



**Annual Business Meeting  
9:15 a.m. – 10:00 a.m., May 7, 2015  
La Crosse Center, La Crosse**

**Proposed Agenda**

- I. Call to Order, Quorum Determination**
- II. Adoption of Agenda**
- III. Leadership Reports**
  - A. Secretary's Report – Minutes of May 3, 2014 Annual Business Meeting
  - B. Recognition of Outgoing Board Members
  - C. Outgoing Chair's Remarks-- Annual Report
  - D. LeadingAge Report
- IV. President/CEO Remarks**
- V. Association Business Matters**
  - A. Proposed 2015-2016 Budget (Treasurer's Report)
  - B. Nominees and Elections for LeadingAge Wisconsin Board of Directors
  - C. Report: Officer Nominations to be Considered by 2015-16 Board of Directors
- VI. Other Business**
- VII. Adjournment**

**LeadingAge Wisconsin  
Annual Business Meeting  
May 3, 2014  
Kalahari Resort, Wisconsin Dells  
9:15 a.m. – 10:00 a.m.**

**Motions**

**MOTION: By Trost, second by Anderson, to accept the minutes of the May 2, 2013 annual business meeting as written. Motion passed unanimously.**

**MOTION: By Petrick, second by Larsen, to adopt the 2014-2015 budget as presented. Motion passed unanimously.**

**MOTION: By Ubbleholde, second by Manzella, to accept the nominees to the LeadingAge Wisconsin Board of Directors as recommended by the Nominating Committee. Motion passed unanimously.**

**Minutes**

**I. LeadingAge Wisconsin's Board of Directors Chair Mike Christensen called the meeting to order. A quorum was present.**

**II. Adoption of Agenda:** Agenda adopted by consensus

**III. Leadership Reports**

A. Secretary's Report – Minutes of May 2, 2013 Annual Business Meeting

**MOTION: By Trost, second by Anderson, to accept the minutes of the May 2, 2013 annual business meeting as written. Motion passed unanimously.**

B. Chair's Report

Christensen highlighted the many successes of LeadingAge Wisconsin this past year that are included in the LeadingAge Wisconsin 2013-14 annual report, and reflected on the Association's impressive advocacy efforts and inspiring members through high-level educational and networking opportunities. He thanked the members for their active participation in LeadingAge Wisconsin by serving on committees and task forces, attending our educational programs, and engaging in the association's long-term care and senior housing advocacy agenda. Christensen thanked the LeadingAge Wisconsin Board and staff for their efforts this past year.

## C. Recognition of Outgoing Board Members

Christensen and Sauer acknowledged and thanked the four outgoing LeadingAge Wisconsin Board members for their past years of service:

- Lynn Binnie, Fairhaven Retirement Community, Whitewater: Lynn has served on the Board since 2003. Lynn led the Association as chair in 2011 and 2012 and served in many other leadership capacities, including Region I Director, Treasurer, Vice-Chair of Public Policy, and chaired several standing committees and task forces. He also represented the members on the LeadingAge Policy Congress and membership task force.
- Mike Basch, formerly of Sheboygan Senior Community: Mike has served on the Board since 2010. He has served as the Association's Chair-Elect, Vice-Chair of Member Services and chaired the Association's Program and Legislative/Reimbursement Committees.
- Joe Xanthopoulos, Oakwood Lutheran Homes, Madison: Joe has served on the Board since 2011. He has served on the Association's Executive Committee as the LeadingAge Liaison and as our representative on the LeadingAge Policy Congress and planning committee.
- Dan Risch, Lincoln Lutheran of Racine, was elected to represent Region I members in 2013. He actively promoted regional participation in regulatory and legal forums and served on several networking and public policy forums.

