

LeadingAge™ Wisconsin

Better Services for Better Aging

Expanding the World of Possibilities for Aging



Overview



Services



Provider
Membership



Subscription
to Services



Associate
Membership



Individual
Membership

Our national partner, LeadingAge, is an association of 5,700 not for profit organizations dedicated to expanding the world of possibilities for aging. Together, we advance policies, promote practices and conduct research that supports, enables and empowers people to live fully as they age.

LeadingAge™

LeadingAge[™] Wisconsin

Better Services for Better Aging

204 South Hamilton Street
Madison WI 53703

608-255-7060

www.LeadinAgeWI.org

info@LeadingAgeWI.org



Table of Contents

1	<i>Overview of LeadingAge Wisconsin</i>	<i>1</i>
	Mission	2
	Core Values	2
	Winning Strategies.	3
	Not-for-Profit Philosophy.	3
	Subscription to Services	3
	Dedicated Commitment	4
	50+ Years of Experience	4
	100+ Years of Expertise.	4
	LeadingAge	5

2	<i>Services</i>	<i>7</i>
	Core Services	8
	Advocacy	8
	Education	9
	Spring Conference	9
	Fall Conference.	9
	Virtual Tradeshow	9
	Pre-Conference Seminars	9
	Winter Symposium/Day at the Capitol	9
	Reimbursement Seminar	10
	Seminars.	10
	e-Learning	10
	RCAC/CBRF Manager’s Certification Program	10
	I-LEAD	11
	Assisted Living Staff Education Training Modules . .	11
	Member Services & Support.	12
	LeadingChoice Network.	12
	Wisconsin Coalition for Collaborative Excellence in Assisted Living (WCCEAL)	12
	Echelon	13
	Senior Housing Resource Clearinghouse	17
	Legal Hotline.	17
	Clinical Assistance & Resources	18

Table of Contents (continued)

	Benchmarking Tools	18
	Special Projects	18
	<i>Somebody Special</i>	18
	<i>Real People Really Care</i>	19
	Information	19
	Publications	19
	Website	20
	Regional Meetings	20
	Networks	20
	Listserv	20
	Committees	21
<hr/>		
3	<i>Provider Membership (not-for-profit and governmental)</i>	23
	Provider Membership Benefits	24
	LeadingAge Wisconsin Membership Dues	25
	LeadingAge	26
	LeadingAge Dues	26
	Application for Provider Membership	27
<hr/>		
4	<i>Subscription to Services</i>	29
	Subscription to Services	30
	Subscription Rates	31
	Application for Subscription Service.	33
<hr/>		
5	<i>Associate Membership</i>	37
	Associate Member Benefits	38
	Associate Member Dues	39
	Application for Associate Membership	41
<hr/>		
6	<i>Individual Membership</i>	43
	Individual Member Benefits.	44
	Individual Member Dues	44
	Application for Individual Membership	45



Better Services for Better Aging

Expanding the World of Possibilities for Aging

Overview



1 Overview

LeadingAge Wisconsin is a statewide membership organization of not-for-profit corporations principally serving seniors and persons with a disability. Membership is comprised of 152 religious, fraternal, private, and governmental organizations which own, operate and/or sponsor 163 nursing homes, 7 facilities for the developmentally disabled, 88 residential care apartment complexes (RCACs), 105 community based residential facilities (CBRFs), 11 adult family homes, 93 senior housing facilities, and more than 300 community service agencies which provide programs such as Alzheimer’s support, adult day care, home health, hospice, home care, and meals on wheels. In addition, we have 14 for-profit organizations (owning a total of 95 skilled nursing and assisted living facilities) which subscribe to the services the association provides. All totaled, LeadingAge Wisconsin serves 562 long-term care, assisted living, senior housing, and other community-based providers principally serving elderly persons and individuals with a disability. LeadingAge Wisconsin members employ over 38,000 people who provide compassionate care and service to over 48,000 individuals each day.

Mission

LeadingAge Wisconsin enhances not-for-profit members’ dedication to excellence by providing programs and services to assist members in meeting the needs of elderly persons and individuals with a disability. LeadingAge Wisconsin demonstrates a

caring commitment to the highest quality of life and greatest independence for each individual served.

Core Values

- LeadingAge Wisconsin is a mission driven, not-for-profit, member-supported, statewide association serving as a leader in advancing the field of long-term care through advocacy, education, and the development of collaborative strategies for its members and the general public.
- LeadingAge Wisconsin strives to be a visionary force whose unified voice advocates within the political and regulatory process in order to advance the development of a comprehensive long-term care delivery system for the future.
- LeadingAge Wisconsin leadership encourages its members to achieve excellence in the delivery of services to elderly individuals and persons with a disability by adhering to the highest ethical standards of practice.
- LeadingAge Wisconsin acknowledges the broad range of individual needs and opinions and provides a forum to foster member empowerment and peer support.
- LeadingAge Wisconsin serves as a resource to its individual members, assists in problem resolution, and offers/develops services and programs to meet and exceed member needs.

Winning Strategies

Members of the LeadingAge Wisconsin Board of Directors have identified five *Winning Strategies* that will lead the association and its members into the future. In developing these strategies, the goal was to develop a vision for the future of the association.

These *Winning Strategies* are built on the foundational successes of the past, and our core functions will be the bricks that help push LeadingAge Wisconsin from good to great. To be clear, while moving forward, the association’s already impressive work in the areas of public policy advocacy, education, member services, networking, mission protection/expansion, and quality improvement will continue to be central to the association’s purpose and functions. By creating/updating our main strategies, LeadingAge Wisconsin will be positioned to proactively provide even more effective assistance and service to the membership.

Our Five *Winning Strategies* are:

1. Guided by our mission, LeadingAge Wisconsin will assist members in developing their futures.
2. LeadingAge Wisconsin will support workforce and leadership development to ensure the success of members.
3. LeadingAge Wisconsin will help members to operate successfully within changing delivery and payment systems.
4. LeadingAge Wisconsin will provide operating, business, and quality tools to help members thrive.
5. LeadingAge Wisconsin will assist members in enriching the lives of those they serve.

Not-for-Profit Philosophy

LeadingAge Wisconsin recognizes that not-for-profit facilities are community based, community owned, and community accountable. LeadingAge Wisconsin promotes the community responsiveness inherent in the philosophy of all not-for-profit organizations. The association is dedicated to the development of a continuum of care which meets the physical, spiritual, emotional, and social needs of aging persons while providing each individual with options and a means of achieving maximum independence. LeadingAge Wisconsin encourages its members to achieve high professional standards and provide innovative approaches to the delivery of quality services, which are both effective and efficient, and which result in the enhancement and enrichment of the lives of those served.

Subscription to Services

While LeadingAge Wisconsin membership is comprised totally of not-for-profit long-term care, assisted living, and senior housing organizations, the association is dedicated to serving all entities who express an interest in and demonstrate a commitment to advancing excellence in quality care, quality service, and quality of life for elderly persons and individuals with a disability. For this reason, LeadingAge Wisconsin offers a subscription to services for proprietary long-term care and assisted living organizations who share our interest in quality for each and every individual served. LeadingAge Wisconsin currently has 14 for-profit organizations (owning a total of 95 long-term care/assisted living facilities) who subscribe to our services, and this number continues to grow.

Dedicated Commitment

LeadingAge Wisconsin enhances not-for-profit members' dedication to excellence in providing programs and services to assist members in meeting the needs of elderly persons and individuals with a disability. LeadingAge Wisconsin demonstrates a caring commitment to the highest quality of life and greatest independence for each individual served.

50+ Years of Experience

LeadingAge Wisconsin has a reputation for quality and a tradition of excellence. While there are a number of associations designed to represent those who serve elderly individuals and persons with a disability, the LeadingAge Wisconsin difference is that we have more than a 50-year history to back up our commitment to quality for the entire spectrum of care and services. From home and community based services and senior housing settings to assisted living and skilled nursing environments, LeadingAge Wisconsin is a recognized voice of leadership. We know who we are and we honor our members' mission dedicated to the not-for-profit philosophy of care. We are our members, and our members are LeadingAge Wisconsin. Together, we have achieved more than a 50-year history worthy of celebration.

