



# ANNUAL REPORT



 **CARE WISCONSIN**  
*Partnering for Independence since 1976*

Care Management | Health Care | Long-Term Care Services

“He really has a great care team. They’re willing to put in whatever it takes to see not only that he has what he needs, but also that he’s happy.”

- Provider

## Our Mission

To promote independence and quality of life by providing innovative solutions to health and long-term care needs

## Our Values

### **Respect**

We value and trust each other, and treat each other with fairness and dignity. We appreciate each person’s views, needs and contributions.

### **Relationships**

We believe in open communication, cooperation and shared responsibility. We are compassionate and nurturing.

### **Integrity**

We are true to our word. We are ethical, honest and responsible in all we do.

### **Social Responsibility**

We participate in our community by enhancing quality of life. We develop solutions that use resources wisely.

### **Excellence**

We set high standards for ourselves. We strive to change what exists into something better.

“This is the best place to be if you have problems with your health, because there’s a whole team of caring people to help you. They know how to help you.”

- Member



**Karen Musser**  
Chief Executive Officer



**Anne Smith**  
Chair  
2008 Board of Directors

## Dear Friends,

In reflecting on 2008, we recognize that this next chapter in our story is really the story of Care Wisconsin and our community partners, sharing a common mission of service.

During a year of remarkable change and growth, these collaborative relationships truly allowed us to live our value of Social Responsibility. Partnering with others whose actions are driven by this sense of social responsibility has been at the heart of Care Wisconsin from our very beginnings.

When leaders from local social service agencies, churches and county boards realized there were no alternatives for frail elders to stay in the community, they decided to try a new idea—and opened the Older Adult Day Center in 1976 with donated space and grant funding.

Later, when people with developmental disabilities were living longer and moving out of institutions or their parents’ homes into the community, we saw another way to contribute to quality of life. So we worked closely with Dane County and advocates to develop new programs for older adults with developmental disabilities.

In the mid-1990s, a growing social concern was the fragmentation of the health care and long-term care worlds. The frail elderly and people with disabilities were

stuck in the middle—trying to make their way through the maze of services, sitting on waiting lists, figuring out bills, getting care in crisis rather than in advance.

Guided by our mission and values, we joined with the Wisconsin Department of Health Services and other nonprofit organizations to launch the Partnership program in 1995, designed to coordinate health care and long-term care services for the frail elderly and people with physical disabilities. We engaged local doctors and hundreds of other providers to be part of this worthy mission. We filled service gaps by investing in our own home care, dental, rehabilitation and transportation services.

This past year, we once again joined forces with the Department of Health Services and community partners throughout south central Wisconsin who share our common values. Together, we started the Family Care program in nine new counties in 2008, as well as welcoming hundreds of new members into our Dane County Partnership program.

What drives our decision-making over the past 30 years and today? Our value of Social Responsibility, and our privilege of partnering with others who share and act on that value.

## 2008 Service Area Roll-Out Schedule

County	Family Care	Partnership
Columbia	March 1	March 1
Dane	•	Current
Dodge	August 1	August 1
Green Lake	August 1	•
Jefferson	September 1	September 1
Marquette	July 1	•
Sauk	•	September 1
Washington	April 1	•
Waukesha	July 1	•
Waushara	June 1	•

### ► Offering a New Home to Partnership Members

In early 2008, the Department of Health Services and the Office of the Commissioner of Insurance turned to Care Wisconsin and asked us to work with Community Living Alliance (CLA) to transfer its Partnership members—younger adults with physical disabilities—to our Partnership program.

While certainly a large undertaking, this request fit well with our mission and values. This was a natural collaboration, since Care Wisconsin had a long association with our colleague agency and respected the commitment and caring shown to its Partnership members.

We were both dedicated to the Partnership concept of comprehensive and coordinated care to support people in their choice to stay in the community. We wanted to assure that adults with physical disabilities would continue to have access to this program in Dane County.

We wanted to maintain as much stability as possible, including transitioning CLA's Partnership staff at the same time and finding opportunities for other CLA employees, too. On May 1st, we welcomed over 370 new Partnership members to Care Wisconsin and greeted over 50 new employees.

### ► Launching Family Care

Since Governor Jim Doyle announced Long-Term Care Reform in 2005, all of us in the Family Partnership Care Management Coalition (FPCMC) have linked arms to make Family Care a reality in our region.

