



2020

2021

ANNUAL REPORT

LeadingAge[™]
Wisconsin



A Message from LeadingAge Wisconsin Leaders



Dan Goodier

This has been a year filled with challenges and struggles but also a year that showered us with opportunities, caused us to stay true to our mission, and reminded us anew to hold tight to the priorities in life.

Throughout this year, it has been a privilege to serve as your leaders in LeadingAge Wisconsin. We saw your dedication to the people you serve. We marveled at your courage as you walked into the doors of our care communities day after day. We witnessed your grit as you continued to serve others despite your own fatigue, frustration, and exhaustion.

As we (hopefully) begin to move beyond this pandemic, we celebrate you. Every day, you braved the realities of today's new normal to be friend, caregiver, and family to the residents you serve. Our communities, indeed, our world made it to this point only because of people such as you! You are the backbone of your team, the lifeblood of your organization, and the heart of long-term care.

Working with you and your organization, LeadingAge Wisconsin realized some incredible victories and made some significant strides in the past twelve months. With this annual report, we take the time to celebrate our successes as we look forward to a new and brighter future. We welcome you to celebrate with us as we reflect on what we have accomplished together and as we contemplate where we will go from here.

Thank you for the honor of serving as your leaders through 2020-2021.



John Sauer

Dan Goodier
Board Chair

John Sauer
President & CEO



Reimbursement, Payment & Delivery Systems

Governor's Task Force on Caregiving

LeadingAge Wisconsin played a key role on the Governor's Task Force on Caregiving and articulated the need to address systemic nursing home payment reform and ensure Family Care dollars reach the providers. The LeadingAge Wisconsin Medicaid and Family Care proposals were embraced by the super-majority of the Task Force. Further, Governor Evers' proposed 2021-2023 biennial budget embraced many of the Task Force recommendations, including \$240 million to fund nursing home annual rate increases of 11.5% and 11.7%; adopting Family Care rate bands by January 1, 2024; allocating \$77.8 million to increase the direct care workforce fund to \$114 million in 2021-22; and providing \$77.8 million over the biennium to support direct care funding for personal care services.



CARES Act Funding

Early in the fiscal year, LeadingAge Wisconsin calculated the cost of pandemic related expenses to providers. This information served as the base for conversations with the Department of Health Services (DHS) as LeadingAge Wisconsin advocated for a \$153 million increase for long-term care providers. Using estimates for staffing additional nursing home beds at the height of the fall Covid surge, LeadingAge Wisconsin advocated for additional CARES Act funds being allocated to providers. In the end, \$50 million was added to DHS CARES Act payments through additional CAPP funding and a \$30 million program was funded to provide a \$2,900 incentive for new admissions from hospitals.



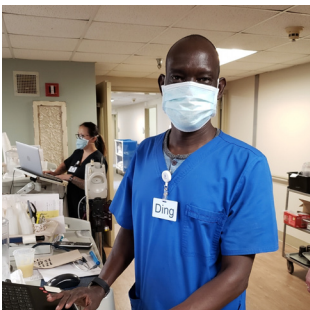
Managed Care Rate Cuts

LeadingAge Wisconsin voiced objections over Managed Care Organization (MCO) provider rate cuts, including Lakeland's efforts to cut certain providers by up to nine percent. DHS responded by indicating it plans to use the recently passed federal American Rescue Plan Act of 2021 to increase provider allocations by \$20-\$30 million to address provider concerns. The Association has requested that ARPA allocations for long-term care providers be funded at a level several times the amount suggested by DHS. A DHS proposal is slated to be unveiled by May 14, 2021.





