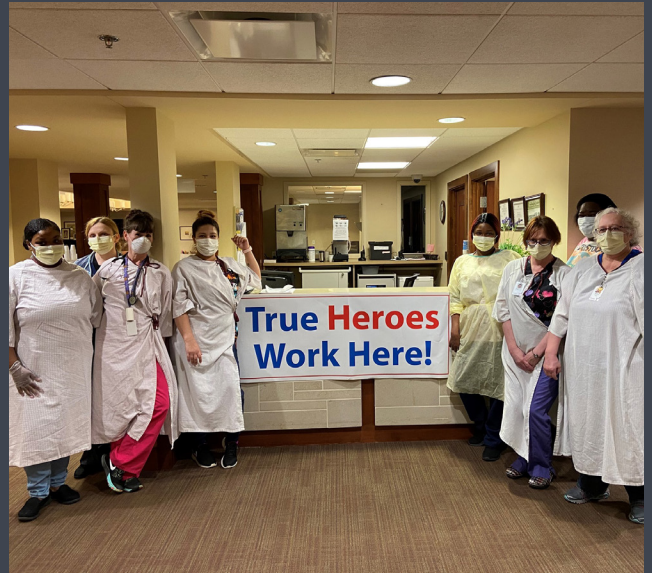


# Together



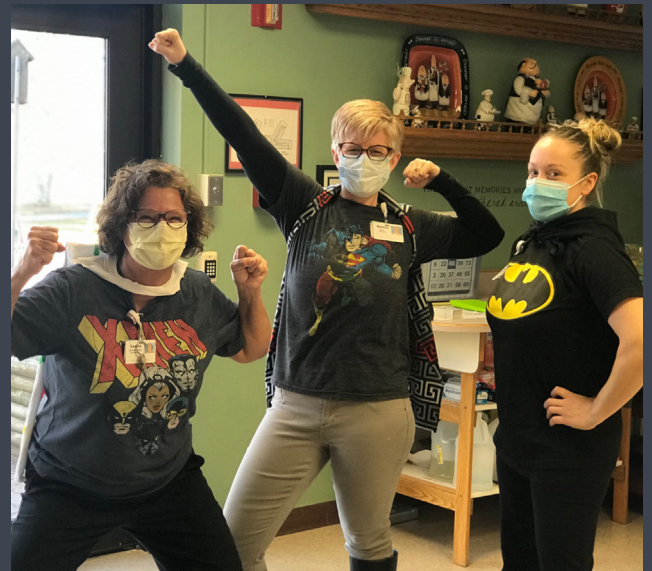
# 2019



# 2020

# Annual Report

LeadingAge™  
Wisconsin

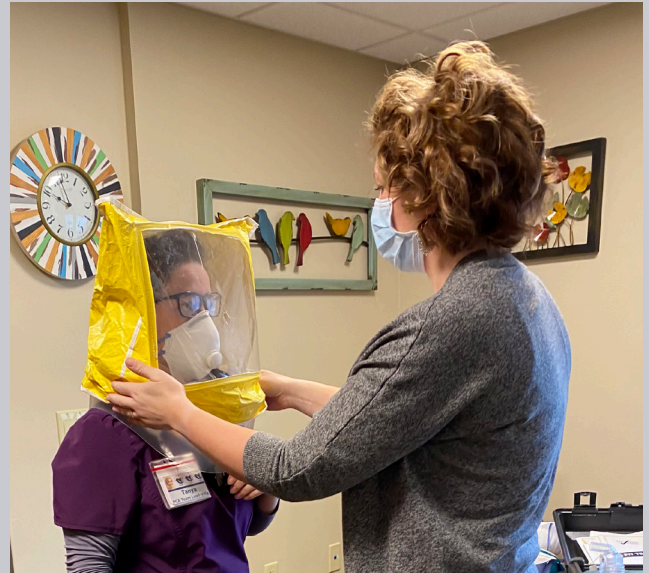


This year, especially, we learned how fast our world and our life can be drastically changed. We learned that the human spirit has the capacity to adapt and to survive. We learned the value of working together and the joy of being together. When our togetherness endured unprecedented challenges, we rose up, we evolved, and we triumphed.

The LeadingAge Wisconsin 2019-2020 Annual Report is a celebration of coming together and being together.

This Annual Report also is a celebration of our heroes in healthcare who provide compassionate care with a focus on keeping individuals safe. It is a celebration of all we can accomplish together – in good times and in bad times.

While our story continues to unfold during the COVID-19 pandemic, we want to share the highlights of what we have accomplished in Fiscal Year 2019-2020 – together.



In the area of  
Reimbursement,  
Payment,  
& Delivery  
Systems

together we:

- Successfully advocated in the state budget for an additional \$74 million (GPR/FED) in funding to increase Medicaid rates for nursing homes by approximately six percent in the first year and one percent acuity adjustment in the second year. This is the largest increase in nursing home rates in decades! An additional \$67 million (GPR/FED) was approved to support the Family Care direct care supplement paid to providers.
- Created Patient Driven Payment Model (PDPM) tools and Home Health PDGM tools to help providers navigate through the most significant federal payment reform in over 20 years.