100+ Years of Expertise

LeadingAge Wisconsin is dedicated to serving the interests, needs, concerns, and opportunities of long-term care, assisted living, senior housing, and community support program professionals. As a staff, collectively we have more than 100 years of experience serving our members and subscribers,

and we have a vast expanse of knowledge in the many areas that influence and impact these professionals. Yet, we readily realize that we are not the long-term care and assisted living experts – that role and responsibility falls to those who work in and manage the facilities themselves. Where LeadingAge Wisconsin truly excels is in bringing these professionals together in collaborative and cooperative forums where each person brings their best to the table. Each person shares a little and every person gains a lot. Through the many LeadingAge Wisconsin forums, committees, networks, task forces, work groups, and the Board of Directors, our members and subscribers readily and willingly share their best information, policies, practices, strategies, solutions, advice, forms, guidelines, and resources.

These professionals “get it.” In order to achieve excellence throughout Wisconsin's long-term care, assisted living, and senior housing environment, we all must work together, and, through our network, LeadingAge Wisconsin moves forward with the understanding that no interested long-term care or assisted living organization that is dedicated and committed to quality will be left behind. The LeadingAge Wisconsin network of members and subscribers grows forward together guided by the LeadingAge Wisconsin staff through a process that recognizes the leaders are the providers themselves.

The LeadingAge Wisconsin commitment to quality throughout our member organizations is integrated into the very fabric of this association. We fully believe our members represent the best of the best in long-term care and senior living providers, and we have mastered the art of members helping members. Our members realize the success of this effort and the quality of our association as a whole is only as great as the weakest link in our chain; therefore, we are committed to the effort of growing all members so that we have no weak link and our level of quality will be our hallmark of success.

LeadingAge

While LeadingAge Wisconsin is busy representing the interests and serving the needs of long-term care, assisted living, and senior housing professionals at the state level, our national association is busy doing the same at the national level. LeadingAge is an association of 6,000 not-for-profit organizations dedicated to expanding the world of possibilities for aging. Together, LeadingAge Wisconsin and LeadingAge advance policies, promote practices, and conduct research that supports, enables, and empowers people to live fully as they age.

The members of LeadingAge help millions of individuals and their families every day through mission-driven, not-for-profit organizations dedicated to providing the services that people need, when they need them, in the place they call home. The 6,000 member organizations, many of which have served their communities for generations, offer the continuum of aging services: adult day services, home health, community services, senior housing, assisted living residences, continuing care retirement communities, and nursing homes. LeadingAge is committed to creating the future of aging services through quality people can trust.

LeadingAge Vision

- Healthy, Affordable, Ethical Aging Services for America

LeadingAge Mission

- Creating the Future of Aging Services
- Increasing the Value of Membership

LeadingAge Ideals

- Dignity of all persons at every stage of life
- Services people need, when they need them, in the place they call home
- Quality that people can trust
- Mission-driven, not-for-profit values
- Advocacy for the right public policy for the right reasons
- Leadership through shared learning

LeadingAge

- Serve. Advocate. Inspire.

This solid partnership between LeadingAge Wisconsin and LeadingAge provides a one-stop shop to address all your issues, interests, needs, and concerns at the state and national level, and you only make one dues payment each year for the combined membership.







Better Services for Better Aging

Expanding the World of Possibilities for Aging

Services



2 Services

LeadingAge Wisconsin has a reputation for quality and a tradition of excellence. The association has a visionary focus, the staff maintains an ambitious work plan, and those we serve are united in the spirit of collaboration. We are, indeed, very well positioned for the future. We have more than a 50-year history to back up our commitment to quality for the entire spectrum of care and services.

LeadingAge Wisconsin enhances not-for-profit members' dedication to excellence by providing programs and services to assist members in meeting the needs of elderly persons and individuals with a disability. LeadingAge Wisconsin demonstrates a caring commitment to the highest quality of life and greatest independence for each individual served.

Core Services

The association has a strong commitment to the core functions of LeadingAge Wisconsin: Advocacy, Education, and Services and Support. As we continuously strategize on how to best build the association into the future, we frequently turn to the types of services that historically have been successful. We work to grow these services into new service offerings to better address the interests and needs of a continually diversifying spectrum of long-term care, assisted living, and senior housing organizations.

Advocacy

As the leaders of LeadingAge Wisconsin, we see an association whose common goal is to provide quality services, quality care, and quality of life for seniors and for individuals with a disability. Providers are faced with the realities of a tight economy, stringent regulations, frail residents, and overwhelmed employees. Accordingly, advocacy on behalf of our members always will be a priority for the leadership and staff of LeadingAge Wisconsin.

LeadingAge Wisconsin employs three registered lobbyists who work diligently to represent your views and interests with the governor's office, with the legislature, and with state agencies. The association is tuned in when it comes to rules, regulations, and reimbursement initiatives that could impact you. We take a proactive position on public policy formation, and our ongoing goal is to work towards a reasonable, rational, common-sense approach to the regulatory environment for long-term care and senior living environments.

When new regulations are implemented, LeadingAge Wisconsin typically is among the first to bring you updates. We provide interpretation to help you understand public policy trends and consultation to help you implement regulatory initiatives.

We pride ourselves on our ability to stand strong while we strive to be flexible. While we plan for our future, we can reposition ourselves quickly to help providers resolve their day-to-day concerns. To keep us vibrant in a constantly evolving environment, we maintain many modes of education and multiple sources of information that keep the lines of communication open between LeadingAge Wisconsin and the members and subscribers.

Education

LeadingAge Wisconsin recognizes the fact that ongoing education is crucial to lifelong learning and continued professional growth. To address and serve the interests and needs of members and subscribers, LeadingAge Wisconsin hosts a wide range of high quality educational offerings.

- **Spring Conference** -- The LeadingAge Wisconsin Spring Conference & Annual Business Meeting not only offers up to 50 educational sessions of interest to a wide range of long-term care and senior living professionals, this program also features the annual business meeting of the association where members come together to make the decisions that will shape the association into the future. This conference typically draws nearly 500 aging services professionals who learn about an array of topics that range from thought-provoking global trends to hand-on skills to enhance quality.
- **Fall Conference** -- The LeadingAge Wisconsin Fall Conference & Annual Exhibitors Forum is one of the largest educational events available in Wisconsin for aging service professionals. Typically, well over 800 professionals attend this event that includes more than 120 vendor exhibits.
- **Virtual Tradeshow** -- As a value-added service, LeadingAge Wisconsin hosts our Virtual Tradeshow that is available 24/7, 365 days a year. Detailed information about new products and services available to aging service professionals is never more than a click away.
- **Pre-Conference Seminars** -- Quite typically, LeadingAge Wisconsin hosts pre-conference educational seminars on the day preceding a major conference. These pre-conference seminars address timely topics, current concerns, future trends, new ideas, innovative programs, and creative solutions.
- **Winter Symposium/Day at the Capitol** -- Through the annual Winter Symposium, LeadingAge Wisconsin comes together with professionals at many levels to identify, discuss, and analyze public policy initiatives at both the state and national level. Through this venue, we introduce new initiatives and teach new strategies that will position you and your organization for success. This forum provides up-to-date information on the issues that impact you, and then allows you to discuss the initiatives that you and LeadingAge Wisconsin will take (individually and collectively) to continue leading the way for aging services. Participants of this forum frequently walk across the street to the Capitol to visit with their state legislators about new and pending public policy initiatives.