Regulation & Quality Improvement



Vaccine Distribution

LeadingAge Wisconsin successfully advocated for independent living/senior housing to be included in the first phase of vaccinations. Working with the Pharmacy Society of Wisconsin, LeadingAge Wisconsin successfully advocated for the Pharmacy Partnership Program to immunize assisted living and independent living residents on a campus that includes a nursing home and/or an assisted living facility. Vaccinations have proven to be the most effective tool in the COVID-19 prevention toolkit. By prioritizing residents for vaccination, residents also were prioritized for decreased transmission risk, visits with families, and a slow return to a normal life.



Admissions During an Outbreak

LeadingAge Wisconsin led efforts to allow, under certain circumstances, nursing homes to continue admissions during an outbreak. DHS had imposed a de facto ban on all admissions during an outbreak, defined as even having a single staff member test Covid-19 positive. DHS's initial ban imposed a hardship on many facilities; modifications to this policy allow for admissions when deemed to be appropriate and safe.



Tools and Resources

LeadingAge Wisconsin developed for members numerous tools and resources, such as the Family Caregiver Program, Hair Salon Policy and Procedures, Outdoor Visitation Policy and tools, Hospitality Aide Policy & Procedure, Safer Visitation Resources for assisted living communities, and various Covid-19 testing, PPE and vaccine resources. In addition, the Dementia Capable Task Force met throughout the year to begin developing a dementia designation program. Further, LeadingAge Wisconsin increased clinical services to members by having clinical staff participation on the Healthcare-Associated Infections in Long-Term Care Coalition, the LeadingAge national Clinical Advisory Group, and in the Wisconsin Director of Nursing (DON) Council.



Advocacy

Increased Funding

LeadingAge Wisconsin coordinated several *For Your Action* campaigns for members urging state legislators and DHS officials to increase the Medicaid per diem payments and Family Care Direct Care Workforce funding necessary for providers to address increased fiscal pressures associated with Covid-19. These campaigns let policy makers know what issues were important to members and directed efforts and funding during the pandemic to ensure member voices were heard.



Virtual Day at the Capitol

LeadingAge Wisconsin successfully transitioned the Advocacy Day at the Capital to a virtual experience by providing virtual meeting instructions, support materials, advocacy tips, and webinar guidance. Further, LeadingAge Wisconsin increased its visibility and political involvement by maximizing the use of PAC funds and participating in various legislative leadership fundraising events and a private fundraiser for Governor Evers.



Kitchen Cabinet

LeadingAge Wisconsin worked collaboratively with the Governor's office to ensure that long-term care provider voices were heard through the creation of the long-term care Kitchen Cabinet. The Kitchen Cabinet, a collaboration with key staff members in the Governor's office, met weekly to ensure that provider voices were heard at the top levels of DHS leadership. LeadingAge Wisconsin members comprised five of the nine members of the cabinet.





Education



Meeting Members' Educational Needs

The pandemic hit within a few days of LeadingAge Wisconsin publishing the brochure for the 2020 Spring Conference. Once the state shut down, LeadingAge Wisconsin canceled the conference and immediately began working to help members acquire the CEUs they needed by launching an unprecedented series of eleven (11) webinars covering topics of interest to people throughout member organizations for a low facility registration fee.



The Learning Center

With the pandemic bringing to a halt all in person meetings, the LeadingAge Wisconsin Program Committee recommended development of a system to offer on demand education. The Learning Center launched in the fall of 2020. In the days, weeks, and months ahead, LeadingAge Wisconsin continued to add additional courses covering timely topics such as strategies to navigate Covid-19, diversity in the workforce, women in leadership roles, trauma-informed care, leadership in stress-filled times, workforce issues, strategic thinking, and planning beyond the pandemic. To date, 117 courses have been offered virtually and 667 individuals are active users in the Learning Center.



Wound Care Education

LeadingAge Wisconsin partnered with the Wound Care Education Institute (WCEI) to offer members and subscribers a substantial discount for Wound Care Certification Training and Testing. The course included 38 Continuing Education credits (CEs), and all the training and testing was completed online at the participant's own pace. Forty individuals enrolled in the program.