- Submitted six of the 14 proposals submitted for consideration by the Paid Workers Subgroup of the Governor's Task Force on Caregiving.
- Led efforts to target Family Care dollars directly to care providers, bypassing the Managed Care Organizations (MCOs).
- Advanced proposals to adopt a "cost-based payment standard" for the nursing home reimbursement formula to address the abysmal Wisconsin nursing facility payment system.

- Advocated for members to receive payments for long-term care workforce funding, to be protected from reductions in room and board, and to receive rate increases within the MCO capitation rates.
- Explored and envisioned what new long-term care federal spending could look like.







Early in March of 2020, we were in the throws of

The COVID-19 Pandemic

and together we:

- Calculated estimated funding amounts for providers in Wisconsin due to federal COVID-19 stimulus bills, providing clarity to members on potential funding sources.
- Helped members know for which COVID-19 funding programs they were eligible with the COVID-19 Stimulus Funding Calculator tool.
- Created the COVID-19 Admission Guidance to aid members with admission and placement decisions.

- Worked with a broad coalition of organizations to successfully advocate for Assembly Bill 1038, which permanently established the CNA minimum training hours requirement to 75 hours, included an important increase in federal Medicaid matching funds of approximately \$300 million, and added liability protections for long-term care and assisted living providers during the public health emergency.
- Created a task force to work with the Department of Health Services (DHS) and the Governor's Office to consider the impact visitation prohibitions will have on the long-term care residents and families.

- Aided members in navigating the constantly evolving federal and state regulatory environment during the COVID-19 emergency, including issues related to 1135 federal waivers, waiver of assisted living regulations, CNA training hours and programs, and testing.



- Worked with other state provider associations to survey providers throughout the state regarding their need for Personal Protective Equipment (PPE) and worked to acquire PPE to fulfill the needs of these providers.
- Urged DHS to pursue COVID-19 testing of long-term care facilities in a more planful way.
- Developed a website to provide tools and resources relating to COVID-19.

- Created an all-hands-on-deck Association response throughout the COVID-19 Crisis, providing daily communications, virtual meetings, and webinars to ensure members had daily assistance and support on all fronts.
- Partnered with Next Step to provide a free, online training and testing program for emergency direct care workers and partnered with Leading-Age Minnesota to make the OnTrack 75-hour online and on-demand CNA training program available to members.



- Conducted and summarized a member satisfaction survey, the results of which were shared at the Board's strategic planning meeting. Amazingly, 195 individuals completed the survey. The survey showed a very high level of member satisfaction and resulted in a net promoter score of 83.59 among all members and 90.64 among CEOs. This rating is one of the highest in the country.
- Collected data and conducted analysis which led to the issuance of the association's 2020 *Workforce Crisis Report*.

In an effort to keep  
Members  
Actively Engaged  
together we:



- Increased the visibility and political involvement of LeadingAge Wisconsin by implementing a political action committee (PAC) strategy, maximizing use of PAC funds, and establishing a PAC fundraising goal for the biennium.

- Grew the Echelon program to 201 participating assisted living communities and met throughout the year to address issues such as: Legal and regulatory concerns, workforce, teamwork, smart devices, dementia care, workplace drama, and COVID-19.
- Through Synergy, provided members resources and tools related to: Staff competencies, trauma informed care, compliance & ethics, Mega Rule Phase 3, bedhold, corporate compliance, medications, sexuality, and visitation.
- Created a virtual networking group for finance professionals.

- Through Value First, brought savings to member's operational expenses through competitive vendor contracts. In 2019, Value First showed savings to members 93% of the time on frequently used products and services such as food, MRO, equipment, furnishings, patient lifts, negative pressure wound care, linens, and filtration.
- Assisted members with finding alternate sources for PPE.
- Brought substantial pharmacy savings to members through the VantagePoint Purchasing Group.

- Served on the Work Group on Facility-Based Care of the Wisconsin Dementia Task Force and began developing the LeadingAge Wisconsin tiered Dementia Capable Program to distinguish our dementia care providers.
- Supported the LeadingAge national public policy-setting process by facilitating the second Wisconsin Town Hall Conversation, where over 100 members shared their priority issues.