- **Reimbursement Seminar** -- As each new year brings new changes to the Medicaid reimbursement methodology, how ready is your nursing home to implement the changes necessary to ensure you of the reimbursement to which you are entitled? Each year, LeadingAge Wisconsin hosts our Reimbursement Seminar to help you maximize your Medicaid rates by enhancing your understanding of the ongoing changes to the Medicaid reimbursement formula. The seminar typically also addresses other issues that have a bearing on a facility's reimbursement.
- **Seminars** -- It is not uncommon for members to need immediate access to education and training on any number of issues that can arise quickly in the world of long-term care and assisted living. LeadingAge Wisconsin is well-positioned to provide high-quality educational programs on quick notice to ensure members have the information they need. It is our goal to ensure you have the education you need, when you need it.
- **e-Learning** -- Just as technology is changing the way we live, it also is changing the way we learn. Senior service professionals cannot always leave the workplace for the quality education they need. LeadingAge Wisconsin is addressing this need through the use of technology. Video clips, web casts, pod casts, and webinars all come into play when it comes to educating our members. From stand-alone webinars to webinar series, LeadingAge Wisconsin is raising the bar of quality with training on issues that range from regulatory issues and legal matters to quality improvement and workforce trends.
- **RCAC/CBRF Manager's Certification Program** -- LeadingAge Wisconsin recognizes that the state has minimum training requirements for some assisted living professionals, but LeadingAge Wisconsin works to ensure all assisted living professionals are well trained to provide high quality care for elderly individuals and persons with a disability. On this quest, LeadingAge Wisconsin has developed an educational curriculum designed to enhance the knowledge base of the Community Based Residential Facility (CBRF) manager and the Residential Care Apartment Complex (RCAC) manager. Through our DVD program, new and experienced managers alike will gain valuable insights and tips for successfully operating a facility that truly embraces the philosophy of assisted living. Participants review the regulations, illustrated with practical, real life examples, to ensure that you gain value-added implementation strategies to strengthen your operations and maintain your success into the future. Both these comprehensive training programs bring together the best information, resources, policies, procedures, forms, and strategies shared by knowledgeable and successful assisted living managers from across the state. From tips on implementing culture change in assisted living to strategies for effective communication with the medical community, this course will assist in preparing you, the assisted living manager, to adapt to the future of this unique senior life setting. Participants also receive a complete resource guide of successful tools, policies, forms, checklists, and resources to complement and supplement the training program.

- **I-LEAD** -- 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. The vision for this intense leadership development academy is to elicit the greatness within a group of high potential leaders who will elevate their organizations, the greater communities, LeadingAge Wisconsin, and the senior living field to new heights of passion, adaptation, and innovation. The values of I-LEAD include:
 - Life-long learning: Embrace and apply new knowledge and wisdom about ourselves, our colleagues, leadership, and the field.
 - Integrity: Be honest and true to our authentic self, and respect the values and opinions of others.
 - Compassion: Seek first to understand, then to be understood.
 - Collaboration: Building a positive, creative, and safe environment.

Each year, a new class of Fellows come together for four sessions which include intimate conversations with aging services leaders and self-exploration of leadership styles through exercises and readings.

- **Assisted Living Staff Education Training Modules** -- Through Echelon, LeadingAge Wisconsin is developing assisted living staff education training modules. Our goals with this initiative are to provide staff training designed to ensure the facility is meeting all regulatory requirements, to develop training tools for new employees whose use is intended to ensure that all assisted living employees are being trained consistently, to develop consistent interpreta-

tions of statutes and rules as a means to ensure regulatory compliance and successful surveys, to develop standardized training and a skills-check condensed into one manual, and to implement a process for developing well-rounded employees.

The first of these training modules is *The Purpose and Philosophy of Assisted Living*. This training module includes a cover sheet, trainer's notes, learner objectives, course outline, PowerPoint presentation, reference guide, post test, post test answer guide, and a certificate of completion. All these materials are available for members and subscribers to download and modify for your facility's training needs.

The second training module is the *Resident Assistant's Basic Training Guide*. To ensure comprehensive and consistent training of the resident assistants throughout Echelon, LeadingAge Wisconsin purchased the rights to Beverly Robertson's *Nursing Assistants: A Basic Training Guide*, and we received permission to modify the contents of this publication to pertain to assisted living resident assistants. This comprehensive training guide is available free of charge to all Echelon participants so that these assisted living providers can train their resident assistants on issues such as: The roles and responsibilities of the resident assistant, personal care and how to collect the data, using good body mechanics, resident rights, taking weights and vital signs, developing interpersonal skills, understanding body systems, dietary considerations, managing information/documentation, controlling infection, maintaining a safe homelike environment, restorative care, and death and dying.

As evidenced by the multi-faceted and comprehensive approach LeadingAge Wisconsin is taking to advance quality throughout our membership, this association takes quality educational offerings and the implementation of standards of practice very seriously, and we are working consistently to help members and subscribers advance in this area.

Member Services & Support

LeadingAge Wisconsin has a rich history of conceptualizing, planning, developing, and implementing innovative services and cutting-edge projects to serve member and subscriber interests, needs, and concerns. The fact is, at LeadingAge Wisconsin, we listen to you. The services we offer are in direct response to your ideas and suggestions. This approach has earned us national respect as a leader in aging services with an ever-evolving and impressive array of member services.

- **LeadingChoice Network:** LeadingAge Wisconsin has created a separate Limited Liability Company, whose mission is: To maximize the health and well-being of seniors in its member communities through innovative, cost-effective care management practices and quality improvement activities through contracting relationships with health plans and health delivery systems so LeadingAge Wisconsin members who join LeadingChoice can better serve Medicare and Medicaid enrollees and all other seniors who access their services.

Joining LeadingChoice provides members with the advantage of sharing the resources of an experienced contract negotiator instead of each

facility needing to develop its own expertise. By approaching contracting jointly, LeadingChoice can negotiate alternative payment arrangements that reward providers for high quality performance, care integration, and cost effective care delivery.

- **Wisconsin Coalition for Collaborative Excellence in Assisted Living**

LeadingAge Wisconsin submitted the first application to be approved by the State of Wisconsin for the Wisconsin Coalition for Collaborative Excellence in Assisted Living (WCCEAL). In his letter, Kevin Coughlin, Director of the Bureau of Assisted Living (BAL), said, “Yours is the first program approved by the Bureau of Assisted Living and you have certainly set the bar!”

The burgeoning growth of assisted living throughout the state of Wisconsin coupled with the tight state budget presented the Bureau of Assisted Living with an interesting opportunity. The BAL was experiencing a continuously increasing workload to oversee the many assisted living facilities throughout the state but had no new resources to cover the escalating demand. A time study revealed that the BAL was spending the greatest percentage of its time with the smallest percentage of the assisted living facilities – the low performers on the quality spectrum. With this realization, the BAL took a big, bold step and introduced WCCEAL – an innovative program to shift the advancement of excellence in assisted living for the high performers to state associations who agree to develop and maintain a system of continuous quality improvement for the state’s top performers in assisted living.

- **Echelon**

What began as the CBRF Quality Improvement Network and the RCAC Quality Improvement Network has grown into Echelon, and Echelon is the LeadingAge Wisconsin answer to WCCEAL. LeadingAge Wisconsin has been working aggressively for at least the past thirteen years to build collaborative excellence into the core services for assisted living organizations with the development of Echelon. Unlike many associations serving assisted living facilities, however, LeadingAge Wisconsin recognizes that one size does not fit all when it comes to serving assisted living professionals. Our service offerings, advocacy initiatives, educational offerings, and networking opportunities are specifically focused on helping those professionals who own, operate, manage, and work within assisted living facilities for elderly persons and individuals with a disability for, we believe, this population presents unique challenges and unparalleled opportunities to pursue quality care, quality service, and quality of life. Further, we offer services specially tailored to address the distinguishable needs of RCAC providers and CBRF providers.

What's truly impressive is the fact that LeadingAge Wisconsin did not simply submit an application to the state, we demonstrated that we have this program fully developed, implemented, and working throughout the majority of LeadingAge Wisconsin member and subscriber assisted living communities.

Once again, this demonstrates that LeadingAge Wisconsin set out to advance quality in assisted living long before the state began to develop the WCCEAL program, and our proactive efforts earned us top honors as officials in the Bureau of Assisted Living and in the Center for Health Systems Research and Analysis (CHSRA) reviewed the impressive array of materials LeadingAge Wisconsin submitted to demonstrate how our system of education, training, leadership development, quality improvement, networking, sharing, policies, tools, forms, and procedures already was working to advance quality throughout those members who are actively participating in Echelon.

In short, this approval means less frequent reviews for many of LeadingAge Wisconsin assisted living facilities. In more detail, If you:

- Qualify for an abbreviated survey, and
- You are a LeadingAge Wisconsin member or subscriber in good standing, and
- You are an active member of the LeadingAge Wisconsin Echelon program, and
- You have implemented the LeadingAge Wisconsin quality improvement program that adopts standards of practice, and
- You sign a "self attestation" that you are in compliance of the regulations and you are working within the parameters of the LeadingAge Wisconsin quality initiatives, then
- You will have significantly less frequent reviews from the state.

