contractor's subcontractors as may be necessary to evaluate or confirm Contractor's cost estimates, rates, and charges for programs and services provided under this Contract or as may be necessary to evaluate or confirm Contractor's delivery of the programs and services in compliance with the Program/Service Guidelines or Specifications for this Contract.

9. Inspection of Premises

Contractor shall allow inspection of Contractor premises to Department representatives and to authorized representatives of any other local, state, or federal government unit. Inspection shall be permitted without formal notice at any time programs and services are being furnished.

10. Audit Requirements

- A. Contractor shall submit to Department, on or before July 1, 2020, or such later date that is mutually acceptable to Contractor and department, one (1) original copy mailed to the address provided below and one soft copy e-mailed to the Program Planning Coordinator, of an Agency-wide Audit for Calendar Year 2019 if the total amount of annual funding is \$100,000 or more, unless waived by Department. Contractor may request, and with written consent of Department

provide an annual Program Audit in lieu of the annual Agency-wide Audit. The audit shall be performed by an independent certified public accountant (CPA) licensed to practice by the State of Wisconsin. CPA audit reports are required under Wisconsin Statutes, Section 46.036 (4)(c). This provision shall survive the termination of this Agreement regardless of the reason.

- B. Non-profit Contractors who received aggregate federal financial assistance of \$500,000 or more, either directly or indirectly, shall submit to County two (2) original copies of a certified audit for calendar year 2020 performed in accordance with the Office of Management and Budget (OMB) Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards. The audit submitted by Contractor shall be conducted in conformance with the following standards:
 - (a) Wisconsin Department of Health Services (DHS) Audit Guide, October 2018 Revision or later.
 - (b) Standards applicable to financial audits contained in Government Auditing Standards (GAS) promulgated by the Comptroller General of the United States; and
 - (c) Generally Accepted Auditing Standards (GAAS) adopted by the American Institute of Certified Public Accountants (AICPA).
- C. Contractors reporting on a fiscal year other than a calendar year shall be considered in compliance with the audit requirements upon submittal of Contractor's fiscal year audit, meeting the audit requirements in Section 8, part A subparts (1),(2), and (3) below, within 180 days of the fiscal year closing, plus financial statements including required supplemental schedules covering the period from the start of the fiscal year beginning in 2019 through December 31, 2019, compiled by a CPA licensed to practice by the State of Wisconsin. Compiled supplemental schedules are due by July 1, 2020. This provision shall survive the termination of this Agreement regardless of the reason.
- D. All audits submitted by Contractor per above requirements shall also be conducted in conformance with the following standards:
 - 1. The Wisconsin *Provider Agency Audit Guide*, 1999 revision *issued by WI Department of Corrections and Workforce Development or Department of Health Service Audit guide (DHSAG) Latest Revision* issued by Wisconsin Departments of Health Services (online at www.DHS.state.wi.us/grants);
 - 2. Standards applicable to financial audits contained in *Government Auditing Standards* (GAS), December 2011 Revision published by the Comptroller General of the United States; and
 - 3. Generally accepted auditing standards (GAAS) adopted by the American Institute of Certified Public Accountants (AICPA).
- E. Requests for substitution of Program Audit for Agency-wide Audit, audit waiver, and/or extension requests must be in writing. Requests for substitution of Program Audit for Agency-wide Audit, audit waiver and/or extension requests must be sent to the following address no later than five months after the end of the Contractor's fiscal year, or such later date mutually agreed to by Contractor and Department. Extensions of the deadline for submission of the audit are at the sole discretion of Department. If Contractor determines an extension is necessary,

Department must receive a request for an extension not later than thirty (30) days prior to the due date for the audit. A request for an extension must include:

1. an explanation as to why an extension is necessary;
 2. the date upon which the Department will receive the audit;
 3. the unaudited financial statements of the Contractor; and,
 4. any additional information Contractor deems relevant to Department's determination.
- F. No extension will be granted for a period greater than ninety (90) days beyond the original date that the audit was due. Requests for extension of audit due date or waiver must be submitted to:

Milwaukee County Department on Aging
Assistant Fiscal Director
1220 W. Vliet Street, Suite 304
Milwaukee, WI 53205

Financial Statements shall be prepared in conformity with accounting principles generally accepted in the United States of America and on the accrual basis of accounting. Contractor must request, and receive written consent of Department to use other basis of accounting in lieu of accrual basis of accounting. CPA audits and reports referenced above shall contain the following Financial Statements, Schedules and Auditors' Reports:

1. Financial Statements and Supplemental Schedules:
 - a. Comparative Statements of Financial Position – For Agency-wide audits only.
 - b. Statement of Activities – For Agency-wide audits only.
 - c. Statement of Cash Flows – For Agency-wide audits only.
 - d. Schedule of Revenue and Expense by Funding Source (Agency-wide) is required of all Contractors. This schedule must follow the format and content of the sample schedule contained in the *Milwaukee County Department of Health and Human Services Year Purchase of Service Guidelines, Technical Requirements – Audit and Reporting* booklet (latest edition). Do not combine multiple line items into a single line item or separate a single line item into multiple line items.
 - e. Allowable administrative and other allocated overhead (collectively, indirect costs) will be limited to 10% of net allowable direct program costs (excluding such allocated costs) for agencies/Contractors electing to provide a program audit in lieu of an agency-wide audit.
 - f. Reserve Supplemental Schedule is required for all non-profit Contractors that provide participant services on the basis of a unit rate per unit of participant service (units-times-price

agreements). A separate schedule must be completed for each contract/facility, or for each program under a Fee-for-Service Agreement with Department. For Contractors whose fiscal year is other than a calendar year, the period covered by the schedule must be the most recently completed calendar year for all Department funded programs.

The schedule must identify revenue from each Purchaser (earned under each contract) separately, and include total units of service provided to all Purchasers for each contract/facility and total units of service provided under the Contract with Department, as well as the items required by the *Provider Agency Audit Guide* (Section 7.1.6), or *Department of Health Service Audit Guide (DHSAG), Latest Revision* for the most recently completed calendar year. The schedule and allowable additions to reserves shall be by contract/facility or by program category. Schedule of Profit for For-Profit Contractors Which Provide Participant Care.

g. For profit Contractors shall include a schedule in their audit reports showing the total allowable costs and the calculation of the allowable profit by contract/facility, or for each rate-based program (service) within a facility. Wis. Stat. 46.036(3)(c) indicates that contracts for proprietary agencies may include a percentage add-on for profit according to the rules promulgated by the Department. Allowable profit will be restricted to 5% of net allowable operating costs.

h. Units of service provided under the Contract, if not disclosed on the face of the financial statements, are required for Contractors that provide participant services on the basis of a unit rate per unit of participant service (units-times-price agreements). Contractor's auditors shall review and report on the extent of support for the number of units for each type of service billed to Department, and compare units billed to Contractor's accounting/billing records that summarize units provided per participant. Contractor's auditors shall reconcile billing records to supporting underlying documents in participant case files on a test basis, and report on any undocumented units billed to Department that exceed the materiality threshold of the DHS *Provider Agency Audit Guide*, 1999 revision issued by WI Department of Corrections and Workforce Development or *Department of Health Service Audit Guide (DHSAG), Latest Revision* issued by Wisconsin Departments of Health Services. The disclosure must include total units of service provided to all Participants for each program, facility, or rate-based program within a facility; and total units of service provided under the Contract or Service Agreement with Department for the most recently completed calendar year.

i. Notes to financial statements including disclosure of related-party transactions, if any. Rental cost under less-than-arms-length leases are allowable only up to the amount that would be allowed had title to the property vested with the Contractor. Rental cost under sale and leaseback arrangements are allowable only up to the amount that would be allowed had the Contractor continued to own the property. Contractor's auditors must disclose the actual costs of ownership, by property, for the property(ies) in question, as well as the amount of such costs to be allocated to each Department program, the amount of rent originally charged, and the amount of such rent that is an unallowable cost.

j. Schedule of Federal and State Awards broken down by contract year. The schedule shall identify the name of the Milwaukee County Department as pass-through grantor, the contract number as pass-through grantor's identifying number, and the program name and number from

the Attachment I of the Contract. Each program under County Contract must be reported as a separate line item by contract year.

2. Independent Auditors Reports and Comments:

- a. "Opinion on Financial Statements and Supplementary Schedule of Expenditures of Federal and State Award" including comparative statements of financial position, and related statements of activities and cash flow of entire agency. For Program Audits, "Opinion on the Financial Statement of a Program in Accordance with the Program Audit."
- b. Report on Compliance and Internal Control over Financial Reporting Based on an Audit of Financial Statements Performed in Accordance with Government Auditing Standards (GAS), and the *Provider Agency Audit Guide*, 1999 revision issued by WI Department of Corrections and Workforce Development or *Department of Health Service Audit Guide (DHSAG)*, Latest Revision issued by Wisconsin Department of Health Services. Or, Program Audits, "Report on Compliance with Requirements Applicable to the Program and on Internal Control over Compliance Performed in Accordance with the Program Audit."
- c. "Report on Compliance with Requirements Applicable to Each Major Program and Internal Control over Compliance in Accordance with OMB Part 200 Uniform Grant Guidance" (applicable only if the audit is also in accordance with OMB Part 200 Uniform Grant Guidance).
- d. Schedule of findings and questioned costs to include:
 - (1) Summary of auditor's results on financial statements, internal control over financial statements and compliance, and if applicable; the type of report that the auditor issued on Compliance for Major Federal Programs;
 - (2) Findings related to the financial statements of the Contractor or of the program which are required to be reported in accordance with Generally Accepted Government Auditing Standards (GAGAS);
 - (3) Findings and Questioned Costs for Federal Awards which shall include audit findings as defined in section .510(a) of OMB Part 200-Uniform Grant Guidance, if applicable;
 - (4) Doubt on the part of the auditors as to the auditee's ability to continue as a going concern;
 - (5) Other audit issues related to grants/contracts with funding agencies that require audits to be performed in accordance with the *Provider Agency Audit Guide*, 1999 revision issued by WI Department of Corrections and Workforce Development or *Department of Health Service Audit Guide (DHSAG)*, Latest Revision issued by Wisconsin Department of Health Services; and
 - (6) Whether a Management Letter or other document conveying audit comments was issued as a result of the audit.
- e. A copy of the Management Letter or other document with auditor's comments issued in conjunction with the audit shall be provided to Department, along with Management's response

to the Management Letter. If no Management Letter was issued, the schedule of findings and questioned costs shall state that no Management Letter was issued.

3. General:

The following is a summary of the general laws, rules and regulations with which the auditor should be familiar in order to satisfactorily complete the audit.