A public program, Family Care provides care management and services for the frail elderly and adults with developmental and/or physical disabilities. It builds on Wisconsin's innovative long-term care programs, yet most significantly, eliminates waiting lists for services. At the start of Family Care expansion planning, over 11,000 of our state's most at-risk citizens were on waiting lists—over 2,500 in the FPCMC region alone.

Together with county partners and other community organizations, we collaborated on a plan to introduce the two Family Care programs to south central Wisconsin: Family Care (long-term care benefits) and Partnership (both health/medical and long-term care benefits). Care Wisconsin was approved by the state to be a managed care organization, providing the two programs. Each county was approved as an Aging and Disability Resource Center, offering information, assistance and enrollment.

So when Care Wisconsin launched our first Family Care program in Columbia County on March 1, 2008, we had definite cause for celebration. And for each county opening over the next seven months (please see the roll-out schedule), we took time to celebrate, to recognize the hard work of all involved in the transition to Family Care:

- County Aging and Disability Resource Centers
- County human services departments
- Providers of long-term care and health services in each county
- County supervisors and human service boards
- Care Wisconsin staff in our local Family Care county offices and our central office in Madison
- Care Wisconsin Board members
- The Wisconsin Department of Health Services

With all this change and growth over such a short period, we all kept faith with our shared value of Social Responsibility and the goals of the Family Care program: Access, Choice, Quality and Cost Effectiveness.

## ► Providing More LTC and Health Services Than Ever

Over the years in Dane County, we've filled gaps and met needs by directly offering health and long-term care services to Partnership members and people in the community. With the addition of over 300 new Partnership members in 2008, everyone at Care Wisconsin pitched in to welcome more clients for the following services:

- Connections, our adult day center for people with health concerns and disabilities;
- The Gathering Place, the area's only adult day center providing services exclusively for individuals with memory loss;
- Dental Clinic, featuring access to routine and specialty dental care to Partnership members;
- Home Care Services, assistance with personal cares in the home, including bathing, meal preparation, light housekeeping and help with grooming;
- Rehabilitation Department, offering physical therapy, occupational therapy and home safety assessments to Partnership members;
- Transportation Services, with 20-plus vehicles taking Partnership members and eligible individuals from the community to health and medical appointments.

Our long-term care services also benefited from the attention of many funding partners, including the United Way of Dane County, American Family Insurance, St. Thomas Aquinas Parish, the Junior League of Madison, the Norman Bassett Foundation, and many individuals and companies.

This was a milestone year for us when the Wisconsin Department of Transportation announced its grants for transportation assistance to the frail elderly and people with disabilities. Care Wisconsin was awarded a \$476,900 grant—our largest grant since we began submitting requests in 1997—all going to purchase 12 new vans and buses over two years.

## ► Previewing the Next Chapter

2008 was a year for enormous growth and change—and a year for difficult economic times here in this state and nationwide. Yet, we showed that we could join with others who share our mission, and we could all step up to act as wise stewards of public funding.