Each of these individuals has given freely of their time and considerable talents and LeadingAge Wisconsin has been made stronger through their many contributions and servant leadership. Members acknowledged these individuals with a round of applause

## D. LeadingAge Delegate's Report

Leslie Knight reported to the membership that LeadingAge continues their work on strengthening not-for-profit leadership, engaging seniors through networking, cultivating talented people and pioneering technology. Knight reviewed the 2013 LeadingAge accomplishments that dealt with challenges associated with changing demographics in combination with shifting consumer desires, "doing more with less" as public funding for housing and continuing care services diminishes. Knight thanked and continued to encourage all LeadingAge Wisconsin members to be involved with LeadingAge initiatives.

## IV. President/CEO Remarks

Sauer discussed the great opportunities that are ahead for the LeadingAge Wisconsin members. The future includes the journey beyond fee-for-service, pushing down the continuum, regulations/quality metrics and technology. Sauer thanked the UW-Eau Claire students in the CHAASE Program for attending the Spring Conference. He commended the membership for their leadership, development and support for providing quality long term services. Sauer noted that the annual report highlights our core services: advocacy, member services, education, visionary and direction. Sauer thanked the membership for their involvement, serving as volunteers, and their

support in making these accomplishments happen. Sauer acknowledged and thanked outgoing LeadingAge Board members for their years of service and the valuable leadership they provide to LeadingAge Wisconsin. He thanked Christensen for his leadership and guidance the past two years as President and thanked the Board of Directors for their ongoing efforts. Sauer also thanked the staff, legal counsel and our Clinical Consultant for their exceptional work. He concluded by noting his optimism fueled by the innovation of the member organizations and their mission to improve the lives of those they serve.

## V. Association Business Matters

### A. Proposed 2014-2015 Budget (Treasurer's Report)

Petrick reported the Budget and Finance Committee met in March to review the current year projections and to develop the 2014-2015 association budget. The operating gain is estimated at \$58,400, rising to \$25,000 after the gain on market value investments is included.

The proposed budget projects net revenues after expenses at (\$26,900). Petrick reported that the proposed budget will expand member services and advocacy efforts and authorized two additional association staff positions; one position to help members achieve added savings under the Value First group purchasing program (funded by a Value First grant) and the other position to help the Association expand its services to a growing membership. Under the proposed budget, a 2% increase would be applied to the LeadingAge Wisconsin modified dues brackets.

Petrick thanked the staff for their efforts in making another solid year possible, with a special acknowledgement to Brian Schoeneck for his hard work on the budget.

**MOTION: By Petrick, second by Larsen, to adopt the 2014-2015 budget as presented. Motion passed unanimously.**

### B. Nominees and Elections for LeadingAge Wisconsin Board of Directors—

Binnie announced the slate of officers as recommended by the Nominating Committee for 2014-2015 will be considered by the newly elected Board:

Chair.....Mari Beth Borek, Lutheran Homes & Health Services, Fond du Lac  
Chair-Elect.....Douglas Trost, St. Francis Home, Fond du Lac  
Vice Chair--Operations.....Jim Williams, Cedar Communities, West Bend  
Vice Chair--Public Policy.....Scott Ross, Woodside Lutheran Home, Green Bay  
Vice Chair--Member Services.....Terry (Hensel) Snow, Pleasant View Nursing Home, Monroe  
Secretary..... Renee Anderson, St John's Communities, Milwaukee  
Treasurer.....Frances Petrick, Brookside Care Center, Kenosha  
LeadingAge Liaison.....Marion Wozniak, Cedar Crest, Janesville  
Immediate Past Chair.....Mike Christensen, Grace Lutheran Foundation, Eau Claire  
Senior Advisor.....TBD

Binnie also announced that the Nominating Committee recommends the following individuals be elected by the membership to serve as At-Large Directors on the LeadingAge Wisconsin Board of Directors in 2014-15:

- Clark Nordberg, Bethel Home and Services, Viroqua, to serve his second, three-year term;
- Jim Williams, Cedar Community, West Bend, to serve his second, three-year term;
- Dan Goodier, Christian Community Homes and Services, to serve his first, three-year term, having completed an unexpired term through May 2014;
- Michelle Putz, Lincoln Lutheran of Racine, Racine, to serve her first, three-year term; and
- Heather Sheehan, Hayward Area Memorial Hospital & Water's Edge, Hayward, to serve her first, three-year term.