- a. Government Auditing Standards, (Standards for Audit of Governmental Organizations, Programs, Activities, and Functions), Latest Revision.
 - b. OMB Uniform Grant Guidance Part 200
 - c. The allowability of costs incurred by commercial organizations is determined in accordance with the provisions of the Federal Acquisition Regulation (FAR) at 48 CFR Part 31 - Contract Cost Principles and Procedures.
 - d. Wisconsin State Statutes, Sections 46.036, 49.34, Purchase of Care and Services.
 - e. State of Wisconsin, Department of Administration Single Audit Guidelines - Latest Revision.
 - f. State of Wisconsin Department of Health Services, Provider Agency Audit Guide - 1999 Revision issued by WI Department of Corrections and Workforce Development.
 - g. *Department of Health Services Audit Guide (DHSAG) Latest Revision* issued by Wisconsin Department of Health Services.
 - h. State of Wisconsin Department of Health Services, Allowable Cost Policy Manual - Latest Revision.
 - i. AICPA Generally Accepted Auditing Standards.
- G. Contractor hereby authorizes and directs its Certified Public Accountant, if requested, to share all work papers, reports, and other materials generated during the audit with Department or Department's representative(s) including the Milwaukee County Department of Health and Human Services and the Milwaukee County Division of Audit Services (DAS) as well as state and federal officials. Such direct access shall include the right to obtain copies of the work papers and computer disks, or other electronic media, which document the audit work. Contractor shall require its CPA to retain work papers for a period of at least seven (7) years following the latter of Contract termination, or receipt of audit report by Department. This provision shall survive the termination of this Contract regardless of the reason.
- H. Contractor and Department mutually agree that Department or Department's representative(s), including the Milwaukee County Department of Aging and the Milwaukee County Division of Audit Services (DAS) , Milwaukee County Office of the Comptroller, as well as state and federal officials, reserve the right to review certified audit reports, supporting work papers, or financial statements, and perform additional audit work as deemed necessary and appropriate, it being understood that additional overpayment refund claims or adjustments to

prior claims may result from such reviews. Such reviews may be conducted for a period of at least seven (7) years following the latter of contract termination, or receipt of audit report, if required. This provision shall survive the termination of this Contract regardless of the reason.

- I. Contractors reporting on a fiscal year other than a calendar year shall be considered in compliance with contract reporting requirements upon submittal of the following unaudited schedules:
 1. A schedule of revenue and allowable costs allocated by funding source, and by program, covering the period from the end of the Contractor's fiscal year ended in 2019 through December 31, 2019, for each program or activity identified as a fee for service agreement with Department. The schedule(s) shall be compiled by Contractor's independent public accountant, with an accountant's compilation report, for the period from the close of Contractor's fiscal year through the end of the calendar year, on or before July 1, 2020, or such later date that is mutually acceptable to Contractor and Department.
 2. If Contractor's fiscal year encompasses two contract years, Contractor shall submit a "bridging schedule" prepared by a CPA, which identifies program revenues and allowable costs for each of the two calendar year contract periods. The "bridging schedule" shall reconcile the two calendar year contract periods to the fiscal year totals for each program reported in the most current fiscal year audit report.
- J. Contractor shall maintain records for audit purposes for a period of at least seven (7) years following the latter of contract termination or receipt of audit report by Department. This provision shall survive the termination of this Contract regardless of the reason.
- K. Contractor's Subrecipients
 1. Contractors who subcontract with other providers for the provision of care and services are required by federal and state regulations to monitor their subrecipients.
 2. Contractors shall have on file, and available for review by Milwaukee County and its representatives, copies of subrecipient's CPA audit reports and financial statements. These reports and financial statements shall be retained for a period of at least seven (7) years following the latter of contract termination, or receipt of audit report, if required. This provision shall survive the termination of this Contract regardless of the reason.
 3. Subrecipient shall maintain and, upon request, furnish to Department, at no cost to Department, any and all information requested by Department relating to the quality, quantity, or cost of services covered by the subcontract and shall allow authorized representatives of Department, the Milwaukee County Division of Audit Services (DAS) and Department's funding sources to have access to all records necessary to confirm subrecipient's compliance with law and the specifications of this Contract and the subcontract. This provision shall survive the termination of this Contract regardless of the reason.
 4. It is agreed that Department representatives, the Milwaukee County Division of Audit Services (DAS) and representatives of appropriate state or federal agencies shall have the right of access to program, financial and such other records of subrecipient as may be requested to evaluate or

confirm subrecipient's program objectives, participant case files, costs, rates and charges for the care and service, or as may be necessary to evaluate or confirm subrecipient's delivery of the care and service. It is further understood that files, records and correspondence for subcontracted engagement must be retained by subrecipient for a period of at least seven (7) years following the latter of contract termination, or receipt of subrecipient's audit report, if required. This provision shall survive the termination of this Contract regardless of the reason.

5. Subrecipient shall allow visual inspection of subrecipient's premises to Department representatives and to representatives of any other local, state, or federal government unit. Inspection shall be permitted without formal notice at any time that care and services are being furnished.
- L. Failure to Comply with Audit Requirements: If Contractor fails to have an appropriate audit performed or fails to provide a complete audit-reporting package to the Department, or fails to request and receive an audit submission waiver (if applicable/available) or extension of time to submit audit,, as required by this Contract within the specified timeframe, the Department may:
 1. Conduct an audit or arrange for an independent audit of Contractor and charge the cost of completing the audit to Contractor;
 2. Charge Contractor for all loss of Federal or State aid or for penalties assessed to Department because Contractor did not submit a complete audit report within the required time frame;
 3. Disallow the cost of the audit that did not meet the applicable standards; and/or
 4. Withhold or suspend any or all payments due the Contractor from Department.
 5. Suspend, reduce or terminate the Contract, or take other actions deemed by Department to be necessary to protect the Department's interests.
 6. In the event of selection by Department of an organization or individual to complete an audit of Contractor's financial statements, Department shall withhold from future payments due to the Contractor from Department an amount equal to any additional costs incurred by the Department for the completion of an audit of Contractor's records by an auditor selected by Department.
 7. Department may withhold or recover a sum of \$1,500.00 from payments due to the Contractor from Department as liquidated damages for the failure to comply with audit requirements.
 8. Department may impose additional monitoring and/ or reporting requirements on contractor. Or take any other action that Department determines is necessary to protect federal or state funding.
 9. These provisions shall survive the termination of this Contract regardless of the reason.
 10. Upon receipt of the audit report, Department will complete preliminary review of all audits received to determine whether additional information is required and notify Contractor of any additional information required to complete review. Once the complete audit is received,

Department will complete a compliance review and notify Contractor of Department's actions on the audit report.

11. Contractor agrees to submit to Department plans for correcting weaknesses identified in audit reviews. Failure on the part of the Contractor to comply with these requirements shall result in withholding of any payments otherwise due the Contractor from Department and ineligibility for future agreements with Department until six months after such time as these requirements are met. This provision shall survive the termination of this Contract regardless of the reason.
12. Contractor agrees that Department is entitled to repayment of amounts identified as a result of the audit required under this section and acknowledges that failure to repay such amounts may result in legal action as determined by Milwaukee County Corporation Counsel. Interest and any legal expenses incurred by Department in collection of these amounts shall be charged the Contractor on outstanding repayments as set forth in s46.09 (4) (h) Milwaukee County General Ordinances. This provision shall survive the termination of this Contract regardless of the reason.
13. Contractor and Department mutually agree that Department or its agents, the Milwaukee County Director of Audits, as well as state and federal officials, reserve the right to review certified audit reports or financial statements and perform additional audit work as deemed necessary and appropriate. It is understood that additional overpayment refund claims or adjustments to prior claims may result from such reviews. This provision shall survive the termination of this Contract regardless of the reason.
14. The Contractor consents to the use of statistical sampling and extrapolation as the means to determine the amounts owed by the Contractor for any Department programs, or Fee-for-Service Provider Networks as a result of an investigation or audit conducted by Department or its agents, the Milwaukee County Division of Audit Services (DAS) , the Wisconsin Department of Health Services, the Department of Justice Medicaid Fraud Control Unit, the federal Department of Health and Human Services, the Federal Bureau of Investigation, or an authorized agent of any of these. This provision shall survive the termination of this Contract regardless of the reason.
15. If the Department has waived the audit requirement for this Contract under Wisconsin Statute s.46.036, this waiver does not absolve Contractor from meeting any federal audit requirements that may be applicable or any audit requirements of other contracts. Waiver of the audit, or failure of Contractor to receive Department funding under this Contract and other County Agreements at a level that would require an audit does not absolve Contractor from submitting an un-audited schedule of program revenue and expenses as a final accounting to determine final settlement under this Contract. This provision shall survive the termination of this Contract regardless of the reason.

M. County Rights of Access and Audit.

The Contractor, Lessee, or other party to the contract, its officers, directors, agents, partners and employees shall allow the County Audit Services Division and department contract administrators (collectively referred to as Designated Personnel) and any other party the Designated Personnel may name, with or without notice, to audit, examine and make copies of any and all records of the

Contractor, Lessee, or other party to the contract, related to the terms and performance of the Contract for a period of up to three years following the date of last payment, the end date of this contract, or activity under this contract, whichever is later. Any subcontractors or other parties performing work on this Contract will be bound by the same terms and responsibilities as the Contractor. All subcontracts or other agreements for work performed on this Contract will include written notice that the subcontractors or other parties understand and will comply with the terms and responsibilities. The Contractor, Lessee, or other party to the contract, and any subcontractors understand and will abide by the requirements of Chapter Section 34.09 (Audit) and Section 34.095 (Investigations concerning fraud, waste, and abuse) of the Milwaukee County Code of General Ordinances.

11. Affirmative Action, TBE Goals, Non-Discrimination and Equal Employment Opportunity

A. Affirmative Action.

The Contractor assures that it will undertake an affirmative action program as required by Milwaukee County Code of General Ordinances (MCCGO) 56.17(1d), to insure that no person shall, on the grounds of race, creed, color, national origin, or sex be excluded from participating in any employment activities covered in MCCGO 56.17(1d). The Contractor assures that no person shall be excluded, on these grounds, from participating in or receiving the services or benefits of any program or activity covered by this subpart. The Contractor assures that it will require that its covered organizations provide assurances to the Contractor that they similarly will undertake affirmative action programs and that they will require assurances from their suborganizations, as required by MCCGO 56.17(1d), to the same effect.

B. Targeted Business Enterprises.

Contractor shall comply with all provisions imposed by or pursuant to Milwaukee County Code of General Ordinances Chapter 42 when and where applicable, and as said Ordinance may be amended. The County shall notify Contractor in the event that new ordinances are issued.

Contractor shall use reasonable efforts to establish Targeted Business Enterprise ("TBE") participation goals, consistent with Milwaukee County TBE goals of seventeen percent (17%) for professional services, and to use good faith efforts to achieve those goals. The parties agree that no TBE goal has been established and no goal is required under this contract.