Workforce

Reaching Out to Strengthen Within

Serving on the LeadingAge Future of Nursing Homes Task Force provided the opportunity for LeadingAge Wisconsin staff to strategize on ways to address the long-term systemic challenges facing skilled care facilities. Staff members also served on the national Workforce/Caregiving Task Force and participated as a panelist on a national webinar organized by LeadingAge to discuss investing in caregivers. The *Making Work Pay* report and resulting press conference provided the opportunity for LeadingAge Wisconsin to discuss the work of the Governor's Task Force on Caregiving, which other states hope to emulate.



Building the Workforce

LeadingAge Wisconsin worked with the University of Wisconsin system to promote their tuition refund program for students who have nursing skills to work on the front lines in member facilities. A \$500 tuition refund was provided to students who met the program's criteria and worked in a healthcare facility. In addition, once emergency orders were in place, LeadingAge Wisconsin worked to secure free certified nursing assistant (CNA) virtual training for members. This training not only provided the 16-hour basic training for the emergency caregivers but also worked for those who wanted to be on a pathway to become certified. Further, LeadingAge Wisconsin has partnered with another association to submit grant applications to relaunch the WisCaregivers program.



Geriatric Career Development Program

The pilot of the Geriatric Career Development program (GCD) now is in its third year. Typically, about 100 students apply each year to get into the program. Program leaders work with key contacts at each high school to select the students who are the best fit and have the best chance of succeeding in the GCD program. Last spring, the school year concluded with eight junior students and fifteen sophomore students. Two of the students graduated from high school one year early. All 23 of the GCD students are in the process of pursuing a health care related field.





Member Engagement



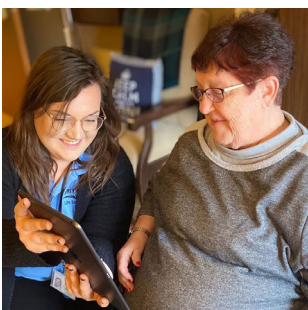
Professional Networking

LeadingAge Wisconsin formed a task force to develop, schedule, and plan CEO Network meetings to best address the interests and needs of the leaders of member organizations. The first meeting in 2020 was virtual, and it attracted nearly 70 registrants – a record for the CEO network. The Synergy network also has been meeting virtually and, throughout the past year, focused their attention on helping each other navigate through and beyond the pandemic, addressing a variety of timely topics. The Finance Networking group has taken root and now meets virtually every month with a steadily increasing number of regular participants.



Echelon

Membership in Echelon has grown to 220 assisted living communities, an increase of 19 facilities in the past year. All meetings throughout the past twelve months have been virtual, and discussions have focused on navigating the pandemic, testing, infection control, activities, dining, visitation, vaccinations, and the use of smart devices in resident rooms. At the end of last quarter, 120 assisted living communities had achieved Gold Star status in the Wisconsin Coalition for Collaborative Excellence in Assisted Living (WCCEAL) – 92 of them were Echelon participants.



Innovation Center

During the 2020 Strategic Planning Forum, the LeadingAge Wisconsin Board of Directors acknowledged that senior living in Wisconsin will undergo tremendous change over the next ten years. In subsequent discussions, the Board emphasized the need for member engagement around innovation as essential to future growth and sustainability as the association guides its members through the changes that are shaping the business of senior supports and services. Early in 2021, LeadingAge Wisconsin launched the Innovation Center and began featuring sessions focused on long-term care professionals who are adapting and implementing innovations to best serve residents today and into the future.