**MOTION: By Ubbelohde, second by Manzella, to accept the nominees to the LeadingAge Wisconsin Board of Directors as recommended by the Nominating Committee. Motion passed unanimously.**

Binnie reported that Regions II and V have completed their regional elections: Terry (Hensel) Snow, Pleasant View Nursing Home, Monroe, has been elected by Region II having completed an unexpired term has been elected to serve her first, three-year term as Region II Director; and Steve Seybold, Homme Home of Wittenberg, has been elected to his first, three-year term as Region V Director. Binnie reported that Region I Director, Dan Risch recently announced his plan to retire by June 1, 2014. Region I will conduct a regional election over the next several weeks.

## **VI. Safe Resident Assistance Grant Program-Award Recipients and Sponsor Acknowledgements**

Sauer announced that six organizations are receiving grants to purchase much needed resident lift equipment in 2014. The grants total nearly \$25,000 provided from West Bend Mutual Insurance Company/West Bend Charitable Foundation. The Foundation plans to make these grants annually available for lift equipment. Sauer thanked West Bend Mutual for their generous gift to six organizations. Sauer also thanked EZ Way Company for discounting the costs of resident lifts to be purchased by grant recipients.

There being no further business, the meeting adjourned.



April 21, 2015

To: LeadingAge Wisconsin Members

From: Mike Christensen, Chairperson, Nominating Committee  
Doug Trost, Chair-Elect, LeadingAge Wisconsin

Subject: LeadingAge Wisconsin's 2015 Spring Conference & Annual Business Meeting

{The LeadingAge Wisconsin Annual Business Meeting will be held from 9:15 a.m. to 10:00 a.m. on May 7, 2015 in conjunction with the Association's May 6-8, 2015 Spring Conference at the La Crosse Center; [www.leadingagewi.org/media/21831/15spring.pdf](http://www.leadingagewi.org/media/21831/15spring.pdf). }

- Proposed Board Nominees and 2015-16 Officers
- Proposed 2015-16 LeadingAge Wisconsin Operating Budget
- Safe Resident Assistance Grant Program-- Awardees
- Spring Conference Highlights—Come Join Us!

Your Association's Annual Business Meeting will be held from 9:15 a.m. to 10:00 a.m. on May 7, 2015 in conjunction with the Association's May 6-8, 2015 Spring Conference, *Be The Voice*, at the La Crosse Center. During this meeting, members will be asked to review and approve the Association's proposed 2015-16 operating budget, act on a slate of nominations to the LeadingAge Wisconsin Board of Directors, and celebrate exceptional long-term services and supports.

## Proposed Board Nominees and 2015-16 Officers

On behalf of the LeadingAge Wisconsin Nominating Committee, we would like to thank all members who applied to serve on the LeadingAge Wisconsin Board of Directors. Participation and leadership in LeadingAge Wisconsin is critically important as we collectively strive to serve older adults and persons with a disability. We congratulate this year's nominees and encourage those members who were not nominated to continue to actively serve their Association through the many networking, forum, task force, committee and regional opportunities.

## Nominating Committee Recommendations

The Nominating Committee recommends that the following individuals be elected by the membership at the May 7, 2015 Annual Business Meeting to serve as **At-Large Directors** on the LeadingAge Wisconsin Board of Directors:

- **Fran Petrick**, Brookside Care Center, to serve her second, three-year term;
- **Marion Wozniak**, Cedar Crest, Janesville, to serve her second, three-year term;
- **Kris Krentz**, Skaalen Retirement Services, Stoughton, to serve his first, three-year term, having completed an unexpired term through May 2015;
- **Mark Radmer**, Harbor Haven, Fond du Lac, to serve his first, three-year term;
- **Dan Meyer**, Vernon Manor, Viroqua, to serve his first, three-year term;
- **Sue Seegert**, Presbyterian Homes-- Kirkland Crossings, Pewaukee, to complete an unexpired term until May 2017; and
- **Sondra Norder**, St. Paul Elder Services, Kaukauna, to complete an unexpired term until May 2016.