The Milwaukee County Community Business Development Partners shall assist Contractor in soliciting potential TBE vendors for the improvements and monitor such goal attainment. Contractor's contact regarding TBE participation is:

Milwaukee County Community Business Development Partners
633 W. Wisconsin Avenue, 9th Floor
Milwaukee, WI 53233
cbd@milwaukeecountywi.gov

C. Non-Discrimination, Equal Employment Opportunity, and Affirmative Action Goals.

In the performance of work or execution of this contract, the Contractor shall not discriminate against any employee or applicant for employment because of race, color, national origin or ancestry, age, sex, sexual orientation, gender identity and gender expression, disability, marital status, family status, lawful source of income, or status as a victim of domestic abuse, sexual assault or stalking, which shall include but not be limited to the following: employment, upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training including apprenticeships. The Contractor will post in conspicuous places, available for employment, notices to be provided by the County setting forth the provisions of the nondiscriminatory clause. A violation of this provision shall be sufficient cause for the County to terminate the Contract without liability for the uncompleted portion or for any materials or services purchased or paid for by the Contractor for use in completing the contract.

The Contractor agrees that it will strive to implement the principles of equal employment opportunities through an effective affirmative action program, and will so certify prior to the award of the Contract, which program shall have as its objective to increase the utilization of women, minorities and handicapped persons, and other protected groups, at all levels of employment in all divisions of the contractor's workforce, where these groups may have been previously under-utilized and under-represented. The Contractor also agrees that in the event of any dispute as to compliance with the aforesaid requirements, it shall be his/her responsibility to show that he/she has met all such requirements.

The Contractor agrees that it will strive to implement the principles of active and aggressive efforts to assist Milwaukee County in meeting or exceeding its overall annual goal of participation of target enterprise firms.

When a violation of the non-discrimination, equal opportunity or Affirmative Action provisions of this section has been determined by County, Contractor shall immediately be informed of the violation and directed to take all action necessary to halt the violation, as well as such action as may be necessary to correct, if possible, any injustice to any person adversely affected by the violation, and immediately take steps to prevent further violations.

If, after notice of a violation to Contractor, further violations of the section are committed during the term of the Contract, County may terminate the Contract without liability for the uncompleted portion or any materials or services purchased or paid for by the Contractor for use in completing the Contract, or it may permit Contractor to complete the Contract, but, in either event, Contractor shall be ineligible to bid on any future contracts let by County.

12. Indemnity

- A. The Contractor agrees to the fullest extent permitted by law, to indemnify, defend, and hold harmless, the Department, and its agents, officers, and employees, from and against all loss or expense including costs and reasonable attorney's fees by reason of liability for damages including statutory benefits under Workers' Compensation laws, suits at law or in equity, caused by any wrongful, intentional, or negligent act or omission of the Contractor, or its (their) agents which may arise out of or are connected with the activities covered by this Contract.

- B. Contractor shall indemnify and save Department harmless from any award of damages and costs against Department for any action based on intellectual property infringement regarding materials, including, but not limited to, computer programs involved in the performance of the programs and services covered by this Contract.
- C. Contractor agrees to indemnify Department for any amount(s) Department may be required to repay to the Wisconsin Department of Health Services by virtue of payments made to Contractor by Department under this Contract that the Department of Health Services determines to be overpayments or inappropriate payment.

13. Insurance

Contractor agrees to strictly comply with the insurance requirements set forth on Exhibit II.

14. Withholding of Payments

Failure of Contractor to comply with Contract requirements may result in withholding or forfeiture of any payments otherwise due Contractor from Department by virtue of any Department obligation to Contractor until such time as the Contract requirements are met.

15. Contract Termination

- A. Department or Contractor may terminate this Contract for any reason, with or without cause, following thirty (30) days written notice, unless an earlier date is determined by Department to be essential to the safety and well-being of the clients covered by this Contract with the exception of those facilities which must meet the notification requirements as applicable in Chapter 50 licensing. Failure to comply with any part of this Contract may be considered cause for early termination by the offended party. In the event of termination, the Department will only be liable for programs and services rendered through the date of termination and not for the uncompleted portion or any materials or services purchased or paid for by Contractor for use in completing this Contract.
- B. Contractor shall notify County, in writing, whenever it is unable to provide the required quality or quantity of programs and services. Upon such notification, Department and Contractor shall determine whether such inability to provide the required quality or quantity of programs and services will require a revision or early termination of this Contract.
- C. Notwithstanding any other right of termination, Department reserves the right to immediately terminate, or reduce in scope, its obligations under this contract in the event that the sources of funding to the Department derived through State or Federal grants or contracts is terminated or reduced. This right of immediate termination for loss of funding applies even if Contractor has not been paid for services previously rendered.
- D. Department reserves the right to withdraw any qualified recipient from the program, service, institution, or facility of the Contractor at any time when in the judgment of Department it is in the best interest of Department or the qualified recipient to do so.

16. Advertising and Media Requests

Contractor shall partner with Department in promoting their own services and the services offered by Department. All brochures, announcements, press releases, signage, and other items used to promote services provided through this Contract must acknowledge that Department funds these services. Any requests for interviews with Media shall be reported to the Department prior to the interview taking place.

17. Coordination of Services

Contractor agrees to coordinate its service efforts with other health and human service providers to eliminate unnecessary duplication of services.

18. Client Contributions

- A. Where required by the relevant Program/Service Guidelines or Specifications, Contractor shall provide clients receiving services under this Contract the opportunity to voluntarily and confidentially contribute toward the cost of services they receive. All solicitations to contribute must be approved in advance by Department. Under no circumstances shall any otherwise eligible client be denied service under this Contract because of a failure to contribute toward the cost of the services provided.
- B. Contractor agrees to report to Department all funds contributed by clients and to record and document such contributions consistent with the accounting requirements for other funds received and expended under this Contract.
- C. Contractor agrees that any and all client contributions will be used as provided in the budget contained in Exhibit I or to provide additional services to eligible clients under this Contract in the same manner and at a cost equivalent to other services purchased through this Contract. Contractor further agrees that all funds raised through client contributions that remain unspent at the end of this Contract must be spent in a manner approved by Department or reimbursed to Department.

19. Modifications

Contractor recognizes the right of Department to make reasonable modifications in the programs and services purchased under this Contract. Contractor shall be notified in writing two weeks prior to any such modifications.

20. Contract Renegotiation or Revision

- A. This Contract may be renegotiated in the event of changes required by law, regulations, court action, or inability of either party to perform as committed in this Contract.
- B. This contract may be revised in a written amendment signed by the authorized representatives of both parties.

21. Independent Contractor

Nothing contained in this Contract shall constitute or be construed to create a partnership, joint venture, or employer-employee relationship between Department or its successors or assigns and Contractor or its successors or assigns. In entering into this Contract and in acting in compliance herewith, Contractor is at all times acting and performing as an independent contractor duly authorized to perform the acts required of it hereunder.

22. Subcontracts

Assignment of any portion of the services by subcontract is prohibited except upon prior written approval of Department.

23. Assignment Limitation

This Contract shall be binding upon and inure to the benefit of the parties and their successors and assigns provided, however, that neither party could assign its obligations hereunder without the prior written consent of the other.

24. Resolution of Disputes

Contractor may appeal the decisions of Department in accordance with section 46.036 (7) Wisconsin Statutes.

25. Prohibited Practices

- A. During the period of this Contract, Contractor shall not hire, retain, or utilize for compensation, any member, officer, or employee of the Department of Aging representing Department or any person who to the knowledge of Contractor has a conflict of interest. No employee of the Department on Aging representing Department shall be an officer, member of the Board of Directors, or have a proprietary interest in Contractor's business.
- B. Contractor shall furnish Department with written disclosure of any financial interest, purchase or lease agreements, employment relationship, or professional services/consultant relationship which any of Contractor's employees, officers, board members, stockholders, or members of their immediate family may have with respect to any supplier to Contractor of goods and services under this Contract.
- C. Contractor attests that it is familiar with Milwaukee County's Code of Ethics (Chapter 9 of the General Ordinances of Milwaukee County) which states in part, "No person shall offer or give to any public official or employee, directly or indirectly, and no public official or employee shall solicit or accept from any person, directly or indirectly, anything of value if it could reasonably be expected to influence the public official's or employee's vote, official actions or judgment, or could reasonably be considered as a reward for any official action or inaction or omission by of the public official or employee."
- D. The use or disclosure by any party of any information concerning eligible clients who receive services from Contractor for any purpose not connected with the administration of Contractor's or Department's responsibilities under this Contract is prohibited, except with the informed written consent of the eligible client or the guardian of the client.

26. Certification Regarding Contractor Debarment or Suspension

Contractor certifies to the best of its knowledge and belief, that it and its principals; (1) are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency; (2) have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false statements, or receiving stolen property; (3) are not presently indicted for or otherwise criminally charged by a governmental entity (Federal, State or local) with commission of any of the offenses enumerated in (2) of this certification; and (4) have not within a three-year period preceding this contract had one or more public transactions (Federal, state or local) terminated for cause or default.

By: _____
(Signature of Official Authorized to Sign Contract)

Date: _____

27. Certification Regarding Lobbying

Contractor certifies, to the best of his or her knowledge and belief, that:

- 1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan or cooperative agreement.
- 2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.
- 3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U. S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

By: _____
(Signature of Official Authorized to Sign Contract)

Date: _____

For: _____
(Name of Grantee)

(Title of Grant Program)

28. Political Activity of Employees

Where applicable, Contractor shall comply with the provisions of the Hatch Act, which limit the political activity of employees who work in federally funded programs.

29. Notices

Notices to Department provided for in this Contract shall be sufficient if sent by certified or registered mail, postage prepaid, and notices to Contractor shall be sufficient if sent by certified or registered mail, postage prepaid, to the respective addresses stated in this Contract or to such other respective addresses as the parties may designate to each other in writing. Contractor agrees, that in conduct of its meetings, it will be guided by Wisconsin Statutes 19.81 et. seq.

30. Health Insurance Portability and Accountability Act of 1996

Department and Contractor agree to comply with the provisions of the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and shall undertake any actions needed to protect individually identifiable health information (45 C.F.R. 164.501) as required under current or future HIPAA regulations as determined by the U.S. Department of Health and Human Services and the Wisconsin Department of Health Services.

Department and Contractor agree that changes to the Contract that would be necessary for one or both parties to meet the requirements of the Health Insurance Portability and Accountability Act of 1996 (HIPAA) shall be made upon discussion and execution of a Contract amendment containing the necessary changes. Neither party shall withhold agreement to modifications to the Contract necessary for one or both parties to comply with HIPAA.

