

# Winning Strategies

2013-2014 Annual Report



*LeadingAge*<sup>™</sup>  
*Wisconsin*  
*Better Services for Better Aging*

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## An Association Of the Members, For the Members, and Liked By the Members

Early in fiscal year 2013-14, LeadingAge Wisconsin conducted a member satisfaction survey. Based on the survey responses, members have an impressively high level of satisfaction with the association. Members ranked advocacy, education, financial services, and assisted living quality initiatives as the most valuable services. Directors of nursing also valued the clinical services while assisted living managers valued the quality improvement network. Overall, the survey showed the association has deep member support, is exceptional at core services, and decision-makers wish for more assistance in addressing the future.

Following the assessment of member satisfaction, the LeadingAge Wisconsin Board of Directors identified strategies that will lead the association and its members into the future. Through this generative discussion, the board concluded:

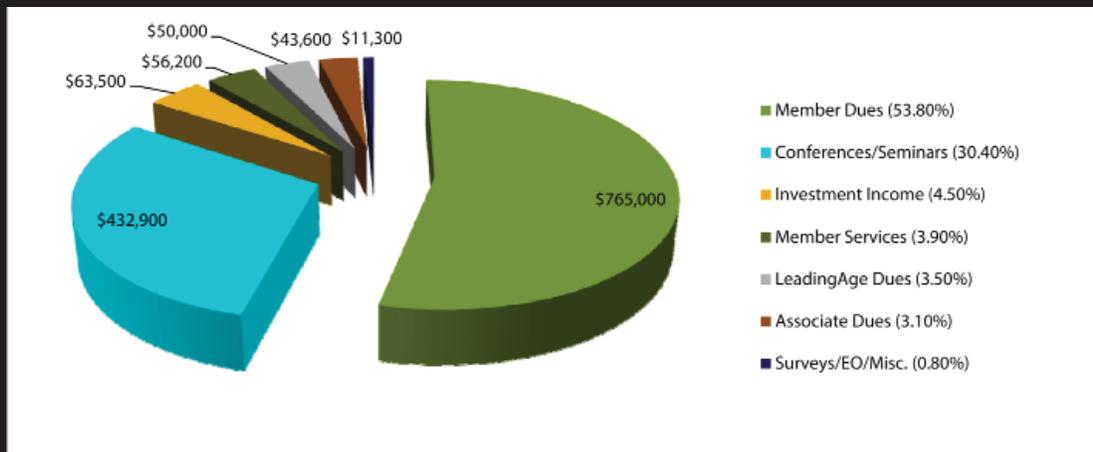
- Our customers of the future will be those who seek/need our services (despite their age) and those interested in healthy aging.

- Increasingly, the services we offer will determine who our customers are. That is, the age of those we serve will be service determined.
- We need to better understand our customers' purposefulness and help these customers make and maintain a connection with the community, regardless of setting or venue.
- We need to promote positive aging, educate about the aging process, and build respect and dignity for elderly individuals.