## Region Elections

Regions I and III have completed their regional elections: **Dennis Ferger**, Clement Manor, Greenfield, is completing his predecessor's term and has been elected to serve his first full three-year term as the Region I Director. **Pete Eide**, Hillview Health Care Center, La Crosse, is completing his first three-year term on the Board has been elected to serve his second, three-year term as the Region III Director.

## Proposed LeadingAge Wisconsin 2015-16 Board Officers

We are also pleased to report that the Nominating Committee recommends the following slate of officers for the 2015-16 LeadingAge Wisconsin Board of Directors. The LeadingAge Wisconsin Board will consider this slate immediately after adjournment of the 2015 Annual Business Meeting:

Chair.....**Douglas Trost**, St. Francis Home, Fond du Lac  
Chair-Elect.....**Fran Petrick**, Brookside Care Center, Kenosha  
Vice Chair of Public Policy.....**Kris Krentz**, Skaalen Retirement Services, Stoughton  
Vice Chair of Operations.....**Renee Anderson**, St John's Communities, Milwaukee  
Vice Chair of Member Services.....**Terry Snow**, Pleasant View Nursing Home, Monroe  
Treasurer.....**Clark Nordberg**, Bethel Home & Services, Viroqua  
Secretary.....**Dan Goodier**, Christian Community Homes and Services, Hudson  
Immediate Past Chair.....**Mike Christensen**, Grace Lutheran Foundation, Eau Claire  
LeadingAge Liaison....**Marion Wozniak**, Cedar Crest, Janesville  
Senior Advisor.....**Steve Jaberg**, Cedar Community, West Bend

Also immediately after adjournment of the 2015 Annual Business Meeting, the LeadingAge Wisconsin 2015-16 Board will consider the following Board members to serve as the Association's representatives on the **LeadingAge Policy Congress**:

**Fran Petrick**, Brookside Care Center, Kenosha  
**Dan Goodier**, Christian Community Homes and Services, Hudson  
**Marion Wozniak**, Cedar Crest, Janesville  
**Clark Nordberg**, Bethel Home & Services, Viroqua

## Outgoing Board Members

This year, four members are leaving the LeadingAge Wisconsin Board of Directors. Please join us in thanking these dedicated volunteers for their past years of service:

- **Scott Ross**, Woodside Lutheran Home, Green Bay: Scott joined the Board in 2009 and served as the Vice Chair of Public Policy, co-chaired the Legislative and Reimbursement Committee and served as our representative and expert advocate on the LeadingAge Policy Council.
- **Ron Schaeztl**, St. Clare Meadows, Baraboo, Ron has been an engaged Board member since 2009. He is active in the Managed Care and Public Policy Forums, and is often looked to for his perspective on system integration and relationships with acute care providers.
- **Jim Williams**, Cedar Community, West Bend, a Board member since 2011, served as the Vice-Chair of Operations, chaired the Managed Care Committee and helped shape the Association's housing and services positions. Jim is retiring from his work with Cedar Community in May and soon thereafter, we are pleased to announce, he will be joining the LeadingAge Wisconsin staff to further the Association's mission of service to the membership.
- **Mari Beth Borek**: Formerly with Fond du Lac Lutheran Homes and Health Services, served on the Board since 2012. During her tenure on the Board she was quickly identified by her peers as an exceptional and inclusive leader. She served as Vice Chair of Member Services, and then served as Chair-Elect and Chair. Mari Beth was instrumental in leading the Association's visioning and strategic planning, including efforts to prepare the membership for the changing payment and delivery systems and cultivate new leaders via the I-LEAD program.