31. Contract Content

The entire Contract of the parties, with all attached exhibits and assurances, together with the relevant Program/Service Guidelines or Specifications and Exhibit I as negotiated is contained herein. This Contract supersedes all oral agreements and negotiations and all writings not herein referred to and incorporated. This Contract may be executed in two or more counterparts, each of which shall be deemed as original.

32. Approval

It is expressly understood and agreed that the parties' obligations hereunder are subject to state approval and federal concurrence with this Contract.

Department enters into this Contract as authorized under ss. 59.17 (2) (b) 4, 59.255 (2) (e), and 59.42 (2) (b) 5 Wisconsin Statutes. Contractor enters into this Contract pursuant to and by authority of its Board of Directors at its meeting on _____.

MINIMUM INSURANCE REQUIREMENTS

Insurance. Every contractor and all parties furnishing services or product to **Milwaukee County (Milw. Cty.)** or any of its subsidiary companies must provide Milw. Cty. with evidence of the following minimum insurance requirements. In no way do these minimum requirements limit the liability assumed elsewhere in the contract. All parties shall, at their sole expense, maintain the following insurance:

(1.) Commercial General Liability Insurance including contractual coverage:

The limits of this insurance for bodily injury and property damage Combined shall be at least:

Each Occurrence Limit	\$1,000,000
General Aggregate Limit	\$2,000,000
Products-Completed Operations Limit	\$2,000,000
Personal and Advertising injury Limit	\$1,000,000

(2.) Business Automobile Liability Insurance:

Should the performance of this Agreement involve the use of automobiles, Contractor shall provide comprehensive automobile insurance covering the ownership, operation and maintenance of all owned, non-owned and hired motor vehicles. Contractor shall maintain limits of at least \$1,000,000 per accident for bodily injury and property damage combined.

(3.) Workers' Compensation Insurance:

Such insurance shall provide coverage in amounts not less than the statutory requirements in the state where the work is performed, even if such coverages are elective in that state.

(4.) Employers Liability Insurance:

Such insurance shall provide limits of not less than \$500,000 policy limit.

(5.) Excess/Umbrella Liability Insurance:

Such insurance shall provide additional limits of not less than \$5,000,000 per occurrence in excess of the limits stated in (1.), (2.), and (4.) above.

Additional Requirements:

(6.) Contractor shall require the same minimum insurance requirements, as listed above, of all its contractors, and subcontractors, and these contractors, and subcontractors shall also comply with the additional requirements listed below.

(7.) The insurance specified in (1.), (2.) and (5.) above shall: (a) name Milw. Cty. including its directors, officers, employees and agents as additional insureds by endorsement to the policies, and, (b) provide that such insurance is primary coverage with respect to all insureds and additional insureds.

- (8.) The above insurance coverages may be obtained through any combination of primary and excess or umbrella liability insurance. Milw. Cty. may require higher limits or other types of insurance coverage(s) as necessary and appropriate under the applicable purchase order.
- (9.) Except where prohibited by law, all insurance policies shall contain provisions that the insurance companies waive the rights of recovery or subrogation, by endorsement to the insurance policies, against Milw. Cty., its subsidiaries, its agents, servants, invitees, employees, co-lessees, co-venturers, affiliated companies, contractors, subcontractors, and their insurers.
- (10.) Contractor shall provide certificates evidencing the coverages, limits and provisions specified above on or before the execution of the Agreement and thereafter upon the renewal of any of the policies. Contractor shall require all insurers to provide Milw. Cty. with a thirty (30) day advanced written notice of any cancellation, nonrenewal or material change in any of the policies maintained in accordance with this Agreement. Coverage must be placed with carriers with an A. M. Best rating of A- or better.

Mail to:

Milwaukee County Risk Management
633 W. Wisconsin Ave. Ste. 750
Milwaukee, WI 53203

EXHIBIT I

Milwaukee County Department on Aging Descriptions of Proposed Programs and Services Funding Period 01/01/2020 to 12/31/2020

1.0 General Program Information

1.01 Program Title or Type of Service to be Provided: Family Caregiver Support and Alzheimer's Direct Services

1.02 Agency Name: Alzheimer's Disease and Related Disorders Association, Inc.

1.03 Address of Primary Office: 620 S. 76th Street, Suite 160
Milwaukee, WI 53214

1.04 Phone Number (414) 479-8800 FAX# (414) 479-8819

1.05 Office Hours Monday - Friday 8:30 am - 4:30 pm E-mail dgrams@alz.org

1.06 Official(s) Authorized by the Board of Directors to Sign Contracts/Reports for the Agency:

Name, Title Dave Grams, Executive Director Signature 

Name, Title Wendy Betley, Program Director Signature 

1.07 Staff Contact for the Program:

Name, Title Wendy Betley, Program Director FAX# (414) 479-8819

Phone Number (414) 479-8800 E-mail wbetley@alz.org

1.08 Type of Agency (please check those that apply):

Public ☐ Non-profit ☒ Proprietary ☐

Minority (owned, directed, or predominantly staffed by minority groups) ☐

1.09 Federal ID No. 13-3039601 State Tax Exempt No. CES 062308

1.10 Type of Request: New ☒ Continuation ☐

1.11 Amount of Department on Aging Request: \$ 797,033

1.12 Total Agency Budget: \$ 5,194,899

1.13 Proposed Cost Per Unit of Service: \$ N/A

1.14 Proposed Units to be Provided: N/A

3.0 Program Staffing Information - Positions Funded by Department on Aging, Match, or Other Resources

A. Position Title	B. % Full Time Equivalent	C. Salary and/or Wage Subtotal \$	D. Fringe Subtotal \$	E. Total All (C & D)	F. Staff Demographics (Check all that apply)						
					Female	Minority	Disabled	Age 45 - 54	Age 55 - 64	Age 65 - 74	Age 75+
FCSN Program Manager	100%	\$ 52,499.98	\$ 12,941.25	\$ 65,441.23	X						
FCSN Resource Coordinator	100%	\$ 42,490.50	\$ 10,473.91	\$ 52,964.41	X						
FCSN Program Coordinator	100%	\$ 44,000.06	\$ 10,846.01	\$ 54,846.07	X						
Program Manager	25%	\$ 14,601.54	\$ 3,599.28	\$ 18,200.81	X						
Program Coordinator	25%	\$ 11,630.26	\$ 2,866.86	\$ 14,497.11							
Program Director	10%	\$ 8,052.12	\$ 1,984.85	\$ 10,036.97	X			X			
Total: (Each Category)		\$173,274.45	\$ 42,712.15	\$215,986.60							

Note: Total wage and fringe for all staff positions (Column E of 3.0 of Program Staffing Information) should match the total wage and fringe on Column 6 of the 4.0 Budget Summary, Personnel Subtotal.

Itemize below percentage of agency fringe benefit costs:

FICA	5.90%
Pension	7.74%
Workers comp	0.20%
Unemployment comp	0.33%
Disability/Life insurance	0.60%
Health insurance	9.88%
Life insurance	0.00%
Other (specified)	0.00%
	24.65%

3.1 Program Staffing Information: Wages and Benefits Please list each individual separately, using as many copies of this form as needed

Position Title	Hours Per Week	Annual Salary	Hourly Wage Rate	Fringe Benefit Category	Check if Employer Pays Fringe Benefit	County of Residence
FCSN Program Manager	37.5+	\$ 52,499.98	\$ 26.92	Health Insurance Dental Insurance Life Insurance	X X	Milwaukee
FCSN Resource Coordinator	37.5+	\$ 42,490.50	\$ 21.79	Health Insurance Dental Insurance Life Insurance	X X	Milwaukee
FCSN Program Coordinator	37.5+	\$ 44,000.06	\$ 22.56	Health Insurance Dental Insurance Life Insurance	X X	Milwaukee
Program Manager	37.5+	\$ 58,406.14	\$ 29.95	Health Insurance Dental Insurance Life Insurance	X X	Walworth
Program Coordinator	37.5+	\$ 46,521.02	\$ 23.86	Health Insurance Dental Insurance Life Insurance	X X	Milwaukee
Program Director	37.5+	\$ 80,521.22	\$ 41.29	Health Insurance Dental Insurance Life Insurance	X X	Walworth

3.2 Direct Service Staff Turnover and Vacancy

2019 Service Provider:

Alzheimer's Disease and Related Disorders Association, Inc.

	I	II	III	IV	V	VI
	Number of Direct Service Staff employed in contract on January 1, 2019	Number of staff listed in Column I who remained employed on July 1, 2019	Number of new employees replacing staff listed in Column I by July 1, 2019	Percent of Column I employees replaced by July 1, 2019 (Column III divided by Column I)	Staff listed in Column I whose positions were vacant on July 1, 2019	Percent of Column I positions vacant on July 1, 2019 (Column V divided by Column I)
Family Caregiver Support and Alzheimer's Direct Services (Department on Aging)	3	3	0	0%	0	0%
Family Caregiver Support and Alzheimer's Direct Services						

Note:

Direct Service Staff are defined as persons employed under the contract whose job routinely brings them into contact with clients, either in person or over the telephone.

4.0 Budget SummaryProvider Name Alzheimer's Disease and Related Disorders Association, Inc.

Contract Period 01/01/2020 - 12/31/2020

Program/Service Family Caregiver Support & Alzheimer's Disease and Related Disorders Association, Inc.
Combined

ITEM	1 Department on Aging Request	2 Non-Federal Match (10% of Program Costs) Cash	3 In-Kind	4 Program Revenue	5 All Other Resources	6 Total
1. PERSONNEL						
A. Wages & Salaries	\$ 173,274	\$ -	\$ -	\$ -	\$ -	\$ 173,274
B. Fringe (24.65%)	\$ 42,712	\$ -	\$ -	\$ -	\$ -	\$ 42,712
C. Other (Describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SUBTOTAL	\$ 215,987	\$ -	\$ -	\$ -	\$ -	\$ 215,987
2. TRAVEL EXPENSES						
A. Local	\$ 1,200	\$ -	\$ -	\$ -	\$ -	\$ 1,200
B. Out of Town	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SUBTOTAL	\$ 1,200	\$ -	\$ -	\$ -	\$ -	\$ 1,200
3. FACILITIES EXPENSE						
A. Rent	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
B. Utilities	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
C. Other (Operating Exp)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SUBTOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4. OPERATING EXPENSES						
A. Office Supplies	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
B. Consumable Supplies	\$ 1,000	\$ -	\$ -	\$ -	\$ -	\$ 1,000
C. Telephone	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
D. Postage	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
E. Equipment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
F. Other (Describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SUBTOTAL	\$ 1,000	\$ -	\$ -	\$ -	\$ -	\$ 1,000
5. MISCELLANEOUS						
A. Staff Training	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
B. Consultant Fees	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
C. Audit	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
D. Other (Describe): Health Fairs	\$ 4,500	\$ -	\$ -	\$ -	\$ -	\$ 4,500
E. Other (Describe): EA Emergencies	\$ 90,747	\$ -	\$ -	\$ -	\$ -	\$ 90,747
F. Other (Describe): Respite/Direct Services	\$ 354,008	\$ -	\$ -	\$ -	\$ -	\$ 354,008
SUBTOTAL	\$ 449,255	\$ -	\$ -	\$ -	\$ -	\$ 449,255
6. INDIRECT COSTS						
A. Indirect Costs (Form 4.1)	\$ 129,592	\$ -	\$ -	\$ -	\$ -	\$ 129,592
B. Other (Describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SUBTOTAL	\$ 129,592	\$ -	\$ -	\$ -	\$ -	\$ 129,592
7. COLUMN TOTAL FOR ALL COSTS	\$ 797,033	\$ -	\$ -	\$ -	\$ -	\$ 797,033
8. TOTAL NON-FEDERAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
9. PROFIT FACTOR	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

*Provide source of Non-Federal Cash match or description of In-Kind Match:

** Indirect costs must be reported by agencies that provide more than one program, service, or activity. See the RFP document for a more detailed definition. (Form 4.1 must be completed, describing specific indirect costs and the plan for allocating those costs.)