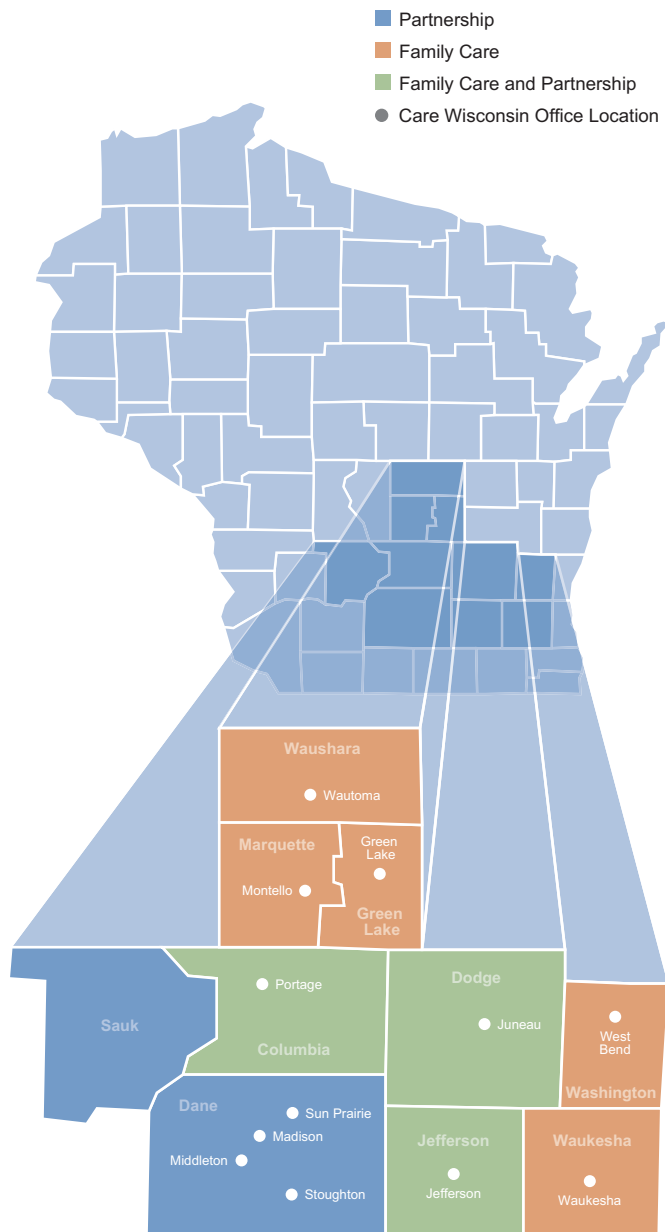
Together, we could live the value of Social Responsibility, opening up innovative long-term care programs to our most at-risk citizens. We could serve as a responsible employer, providing jobs and benefits to over 500 people in 10 counties. We could make decisions driven by our values, yet balanced by the need to maintain soundness and stability for our organization.

Now in 2009, we're turning inward to focus on our values of Excellence and Integrity as we strengthen internal processes, systems and structures. In keeping with the times, we're working together with all our community partners to find ways to spread our resources fairly and wisely, to be responsible stewards. So, early next year, watch for the next chapter in the Care Wisconsin story—really, the continuing story of Care Wisconsin and its partners.

<b>Stats and Facts</b>	<b>2007</b>	<b>2008</b>
Family Care Members	0	2,465
Partnership Members	699	1,096
Total Members	699	3,561
<b>Support Services in Dane County</b>		
Transportation Rides	45,939	52,830
Fleet of Specialized Vehicles	25	28
Home Care Visits	65,718	67,105
Dental Clinic Visits	1,074	1,254
Adult Day Center Attendance Days	19,499	20,653
Rehabilitation Service Referrals	787	1,311
Employees	355	569
Offices	5	14
Community Volunteers	200+	250+

# Service Area and Financial Summary

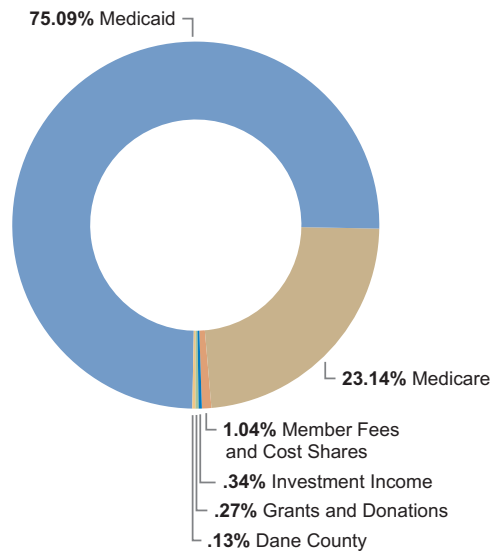
## Service Area



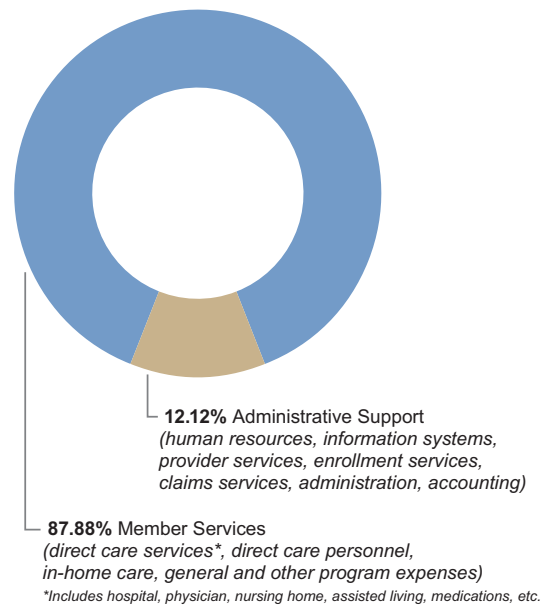
“The care team met with me and identified as my goals staying healthy, active and motivated. This will help me prevent future medical issues.”

