

# ANNUAL REPORT

LAKELAND  
CARE, INC.  
2020



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# MISSION VISION VALUES

## MISSION

Enriching individuals' lives by honoring their values through high quality, cost effective care and supports.

## VISION

We are a person-centered organization that coordinates care and supports to build and sustain individuals' success by:

- Delivering high quality, cost-effective options
- Expanding individuals' access and choices
- Enhancing partnerships and resources
- Improving the health and well-being of individuals, families and communities

## VALUES

- Kindness
- Trust
- Inclusion





# CEO MESSAGE



Dear Stakeholders –

Where does one even start to summarize the year 2020?

As the newly appointed CEO to Lakeland Care in late 2019, this is a strange message to write given there is no other year with which to compare the magnitude of challenges we faced. 2020 was a year that tested everyone among us to some degree. It was a year of paramount struggle and significant loss. The world seemed to be thrust into a perfect storm of a global pandemic, emotionally charged elections, increased poverty and joblessness and deeply felt racial injustice that impacted our collective physical and mental health in unprecedented ways.

2020 was also a year of resolute resilience and reinvention. It was a time when companies discovered what they really were and what they might become. And while COVID-19 was very unexpected, Lakeland Care was able to pivot and recalibrate in innovative ways in order to continue to serve our communities' most vulnerable population. It was not an easy journey, but despite the challenges that the year presented, Lakeland Care still saw a 10.8% growth in membership over the prior calendar year.

I'm proud of how Lakeland Care responded because we led with our values of kindness, inclusion and trust. We focused first on the health and safety of our employees, our members and the communities in which we operate. In April, we purchased and distributed personal protective equipment to hundreds of providers. We also dispersed funding to some of our providers who experienced a reduction in utilization of services in order to sustain those businesses during the uncertain times of the pandemic.

2020 also marked a milestone for Lakeland Care when we celebrated our 20th anniversary of providing Family Care services. As we think back on the past two decades in business, some immediate things that come to mind that have contributed to Lakeland Care's success is our unwavering dedication to serving employees, members, providers and communities who execute our mission every day. Lakeland Care would not have experienced our great success without the hard work of our employees, the strong relationships that have been built with providers and community partners and most importantly, the members who voluntarily entrust us with helping them to live their best lives. What started as a one county entity has evolved into a 22-county organization that serves over 7,600 members and continues to deliver high quality customer service and supports to all who rely on and partner with us.

Together, we build better lives.

Sara Muhlbauer



# 20 YEAR ANNIVERSARY

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Lakeland Care, Inc. (LCI) celebrated our 20-year milestone of providing key services to seniors and adults with disabilities in 2020!

Lakeland Care evolved from Creative Care Options of Fond du Lac County, which was one of the first Family Care pilot organizations to open in February 2000. We've now grown to serve twenty-two counties throughout Northeast and North Central Wisconsin and are grateful to provide long-term needs and enrichment to the lives of over 7,600 members.

We do this by working in close partnership with over 1,000 local provider organizations. These provider partners are the backbone to ensuring that members are able to live in the community they call home. In addition, many members are fortunate to have the support of their family, friends, or neighbors to help them live in their own homes.

Throughout the many changes in health and long-term care during the past two decades, LCI leaders and employees have remained committed to providing person-centered care to all its members. As a mission-focused company, our goal remains constant: To assist members who receive care and services from Lakeland Care to live their best possible life while maximizing their strengths.

Sara Muhlbauer, Lakeland Care's CEO, stated "Lakeland Care has experienced exceptional growth over the past several years, and has achieved this milestone through the hard work and dedication of our employees and providers. We are honored to be a part of so many local communities and to serve those citizens."

Lakeland Care values the communities we live and work in and encourage all employees to find a way to 'give back.' Our employees live and work in the communities we serve. Our success is directly related to the relationships we form with others, and the contributions that we make together!



**LAKELAND CARE**  
Local. Compassionate. Dependable.

CELEBRATING  
**20**  
YEARS

# MEET JESSE



Jesse has been working at Lakeside Packaging Plus (LPP) since 2002 where he started as a high school student and learned various tasks through the prevocational program. Eventually, Jesse learned to ride the city bus independently to and from work and advanced to doing janitorial work at LPP, a separate job from the work floor which he excelled at. Jesse also participated in LPP's Community Based Pre-Vocational Services program in 2014 which exposed him to various community jobs. Jesse was successful and happy working at LPP with his friends but still, he wanted to find a job in the community.

Jesse's mother struggled with the idea of him working in the community and had a lot of doubts. After a few meetings discussing Jesse's progress, the skills he has, supports available, and potential jobs he could do in the community, a DVR referral was made. Jesse was excited about this opportunity and although there were concerns and barriers to address, DVR was able to work with Jesse step by step to reach his goal.