LeadingAge Wisconsin support is built into the very fabric and function of Echelon. Some of our association support programs are designed to help all our assisted living facilities to enhance excellence; others are very specific for different types of assisted living facilities (RCACs and CBRFs).

As previously stated, LeadingAge Wisconsin recognizes that one set of services does not work to serve all segments of assisted living. While everybody benefits from a solid core set of quality services, LeadingAge Wisconsin has grown and diversified to offer services designed to serve the specific needs of RCACs and CBRFs.

What now is Echelon began in 2005 when a group of member RCACs agreed to work together to develop a set of quality improvement benchmarks. The intent was to develop a set of tools, guidelines, and practices which RCAC members would voluntarily share, develop, discuss, implement, adapt, modify, and fine tune, and, thereby, work together to systematically improve the level of quality in participating member and subscriber RCACs. The RCAC Quality Improvement Network was born, and the CBRF Quality Improvement Network followed shortly thereafter in 2008. Together, these programs became known as the Assisted Living Quality Improvement Network.

The Assisted Living Quality Improvement Network worked to advance quality in many areas and it offered forms, guidelines, policies, and other materials designed to help the assisted living communities to achieve the standard of quality for which LeadingAge Wisconsin strives.

As the Assisted Living Quality Improvement Network grew, the Assisted Living Quality Improvement Task Force ensured that:

- The program was comprehensive enough to raise the bar of quality for every performer.
- The program was manageable and adaptable based on facility size.
- The program allowed flexibility as to how any given facility participated.
- The program incorporated technical assistance for implementing the program.
- The program incorporated a marketing push to work towards 100 percent participation among LeadingAge Wisconsin member and subscriber assisted living communities.

In our effort to ensure the highest quality of life for each tenant/resident served, LeadingAge Wisconsin devoted the necessary resources to develop and implement a voluntary system of tools, guidelines, practices, educational opportunities, peer support, consulting services, facilitated discussions, and network meetings to advance this quality improvement initiative. Our quest for quality is driven by our firm belief that our residents deserve excellent care and services.

By the end of 2015, it was undeniable that our quality improvement program for assisted living was so much more than a network -- it was a systematic and comprehensive approach to implementing quality improvement that was customizable for every participating assisted living community. Early in 2016, the Assisted Living Quality Improvement Network became Echelon.

Echelon is an unparalleled forum offering an all encompassing program to serve assisted living professionals who strive for excellence in the care and services they offer.

- Echelon includes a system of quality initiatives to advance the level of quality throughout Echelon participants. Each quality initiative includes a review of rules, regulations, and interpretations that pertain to the specific area addressed in the initiative; additional practices developed by Echelon participants that go further to enhance quality in each area; and examples of what Echelon members are doing to implement standards of practice in this specific area. Each quality initiative incorporates a checklist so that Echelon participants can indicate those areas they already are addressing and, thereby, calling attention to those areas where they need to devote more attention.
- For CBRF Echelon members, LeadingAge Wisconsin offers a system of assessments, decision trees, and individualized service plan (ISP) templates for member modification and implementation.
- Echelon members have access to a Policy & Procedure Bank to ensure they have ready access to a variety of examples as they develop, revise, and enhance their respective policies and procedures.
- Through the Echelon Employee Orientation guide, Echelon participants share tools, resources, templates, agendas, and other valuable resources they have incorporated into their employee orientation program. This is a guide to assist other Echelon participants in developing or enhancing their employee orientation process and program.
- LeadingAge Wisconsin offers Echelon members free access to staff education training modules. These educational resources are available for members to download and modify for their specific training needs.
- Through the Wisconsin Coalition for Collaborative Excellence in Assisted Living (WCCEAL), Echelon members have access to the WCCEAL customer satisfaction survey, outcome reports, and benchmarks.
- Members continue to share examples of their efforts to implement these initiatives, as well as the policies, tools, forms, resources, and guidelines they develop so as to help all members implement the tools successfully for the advancement of quality throughout Echelon.
- Echelon managers meet throughout the year to discuss practical application of the quality initiatives, enhance their knowledge base on many topics related to quality in assisted living, to offer peer support and mentoring for any issue related the management of an assisted living community, and to give feedback to the Echelon Task Force.
- The Echelon nurses meet throughout the year to discuss the clinical application of quality initiatives, to offer peer support and mentoring for clinical issues in assisted living, and to give feedback to the Echelon Task Force.

- LeadingAge Wisconsin maintains websites exclusively for Echelon members. Through this web portal, Echelon members are able to access, review, download, modify, and implement tools, guidelines, and policies designed to enhance their ongoing journey for excellence. This also is the electronic forum through which Echelon members can share best practices and valuable resources.
- LeadingAge Wisconsin works with each member of Echelon to pursue continuous quality improvement. With every member of Echelon sharing their best practices as well as suggestions and ideas, and with every member of Echelon providing updates on the status of their quality improvement journey, all members of Echelon continue to strive for and achieve higher levels of quality in the care and services they provide.
- Ensure that LeadingAge Wisconsin Echelon members are recognized for their commitment to excellence in assisted living.
- Raise the level of quality throughout LeadingAge Wisconsin Echelon members.
- Empower Echelon members with the highest educational opportunities and tools to achieve the highest quality of care.
- Set a standard for all Echelon members.
- Be proactive.
- Increase efficiency and competency across the board.
- Increase members' critical thinking skills by the enhanced knowledge/education they receive.
- Demonstrate the fact that LeadingAge Wisconsin Echelon members strive for excellence in assisted living.

New members of Echelon are encouraged to complete the LeadingAge Wisconsin RCAC or CBRF Manager's Certification Program. (The CBRF Manager's Certification Program now meets Bureau of Assisted Living requirements as a department approved assisted living administrator's training course for Echelon participants.) In addition, all members of Echelon are required to attend at least one LeadingAge Wisconsin educational event and (at a minimum) one Echelon meeting each year; however, most members attend meetings regularly throughout the year, enhancing Echelon with continuity and a collaborative effort as all participants work together to advance excellence.

Through the continued development of Echelon, LeadingAge Wisconsin is working to:

To drive this quality improvement journey, LeadingAge Wisconsin formed the Echelon Task Force to continue developing the quality improvement system. Through Echelon, LeadingAge Wisconsin is pursuing an aggressive and continuing journey of providing the information, education, tools, and resources Echelon members need to collectively raise the bar of quality for Wisconsin's assisted living communities.

Participation in the LeadingAge Wisconsin Echelon program requires an additional fee beyond LeadingAge Wisconsin dues.

As this network continues to develop, it is working to advance quality in many areas, and it incorporates forms, guidelines, policies, and other materials designed to help the CBRFs achieve the standard of quality for which we strive.

Echelon continues to develop new tools and resources designed to guide members on their journey to excellence for all the major care and services provided within assisted living. Already LeadingAge Wisconsin is building the Echelon resources to include:

- Quality assurance program strategies
- Recruitment and retention strategies
- Employee orientation and mentoring programs
- Training and support for direct care workers
- Caregiver engagement and empowerment
- Environmental and professional quality improvement initiatives
- Recognition for achieving Echelon status

Senior Housing Resource Clearinghouse

The purpose of the LeadingAge Wisconsin Senior Housing Resource Clearinghouse is to provide a systematic approach to collecting and sharing information and resources to serve the interests and needs of member and subscriber senior housing facilities. The clearinghouse is led by a task force of members who dedicate their time and expertise to develop the Resource Clearinghouse and to ensure there is ongoing sharing and collaboration among the member and subscriber senior housing facilities. Through the efforts of this task force, the members and subscribers work to enhance the networking opportunities and resources available for all participating senior housing facilities. We already have resources available on issues such as:

- Activities
- Economic Trends
- Admissions/Evictions
- Employees

- Food Services
- Housekeeping/Maintenance
- Marketing
- Mission Statements
- Pets
- Resident Health
- Resident Safety & Wellbeing
- Transfers
- Transportation
- Trends & Future Initiatives
- Vendors/Guests/Visitors

The LeadingAge Wisconsin Senior Housing Network also has developed Quick Questions as a way to collect and share valuable information and resources for member and subscriber senior housing providers. Periodically, the association asks members to complete a few quick questions relating to an area of interest or concern. The summary of member responses is posted to the online Resource Clearinghouse thereby continuing our tradition of members helping members through continued sharing and networking.