- Member

## 2008 Sources of Funds



## 2008 Uses of Funds



# Boards of Directors and Executive Team

## Care Wisconsin First, Inc. 2008 Board of Directors

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**Tom Alt**

Retired  
Wisconsin State Government

**Iris Christenson**

Elder Law Attorney  
Law Offices of Christenson and Alex, LLC

**Brian Hellmer**

Director of Research  
Northern Capital Management, LLC

**Tom Klingele**

Director  
RSM McGladrey

**Diane Krueger**

Research Program Manager  
Osteoporosis Clinical Research Program  
University of Wisconsin

**Terry Lynch**

Owner/Consultant  
Strategies for Independent Aging, LLC

**Rebecca Marnocha**

Director, Pharmaceutical Research Center  
UW Hospital & Clinics

**Mark Moody**

Vice President, Field Operations  
WEA Trust

**Karen Musser**

Chief Executive Officer  
Care Wisconsin First, Inc.

**Karen Paulson**

Retired  
American Family Insurance

**John Schanen**

Vice President & Controller  
QBE Americas

**Anne Smith**

Vice President & General Counsel  
Promega Corporation

**Mary Pat Williams**

Vice President  
US Bank

## Care Wisconsin Health Plan, Inc. 2008 Board of Directors

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**Karen Musser, President**

Chief Executive Officer  
Care Wisconsin First, Inc.

**Dennis Carlson**

Retired  
American Family Insurance

**Jim Jaeger**

Elder Law Attorney  
Hill, Glowacki, Jaeger & Hughes, LLP

**Tom Klingele**

Director  
RSM McGladrey

**Robert Mucci**

Senior Vice President  
National Guardian Life Insurance Company

**Peg Smelser**

Chief Operating Officer  
WEA Trust

## Care Wisconsin First, Inc. 2008 Executive Team

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**Karen Musser**

Chief Executive Officer

**Ken Eimers**

Chief Operating Officer

**Lora Wiggins, MD**

Chief Medical Officer

**Craig Dupont**

Chief Financial Officer

**Wayne Hagenbuch**

Vice President  
Health Plan Operations

**Debbie Waite**

Vice President, Organizational  
Development & Human Resources

**Kristin Jeffries**

Vice President  
Planning & Development

“My care manager is a really neat lady with great follow-up. She was my hands as I applied for funding sources for a car lift, and she never gave up.”

- Member



Equal Opportunity Service Provider | Equal Opportunity Employer

**(608) 240-0020**  
**1-800-963-0035**  
**[www.carewisc.org](http://www.carewisc.org)**

## Administrative Offices

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### Main Office

2802 International Lane  
P.O. Box 14017  
Madison, WI 53708-0017

2917 International Lane  
P.O. Box 14017  
Madison, WI 53708-0017

3118 International Lane  
P.O. Box 14017  
Madison, WI 53708-0017

## Regional Offices

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### Columbia County

2425 New Pinery Road, Suite 201  
Portage, WI 53901

### Dane County

7448 Hubbard Avenue  
Middleton, WI 53562

221 King's Lynn Road  
Stoughton, WI 53589

100 Wilburn Road, Suite 114  
Sun Prairie, WI 53590

### Dodge County

820 N. Main Street, Suite C  
P.O. Box 147  
Juneau, WI 53039

### Green Lake County

745 South Street, Suite 3B  
Green Lake, WI 54941

### Jefferson County

824 W. Racine Street  
Jefferson, WI 53549

### Marquette County

428 Underwood Avenue  
P.O. Box 176  
Montello, WI 53949

### Washington County

2021 South 18th Avenue, Suite 201  
West Bend, WI 53095

### Waukesha County

N19 W24075 Riverwood Drive, Suite 300  
Waukesha, WI 53188

### Waushara County

203 South 16th Court  
P.O. Box 1135  
Wautoma, WI 54982

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