DVR started by setting Jesse up with a benefits analysis through Alex Annoye who was able to tell him and his guardian how his benefits would be impacted by working. Alex broke down the analysis in a way that was easy to understand to show Jesse and his mother how much money he can earn while still maintaining his medical benefits and income. They even found out that working could increase his overall income!

In July 2019, Jesse started working with Lakeside Packaging Plus in their Community Integrated Employment program where he did a worksite tour as part of the career exploration stage. During the tour, Jesse and his Job Developer felt confident that Jesse was able to do the tasks and he was offered the job on the spot! Jesse officially started working for Tier One Property Services as the Day Porter in September 2019. He is responsible for cleaning 9 bathrooms and the break room throughout a two-story office building. Jesse started out with 100% coaching for the first week to assist with learning tasks and navigating the two-story building. Coaching was able to start fading the next few weeks with the assistance of a task and supply list. Jesse is now only receiving monthly check ins from LPP to help maintain his employment.

"My job is awesome and I love it! I ride the bus to and from work independently and I am proud of my work!" - Jesse

Jesse has developed a wonderful relationship with his supervisor and is great at communicating with him when his supplies are low. Jesse's supervisor says- "he shows great work ethic, maintains the cleaning standards high, and always has a smile while working. Jesse's good performance is what we look for in employees." Although this experience pushed Jesse and his mother out of their comfort zone, he would have never known how fulfilling a job in his community could be without the ongoing support and encouragement from his entire care team!

# MEMBER ENROLLMENTS

## GSR4 COUNTIES:

Florence, Forest, Langlade, Lincoln,  
Marathon, Oneida, Portage, Vilas,  
Wood

## GSR9 COUNTIES:

Fond du Lac, Manitowoc, Winnebago

## GSR10 COUNTIES:

Calumet, Outagamie, Waupaca

## GSR13 COUNTIES:

Brown, Door, Kewaunee, Marinette,  
Menominee, Oconto, Shawano

## TRIBAL:

Menominee Indian Tribe of  
Wisconsin, Oneida Nation

# 7,699

## TOTAL MEMBERS ENROLLED

GSR4: 865

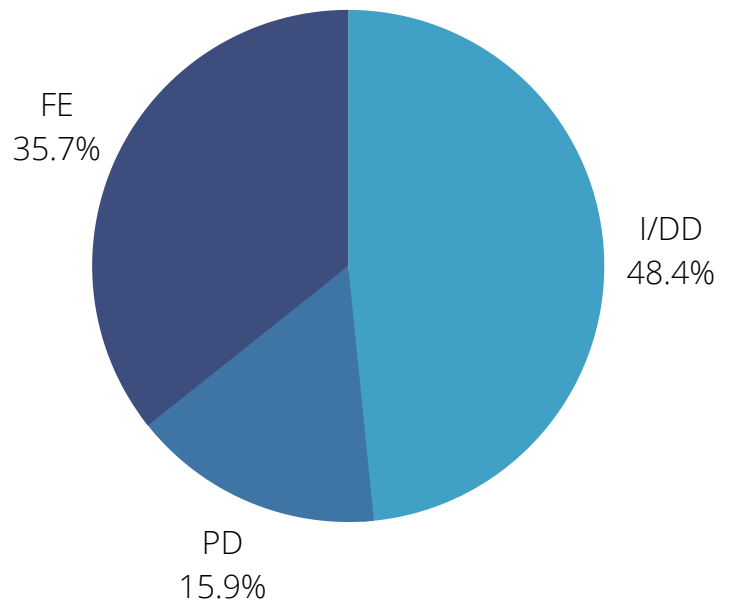
GSR9: 2,519

GSR10: 524

GSR13: 3,639

TRIBAL: 152

## TARGET GROUP MIX



I/DD: INTELLECTUAL/ DEVELOPMENTAL  
DISABILITY

PD: PHYSICAL DISABILITY

FE: FRAIL ELDER



# 2020 FINANCIALS

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## OVERVIEW

Overall, in Wisconsin, the Family Care program began the year with 50,015 members and added a mere 756 additional members throughout the year. Lakeland Care had the greatest growth in membership of any of the four Family Care Managed Care Organizations. Lakeland Care's membership increased by 414 members or 55% of the overall Family Care growth.

## MEMBER ENROLLMENT

At the end of calendar year 2020, Lakeland Care had 7,699 members enrolled in the Family Care program, which represents a 10.8% growth in membership over the prior calendar year.

## BUDGET

To validate this growth, Lakeland Care's operating revenues increased by \$67 million, or 23.7%, in 2020. The table below provides the Key Ratios for Lakeland Care, Inc. Direct Member Service Costs ended the year at 82.75% of revenue. Although this measure slightly increased in 2020, Lakeland Care remains above the industry average of 81.70%. Lakeland Care's other cost measures, Care Management and Administration as a percent of revenue, remain at or near industry averages as of 2020 third quarter results.