- **Legal Hotline**

In conjunction with our legal counsel, Reinhart Boerner Van Deuren, LeadingAge Wisconsin hosts a legal hotline to ensure that quality legal advice is only a phone call away. The attorneys at the Reinhart offices in Madison and Milwaukee always are willing to provide quality legal advice, interpretations, and opinions for the quick questions that arise so frequently. The Reinhart attorneys also are available to assist members and subscribers with the more complicated, complex, and time-consuming legal questions that involve more research and investigation.

- **Clinical Assistance & Resources**

LeadingAge Wisconsin offers members and subscribers access to clinical assistance and resources through three listservs: the Assisted Living Nursing Professionals Listserv, the Directors of Nursing Listserv, and the MDS Coordinators Listserv.

LeadingAge Wisconsin has partnered with esteemed associate members who offer clinical consulting to serve as a resource to address member/subscriber questions and concerns. These knowledgeable clinical consultants respond to member/subscriber issues, questions, and concerns submitted through any of the three listed listservs. There is no additional fee to submit an inquiry through the listserv. LeadingAge Wisconsin and/or the consultants will inform you if your specific issue is beyond the scope of the listserv. If further consultation or research is necessary, it is the member's option to engage in independent consultation with the clinical consultant of their choosing.

- **Benchmarking Tools**

LeadingAge Wisconsin conducts surveys and research to provide members and subscribers with valuable benchmarking tools. Since 1984, LeadingAge Wisconsin has been conducting the annual survey of compensation and benefits as a service to our members and subscribers. The survey has been expanded to include the executive compensation survey. This annual survey is very successful with about 120 members participating each year.

- **Special Projects**

LeadingAge Wisconsin is in tune with our members and subscribers. We watch the trends that impact you. We listen to your ideas and suggestions. We work hard to turn your ideas into reality, and out of this continuous process we have developed some very innovative special projects.

- One of our most powerful special projects was our effort to tell the story of long-term care and assisted living. As much as the LeadingAge Wisconsin staff values long-term care and the many people who devote their lives to quality, compassionate care and service, we knew we were not the best people to tell this story. We knew the story would have more power, more meaning, and more significance if it were told by the very people who are closest to long-term care and assisted living. With that, we went into our member organizations and interviewed the residents, family members, and employees, and captured in their own words what care giving means to them. The end product is the 45-minute story of ***Somebody Special***. *Somebody Special* focuses on the value of high touch care in a high tech world. This is your story. This is our story. This is why we do what we do. Because of the success of LeadingAge Wisconsin fundraising efforts for this special project, LeadingAge Wisconsin was able to provide every member and subscriber facility with a free copy of the *Somebody Special* DVD.

- ***Real People Really Care*** is a short but very powerful message highlighting the role of long-term care in today's society. Residents, family members, and employees tell in their own words how their lives would be significantly impacted if it were not for the quality long-term care environments the residents call home. This is a message that needs to be heard by governmental officials and the public at large.

Information

As much as we pride ourselves on creativity and innovation, we are committed to ensuring our members have the information they need, when they need it, in a concise and easy-to-access and understand format. LeadingAge Wisconsin maintains a myriad of information vehicles to ensure members and subscribers have the information they need.

- **Publications**

LeadingAge Wisconsin is in touch with our members and subscribers with informational bulletins that we email to members at least once per week.

- ***eNews*** is a one-stop shop for everything you need to know that will impact your organization from the association's perspective. We watch the trends, the regulations, and the innovations, and then we interpret it, condense it, and report it back to you through this weekly electronic newsletter on developments and issues that impact you.
- You will be alerted on matters which require your involvement or attention through our publication of ***For Your Action***.
- ***Employment Opportunities*** lists positions available in long-term care, assisted living, and senior housing. This publication also allows you the opportunity to list positions at a reduced rate.
- Members and subscribers also have access to archived publications such as:
 - ***Checkpoints***, which is directed towards directors of nursing and other long-term care professionals interested in staying up-to-date on clinical issues, regulatory concerns, hands-on-strategies, and other relevant topics.
 - ***Beyond the Boundaries***, which provides the nitty-gritty details of operating a senior housing facility.
 - ***Board Briefs***, which provides brief updates on issues relevant to members' boards of directors.
 - ***The Corner Office***, which is a publication that draws together many valuable lessons for new leaders who are destined to shape senior services and support organizations for a new generation. These articles, unrepeated anywhere, reveal the keys to success in the aging services arena. *The Corner Office* newsletter offers a path to future success as experienced leaders reveal their candid insights of the keys to effective leadership and the qualities that set high performers apart.
 - ***Legends in Leadership***, which features practical tips aging service providers can implement immediately to enhance their leadership and supervisory skills.

- **Website**

LeadingAge Wisconsin maintains a user-friendly website with special features available only to members and subscribers. Through timely updates, LeadingAge Wisconsin guarantees the information you need is never more than a couple of clicks away.

- **Regional Meetings**

LeadingAge Wisconsin is divided into five geographic regions. Each region has a director who serves on the LeadingAge Wisconsin Board of Directors. Members of each region gather about once each month to discuss common concerns, share new ideas, and to hear news from association staff and leaders.

- **Networks**

LeadingAge Wisconsin firmly believes that the true experts in aging services are the providers themselves. Many of our existing members and subscribers tell us that the most valuable service we offer is the opportunity to get together with peers for networking and sharing. To continue serving your interests and needs, LeadingAge Wisconsin has established the following structured networking forums:

- CEO Network
- Campus Administrator Network
- CBRF Echelon
- RCAC Echelon
- Nurses in Assisted Living Network
- Senior Housing Network
- DON ELITE
- MDS Innovation Team

LeadingAge Wisconsin also offers preconference networking opportunities for directors of nursing, social service directors, activity directors, human resource directors, financial service directors, and marketing professionals.

- **Listserv**

LeadingAge Wisconsin hosts a statewide listserv featuring six regional and more than 20 professional networks. Included in this listserv is an electronic forum for member professionals to stay connected, answer questions, resolve concerns, and share best practices. Currently, this listserv is serving the interests and needs of:

- Activity Directors
- Adult Day Care Directors
- Assisted Living Nursing Professionals
- Campus Administrators
- CBRF Managers
- Directors of Nursing
- Emergency Preparedness Staff
- Environmental Service Professionals
- Financial Service Directors
- Foodservice Professionals
- Homecare Directors
- Human Resource Directors
- I-LEAD Fellows
- I-LEAD Alumni
- Independent Living Facility Managers
- Marketing, Public Relations, & Fund Development Professionals
- MDS Coordinators
- Presidents, Executive Directors, and CEOs
- RCAC Managers
- Skilled Nursing Facility Administrators
- Social Service Directors
- Trends & Technology Professionals

- **Committees**

LeadingAge Wisconsin has established a number of committees to shape association policy and serve member needs and interests in areas such as regulations, reimbursement, clinical issues, housing, education, member services, and awards.

This document provides you a glimpse of what LeadingAge Wisconsin does on a daily basis to keep aging service professionals informed, educated, represented, connected, and inspired. If you would like to learn more, we invite you to call us at 608-255-7060.

Do you yearn to collaborate with peers, exchange information, get answers, take charge? Isn't it time you jump on the bandwagon that is *LeadingAge* and leading the way? Isn't it time you join LeadingAge Wisconsin where we are dedicated to Better Services for Better Aging? If so, please continue to the section of this membership packet that details the membership or subscription program that is designed for you.





Better Services for Better Aging

Expanding the World of Possibilities for Aging

Provider Membership
(not-for-profit & governmental)



3

Provider Membership (not-for-profit and governmental)

Any organization recognized as an exempt entity under Section 501(c)(3) or 501(c)(4) of the Internal Revenue Code or owned and operated by a unit of government owning a facility primarily serving the elderly or developmentally disabled, such as a nursing home, community based residential facility or other living facility, shall be eligible for provider membership upon application. When such an organization becomes a provider member, all related organizations/facilities in Wisconsin which share a common element on the administrative team shall be included in the same membership as long as such organizations/facilities meet the criteria set forth above. For purposes of provider membership, “common element on the administrative team” is defined to mean an executive director, chief executive officer, administrator, or other comparable position.