4.0 Budget Summary

Provider Name Alzheimer's Disease and Related Disorders Association, Inc.

Contract Period 01/01/2020 - 12/31/2020

Program/Service Family Caregiver Support & Alzheimer's
NFCSP

ITEM	1 Department on Aging Request	2 Non-Federal Match (25% of Program Costs) Cash	3 In-Kind	4 Program Revenue	5 All Other Resources	6 Total
1. PERSONNEL						
A. Wages & Salaries	\$ 135,006	\$ 38,268	\$ -	\$ -	\$ -	\$ 173,274
B. Fringe (24.65%)	\$ 33,279	\$ 9,433	\$ -	\$ -	\$ -	\$ 42,712
C. Other (Describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SUBTOTAL	\$ 168,286	\$ 47,701	\$ -	\$ -	\$ -	\$ 215,987
2. TRAVEL EXPENSES						
A. Local	\$ -	\$ 1,200	\$ -	\$ -	\$ -	\$ 1,200
B. Out of Town	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SUBTOTAL	\$ -	\$ 1,200	\$ -	\$ -	\$ -	\$ 1,200
3. FACILITIES EXPENSE						
A. Rent	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
B. Utilities	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
C. Other (Operating Exp)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SUBTOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4. OPERATING EXPENSES						
A. Office Supplies	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
B. Consumable Supplies	\$ -	\$ 1,000	\$ -	\$ -	\$ -	\$ 1,000
C. Telephone	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
D. Postage	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
E. Equipment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
F. Other (Describe):	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SUBTOTAL	\$ -	\$ 1,000	\$ -	\$ -	\$ -	\$ 1,000
5. MISCELLANEOUS						
A. Staff Training	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
B. Consultant Fees	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
C. Audit	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
D. Other (Describe): Health Fairs	\$ -	\$ 4,500	\$ -	\$ -	\$ -	\$ 4,500
E. Other (Describe): EA Emergencies	\$ 90,747	\$ -	\$ -	\$ -	\$ -	\$ 90,747
F. Other (Describe): Respite/Direct Services	\$ 79,404	\$ 274,604	\$ -	\$ -	\$ -	\$ 354,008
SUBTOTAL	\$ 170,151	\$ 279,104	\$ -	\$ -	\$ -	\$ 449,255
6. INDIRECT COSTS						
A. Indirect Costs (Form 4.1)	\$ 96,691	\$ 32,900	\$ -	\$ -	\$ -	\$ 129,592
B. Other (Describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SUBTOTAL	\$ 96,691	\$ 32,900	\$ -	\$ -	\$ -	\$ 129,592
7. COLUMN TOTAL FOR ALL COSTS	\$ 435,128	\$ 361,905	\$ -	\$ -	\$ -	\$ 797,033
8. TOTAL NON-FEDERAL		\$ 361,905	\$ -			\$ 361,905
9. PROFIT FACTOR	\$ -				\$ -	\$ -

*Provide source of Non-Federal Cash match or description of In-Kind Match:

Non-federal match covered by FCSN Alzheimer's state fund support of \$361,905.

** Indirect costs must be reported by agencies that provide more than one program, service, or activity. See the RFP document for a more detailed definition. (Form 4.1 must be completed, describing specific indirect costs and the plan for allocating those costs.)

4.0 Budget Summary

Provider Name Alzheimer's Disease and Related Disorders Association, Inc.

Contract Period 01/01/2020 - 12/31/2020

Program/Service Family Caregiver Support & Alzheimer's
AFCSP Only

ITEM	1	2	3	4	5	6
	Department on Aging Request	Non-Federal Match (10% of Program Costs) Cash In-Kind		Program Revenue	All Other Resources	Total
1. PERSONNEL						
A. Wages & Salaries	\$ 38,268	\$ -	\$ -	\$ -	\$ -	\$ 38,268
B. Fringe (24.65%)	\$ 9,433	\$ -	\$ -	\$ -	\$ -	\$ 9,433
C. Other (Describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SUBTOTAL	\$ 47,701	\$ -	\$ -	\$ -	\$ -	\$ 47,701
2. TRAVEL EXPENSES						
A. Local	\$ 1,200	\$ -	\$ -	\$ -	\$ -	\$ 1,200
B. Out of Town	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SUBTOTAL	\$ 1,200	\$ -	\$ -	\$ -	\$ -	\$ 1,200
3. FACILITIES EXPENSE						
A. Rent	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
B. Utilities	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
C. Other (Operating Exp)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SUBTOTAL	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4. OPERATING EXPENSES						
A. Office Supplies	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
B. Consumable Supplies	\$ 1,000	\$ -	\$ -	\$ -	\$ -	\$ 1,000
C. Telephone	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
D. Postage	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
E. Equipment	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
F. Other (Describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SUBTOTAL	\$ 1,000	\$ -	\$ -	\$ -	\$ -	\$ 1,000
5. MISCELLANEOUS						
A. Staff Training	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
B. Consultant Fees	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
C. Audit	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
D. Other (Describe): Health Fairs	\$ 4,500	\$ -	\$ -	\$ -	\$ -	\$ 4,500
E. Other (Describe): EA Emergencies	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
F. Other (Describe): Respite/Direct Services	\$ 274,604	\$ -	\$ -	\$ -	\$ -	\$ 274,604
SUBTOTAL	\$ 279,104	\$ -	\$ -	\$ -	\$ -	\$ 279,104
6. INDIRECT COSTS						
A. Indirect Costs (Form 4.1)	\$ 32,900	\$ -	\$ -	\$ -	\$ -	\$ 32,900
B. Other (Describe)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
SUBTOTAL	\$ 32,900	\$ -	\$ -	\$ -	\$ -	\$ 32,900
7. COLUMN TOTAL FOR ALL COSTS	\$ 361,905	\$ -	\$ -	\$ -	\$ -	\$ 361,905
8. TOTAL NON-FEDERAL		\$ -	\$ -			\$ -
9. PROFIT FACTOR	\$ -				\$ -	\$ -

*Provide source of Non-Federal Cash match or description of In-Kind Match:

No Match Required

** Indirect costs must be reported by agencies that provide more than one program, service, or activity. See the RFP document for a more detailed definition. (Form 4.1 must be completed, describing specific indirect costs and the plan for allocating those costs.)

4.1 Indirect Cost Allocation Plan

Name of Agency Alzheimer's Disease and Related Disorders Association, Inc.

If your agency provides only one kind of program, service or activity, and all costs are directly related to providing this program, service or activity, even if only partially allocated to the proposed Department on Aging program or service, you are not required to complete the Indirect Cost Allocation Plan.

Description of Item Costs	Total Agency Cost	Department of Aging Program Costs	Indirect Cost Rate
1. General Administration			
A. Salaries of Executive Officers	\$ -	\$ -	0%
B. Expenses of Executive Officers	\$ -	\$ -	0%
C. Personnel Administration	\$ -	\$ -	0%
D. Accounting	\$ -	\$ -	0%
E. Other (Describe) _____	\$ -	\$ -	0%
F. Other (Describe) _____	\$ -	\$ -	0%
G. Other (Describe) _____	\$ -	\$ -	0%
2. Buildings and Equipments			
A. Depreciation	\$ -	\$ -	0%
B. Use	\$ -	\$ -	0%
C. Operation	\$ -	\$ -	0%
D. Maintaining Facilities	\$ -	\$ -	0%
E. Other (Describe) _____	\$ -	\$ -	0%
F. Other (Describe) _____	\$ -	\$ -	0%
3. Communication Costs			
A. Advertising Costs	\$ -	\$ -	0%
B. General Communication Costs (Telephone, postage, etc.)	\$ -	\$ -	0%
C. Other (Describe) _____	\$ -	\$ -	0%
D. Other (Describe) _____	\$ -	\$ -	0%
E. Other (Describe) _____	\$ -	\$ -	0%
4. Other Indirect Costs			
A. Other (Describe) <u>28.57% (NFCSP) NICRA on all MTDC</u>	\$ -	\$ 96,691.35	28.57%
B. Other (Describe) <u>10% (AFCSP)</u>	\$ -	\$ 32,900.46	10%
C. Other (Describe) _____	\$ -	\$ -	0%
D. Other (Describe) _____	\$ -	\$ -	0%
TOTAL ALL INDIRECT COSTS	\$ -	\$ 129,591.81	16.26%

Total Department on Aging Program Costs should be included on Line 6A of the 4.0 Budget Summary.

For allowability of certain selected items of cost, refer to Office of Management and Budget Circular A-122

Demographic Summary of Board of Directors/Agency Owners

Board Member Name	Gender		Age					Ethnicity					
	Female	Male	45 - 54	55 - 64	65 - 74	75+	American Indian Alaska Native	Asian	Black	Latinx	Native Hawaiian Other Pacific Islander	White	Multi-ethnic
Sue Colegrove	X		x									X	
Rebecca Emmons, RN, MBA, CFRE	X		x									X	
David B. Schulz		X	x									X	
Brian Henning		X	x									X	
Piero Antuono, MD		X	x									X	
Haley Boyle-Williams	X		x									X	
Terese Capizzi	X				x							X	
Fatou Ceesay	X		x						X				
David Crass		X	x									X	
Dale Egan		X	x									X	
Terry Erickson		X			x							X	
Amy Fouts	X		x									X	
Dean Gille		X	x									X	
Gina Green-Harris	X			x					X				
Amy Hechimovich	X		x									X	
Chuck Kincaid		X			x							X	

[illegible]

EEOC COMPLIANCE

2019 EQUAL EMPLOYMENT OPPORTUNITY CERTIFICATE FOR MILWAUKEE COUNTY CONTRACTS

CONTRACTOR hereby certifies that it is in compliance with the equal opportunity policy and standards of Milwaukee County, and Federal rules and regulations regarding nondiscrimination in employment and service delivery.