Key Ratios	2020 Actual YTD	2020 Industry Averages
Member Service Costs	82.75%	81.70%
Care Management	11.51%	11.20%
Combined Member Costs	94.26%	92.90%
Administration Expense	3.48%	3.40%

# 2020 FINANCIALS

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**Lakeland Care, Inc.**  
**Statement of Activities**  
**Year ended December 31, 2020**

<b>NET ASSETS</b>	<b>2020</b>
Operating Revenues	
Medicaid Capitation	\$308,914,796
Room and Board	\$26,720,066
Cost Share	\$9,156,971
Other	\$5,193,266
Total Operating Revenues	<u>\$349,985,099</u>
Operating Expenses	
Member Service Costs	\$295,841,073
Care Management Expenses	\$36,132,644
Administration Expense	\$10,924,856
Total Operating Expenses	<u>\$342,898,573</u>
Change in net assets operating	\$7,086,526
Nonoperating Revenues (Expenses)	
Prior Year IBNR adjustment	\$32,535
Interest Income	\$29,256
Other nonoperating revenues	\$1,795,462
Net Nonoperating Revenues (Expenses)	<u>\$1,857,253</u>
Provider Sustainability Expenses	<u>-\$698,873</u>
<b>CHANGE IN NET ASSETS</b>	<b>\$8,244,906</b>
Net Assets - Beginning of Year	<u>\$19,072,431</u>
<b>NET ASSETS - END OF YEAR</b>	<u><b>\$27,317,337</b></u>

# MEMBER SATISFACTION SURVEY

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Lakeland Care is committed to keeping members at the center of all it does and each member's voice and experience matters. One way to measure the success of that commitment and seek to understand about their experience with Lakeland Care is through a survey. Annually, a sample of LCI members or legal representatives complete a satisfaction survey that is intended to depict the member's overall satisfaction with the services and support provided to them. Below is an overview of the 2020 results:

- When asked "How often do you get the help you need from your Care Team?", over 70% of respondents answered with extremely or very often.
- Almost 82% of respondents indicated that they are extremely or very involved in making decisions about their Care Plan.
- Nearly 88% of respondents indicated their Care Team explains things to them clearly.
- Similarly, nearly 94% of members responded that their Care Team treats them respectfully.

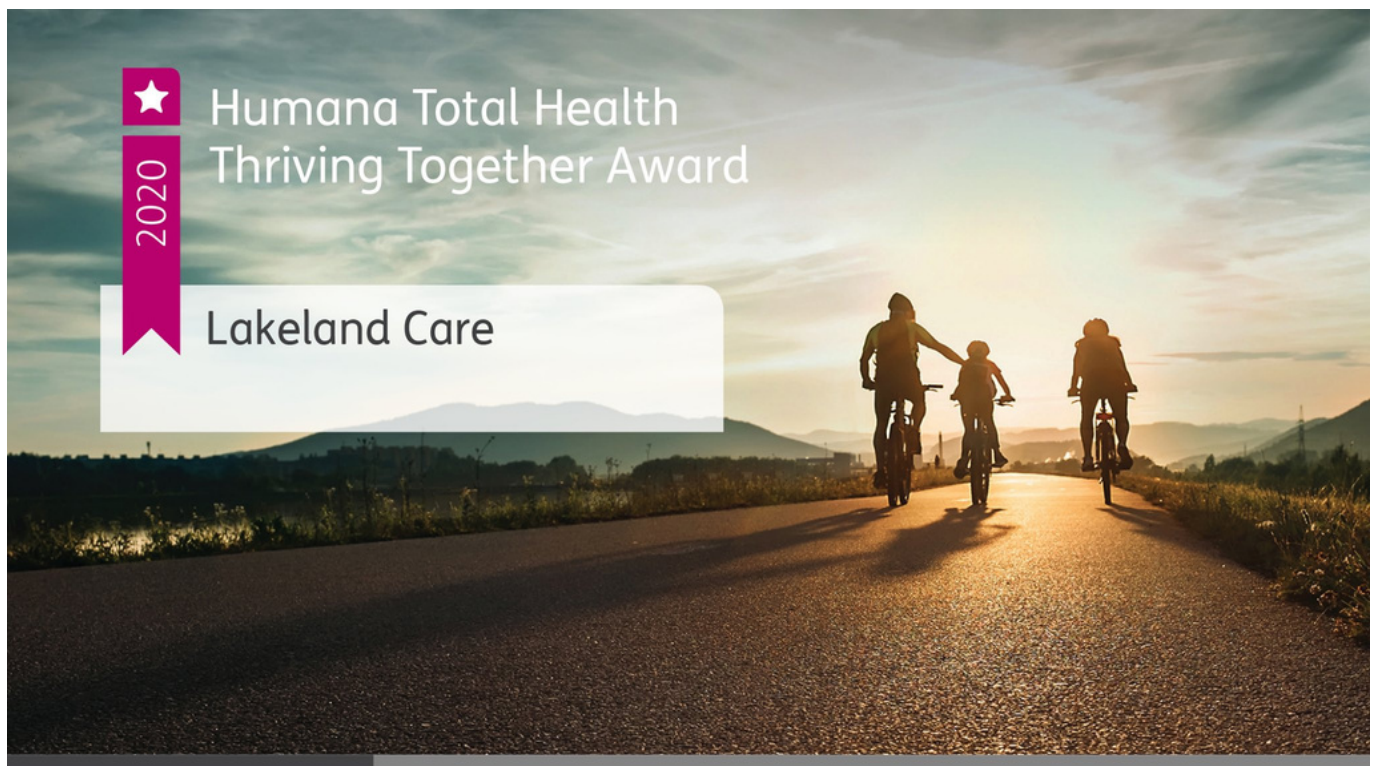
In addition to these noteworthy results, Lakeland Care is very proud of the fact that member satisfaction continues to improve each year. Lakeland Care remains committed to keeping members at the forefront of all we do. These results portray the commitment of our Care Teams in engaging members in the Care Planning process and developing plans to meet each members' unique needs.