Provider Membership Benefits

Organizations that join as provider members of LeadingAge Wisconsin have full access to all the programs and services provided by the association (see the Services section of this packet). In addition, provider members are invited to participate fully in regional meetings, network meetings, and committee meetings. Provider members have voting rights at the LeadingAge Wisconsin annual business meeting, are eligible to serve on the LeadingAge Wisconsin Board of Directors, and are encouraged to help shape the policies and directions of the association.

LeadingAge Wisconsin Membership Dues

The LeadingAge Wisconsin dues system is based on a modified tiered millage system tied to members’ program service revenues. The millage system addresses the membership’s increasingly diverse service mix and is consistent with the association’s vision of greater long-term care services being provided throughout the continuum of care and service settings. This new dues system automatically tracks changes in member programs/emphasis and better reflects the operations of member organizations and changes in their mission. In turn, the association will be positioned to change with the members and continue its impressive member services and advocacy activities. The following table provides the millage rates based on program revenues.

Program service revenue is the revenue your organization receives from aging services including revenue from nursing care, assisted living, senior housing units, adult day care, home health care, transportation, outpatient services, therapies, meals on wheels hospice, and other community based services. Program revenues exclude interest, investments, realized gains or losses, special events and activities, contributions from foundations and other sources, and any other services unrelated to LeadingAge Wisconsin mission.

Program revenue activities are “primarily those that form the basis for a not-for-profit organization’s exemption from tax. Program service revenues are from line 2 of the most recent IRS 990 plus direct and indirect public support and government support reported on line 1d of IRS 990. Program service

If Program Service Revenues Are	LeadingAge Wisconsin Dues
Between \$0 and \$999,999	\$ 500
Between \$1,000,000 and \$1,999,999	\$ 1,020
Between \$2,000,000 and \$2,999,999	\$ 1,530
Between \$3,000,000 and \$3,999,999	\$ 2,040
Between \$4,000,000 and \$4,999,999	\$ 2,550
Between \$5,000,000 and \$5,999,999	\$ 3,060
Between \$6,000,000 and \$6,999,999	\$ 3,570
Between \$7,000,000 and \$7,999,999	\$ 4,080
Between \$8,000,000 and \$8,999,999	\$ 4,590
Between \$9,000,000 and \$9,999,999	\$ 5,100
Between \$10,000,000 and \$10,999,999	\$ 5,610
Between \$11,000,000 and \$11,999,999	\$ 6,120
Between \$12,000,000 and \$12,999,999	\$ 6,630
Between \$13,000,000 and \$13,999,999	\$ 7,140
Between \$14,000,000 and \$14,999,999	\$ 7,650
Between \$15,000,000 and \$19,999,999	\$ 8,160
Between \$20,000,000 and \$24,999,999	\$ 8,670
Between \$25,000,000 and \$29,999,999	\$ 9,180
\$30,000,000 or More	\$ 9,690

revenue, particularly for governmental facilities, can also be obtained from the most recent audited financials, annual profit and loss statements or from Schedule 11, line 16 of the 2010 Medicaid cost report, and should include SP revenues.

Dues for your first year in LeadingAge Wisconsin are 50% of the amount listed above for your program service revenues. Dues would be at 100% of the amount listed above for your program service revenues beginning your second year in LeadingAge Wisconsin.

LeadingAge

LeadingAge Wisconsin makes it easy for aging service professionals to be connected throughout the state and across the nation. For this reason, when you join LeadingAge Wisconsin, you also are joining our national partner, LeadingAge.

LeadingAge Dues

The dues for LeadingAge are based on a millage system, as reflected in the following table. Dues for your first year in LeadingAge are 50% of the amount listed for your program service revenues. Dues would be at 100% of the amount listed for your program service revenues beginning your second year in LeadingAge.

Program Service Revenue Definition: Program service revenue from aging services would be (but not limited to) revenue from nursing care, assisted

living, senior housing units, adult day care, home health care, transportation, outpatient services, meals on wheels, hospice, and community based services. It would exclude interest, investments, realized and unrealized gains or losses, special events and activities, contributions, and any other services unrelated to the mission of LeadingAge.

If you have any questions regarding dues, please contact Brian Schoeneck at the LeadingAge Wisconsin office 800-466-7011 or BSchoeneck@LeadingAgeWI.org.

If Program Revenue is:	Millage Rate		Flat Amount
Between \$0 and \$999,999	0.00040	+	N/A
Between \$1,000,000 and \$9,999,999	0.00035	+	\$ 50
\$10,000,000 or more	0.00030	+	\$550

For LeadingAge, Minimum dues are \$350; Maximum dues are \$9,200.

1) **Legal Name of Owning (Parent) Corporation:** _____

Type of Ownership: *(Check One)*

- ☐ Religious Nonprofit ☐ Nonprofit Association ☐ Governmental ☐ Other

2) **Does the home have on file an Internal Revenue Service approved ruling of exemption? (If so, please check one)**

- ☐ 501(c)(3) ☐ 501(c)(4) ☐ Governmental

3) **Year Organization Was Founded:** _____

4) **Facilities**

When an organization becomes a provider member of LeadingAge Wisconsin, all related organizations/facilities in Wisconsin which share a common element on the administrative team are included in the same membership as long as these organizations/facilities meet the criteria for provider membership. For purposes of provider membership, “common element on the administrative team” is defined to mean an executive director, chief executive officer, administrator, or other comparable position.

Please indicate which of the following are encompassed under the umbrella of the owning corporation applying for LeadingAge Wisconsin provider membership (as defined above) (check all that apply):

- | | |
|---|--|
| <input type="checkbox"/> Skilled Nursing Facility | How Many Skilled Nursing Facilities _____ |
| <input type="checkbox"/> ICF-MR | How Many Facilities for the Developmentally Disabled _____ |
| <input type="checkbox"/> RCAC (Registered) | How Many Registered RCACs _____ |
| <input type="checkbox"/> RCAC (Certified) | How Many Certified RCACs _____ |
| <input type="checkbox"/> CBRF | How Many CBRFs _____ |
| <input type="checkbox"/> Adult Family Home | How Many Adult Family Homes _____ |
| <input type="checkbox"/> Senior housing Facility | How Many Senior housing Facilities _____ |
| <input type="checkbox"/> HUD 202 (Elderly) | How Many HUD 202 Facilities _____ |
| <input type="checkbox"/> HUD 811 (Disabled) | How Many HUD 811 Facilities _____ |
| <input type="checkbox"/> Senior Housing Utilizing IRC
Section 42 Low-Income
Housing Tax Credits | How Many Facilities Utilizing Section
42 Low-Income Housing Tax Credits _____ |

5) Facility Details

Please attach a separate sheet listing all facilities/organizations (as checked above) which share a common element on the administrative team. Please provide the following information for each facility you list:

- Name of Facility
- Type of Facility
- License/Registration/Certification Number (if applicable)
- Licensed/Unlicensed Capacity
- Street Address
- City
- State
- Zip
- County
- Telephone Number
- Fax Number
- Website Address
- Name of CEO/Administrator/Housing Manager
- Email Address for CEO/Administrator/Housing Manager

6) Community Service Programs Offered: *(Check All That Apply)*

- | | | | |
|---|--|--|---|
| <input type="checkbox"/> Adult Day Care | <input type="checkbox"/> Child Day Care | <input type="checkbox"/> Counseling/Referral | <input type="checkbox"/> Dementia Support |
| <input type="checkbox"/> Home Care/Home Share/Self Care (Unlicensed) | | <input type="checkbox"/> Home Health Agency (Licensed) | |
| <input type="checkbox"/> Home Maintenance | <input type="checkbox"/> Home Monitoring | <input type="checkbox"/> Hospice | <input type="checkbox"/> Housing Services |
| <input type="checkbox"/> Life Enrichment/Lifelong Learning | | <input type="checkbox"/> Mental Health Services | <input type="checkbox"/> Meals/Nutrition |
| <input type="checkbox"/> Neurological/Developmentally Disabled Services | | <input type="checkbox"/> Parish Nurse Program | <input type="checkbox"/> Pastoral Care |
| <input type="checkbox"/> Rehabilitation Services | <input type="checkbox"/> Respite Care | <input type="checkbox"/> Senior Center | <input type="checkbox"/> Supportive/Personal Care |
| <input type="checkbox"/> Telephone Reassurance/Elder Response | | <input type="checkbox"/> Therapeutic Care | <input type="checkbox"/> Transportation |
| <input type="checkbox"/> Volunteer Programs | <input type="checkbox"/> Other _____ | | |

7) I certify that the information provided above and in all attachments is true and correct to the best of my knowledge.