Each of these individuals has given freely of their time and considerable talents and LeadingAge Wisconsin has been made stronger through their many contributions and servant leadership. ***We will recognize these Directors at the Annual Business Meeting.*** Please extend your personal thanks and gratitude to them as well.

## Proposed 2015-16 LeadingAge Wisconsin Operating Budget

As noted in [the LeadingAge Wisconsin 2014-2015 Annual Report](#), the Association achieved a number of impressive accomplishments over the past year. As a platform to build on those accomplishments and further assist the membership, the LeadingAge Wisconsin Board of Directors has unanimously approved the proposed 2015-16 Association operating budget as recommended by the Budget and Finance Committee and Executive Committee. The proposed budget dedicates additional resources for member services, invests in Value First (our group purchasing program), and maintains the strategic development fund. We note that should additional funds be necessary to fund activities related to responses to the Association's recent managed care request-for-proposals, those dollars would be drawn from available reserves. The proposed budget does not change the current LeadingAge Wisconsin modified millage dues brackets, Premier Associate (business) dues or Subscriber Organization fees.

## Safe Resident Assistance Grant Program-- Year Two

LeadingAge Wisconsin and Value First would like to extend our sincere appreciation to **West Bend Mutual Insurance Company and West Bend Mutual Charitable Foundation** for their annual sponsorship of the Safe Resident Assistance Program. For the second year in a row, they donated nearly \$25,000 to the Association's Research and Education Foundation, allowing seven organizations to purchase resident lift equipment this year. West Bend Mutual Insurance Company has made a long-term financial commitment to sustain the Safe Resident Assistance Grant Program.



We would also like to acknowledge the partnership between Value First, EZ Way Company and Direct Supply for providing contracted costs of resident lifts to be purchased by the grant recipients. We were able to purchase more lifts this year due to that partnership!

The 2015 grant recipients will be announced on May 7<sup>th</sup> during the luncheon at the LeadingAge Wisconsin Spring Conference.

***Please join us in thanking the West Bend Mutual Insurance Company/West Bend Mutual Charitable Foundation for their support!!***

Look for details on the 2016 Safe Resident Assistance Program at the LeadingAge Wisconsin Fall Conference in Green Bay, WI.

## **Spring Conference—Come Join Us!**

We are just two weeks away from the start of our Spring Conference, our attendance numbers are climbing impressively. ***There is still time to join your peers for this program which offers something for everyone.***

On **Wednesday, May 6, 2015**, staff can go to any of the pre-conference sessions offered for one low organizational fee (\$55 for members) that covers as many individuals as you deem appropriate from your organization to any/all of the six pre-conference sessions. The pre-conference sessions will address: Clinically Integrated Networks; Assisted Living Person-Centered Care; Improving Donor Retention Rates; Providing Safer Care/Risk Control; Palliative Care; and Hospitality Dining Services.

In addition to the pre-conference sessions, the remaining ***38 educational sessions*** on May 7-8, 2015 will explore areas such as:

- The changing world of health care
- Strategic positioning
- Changing payment systems
- Effective Board/CEO relationships
- Leadership development
- New approaches to dementia care
- Current legal issues
- Care transitions
- National policy strategies
- Reducing the incidence of falls
- Medically integrated wellness
- ICD-10 implementation
- Billing and collecting reviews
- Negotiating Family Care rates
- The role of the Power of Attorney for Health Care
- Pharmacy challenges
- Walking the walk of person-centered care
- Implementing QAPI in assisted living
- Measuring the quality of life
- Service standards, processes, and methods
- Internal and external marketing communications

- Recruiting and retaining outstanding employees
- Minimizing your risk for litigation
- Fundraising and donor retention
- Palliative care in long-term care
- Excellence in food service
- The spirit of adventure
- The opportunity to be happy

Also, you won't want to miss Band-O-Rama, featuring four bands in four bars in downtown La Crosse.