Internal Operations & Business Development

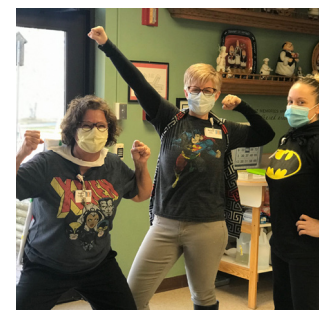
Value First

Value First successfully transitioned to new contracts with HPSI. This new partnership offers members many positive changes, including more variety in food distribution. Despite the challenging times, LeadingAge Wisconsin saw a 19 percent growth in member utilization of the Value First program. Wisconsin members accessed over \$13,000,000 worth of goods and services through the Value First Group Purchasing Organization (GPO) in 2020. Further, LeadingAge Wisconsin worked with a variety of providers and distributors to secure PPE resources for members during the pandemic and worked with the Medical College of Wisconsin's grant program to secure (at no cost) surgical masks and facial shields for member skilled nursing facilities.



VantagePoint Pharmacy Program

LeadingAge Wisconsin staff, LeadingChoice Network staff, members, and a hired pharmacy consultant met several times over many months to establish a request for proposals to ensure members had the best pharmacy partner possible with the VantagePoint pharmacy contract. After reviewing proposals submitted from six pharmacies, the group unanimously selected HealthDirect as the preferred partner for the VantagePoint Pharmacy program. HealthDirect demonstrated a commitment to exemplary customer service, competitive pricing, and an appreciation of what membership in LeadingAge Wisconsin means to member providers.



Safe Resident Assistant Program

Through a partnership with West Bend Mutual Insurance, LeadingAge Wisconsin again was able to offer the Safe Resident Assistant Program. LeadingAge Wisconsin awarded five grants and disbursed \$18,000 of lift equipment by securing discounted pricing through the Value First GPO. To date, West Bend Mutual Insurance has granted approximately \$200,000 worth of equipment, allowing 50 lifts to be purchased by LeadingAge Wisconsin members.



LeadingAge Wisconsin Income Statement



	2020-21 Budget	2020-21 Projected	2021-22 Budget
Member Dues	\$ 732,875	\$ 711,686	\$ 729,478
Associate Dues	\$ 35,000	\$ 27,518	\$ 27,518
LeadingAge Dues	\$ 55,000	\$ 48,700	\$ 48,700
Conferences/Seminars	\$ 289,000	\$ 175,848	\$ 324,675
Member Services	\$ 83,070	\$ 65,198	\$ 75,550
Value First/Vantage Point	\$ 223,700	\$ 180,175	\$ 211,267
LeadingChoice Network	\$ 4,200	\$ 4,200	\$ 8,400
Misc Income	\$ -	\$ 78	\$ -
Total Revenue	\$ 1,422,845	\$ 1,213,402	\$ 1,425,588
Staff Costs	\$ 971,714	\$ 1,032,701	\$ 940,225
Professional Services	\$ 97,440	\$ 116,598	\$ 97,440
Value First	\$ 27,000	\$ 1,125	\$ 27,000
Staff Travel	\$ 25,000	\$ 367	\$ 25,000
Professional Development	\$ 3,000	\$ 300	\$ 3,000
Board/Networking	\$ 20,000	\$ 2,826	\$ 23,000
Office Insurance/Taxes	\$ 11,000	\$ 9,549	\$ 11,000
Telephone	\$ 6,000	\$ 4,124	\$ 6,000
Copier	\$ 15,500	\$ 10,832	\$ 15,500
Postage	\$ 4,000	\$ 4,370	\$ 4,000
Computer Expense	\$ 15,200	\$ 15,200	\$ 15,200
Printing	\$ 4,000	\$ 200	\$ 4,000
Supplies/Sub./Memberships	\$ 14,000	\$ 11,649	\$ 10,000
Conferences/Seminars	\$ 121,392	\$ 116,928	\$ 222,735
Legal Counsel	\$ 25,000	\$ 25,000	\$ 25,000
Audit	\$ 8,000	\$ 8,000	\$ 8,000
Bank Expense/Misc.	\$ 1,000	\$ 3,284	\$ 2,000
Member Services	\$ 27,499	\$ 17,265	\$ 32,391
Depreciation	\$ 21,000	\$ 21,000	\$ 21,000
Office Building	\$ 28,500	\$ 19,989	\$ 28,500
Total Operating Expenses	\$ 1,446,245	\$ 1,421,306	\$ 1,520,991
Net Revenue/Expenses	\$ (23,400)	\$ (207,904)	\$ (95,403)
Gain(Loss) Investments	\$ 24,000	\$ 183,255	\$ 65,000
Net Income (Loss)	\$ 600	\$ (24,648)	\$ (30,403)
LMS (growth and ent fund)		\$ (30,000)	
MBS Engagement		\$ (75,000)	
PPP loan		\$ 186,092	
Employer Retention Credit		\$ 120,000	
Total other adjustments	\$ -	\$ 201,092	\$ -
Total Net Income	\$ 600	\$ 176,444	\$ (30,403)
Property & Equipment	\$ 8,000	\$ -	\$ 8,000
Growth and Entrepreneurial fund	\$ 70,000	\$ -	\$ 70,000
LMS (above)	\$ 30,000	\$ 30,000	\$ -
Advocacy Campaign (above)	\$ 30,000	\$ 75,000	\$ -