Signed: _____ Date: _____
Officer of Organization's Governing Board

Signed: _____ Date: _____
CEO/Administrator



Better Services for Better Aging

Expanding the World of Possibilities for Aging

Subscription to Services



4 Subscription to Services

LeadingAge Wisconsin recognizes that it is this association's responsibility to serve every interested aging services provider who demonstrates a commitment to improving quality of care for residents. As such, LeadingAge Wisconsin allows for-profit providers (including, but not limited to, skilled nursing facilities, assisted living facilities, senior housing facilities, and other senior service providers) to subscribe to the association's services.

Organizations/Facilities that subscribe to our services are not LeadingAge Wisconsin members and are not permitted to promote themselves as LeadingAge Wisconsin members, nor are they permitted to indicate they are partnered with LeadingAge Wisconsin. Subscribers do have access to LeadingAge Wisconsin information.

Subscription to Services

Senior service providers who subscribe to LeadingAge Wisconsin services enjoy the following services:

- All mailings sent to members.
- Access to the member/subscriber website.
- Access to the network member websites (RCAC, CBRF, MDS, Senior Housing, etc.) under the same conditions as set forth for members.

- The opportunity to attend regional meetings at the invitation of the corresponding region.
- The opportunity to attend committee meetings that are not policy-shaping meetings.
- Member/Subscriber rates to attend all LeadingAge Wisconsin educational events.
- An invitation to participate in all networking forums under the same conditions as set forth for members.
- Access to special materials developed by members (Quality Improvement Initiatives, Resource Clearinghouse, Training Modules, Assisted Living Preferred Status, etc.) under the same conditions as set forth for members.

Please see the "Services" section of this packet for more detailed information related to the association's services.

Aging service providers who subscribe to LeadingAge Wisconsin services are not entitled to voting rights. This includes, but is not limited to, the LeadingAge Wisconsin Annual Business Meeting, committee meetings, regional meetings, and networking meetings. Further, subscribers are not permitted to serve on the LeadingAge Wisconsin Board of Directors nor on the Executive Committee. Subscribers do not help LeadingAge Wisconsin shape policy.

Subscription Rates

When an organization subscribes to LeadingAge Wisconsin services, the subscribing organization must pay for each affiliated senior service entity in Wisconsin. That is, the subscription applies to and the organization must pay the subscription fee for all Wisconsin-based facilities and all levels of care for the subscribing provider, and the potential subscriber must identify all affiliated facilities and their physical address on the subscription service application form.

The subscription fee uses a modified tiered millage system based on the facility’s/entity’s program service revenues. The millage system also addresses the subscribers’ increasingly diverse service mix and is consistent with the association’s vision of greater long-term care services being provided throughout the continuum of care and service settings.

The following table provides the millage rates based on an individual facility’s or entity’s program revenues. If program revenue exceeds \$35,000,000, please contact LeadingAge Wisconsin.

The subscription fee for your first year in LeadingAge Wisconsin is 50% of the amount listed for your program service revenues. The subscription fee would be 100% of the amount listed above for your program service revenues beginning your second year with LeadingAge Wisconsin.

Program Service Revenue Definition: Program service revenue is the revenue your organization receives for each individual facility/entity, including revenue from nursing care, assisted living, independent living units, adult day care, home health care, transportation, outpatient services, therapies, meals on wheels hospice and other community based services. Program revenues exclude interest, investments, realized

If Individual Facility/Service Program Service Revenues Are	Subscription Fee
Between \$0 and \$999,999	\$ 500
Between \$1,000,000 and \$1,999,999	\$ 1,020
Between \$2,000,000 and \$2,999,999	\$ 1,530
Between \$3,000,000 and \$3,999,999	\$ 2,040
Between \$4,000,000 and \$4,999,999	\$ 2,550
Between \$5,000,000 and \$5,999,999	\$ 3,060
Between \$6,000,000 and \$6,999,999	\$ 3,570
Between \$7,000,000 and \$7,999,999	\$ 4,080
Between \$8,000,000 and \$8,999,999	\$ 4,590
Between \$9,000,000 and \$9,999,999	\$ 5,100
Between \$10,000,000 and \$10,999,999	\$ 5,610
Between \$11,000,000 and \$11,999,999	\$ 6,120
Between \$12,000,000 and \$12,999,999	\$ 6,630
Between \$13,000,000 and \$13,999,999	\$ 7,140
Between \$14,000,000 and \$14,999,999	\$ 7,650
Between \$15,000,000 and \$19,999,999	\$ 8,160
Between \$20,000,000 and \$24,999,999	\$ 8,670
Between \$25,000,000 and \$29,999,999	\$ 9,180
Between \$30,000,000 and \$34,999,999	\$ 9,690
\$35,000,000 and Up	Contact Us

gains or losses, special events and activities, contributions from foundations and other sources, and any other services unrelated to LeadingAge Wisconsin’s mission. Program service revenue, particularly for for-profit facilities, can also be obtained from the most recent audited financials, annual profit and loss statements or from Schedule 11, line 16 of the 2015 Medicaid cost report, plus service revenue from assisted living and independent living units.

If you have questions regarding these subscription rates, please contact Brian Schoeneck at 800-466-7011 or BSchoeneck@LeadingAgeWI.org.



- 1) Legal Name of Owning (Parent) Corporation: _____

- 2) Type of Ownership: _____

- 3) Year Organization Was Founded: _____

- 4) The purpose of LeadingAge Wisconsin is as follows: *LeadingAge Wisconsin is a statewide membership association of nonprofit corporations dedicated to serving the needs of aging adults and people with disabilities. We provide our membership, which includes religious, fraternal, private, and government organizations, with programs and services to promote the highest quality of life and greatest independence for each individual served.*

If your application for a Subscription to Services is approved by the Board of Directors, will you will you honor and uphold this stated purpose of LeadingAge Wisconsin? Yes____ No____

- 5) Please state your primary reason for seeking a Subscription to Services with LeadingAge Wisconsin:

- 6) Please provide your organization’s mission statement:

- 7) Do you or your organization have ownership, affiliation or representation on or with other long-term care or senior housing entities? If, so, please list those entities and state your relationship (board, staff, owner, etc.) with each below:

- 8) If your application for a Subscription to Services is approved by the LeadingAge Wisconsin Board of Directors, is it also your organization’s intent to seek membership in the LeadingChoice Network? ____ Yes No ____

- 9) Please provide a reference from one LeadingAge Wisconsin (not-for-profit) provider member (Name, organization, location, phone, and email):

10) Facilities

When an organization subscribes to LeadingAge Wisconsin services, the subscribing organization must pay for all affiliated senior service entities in Wisconsin. That is, the subscription applies to and the organization must pay the subscription fee for all Wisconsin-based facilities and all levels of care for the subscribing provider, and the potential subscriber must identify all affiliated facilities and their physical address on this subscription service application form. Please indicate which of the following are encompassed under the umbrella of the owning corporation applying for a subscription to LeadingAge Wisconsin services (as defined above) (check all that apply):

<input type="checkbox"/> Skilled Nursing Facility	How Many Skilled Nursing Facilities _____
<input type="checkbox"/> ICF-MR	How Many Facilities for the Developmentally Disabled _____
<input type="checkbox"/> RCAC (Registered)	How Many Registered RCACs _____
<input type="checkbox"/> RCAC (Certified)	How Many Certified RCACs _____
<input type="checkbox"/> CBRF	How Many CBRFs _____
<input type="checkbox"/> Adult Family Home	How Many Adult Family Homes _____
<input type="checkbox"/> Senior housing Facility	How Many Senior housing Facilities _____
<input type="checkbox"/> HUD 202 (Elderly)	How Many HUD 202 Facilities _____
<input type="checkbox"/> HUD 811 (Disabled)	How Many HUD 811 Facilities _____
<input type="checkbox"/> Senior Housing Utilizing IRC Section 42 Low-Income Housing Tax Credits	How Many Facilities Utilizing Section 42 Low-Income Housing Tax Credits _____

11) Facility Details

Please attach a separate sheet listing all affiliated senior service entities in Wisconsin (as checked above). Please provide the following information for each facility you list:

- Name of Facility
- Type of Facility
- License/Registration/Certification Number (if applicable)
- Licensed/Unlicensed Capacity
- Street Address
- City
- State
- Zip
- County
- Telephone Number
- Fax Number
- Website Address
- Name of CEO/Administrator/Housing Manager
- Email Address for CEO/Administrator/Housing Manager

12) Community Service Programs Offered: *(Check All That Apply)*

- | | |
|--|---|
| <input type="checkbox"/> Adult Day Care | <input type="checkbox"/> Neurological/Developmentally Disabled Services |
| <input type="checkbox"/> Child Day Care | <input type="checkbox"/> Parish Nurse Program |
| <input type="checkbox"/> Counseling/Referral | <input type="checkbox"/> Pastoral Care |
| <input type="checkbox"/> Dementia Support | <input type="checkbox"/> Rehabilitation Services |
| <input type="checkbox"/> Home Care/Home Share/Self Care (Unlicensed) | <input type="checkbox"/> Respite Care |
| <input type="checkbox"/> Home Health Agency (Licensed) | <input type="checkbox"/> Senior Center |
| <input type="checkbox"/> Home Maintenance | <input type="checkbox"/> Supportive/Personal Care |
| <input type="checkbox"/> Home Monitoring | <input type="checkbox"/> Telephone Reassurance/Elder Response |
| <input type="checkbox"/> Hospice | <input type="checkbox"/> Therapeutic Care |
| <input type="checkbox"/> Housing Services | <input type="checkbox"/> Transportation |
| <input type="checkbox"/> Life Enrichment/Lifelong Learning | <input type="checkbox"/> Volunteer Programs |
| <input type="checkbox"/> Mental Health Services | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Meals/Nutrition | _____ |

13) I certify that the information provided above and in all attachments is true and correct to the best of my knowledge.

Signed: _____ **Date:** _____
CEO/Administrator





Better Services for Better Aging

Expanding the World of Possibilities for Aging

Associate Membership



5 Associate Membership

(A) Any individual not a member of the staff or on the Board of Directors of a nursing home, hospital, community based residential facility, residential care apartment complex, senior housing unit, or any other facility serving the elderly or developmentally disabled who is engaged in a related field of activity or interested in the purposes of LeadingAge Wisconsin, or (B) Any exempt organization under Section 501(c)(4) of the Internal Revenue Service Code which is engaged in a related field of activity or interested in the purposes of LeadingAge Wisconsin, or (C) Any for-profit organization which provides products or services useful to LeadingAge Wisconsin and its members, may be granted associate membership status upon application.

Although LeadingAge Wisconsin does not actively endorse the products or serves of the associate members, we readily publicize the associate members' names, addresses, phone numbers, and types of products or services offered.

Associate Member Benefits

LeadingAge Wisconsin associate members enjoy the following benefits:

- All mailings sent to members.
- Access to the member/subscriber website.
- The opportunity to attend regional meetings only at the invitation of the corresponding region.
- The opportunity to serve as resource members on LeadingAge Wisconsin committees (but associate members have no voting rights). This provides you the opportunity to share your expertise and obtain updated information in areas such as housing, legislative matters, reimbursement issues, budget & finance, awards, member services and community relations, educational programs, and clinical issues, to name a few.

- Member/Subscriber rates to attend all LeadingAge Wisconsin educational events (conferences, seminars, webinars, etc.).
- The opportunity to promote your company at LeadingAge Wisconsin annual exhibitors forum. As an associate member, you may participate in the forum at the discounted member rate, and you will have access to the preferred booth locations, reserved for LeadingAge Wisconsin associate members only.
- You will be affiliated with the largest association representing not-for-profit aging service providers in Wisconsin. Through such affiliation, our members and subscribers are readily able to

identify you and your company. They may, from time to time, call on you for information or support. Affiliation with LeadingAge Wisconsin affords you many promotional and public relations opportunities.

Please see the “Services” section of this packet for more detailed information related to the services LeadingAge Wisconsin provides.

Associate Member Dues

The annual dues for associate members currently are set at \$495.



Organization _____

Name _____

Title _____

Address _____

City _____ State _____ Zip _____

Telephone Number: Area Code (_____) _____

Fax Number: Area Code (_____) _____

eMail Address: _____

Website Address: _____

Do you currently serve on the staff or board of directors of a nursing home, hospital, community based residential facility, residential care apartment complex, senior housing unit, or facility for the elderly?

☐Yes ☐No

To the best of your knowledge, does any person from your company or organization serve on the staff or board of directors of a facility such as those listed above?

☐Yes ☐No

Briefly describe the product(s) and/or service(s) you provide which would be useful to LeadingAge Wisconsin and/or its member/subscriber facilities:

Please give a brief statement of purpose for your company or organization:

What are your reasons for seeking associate membership in LeadingAge Wisconsin and what benefits do you anticipate from such membership:

Does your company or organization have on file a ruling of exemption -- 501(c)(3) or 501(c)(4) --status approved by the Internal Revenue Service? ☐Yes ☐No

Associate Member Annual Dues are \$495.00

Please return your completed application to the LeadingAge Wisconsin office. You may send your dues payment now; or we can bill you for the appropriate amount after the LeadingAge Wisconsin Board of Directors approves your application.

I certify that all information provided above is true and correct to the best of my knowledge.

Signed _____
(Associate Member Applicant)

Date _____



Better Services for Better Aging

Expanding the World of Possibilities for Aging

Individual Membership



6 Individual Membership

Any person who is a student, a retired aging services professional, or an aging service professional who currently is unemployed and is seeking a new aging services position is eligible for individual membership.

Individual Member Benefits

Individual members enjoy the following benefits:

- All mailings sent to members.
- Access to the member/subscriber website.
- The opportunity to attend regional meetings.
- The opportunity to serve as resource members on LeadingAge Wisconsin committees (but individual members have no voting rights). This provides you the opportunity to share your expertise and obtain updated information in areas such as housing, legislative matters, reimbursement issues, budget & finance, awards, member services and community relations, educational programs, and clinical issues, to name a few.

- Member/Subscriber rates to attend all LeadingAge Wisconsin educational events (conferences, seminars, webinars, etc.).
- You will be affiliated with the largest association representing not-for-profit aging service providers in Wisconsin.

Please see the “Services” section of this packet for more detailed information related to the services LeadingAge Wisconsin provides.

Individual Member Dues

The annual dues for associate members currently are set at \$125.

Name _____

Address _____

City _____ State _____ Zip _____

Telephone Number: Area Code (_____) _____

Fax Number: Area Code (_____) _____

eMail Address: _____

Website Address: _____

Do you currently serve on the staff or board of directors of a nursing home, hospital, community based residential facility, residential care apartment complex, senior housing unit, or facility for the elderly? ☐Yes ☐No

What are your reasons for seeking individual membership in LeadingAge Wisconsin and what benefits do you anticipate from such membership?

Individual Member Annual Dues are \$125.00

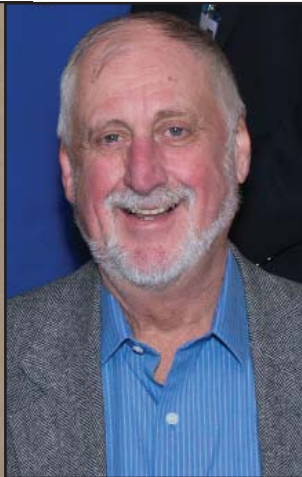
Please return your completed application to the LeadingAge Wisconsin office. You may send your dues payment now; or we can bill you for the appropriate amount after the LeadingAge Wisconsin Board of Directors approves your application.

I certify that all information provided above is true and correct to the best of my knowledge.

Signed _____ Date _____

(Individual Member Applicant)







Better Services for Better Aging

Expanding the World of Possibilities for Aging

LeadingAge Wisconsin is form and function, fun and formality, friends and family, forums and festivities. LeadingAge Wisconsin is more than 50 years of history providing the experience and expertise to lead you into the future. LeadingAge Wisconsin is what we do. LeadingAge Wisconsin is who we are.

LeadingAge Wisconsin - Better Services for Better Aging.

204 South Hamilton Street
Madison WI 53703

(T) 608-255-7060
(F) 608-255-7064

www.LeadingAgeWI.org
info@LeadingAgeWI.org