Nondiscrimination (Milwaukee County General Ordinance (MCGO) 56.17)

CONTRACTOR certifies that in the performance of work or execution of this contract, it shall not discriminate against any employee or applicant for employment because of race, color, national origin, or ancestry, age, sex, sexual orientation, gender identity and gender expression, disability, marital status, family status, lawful source of income, or status as a victim of domestic abuse, sexual assault or stalking, which shall include but not be limited to the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training including apprenticeships.

CONTRACTOR will post in conspicuous places, available to its employees and applicants for employment, notices to be provided by the County setting forth the provisions of the non-discriminatory clause.

A violation of these provisions shall be sufficient cause for the County to terminate the contract without liability for the uncompleted portion or for any materials or services purchased or paid for by the CONTRACTOR for use in completing the contract.

Equal Opportunity (Title 41 of the Code of Federal Regulations, Chapter 60 (41 CFR 60))

CONTRACTOR will not discriminate against any employee or applicant for employment because of race, color, religion, sex, sexual orientation, gender identity, or national origin.

CONTRACTOR will take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, religion, sex, sexual orientation, gender identity, or national origin. Such action shall include, but not be limited to the following: employment, upgrading, demotion, or transfer, recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship.

CONTRACTOR agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the contracting officer setting for the provision of his nondiscrimination clause. CONTRACTOR will, in all solicitations or advertisements for employees placed by or on behalf of the CONTRACTOR, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, or national origin.

Affirmative Action Program (41 CFR 60-1.40)

CONTRACTOR certifies that it will strive to implement the principles of equal employment opportunity through an effective affirmative action program (and will so certify prior to the award of the contract), which shall have as its objective to increase the utilization of women, minorities, and disabled persons and other protected groups, at all levels of employment in all divisions of the CONTRACTOR'S work force, where these groups may have been previously under-utilized and under-represented. CONTRACTOR also agrees that in the event of any dispute as to compliance with the preceding requirements, it shall be its responsibility to show that all requirements are met.

Non-Segregated Facilities (41 CFR 60-1.8)

CONTRACTOR certifies that it does not and will not maintain or provide for its employees any segregated facilities at any of its establishments, and that it does not permit its employees to perform their services at any location under its control, where segregated facilities are maintained..

Subcontractors

CONTRACTOR certifies that it has obtained or will obtain certifications regarding non-discrimination, an affirmative action program and non-segregated facilities from proposed subcontractors that are directly related to any contracts with Milwaukee Count before the award of any subcontracts, and that it will retain such certifications in its files.

Reporting Requirement

Where applicable, CONTRACTOR certifies that it will comply with all reporting requirements and procedures established in 41 CFR 60.

Affirmative Action Plan

CONTRACTOR certifies that, if it has 50 or more employees, that it will develop and/or update and submit (within 120 days of contract award) an Affirmative Action Plan to: Mr. Paul Grant, Audit Compliance Manager, Milwaukee County Department of Audit, 633 W. Wisconsin Ave., Milwaukee, WI 53203 [Telephone No.: (414) 278-4292].

CONTRACTOR certifies that, if it has 50 or more employees, it has filed or will develop and submit (within 120 days of contract award) for each of its establishments a written affirmative action plan. Current Affirmative Action plans, if required, must be filed with the Milwaukee County Department of Audit, 633 W. Wisconsin Ave., Milwaukee, WI 53203 [Telephone No.: (414) 278-4292].

CONTRACTOR will also require its subcontractors that have 50 or more employees to establish similar written affirmative action plans.

Employees

CONTRACTOR certifies that it has the following number of employees in the Standard Metropolitan Statistical Area, which includes the counties of Milwaukee, Waukesha, Ozaukee and Washington, Wisconsin: 25. CONTRACTOR certifies that it has the following total number of employees in its workforce: 48.

Executed this 4th day of October, 2019

Firm Name: Alchermers Association

Address: 6200 75th St. RD Milwaukee, WI 53214

Representative: [Signature] Executive Director
(Signature/Title)

Milwaukee County Department on Aging
Grant Proposal submitted by the
Alzheimer's Disease and Related Disorders, Inc
Family Caregiver Support and Alzheimer's Direct Services
From January 1 - December 31, 2019

Exhibit I

2.0 PROGRAM SUMMARY

Narrative

1. Mission and Goals (5 points)

The Alzheimer's Association, Southeastern Wisconsin Chapter, is part of the national not-for-profit Alzheimer's Association and is also known as the Alzheimer's Disease and Related Disorders Inc. The mission of the Alzheimer's Association is to eliminate Alzheimer's disease through the advancement of research; to provide and enhance care for all affected; and to reduce the risk of dementia through the promotion of brain health. The Alzheimer's Association's vision is: **A world without Alzheimer's disease.**

The Association's strategic plan for 2019 -2024 identifies the following five strategic objectives:

- **Enhancing Care and Support.** Increase the number of service contacts provided through quality measured Association programs and services directly delivered through the chapters and the national organization through alz.org and the Contact Center by 50 percent. Conduct an assessment to identify appropriate standards and evidence-based programs to ensure delivery of quality care, including supportive and diagnostic services. The results of this assessment will lead to collaboration with others within the broader dementia related field to achieve outcomes.
- **Increasing Concern and Awareness.** Continue commitment to strengthen the momentum of the Alzheimer's disease movement by increasing concern about Alzheimer's disease; increasing unaided awareness of the Alzheimer's Association in the Champions audience by 50 percent; and increasing constituent engagement through activities to support all strategic objectives.
- **Advancing Public Policy.** Steadily increase the Association's influence with policymakers to achieve implementation of the National Alzheimer's Plan and established federal and state policy priorities. Accomplish this by executing strategies to develop knowledgeable, professional, productive relationships with state policymakers; mobilizing Alzheimer's advocates in a comprehensive, coordinated and activist-oriented plan to engage their members of Congress; and through the political activities of respected and growing sister organization, the Alzheimer's Impact Movement.
- **Accelerating Research.** The Alzheimer's Association continues to be the respected leader and largest non-profit funder in advancing international Alzheimer's research. We are committed to maintaining our leadership role in convening, collaborating and coordinating to advance research and to playing a significant role in the direction and funding of research into the care, cure and prevention of Alzheimer's disease through the expansion of private and public funding efforts, domestically and abroad.
- **Growing Revenue Support of the Mission.** Achieve significantly greater Association-wide mission impact by growing contributed revenue by an average of 8 percent per year and additional growth through the nationwide research campaign toward the five-year goal of doubling all Association revenue to \$450 million by 2019, through the development of

an Association-wide philanthropic culture (including boards, staff, and volunteers at national and chapters) that fully embraces, prioritizes and invests in partnerships, fundraising and revenue growth priorities as essential keys to the success of the mission.

The Family Caregiver Support and Alzheimer's Direct Services program seeks to increase the level of understanding and awareness of dementia including Alzheimer's disease and related dementias to enable individuals and families to effectively address, cope and manage the disease effects and long-term consequences through the provision of a broad range of support and educational services.

The 2019 expected outcome is that older adults and family caregivers who assist them will have an increased opportunity for educational information and support as it relates to Alzheimer's and other related topics that will allow them to remain independent within the community to every extent possible. This includes an array of information ranging from caregiver needs, training and information to build skills in family caregivers, issues and concerns to brain health promotion to help reduce the risk of developing dementia as we age.

Through grant funding from the Alzheimer's Family Caregiver Support Program services as well as from the national Family Caregiver Support Program the Alzheimer's Association of SE WI will abide by the guidelines of both grants. The Alzheimer's Association understands the importance to provide support and skill building education to older adults and family caregivers, as well as the need to assist with building connections in the community that will help build a caregiving team which is essential for the wellbeing of both the caregiver and the older adult.

2. Service Delivery Plan (25 points)

Program activities:

Assistance is provided in person and over the phone to help caregivers gain access to supportive resources and services. The Family Caregiver Support Coordinators assess caregiver needs and assist in identifying appropriate resources that will meet the need of the caregiver and older adult. A plan of care is created with the family designed to lessen stresses and increase coping capacities. When appropriate, FCS coordinators will advocate for caregivers with service agencies and providers.

Assessment of caregiver's needs, well-being, eligibility for resources and services will be provided. FCS Coordinators will provide support with a person-centered approach while providing referrals and follow-up as needed. AFCSP and NFCSP clients receive at least one in home visit, monthly follow-up calls and any additional follow-up as needed.

Care Consultations provide emotional support, education both for the caregiver and the older adult, while connecting them to support groups, social engagement and other resources in the community. FCS Coordinators will offer the following:

- Grand-family Intergenerational support group
- Powerful Tools for Caregiving
- Caring for the Caregiver events in collaboration with partners in the community emphasizing the need for self-care.

Respite, a vital part of self care, will continue to be facilitated through both NFCSP and AFCSP funding and guidelines, and provides caregivers with much needed relief from the physical, emotional and financial demands of their caregiving responsibilities. Respite can be received informally and in-home through other family members or trusted friends, or through referral to an assortment of professional personal care providers. Another option is out-of-home care at one of the many adult day or long term care centers in the area. FCSN staff counsels caregivers that to care for others they must also care for themselves. Self-care includes taking breaks and utilizing respite options on a regular basis. FCSN staff visit all individuals receiving respite resources and monitors their overall well-being, making additions and adjustments to their support plan as needed.

- a. National Family Caregiver Support Program (NFCSP) specifies the following for eligibility:
 - i. Priority is given to:
 1. Family caregivers of people who have been diagnosed with dementia regardless of age.
 2. Family caregivers who are older adults caring for people, including children and those with disabilities.
 3. Family caregivers who are older adults with greatest social and economic needs.
 - ii. Grandparents or older individuals that are relative caregivers, 55 and older, caring for minors under age 19.
 - iii. Grandparent or relative caregivers, providing care for adult children with disabilities, between 19 and 59 years of age. These caregivers must be age 55 year and older and cannot be the child's parent. Services provided to these caregivers shall not be counted against the 10% ceiling for grandparent and other caregivers. Priority is to be given to family caregivers providing care for an adult child with severe disabilities.
- b. Alzheimer's Family Caregiver Support Program (AFCSP) specifies the following for eligibility:
 - i. With a referral from MCDA, FCS Coordinators determine the eligibility of each household or person residing in a home setting in Milwaukee County who applies to participate in AFCSP by establishing that the household or person meets the following conditions:
 1. Diagnosis of probable irreversible Alzheimer's or other permutation of dementia.
 2. The person with dementia and that person's spouse are expected to have a joint income of no more than \$48,000 for the 12-month period directly following application for the program, except that in determining the income of the household, with a joint or gross income of more than \$48,000, and administering agency shall subtract any expenses attributable to the Alzheimer's or dementia care needs of the diagnosed person or their caregiver. If the net income determined by subtracting the Alzheimer's/dementia-related expenses for a household is \$48,000 or less, the household shall be considered as eligible. There is no asset test.
 3. AFCSP participants may not simultaneously receive assistance from

NFCSP
(for the same service purpose) or from COP/Waiver, or Family Care.