2020-2021 Executive Committee

Chair: Dan Goodier, Christian Community Homes & Services, Hudson
Immediate Past Chair: Doug Trost, SSM Health LTC-Post Acute, Fond du Lac
Chair Elect: Kris Krentz, Skaalen Retirement Services, Stoughton
Vice Chair of Member Services: David Fulcher, Milwaukee Catholic Home, Milwaukee
Vice Chair of Operations: Dan Meyer, Morrow Home, Sparta
Vice Chair of Public Policy: Sondra Norder, St. Paul Elder Services, Inc., Kaukauna
Secretary: Sue Seegert, Villa St. Francis, Milwaukee
Treasurer: Dennis Ferger, Clement Manor Health Center, Greenfield
LeadingAge Liaison: Tim Conroy, Capitol Lakes, Madison
Senior Advisor: Fran Petrick, Retired, Kenosha

2020-2021 Directors at Large

Barbara Beardsley, Brookside Care Center, Kenosha
Stephanie Chedid, Luther Manor, Wauwatosa
Tim Conroy, Capitol Lakes, Madison
David Fulcher, Milwaukee Catholic Home, Milwaukee
Kim Gochanour, Oakwood Village Prairie Ridge, Madison
Michelle Godfrey, Marquardt Village, Watertown
Dan Meyer, Morrow Home, Sparta
Sondra Norder, St. Paul Elder Services, Inc., Kaukauna
Mark Radmer, Harbor Haven Health & Rehabilitation, Fond du Lac
Kevin Schwab, St. Camillus Health Center, Wauwatosa
Sue Seegert, Villa St. Francis, Milwaukee
Frank Soltys, Felician Village, Manitowoc
Paul Treffert, Sheboygan Senior Community, Sheboygan
Jennifer Vosen, Sauk County Health Care Center, Reedsburg
Zach Ziesemer, Pine Crest Nursing Home, Merrill

2020-2021 Regional Directors

Region 1: Dennis Ferger, Clement Manor Health Center, Greenfield
Region 2: Erin Franco, New Glarus Home, New Glarus
Region 3: Marissa Janke, Eagle Crest Communities, La Crosse
Region 4: Ellen Thompson, Heritage of Elmwood, Elmwood
Region 5: Justin Cieslewicz, Homme Home of Wittenberg, Wittenberg

LeadingAge Wisconsin Staff

President & CEO: John Sauer
Accounting Services Specialist: Jing Ning
Member Services Assistant: Sarah Paterson
Director of Business Development: Denise May
Director of Housing & Clinical Services: Robin Wolzenburg
Vice President of Public Policy & Advocacy: Annette Cruz
Vice President of Financial & Regulatory Services: Brent Rapos
Vice President of Member Services & Innovation: Janice Mashak