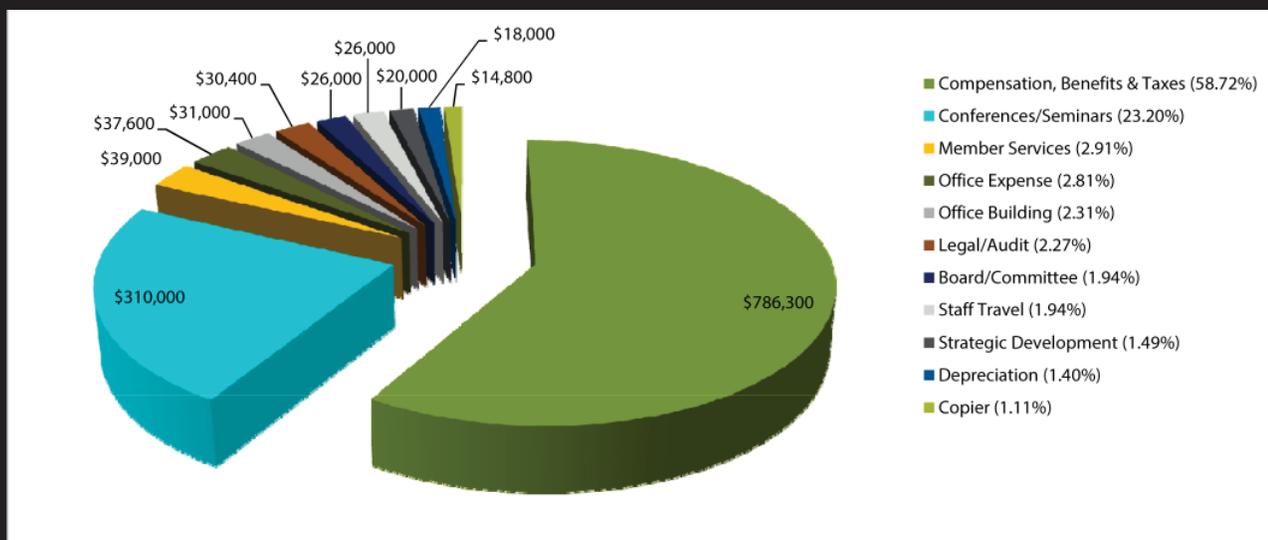
Based on these conclusions, LeadingAge Wisconsin set the direction that will move the association and its members into the future. This direction will be driven by the association's core serves (Advocacy, Education, and Member Services and Supports) and guided by the five winning strategies as defined by the Board of Directors and as detailed throughout this annual report.

The dedicated efforts of the Association and its members throughout the year were streamlined to align with the core services and to advance the five winning strategies.

## Projected Revenues June 30, 2014 -- \$1,422,500



## Projected Expenses June 30, 2014 -- \$1,339,100



**Winning Strategy #1: LeadingAge Wisconsin will establish and follow a visionary strategy to assist members in developing their futures.**

- Through the LeadingAge Wisconsin CEO Network, members explored ideas, concepts, and trends related to health care reform, the Accountable Care Act, changing payment systems, visioning, strategic planning, changing systems, positioning, and other comparable issues that are shaping the future of senior services and supports.
- LeadingAge Wisconsin helped launch LeadingAge Insights and its performance metrics and readmission rates. Wisconsin has the second highest Insights utilization rate, trailing only New York.

**Winning Strategy #2: LeadingAge Wisconsin will embrace and promote the sense of community for the consumer regardless of the place, setting, or venue of care/services.**

- LeadingAge Wisconsin is guiding members of the Assisted Living Quality Improvement Network on an outcome improvement journey to enhance activity offerings. Members are developing innovative activities that engage residents/tenants in community offerings while engaging the community in the lives of the residents/tenants.
- LeadingAge Wisconsin developed new tools to assist member Senior Housing professionals with census development.
- One of the themes incorporated throughout the association's new leadership development focuses on community engagement and the concept of "giving back."

**Winning Strategy #3: LeadingAge Wisconsin will cultivate and grow the talent and leadership necessary to ensure the future success of our member organizations.**

- The Association developed a new leadership academy. I-LEAD is an engaging growth and development experience resulting in self-awareness, peer networking, and a discovery of new practices designed to inspire and motivate. It is our vision to elicit the greatness within a group of high potential leaders who will elevate their organizations, their greater communities, LeadingAge Wisconsin, and the senior living field to new heights of passion, adaptation, and innovation.
- LeadingAge Wisconsin introduced the Director of Nursing Exceptional Leadership Incorporating Timeless Essentials (DON ELITE), a new service for members and subscribers to help DONs enhance their clinical and leadership skills. Currently, 92 organizations are participating.
- LeadingAge Wisconsin developed a program to work with students in the UW-Eau Claire Health Care Administrator (HCAD) program and new leaders in member organizations, offering them information, education, and services to support their growth

and leadership. LeadingAge Wisconsin gave a restricted \$5,000 donation to assist the HCAD program and to increase the LeadingAge Wisconsin visibility on campus.