So please join us May 6-8, 2015 at the La Crosse Center in La Crosse, Wisconsin for the most impressive line-up of nationally acclaimed speakers available in Wisconsin for long-term care, assisted living, senior housing, and community service programs professionals.

**Complete conference and registration materials are available at:**

[www.leadingagewi.org/media/21831/15spring.pdf](http://www.leadingagewi.org/media/21831/15spring.pdf).

In closing, should you have any questions on the proposed nominations, operating budget, or Spring Conference details, please do not hesitate to contact us or the LeadingAge Wisconsin staff. We again thank you for your interest and involvement in LeadingAge Wisconsin and look forward to seeing you in La Crosse on May 6-8, 2015

Thank you!

***Be Sure to Attend:  
The 2015 LeadingAge Wisconsin  
Spring Conference & Annual Business Meeting –  
Be The Voice  
May 6-8, 2015, La Crosse Center, La Crosse***  
[www.leadingagewi.org/media/21831/15spring.pdf](http://www.leadingagewi.org/media/21831/15spring.pdf)

**LeadingAge Wisconsin  
Income Statement  
Projected FY 2015 and Proposed FY 2016 Budget**

	<b>2014/15 Budget</b>	<b>Projected 6/30/2015</b>	<b>Variance</b>	<b>Proposed 2015/16 Budget</b>
Member Dues	\$ 778,800	\$ 767,000	\$ (11,800)	\$ 764,200
Associate Dues	45,900	\$ 47,000	\$ 1,100	47,000
LeadingAge Dues	50,000	\$ 51,000	\$ 1,000	50,000
Investment Income	36,400	\$ 88,700	\$ 52,300	42,000
Conferences/Seminars	460,000	\$ 518,400	\$ 58,400	490,000
Surveys/EO	3,500	\$ 3,900	\$ 400	4,500
Member Services	56,000	\$ 70,000	\$ 14,000	83,000
Value First - Marketing	93,500	\$ 92,000	\$ (1,500)	112,000
Miscellaneous	2,000	\$ 1,000	\$ (1,000)	1,000

**Total Revenue \$ 1,526,100                      \$ 1,639,000                      \$ 112,900                      \$ 1,593,700**

Salaries/Insurance/Temp.	\$ 788,100	\$ 730,000	\$ 58,100	\$ 792,100
Payroll Taxes	44,700	44,754	\$ (54)	44,900
Employee Pension	32,700	33,858	\$ (1,158)	33,600
Value First	100,600	92,000	\$ 8,600	112,000
Staff Travel	31,000	27,000	\$ 4,000	31,500
Professional Development	2,000	2,000	\$ -	2,000
Board/Committee	26,800	23,800	\$ 3,000	27,300
Insurance/Taxes	6,900	7,400	\$ (500)	8,000
Telephone	7,500	7,500	\$ -	7,500
Copier	15,000	15,200	\$ (200)	15,500
Postage	5,000	4,400	\$ 600	4,500
Computer Expense	12,000	11,500	\$ 500	12,000
Printing	3,000	2,500	\$ 500	3,000
Supplies/Sub./Memberships	6,700	7,800	\$ (1,100)	6,000
Conferences/Seminars	330,000	383,800	\$ (53,800)	350,000
Legal Counsel	25,000	24,400	\$ 600	25,000
Audit	7,200	7,600	\$ (400)	7,600
Bank Expense/Misc.	1,000	400	\$ 600	1,000
Data Base	2,000	2,100	\$ (100)	2,500
Member Services	46,000	50,000	\$ (4,000)	58,000
Depreciation	18,500	18,000	\$ 500	18,500
Office Building	26,300	30,700	\$ (4,400)	30,000
Strategic Development	15,000	10,000	\$ 5,000	10,000