Outreach will be accomplished in the following ways:

- a. Routinely working with professionals, businesses, agencies, organizations, and institutions to provide information about FCSN to the public and to provide caregivers with as many support and referral options as possible within the prescribed parameters of FCSN's program directives.
- b. Strategic marketing and multi-media advertising, including bilingual advertisements.
- c. Participation with hundreds of grassroots networking contacts through community and neighborhood-based activities and events. This serves a triune purpose:
 - i. Answering questions and giving out information about FCSN.
 - ii. Networking and establishing some personal connections between FCSN and local communities.
 - iii. Creating opportunities to listen to caregivers and make note of their ideas, needs, obstacles faced, and gaps they perceive in available programs and services.
- d. Offering public speaking services, caregiver information presentations, and employer presentations.

Advocacy will occur on behalf of caregivers, both individually and collectively, with service providers, programs, agencies and institutions -- observing and noting programmatic gaps and systemic barriers that tend to make caregiving, and access to resources and services for caregivers, more difficult. These observations are shared with those in positions to recommend and initiate changes to improve relationships, programs and structures and, thereby better support and assist those we serve.

Follow-up of Client Referrals. Agencies who refer clients for services to the Alzheimer's Association should utilize our 24/7 Helpline (800.272.3900). The 24/7 Helpline is answered by our Contact Center staff, located in Chicago, who manage all 24/7 Helpline calls from across the country. All of the Contact Center staff are Master's level Social Workers and they have Spanish-speaking staff plus access to a language line to assist callers with other language needs. This Helpline is answered night or day and for after-hour calls, follow-up is offered and is provided by the local chapter within 1-2 business days. The local chapter pulls down reports every morning to determine who called, level or urgency of follow-up and then we triage the follow-up plan with our Milwaukee office staff.

During all follow-up calls clients are assessed and service options are discussed. Depending on the client's needs, client is connected to education programs in the community, caregiver support groups, respite programs, community services, etc. Home visits as well as in person and/or phone consultations offer the opportunity for individuals to be referred to those community agencies and services that are best suited to the individual's needs and location in the community. Other services available through the Department on Aging and other community service providers, such as transportation, Adult Day Programs, etc. are used whenever appropriate. Individuals are also assisted in taking advantage of benefits under other programs in the community for which they are eligible. With permission from the client, chapter staff provide follow-up on referrals made to outside agencies and resources to ensure client satisfaction with the referral.

Follow-up is done either in-person, or over-the-phone after an appropriate interval following the referral. All follow-up activities for clients receiving services through this project are documented in writing in the client's record and input into our CRM Database.

In order to ensure client safety when dangerous situations are identified, appropriate officials are notified immediately, i.e., Elder Abuse, Department of Geriatric Psychiatry or other emergency services, as needed.

Records. In accordance with the provisions of the contract, participant records are maintained to ensure client confidentiality. Files document services which were performed, referrals made and the satisfaction with services to which the client was referred. The Program Director and the FCSN Staff are responsible to maintain confidential participant files at the Association office. Staff completes monthly outcome reporting as required and communicates and works with the assigned Milwaukee County Department on Aging contract staff as needed.

Initiation and Termination of Service. Services to be provided are initiated and terminated upon request by personal referral, request of site staff, other referral sources, family members or caregivers of a person with Alzheimer's disease or a related dementia.

Compliance with Program Guidelines and Contract Provisions. Services provided by this project comply with all provisions of the Department on Aging contract or program/service guidelines. All activities relate directly to serving older adults. Services provided under this program are free-of-charge to participants; however individuals are informed that they may make a voluntary contribution toward the cost of the services they receive in accordance with Department on Aging Contribution Policy.

Performance Outcomes. The 2019 expected outcome for the Family Caregiver Support Network is that older adults and the family members who assist them will have an increased opportunity for educational information and support as it relates to Alzheimer's and other related topics that will allow them to remain independent within the community including respite funding. This includes an array of information ranging from caregiver needs, training and information to build skill in family caregivers, issues and concerns to brain health promotion to help reduce the risk of developing dementia as we age.

Monthly outcome reports will be provided as required. The agency will implement client satisfaction surveys across the various services in an ongoing and timely fashion. For education programs we survey after the program is completed, for information and referral and care consultation we sample survey people who have received this service every other month via mailed surveys.

Program Goals and Objectives

Goal: To promote program to increase participation

- a. Objective: 200 caregivers will be served in the program
- b. Objective: The number of caregivers served under AFCSP funding will increase year over year and reported to MCDA. In 2019, 65 caregivers will be served by AFCSP.
- c. Objective: The number of caregivers served under NFCSP funding will increase year over year and reported to MCDA. In 2019, 75 caregivers will be served by NFCSP

Goal: To increase public awareness of Family Caregiver Support and Alzheimer's Direct Services.

- a. Objective: Number of outreach services will increase year over year and reported to MCDA by 12/31/19. In 2019, FCSN will attend 25 of outreach events.

Goal: Provide evidenced based caregiver education.

- a. Objective: 2 Powerful tools for caregivers classes will be offered
- b. Objective: 1 Savvy Caregiver class
- c. Objective: 1 Living Well with a Chronic Condition

Goal: Caregivers will be better able to provide support for the individual (care receiver).

- a. Objective: FCSN will survey a minimum of 30% (but, no fewer than 100) of its caregivers/clients annually. 80% of surveyed participants will meet or exceed indicator.

Goal: Caregiver will be better able to provide support for him/herself.

- a. Objective: FCSN will survey a minimum of 30% (but, no fewer than 100) of its caregivers/constituents annually. 80% of surveyed participants will meet or exceed indicator.

3. Staffing Plan (15 points)

The chapter's staffing plan for this project includes three full-time salaried Family Caregiver Support Network team members and each will dedicate approximately 100% of their time to this project. Community Outreach coordinator focused on the African American Population has 25% of her time allocated to assist with promotion of the program, but also provide the evidenced based seven week SAVVY Caregiver program and Living Well with Chronic Conditions Class. Out Latino Community Outreach Coordinator has 25% of her time allocated to assisting the Family Caregiver Support Network Team with Latino families receiving respite funds as well as provide evidenced based programs in Spanish. The Program manager and Program coordinator both have 25% of their time allocated to this project to assist the Family Caregiver Support Network Team with care consultations, evidenced based education programs, support groups and also provide training on education programs and care consultations to the FCSN Staff. The Program specialist is a full time position and 25% of their time will be assisting data input into personify, providing necessary information needed for education programs, assists with communication with support group facilitators, provides training to volunteers who facilitate support groups and will provide administrative support to the FCSN. This project is supervised by the chapter's full-time salaried Program Director with 20% of her time allocated to this program.

Staff Qualifications. Alzheimer's Association personnel and the Program Director provide direct service to caregivers and persons with dementia and have experience in working with the elderly and specifically with individuals with Alzheimer's disease. In addition to the Family Caregiver Support Network Team will also continue to receive up to date training related to NFCSP and AFCSP funding and data bases/tracking systems. Other essential job necessities include experience with community outreach and engagement and experience working with volunteers.

Orientation and Training. Orientation for new staff includes a review of Chapter policies and procedures, introduction to other personnel, explanation of the organizational structure, human resource policies and procedures, review of specific job duties and education as to the handling of confidential information. New staff members receive instruction as to materials available within the chapter on Alzheimer's disease and related dementia and services available for the affected individual and the family member/caregiver. Staff utilizes these materials to gain additional knowledge of the disease and its effects on families and the individual with dementia. Job shadowing occurs for a limited time before the new staff member begins direct services to individuals. Direct care staff is supervised by the Program Director who has worked for the Alzheimer's Association for over 18 years and has a background in Social Work.

In addition, any specific needs of a staff person in terms of orientation are provided for on an individual basis by the person's immediate supervisor.

All direct service staff continue to receive specialized training on dementia including Alzheimer's disease and the needs of the patients, family members, and caregivers after employment. This is provided through in-service training (at both the local chapter and national association level), attendance at educational seminars, and consultation with experienced staff. Monthly all-staff meetings are held to ensure all staff is informed on overall association activities

and developments. Monthly program staff meetings are also held to facilitate planning and communications with all outreach and program staff. Supervisors meet regularly with staff to keep informed of ongoing work and to provide direction as needed.

The national headquarters of Alzheimer's Association also provides ongoing technical assistance to Chapter staff through educational training seminars and materials and consultation services. Staff can access the Benjamin Greenfield Library at the national headquarters in Chicago and the Alzheimer's disease Education and Referral (ADEAR) Center in Silver Spring, MD.

Staff and Volunteers Age 45 or Older. The Alzheimer's Association values past experience in choosing its workforce - both paid and volunteer. A significant portion, 69% (20 out of 29), of paid staff are persons aged 45 or older. The Association also has over 25 older adult volunteers who assist in the office, on our Helpline, with the Resource Library, and various other responsibilities like our special events. Many of these volunteers are family members of persons who have lived with Alzheimer's disease. Trained older adult volunteers also assist in providing services such as support groups and Helpline services. The Association actively recruits persons aged 45 and older to serve on its Board of Directors and various Board committees.

Volunteers aged 45 and older who are representative of the minority and low-income populations to be served through this Alzheimer's Counseling and Community Support Services are actively recruited to assist this project by serving as support group facilitators, program/outreach volunteers, advisory group members, ambassadors, and language translators as needed.

"Living Wage" Compliance. Compensation for staff at all levels within the chapter exceeds the "living wage" standard as defined by the Milwaukee County Board. Position classifications and salary ranges are set within the chapter based upon going salary rates as determined by the Nonprofit Management Association's Salary Survey. Compensation for staff includes such benefits as health insurance, short and long term disability, workers compensation, life insurance, paid sick, vacation and holidays, and an employer contributed retirement program. All employees are eligible for and receive the same benefit package, regardless of employee classification.

4. Accessibility (10 points)

Facility. The Chapter's main office is located at 620 South 76th Street, Suite 160, Milwaukee. This building is accessible by public bus lines and there is adequate regular and handicap parking. We are located on the main floor of the building and access to our building and office suite do not have stairs. Doorways are sufficiently wide to allow accessibility for handicapped individuals. Chapter office and other service facilities used for program services comply with guidelines of Americans with Disabilities Act.