# LeadingAge Wisconsin Income Statement

|                                 | 2019-20<br>Budget   | 2019-20<br>Projected | 2020-21<br>Budget   |
|---------------------------------|---------------------|----------------------|---------------------|
| Member Dues                     | \$ 735,000          | \$ 731,003           | \$ 732,875          |
| Associate Dues                  | \$ 45,000           | \$ 37,400            | \$ 35,000           |
| LeadingAge Dues                 | \$ 59,063           | \$ 60,587            | \$ 55,000           |
| Investment Income               | \$ 40,000           | \$ (33,192)          | \$ 24,000           |
| Conferences/Seminars            | \$ 550,000          | \$ 345,709           | \$ 289,000          |
| Member Services                 | \$ 100,000          | \$ 103,877           | \$ 83,070           |
| Value First/Vantage Point       | \$ 203,400          | \$ 250,328           | \$ 223,700          |
| LeadingChoice Network           | \$ 8,400            | \$ 6,300             | \$ 4,200            |
| <b>Total Revenue</b>            | <b>\$ 1,768,863</b> | <b>\$ 1,533,910</b>  | <b>\$ 1,446,845</b> |
| Staff Costs                     | \$ 1,087,328        | \$ 974,485           | \$ 971,714          |
| Professional Services           |                     |                      | \$ 97,440           |
| Value First                     | \$ 37,000           | \$ 8,837             | \$ 27,000           |
| Staff Travel                    | \$ 30,000           | \$ 11,800            | \$ 25,000           |
| Professional Development        | \$ 2,000            | \$ 2,920             | \$ 3,000            |
| Board/Networking                | \$ 25,000           | \$ 25,314            | \$ 20,000           |
| Office Insurance/Taxes          | \$ 11,000           | \$ 9,873             | \$ 11,000           |
| Telephone                       | \$ 6,000            | \$ 5,305             | \$ 6,000            |
| Copier                          | \$ 15,500           | \$ 14,579            | \$ 15,500           |
| Postage                         | \$ 4,000            | \$ 4,000             | \$ 4,000            |
| Computer Expense                | \$ 15,200           | \$ 11,967            | \$ 15,200           |
| Printing                        | \$ 2,500            | \$ 3,354             | \$ 4,000            |
| Supplies/Sub./Memberships       | \$ 7,500            | \$ 11,415            | \$ 14,000           |
| Conferences/Seminars            | \$ 373,000          | \$ 209,817           | \$ 121,392          |
| Legal Counsel                   | \$ 25,000           | \$ 25,369            | \$ 25,000           |
| Audit                           | \$ 8,000            | \$ 8,000             | \$ 8,000            |
| Bank Expense/Misc.              | \$ 1,000            | \$ 1,000             | \$ 1,000            |
| Member Services                 | \$ 50,000           | \$ 53,835            | \$ 27,499           |
| Depreciation                    | \$ 21,000           | \$ 21,181            | \$ 21,000           |
| Office Building                 | \$ 27,500           | \$ 27,888            | \$ 28,500           |
| <b>Total Operating Expenses</b> | <b>\$ 1,768,528</b> | <b>\$ 1,514,825</b>  | <b>\$ 1,446,245</b> |
| <b>Net Revenue/Expenses</b>     | <b>\$ 335</b>       | <b>\$ 19,086</b>     | <b>\$ 600</b>       |
| Property & Equipment            | \$ 8,000            | \$ 5,407             | \$ 8,000            |
| Growth and Entrepreneurial fund | \$ 100,000          | 0                    | \$ 70,000           |
| LMS                             |                     |                      | \$ 30,000           |
| Advocacy Campaign               |                     |                      | \$ 30,000           |

## **2019-2020 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: Michelle Putz, Ovation Communities, Milwaukee  
Vice Chair of Operations: Terry Snow, Pleasant View Nursing Home, Monroe  
Vice Chair of Public Policy: Sondra Norder, St. Paul Elder Services, Inc., Kaukauna  
Secretary: Tim Conroy, Capitol Lakes, Madison  
Treasurer: Dan Meyer, Morrow Home, Sparta  
LeadingAge Liaison: David Fulcher, Milwaukee Catholic Home, Milwaukee  
Senior Advisor: Fran Petrick, Brookside Care Center, Kenosha

## **2019-2020 Directors at Large**

Stephanie Chedid, Luther Manor, Wauwatosa  
Tim Conroy, Capitol Lakes, Madison  
David Fulcher, Milwaukee Catholic Home, Milwaukee  
Michelle Godfrey, St. Elizabeth Manor, Janesville  
Dan Goodier, Christian Community Homes & Services, Hudson  
Morgan Hinkley, Brewster Village, Appleton  
Kris Krentz, Skaalen Retirement Services, Stoughton  
Dan Meyer, Morrow Home, Sparta  
Sondra Norder, St. Paul Elder Services, Inc., Kaukauna  
Michelle Putz, Ovation Communities, Milwaukee  
Mark Radmer, Harbor Haven Health & Rehabilitation, Fond du Lac  
Kevin Schwab, St. Camillus Health Center, Wauwatosa  
Sue Seegert, Villa St. Francis, Milwaukee  
Heather Sheehan, Hayward Area Memorial Hospital & Water's Edge, Hayward  
Frank Soltys, Felician Village, Manitowoc  
Zach Ziesemer, Pine Crest Nursing Home, Merrill

## **2019-2020 Regional Directors**

Region 1: Dennis Ferger, Clement Manor Health Center, Greenfield  
Region 2: Terry Snow, Pleasant View Nursing Home, Monroe  
Region 3: Marissa Janke, Onalaska Care Center, Onalaska  
Region 4: Jill Gengler, Colfax Health and Rehab, Colfax  
Region 5: Steve Seybold, Homme Home of Wittenberg, Wittenberg

## **LeadingAge Wisconsin Staff**

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