**Total Operating Expenses \$ 1,553,000                      \$ 1,536,712                      \$ 16,288                      \$ 1,602,500**

Net Revenue/Expenses	\$ (26,900)	\$ 102,288	\$ 129,188	\$ (8,800)
Gain(Loss) Investments	\$ -	\$ 1,000	\$ 1,000	\$ -

**Net Income (Loss) \$ (26,900)                      \$ 103,288                      \$ 130,188                      \$ (8,800)**

Property & Equipment	\$ 8,000	\$ 7,000	\$ 1,000	\$ 8,000
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**LeadingAge Wisconsin  
Research and Education Corporation  
Financial Statements**

<b>Assets</b>	<b>06/30/13</b>	<b>06/30/14</b>	<b>03/31/15</b>
Cash-First Business Bank	\$ 53,333.44	\$ 50,148.57	\$ 50,552.94
<b>Total Assets</b>	<b>\$ 53,333.44</b>	<b>\$ 50,148.57</b>	<b>\$ 50,552.94</b>
<b>Total Liabilities/Fund Balance</b>	<b>\$ 53,333.44</b>	<b>\$ 50,148.57</b>	<b>\$ 50,552.94</b>

**Income Statement**

**Revenue**

Fund Raising	\$ -	\$ 7,263.00	\$ -
West Bend Foundation Grant	\$ -	\$ -	\$ 24,660.00
Contribution	\$ -	\$ -	\$ 200.00
Interest Income	<u>\$ 56.10</u>	<u>\$ 52.43</u>	<u>\$ 58.73</u>
<b>Total Revenue</b>	<b>\$ 56.10</b>	<b>\$ 7,315.43</b>	<b>\$ 24,918.73</b>

**Expenses**

Resident Lift Program	\$ -	\$ -	\$ 24,514.66
LeadingAge Innovation Fund	\$ 5,000.00	\$ -	\$ -
UW-Eau Claire Foundation	\$ 500.00	\$ 500.00	\$ -
CHSRA - WCCEAL Funding	\$ -	\$ 5,000.00	\$ -
UW-Eau Claire Foundation - CHAASE Program	\$ -	\$ 5,000.00	\$ -
<b>Total Expenses</b>	<b>\$ 5,500.00</b>	<b>\$ 10,500.00</b>	<b>\$ 24,514.66</b>

<b>Net Income (Loss)</b>	<b>\$ (5,443.90)</b>	<b>\$ (3,184.57)</b>	<b>\$ 404.07</b>
Fund Balance-Beginning of Year	<u>\$ 58,777.34</u>	<u>\$ 53,333.44</u>	<u>\$ 50,148.87</u>
<b>Fund Balance-End of Year</b>	<b>\$ 53,333.44</b>	<b>\$ 50,148.87</b>	<b>\$ 50,552.94</b>

LeadingAge Wisconsin and Value First would like to extend our sincere appreciation to:

**West Bend Mutual Insurance Company  
&  
West Bend Mutual Charitable Foundation**



for their annual sponsorship of the Safe Resident Assistance Program. West Bend Mutual Insurance Company has made a long-term financial commitment to sustain the Safe Resident Assistance Grant Program. For the second year in a row, they donated nearly \$25,000 to the Association's Research and Education Foundation, allowing seven organizations to purchase resident lift equipment this year.

We would also like to acknowledge the Value First partnership with EZ Way Company and Direct Supply. Both of these valued partners have contracted costs with Value First and we were able to purchase more lifts this year due to these contracts!

The 2015 grant recipients will be announced on May 7<sup>th</sup> during the luncheon at the LeadingAge Wisconsin Spring Conference.

***Please join us in thanking the West Bend Mutual Insurance Company/West Bend Mutual Charitable Foundation for their support!!***

\*\* Details on the 2016 Safe Resident Assistance Program will be available at the LeadingAge Wisconsin Fall Conference in Green Bay, WI.