Clients may also receive services in their homes or other locations through this project. Sites selected for this project are all physically accessible for the disabled. Sites offer either ramps or elevators, appropriate toilet facilities, power doors, and other code requirements

Geographic and Limitations. The Alzheimer's Association Southeastern Wisconsin Chapter serves an eleven county region in southeastern Wisconsin. Services funded by the Milwaukee County Department on Aging will be targeted to underserved populations of Milwaukee County. However, any individual with a presenting or possible concern or problem related to Alzheimer's disease or a related dementia who is 60 years of age or older and who resides in Milwaukee County is accepted for service by the chapter.

Hours of Operation. The chapter office is open from 8:30 am-4:30 pm, Monday-Friday. A 24-hour seven-day-a week Helpline phone service (800.272.3900) is also available. Services provided by the chapter are carried out primarily during the day. Evening and weekend availability to accommodate the needs of those served are available by special arrangement. Many staff work weekends in order to attend health/community events that are important to our Mission.

Weather Related Emergencies. In weather related emergencies, announcement of the closing of the Association and cancellation of services is broadcast on WTMJ AM 620 Radio. Should a weather related emergency occur while clients are in the office, appropriate precautions and assistance are provided.

Bi-Lingual and Hearing Impaired Clients. We are able to meet the needs of these special groups of clients; the chapter's 24-hour Helpline provides language translation services for 144 languages. Chapter printed materials have been created in Spanish. We have one staff member (Community Outreach Coordinator – Hispanic focus) that is bilingual in English/Spanish. We also offer a direct line in Spanish, 414.431.8811. To serve clients who are hearing impaired, the chapter has arranged with Independence First to have a translator available to assist clients and a TTY phone line is established. To make the program accessible to elderly persons who are socially isolated due to cultural or language factors, the chapter offers home visits and programs in the elderly housing units along with partners who have established footprints in different cultural communities.

5. Experience (25 points)

Agency Experience. The Alzheimer's Association of Southeastern Wisconsin has thirty-two years of experience providing quality advocacy, education, information, referral and support services to individuals, their families and the community at large concerned with Alzheimer's disease and other related dementias. The chapter has provided the Alzheimer's Counseling and Community Support Services program through support of the Milwaukee County Department on Aging since 1990. Each year additional culturally diverse and low-income individuals and families are assisted through this project.

Prior Government Contracts. The Alzheimer's Association, Southeastern Wisconsin Chapter, has competently and efficiently implemented several grants in the past. These include an annually renewing grant from Milwaukee County Department on Aging to fund the project for which we are requesting continuation funding. This grant has been renewed annually since 1990. The Association received state funding for a period of ten years for the Wisconsin

Alzheimer's Information and Training Center (WAITC). The contact person for this grant was Janet Smith, Chief, Policy and Planning Section, Bureau on Aging. From 2000 until June 30, 2004, the Association received a federally funded, state administered Administration on Aging (AoA) Dementia Demonstration Grant. This AoA grant complimented the minority and low-income outreach and education efforts of the Alzheimer's Counseling and Support Services grant and targeted additional areas in Milwaukee County, Waukesha, Racine, Kenosha, Ozaukee, and Walworth Counties. The contact person for this grant was also Janet Smith of the State Bureau on Aging. In, 2005, the chapter received an AoA grant for statewide Dementia Specialist Training in collaboration with the 2 other Wisconsin Chapters. In July 2008, we completed a 3 year AOA grant for the Jefferson County Memory Care Connection program.

In 2009 we entered into a 5-year contract with the University of Wisconsin. We will help with the educational core requirements of the newly established Alzheimer's Disease Research Center. The contact person for this grant would be Mark Sager, MD. In 2014 we renewed our 5-year contract and our contact person for this current grant contract is Dorothy Edwards, PhD.

In 2010 we became a funded partner for an AoA Alzheimer's Disease Supportive Services Program (ADSSP) 3-year innovative grant. The partners include the Alzheimer's Association, GWAAR, Zablocki VA Medical Center, and 4-county Aging and Disability Resource Centers/Aging Resource Center (Milwaukee, Kenosha, Racine and Waukesha). The goal of this innovative project was to help the VAMC become family caregiver competent and capable; help the resource centers become better dementia competent and capable; and help the Alzheimer's Association become better accustomed to VA and resource center services. Additionally, this grant project analyzed the inter-agency referral process to ensure caregivers are being connected to community agencies/resources in the most streamlined and proactive manner.

In July of 2015 we became a 3-year funded partner in the Wisconsin Geriatric Workforce Enhancement Program, managed by Marquette University with funding from the Health Resources and Services Administration (HRSA). Our focus is to provide training to health professionals across three major settings: primary care physicians and staff, hospital physicians and staff, and first responders in the community. In addition, we engage in systems level transformations around the needs of people with dementia in crisis and working with hospitals and first responder partners to develop dementia-related practice strategies, particularly for persons experiencing Behavioral and Psychological Symptoms of Dementia (BPSD).

Chapter Board of Directors. The Alzheimer's Association Southeastern Wisconsin chapter is governed by a volunteer Board of Directors comprised of representatives from business, health care, human services, and the community. The Chapter's Board of Directors is both age and race diverse. The Board continues to seek interested minority members and older persons on an ongoing basis. The Board includes members who have or have had a family member with Alzheimer's disease or a related disorder. Please see **Appendix 3** for a list of the Board of Directors, and **Form 7.0 or Appendix 4** for the Demographic Summary of the Board. The Board meets five times per year. It guides the Alzheimer's Association of Southeastern Wisconsin through an ongoing strategic planning process to ensure that services stay responsive to local community needs. The work of the Board is divided among Seven Board designated committees that include Finance & Human Resources, Fund Development, Communications and

Marketing, Program Services, Diversity and Inclusion, Nominations & Board Development, and Public Policy and Advocacy. Board oversight of the Alzheimer's Counseling and Community Support Services project is provided by the Program Committee which meets four times per year. Additionally, the chapter has an established Medical and Scientific Advisory Committee which meets four times per year and is made up of medical and healthcare champions in dementia care. This committee is chaired by Piero Antuono, MD and works to educate physicians and other professional entities about Alzheimer's disease, proper assessments, and available support resources.

The Board of Directors and the Association are committed to providing education, support and services to all families affected by Alzheimer's disease regardless of their cultural or ethnic backgrounds.

6. Administrative Ability (15 points)

The Alzheimer's Association, Southeastern Wisconsin Chapter is a member in good standing with its national headquarters. Operations follow established national organization standards. Personnel have appropriate credentials and licensure as needed to carry out responsibilities assigned.

Insurance and Bonding Coverage. All necessary insurance and bonding coverage is maintained as required by the Department on Aging for grantees. This includes coverage at the following levels:

Workers Compensation	In accordance with Statutes
Employers and Comprehensive	
General Liability	\$1,000,000 per occurrence
Bodily Injury & Property Damage	\$1,000,000 per Occurrence
Automobile Liability	\$1,000,000
Comprehensive Crime Coverage	
Employee dishonesty	\$500,000
Umbrella – excess liability	\$1,000,000

The Association complies with all administrative requirements for Milwaukee County Department on Aging grants. The Association has also met all State and Federal administrative requirements for grants received.

7. Program Outcomes and Quality Assurance (15 points)

Program outcomes are evaluated using quarterly program outcome reports. An evaluation of services and chapter activities occur on an ongoing basis to ensure program quality. Education programs are surveyed immediately after each program. We do our best to collect surveys from all programs but it can be challenging to ask attendees to do this after a 1 hour program or if we were invited into an agency to provide the program. Helpline callers and families who access

our Care Consultation services are surveyed. Input is sought from the Program Committee of the Board, program participants and other community representatives on a regular basis.

The chapter has in place a quality-control process that ensures that staff is provided with adequate supervision, mentoring, coaching, and assistance on a regular basis through their direct supervisors. Direct service staff is supervised by the Program Director. Regular supervisory meetings are held with staff to determine performance goals and accomplishments and rectify any performance deficiencies. Staff evaluations are conducted after 90 days of continuous employment and then on an annual basis.

Agency Client Grievance Procedure. If a grievance situation arises, the client is to be directed to the Program Director, who will attempt to resolve the issue. If that cannot be done or the matter concerns an official Association policy, the Program Director will refer the client grievance in writing to the Executive Director for resolution. To date, the chapter has never had a grievance filed by any client.

Consumer Involvement. Consumers of chapter services are involved at all levels of operation. At the policy setting level, the Board of Directors accomplishes this goal through the nomination and recruitment process. The Board's nominating committee assures that all sectors engaged in and/or affected by activities of the Association are represented on the Board. At the service level, the chapter utilizes volunteers in developing new activities and expanding and evaluating activities. Consumers of our services also serve on our Program Committee. Additionally, consumer volunteers assist in providing services and planned events sponsored by the chapter.

8. Coordination Activities (5 points)

Collaborative efforts involving numerous agencies and organizations serving the underserved elderly population are critical to the success of the chapter's programs and services. The chapter maintains strong linkages in the community with other social service providers and volunteer organizations. These include, but are not limited to:

- Milwaukee County Department on Aging
- Dementia Specialist Staff in Milwaukee County
- Wisconsin Alzheimer's Institute (WAI)
- Council for the Spanish Speaking
- Visiting Nurse Association
- Elder Abuse and Neglect Reporting System
- Aurora Family Service
- Community Care
- Social Development Commission (SDC)
- Senior Law
- Project Focal Point
- Clinton Rose Senior Center
- Bethesda Senior Center
- Washington Park Senior Center
- Kelly Senior Center

Wilson Park Senior Center
Indian Council of the Elderly
Lapham Park Venture
Froedtert Medical Center
Aurora Healthcare
Milwaukee Aging Consortium
Milwaukee Christian Center
United Community Center
American Heart Association
American Cancer Society
Lisbon Avenue Neighborhood Development (LAND)
Well Women's Program
Sixteenth Street Community Health Center
Milwaukee Health Services
Brentwood Health Organization
Alzheimer's Action Network
Alpha Kappa Alpha Sorority
Numerous community churches
Independence First

The Association also works with:

Milwaukee area medical facilities including hospitals and clinics
Transportation services for the elderly
Adult day programs
Community-based residential facilities
Nursing homes
Senior centers
Pharmacies
Milwaukee County senior meal sites

The Association, including this project, makes frequent referrals to Family Care, Milwaukee County Aging Resource Center, Community Care, Elder Link, Aurora Family Services, and other appropriate agencies. The staff works to stay current on appropriate government-funded programs and eligibility criteria for these programs.

Special attention is paid to any possible situation for elder abuse and referrals are made to the Elder Abuse Hotline, County MUTT team, and other community agencies. All referrals are followed up by referring staff. If immediate danger is sensed, we tell clients to hang up and dial 911. We follow-up on the situation to assess next steps.

The Association also assists clients who are not American citizens to obtain citizenship through contacts at Senior Law or directs them to Council for the Spanish Speaking.