**Winning Strategy #4: LeadingAge Wisconsin will help members to successfully operate within changing delivery and payment systems.**

- LeadingAge Wisconsin aggressively represents the members' interests before the Department of Health Services (DHS) on Family Care and managed care issues. Members are fully engaged in strategies to secure Family Care rate increases, improve the functional screen, and achieve efficiencies in care management/coordination, and other operational issues.
- LeadingAge Wisconsin continues to work with members on Managed Care Organization (MCO) contract issues and on Medicare Advantage Plan contract and coverage issues.
- At the Association's relentless urging, DHS agreed to amend the Long-Term Care Functional Screen to more fully capture a person's behavioral conditions and challenges. The functional screen software will be updated and fully operational by July 1, 2014.
- LeadingAge Wisconsin organized a meeting of MCOs and providers to discuss common issues surrounding the Family Care capitation rate-setting methodology. Leading Age Wisconsin also initiated conversations to begin exploring higher Family Care rates and lower insurance premiums for facilities participating in the Wisconsin Coalition for Collaborative Excellence in Assisted Living (WCCEAL).

**Winning Strategy #5: LeadingAge Wisconsin will provide members with the operating, quality and business tools to help members succeed.**

- LeadingAge Wisconsin grew membership in WCCEAL to 163 (of 334 total members). We continue to lead the way in level of participation in the quarterly reports and in the customer satisfaction survey. The outcomes for LeadingAge Wisconsin members lead the overall benchmark reports. To further enhance member outcomes, the Association developed CBRF quality initiatives focusing on Behaviors, Memory Care, and Social Participation, and introduced RCAC quality initiatives focusing on Advance Directives and Social Participation.
- Following the Assisted Living Winning Strategies meeting, the association launched the 2014 Outcome Improvement Project for each member of the Assisted Living Quality Improvement Network. These outcome improvement projects drive the network meetings and provide opportunities for members to share best practices.

- LeadingAge Wisconsin developed the *Assisted Living Resident Assistant Training Guide*, which is receiving outstanding reviews from the members.
- Through a partnership with American Data, LeadingAge Wisconsin is working to incorporate our assisted living tools, policies, and procedures into the ECS software for network members who own or purchase the ECS software.

**Education**

- LeadingAge Wisconsin continued our tradition of excellence in our 2013-2014 educational offerings. Through the Fall Conference, Reimbursement Seminars, Winter Symposium, Spring Conference, Legal Chats, Business Office Chats, ICD-10 Webinar, and DON ELITE, LeadingAge Wisconsin provided quality education, unparalleled networking, and a diverse range of social activities to a combined total of more than 2500 individuals.

**Advocacy**

- LeadingAge Wisconsin helped secure a nursing home resident acuity adjustment of \$15.9 million GPR/\$38.7 million AF over the 2013-15 biennium, making nursing homes the only Medicaid provider to receive additional funding in the 2013-15 state budget.
- LeadingAge Wisconsin played a vocal role in the DHS Dementia Redesign Summit, at which we pushed for a plan to address safe harbors and facility-based care issues. The Association issued comprehensive point-by-point comments on the Dementia redesign plan issued by DHS and created six workgroups from the Health Issues Forum to address dementia-capable standards.
- LeadingAge Wisconsin arranged for Cowles Research Inc. to evaluate Wisconsin Division of Quality Assurance (DQA) citing practices versus those of other states. The study conclusively noted DQA is more punitive than most other states. Association representatives met with DHS and DQA to discuss the need for a root cause analysis on why Wisconsin is an outlier.
- LeadingAge Wisconsin played a key role in the passage of legislation to provide reciprocity to out-of-state nurse aides and to permit nursing homes to develop their own drug formularies.
- Other advocacy initiatives included supporting the hospital observation days/Medicare SNF benefit legislation, challenging a proposed final rule which could jeopardize the ability of many Wisconsin CBRFs to receive Medicaid waiver funds, and urging the Wisconsin Congressional delegation to oppose the elimination of the charitable contributions deduction and to support the elimination of the Medicare therapy caps.

# LeadingAge Wisconsin -- Leadership

<p><b>2013-14 Executive Committee</b></p> <p><b>Chair</b> <i>Mike Christensen</i> Grace Lutheran Foundation Eau Claire</p>	<p><b>Chair Elect</b> <i>Mike Basch</i> Sheboygan Senior Community Sheboygan</p> <p><b>Vice Chair/Operations</b> <i>Jim Williams</i> Cedar Community West Bend</p> <p><b>Immediate Past Chair</b> <i>Lynn Binnie</i> Fairhaven Retirement Community Whitewater</p>	<p><b>Treasurer</b> <i>Fran Petrick</i> Brookside Care Center Kenosha</p> <p><b>Vice Chair/ Member Services</b> <i>Mari Beth Borek</i> Lutheran Homes &amp; Health Services Fond du Lac</p> <p><b>LeadingAge Liaison</b> <i>Joe Xanthopoulos</i> Oakwood Lutheran Homes Madison</p>	<p><b>Secretary</b> <i>Doug Trost</i> St. Francis Home Fond du Lac</p> <p><b>Vice Chair/Public Policy</b> <i>Scott Ross</i> Woodside Lutheran Home Green Bay</p> <p><b>Senior Advisor</b> <i>David Keller</i> Luther Manor Wauwatosa</p>
<p><b>2013-14 Directors at Large</b></p>	<p><b>Renee Anderson</b> Saint John's Communities Milwaukee</p> <p><b>Dan Goodier</b> Christian Community Home &amp; Services Hudson</p> <p><b>Vern Larson</b> LindenGrove Mukwonago</p> <p><b>Scott Ross</b> Woodside Lutheran Home Green Bay</p> <p><b>Jim Williams</b> Cedar Community West Bend</p>	<p><b>Mari Beth Borek</b> Lutheran Homes &amp; Health Services Fond du Lac</p> <p><b>Jane Hooper</b> Clearview Juneau</p> <p><b>Clark Nordberg</b> Bethel Home &amp; Services Viroqua</p> <p><b>Ron Schaetzel</b> St. Clare Meadows Baraboo</p> <p><b>Marion Wozniak</b> Cedar Crest Janesville</p>	<p><b>Pauline Darling</b> Bethany Home Waupaca</p> <p><b>Kris Krentz</b> Skaalen Retirement Services Stoughton</p> <p><b>Fran Petrick</b> Brookside Care Center Kenosha</p> <p><b>Doug Trost</b> St. Francis Home Fond du Lac</p>
<p><b>2013-14 Regional Directors</b></p>	<p><b>Region I</b> <b>Dan Risch</b> Lincoln Lutheran Racine</p> <p><b>Region IV</b> <b>Tony Manzella</b> Dunn County Health Care Center Menomonie</p>	<p><b>Region II</b> <b>Terry (Hensel) Snow</b> Pleasant View Nursing Home Monroe</p> <p><b>Region V</b> <b>Mike Basch</b> Sheboygan Senior Community Sheboygan</p>	<p><b>Region III</b> <b>Pete Eide</b> Hillview Health Care Center La Crosse</p>
	<p><b>Immediate Past Chair</b> <i>Lynn Binnie</i> Fairhaven Retirement Community Whitewater</p>	<p><b>Senior Advisor</b> <i>David Keller</i> Luther Manor Wauwatosa</p>	<p><b>LeadingAge Board Member</b> <i>Steve Jaberg</i> Cedar Community West Bend</p>

## Staff

**John Sauer**  
President/CEO

**Janice Mashak**  
VP Member Services/Innovation

**Brian Schoeneck**  
VP Financial/Regulatory Services

**Tom Ramsey**  
VP Public Policy/Advocacy

**Sarah Paterson**  
Member Services Assistant

**Pam Walker**  
Executive Secretary