# 2020 AWARDS

Lakeland Care is excited to announce that Humana presented Lakeland Care with the Thriving Together Award for 2020 for the fourth year in a row! The Thriving Together Award is given in recognition of Lakeland Care's commitment to a culture of employee health and well-being as demonstrated through high engagement in the Go365 Wellness Program. Thanks to all LCI employees and families for your time and dedication to making your well-being a priority.



**Humana.**

GCHJE9KEN 0418

Humana is pleased to recognize your commitment to building a culture of well-being and helping employees live healthier lives in 2020.

You've committed time and energy to make wellness a priority with Go365®. Sixty percent or more of your employees achieved Silver Status!

Granted by:

A handwritten signature in black ink, reading 'Bruce Brownail'.

President and Chief Executive Officer

# EMPLOYEE ENGAGEMENT

Engaged employees work with passion and feel a connection to their organization and its mission. Organizations have more success with engagement and improve business performance when they treat employees as stakeholders of their own future and the company's future. This means focusing on concrete performance management activities such as clarifying work expectations, getting people the support they need to do their jobs, providing development opportunities and continued learning, and promoting positive coworker relationships. Essentially, engagement is the emotional commitment an employee has to the organization and its goals.

Lakeland Care Inc. scored an Engagement Grand Mean score of 4.04 out of 5.0 in 2020, which is a slight decline from 2019 and is largely believed to be influenced by how employees were managing through COVID-19 challenges.

Despite this decline, LCI achieved a 9:1 engagement index, which is the measurement of engaged staff to disengaged staff. This ratio places Lakeland Care in Gallup's categorization of having a 'Best Practice Engagement Index' two years in a row.

When asked via the engagement survey, employees shared that LCI's flexible work model culture, mission/purpose and people-centric operations and emphasis on relationships are major strengths of the organization.

# NEW GREEN BAY EAST OFFICE

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The snip of a giant scissors officially marked the opening of Lakeland Care's second office in Green Bay. Lakeland Care's newest office is located at 2050 Riverside Drive. Lakeland Care staff welcomed the Greater Green Bay Chamber staff and ambassadors, area businesses, providers, and Lakeland Care board members to an Open House and Ribbon Cutting on February 6.

"We are excited to announce the opening of our new office in Green Bay," said Sara Muhlbauer, Chief Executive Officer of Lakeland Care. "Lakeland Care has experienced significant growth in membership over the last six months in Brown County. We look forward to continuing to provide quality services to the residents in Northeast Wisconsin."





# UNITED WAY DONATION

\$15,675 DONATED

to

14 UNITED WAYS

with

92% STAFF  
PARTICIPATION

Lakeland Care, Inc. (LCI) employees excitedly welcomed the opportunity to help the United Way during these challenging times. Lakeland Care employees donated \$15,675 to 14 local United Way organizations in Northeast and North Central Wisconsin. Lakeland Care's executive staff presented a check to Amber Kilawee from the Fond du Lac Area United Way who spearheaded the campaign with Lakeland Care.

Pictured left to right below: Amber Kilawee, Fond du Lac Area United Way; Sara Muhlbauer, LCI Chief Executive Officer; Dan Bizub, LCI Chief Financial Officer; Suzanne Sinjakovic, LCI Chief Administrative Officer; Brian Carmody, United Way Board Member. Lakeland Care provides Family Care services, a Medicaid managed care program providing managed long-term care services and supports.



# GIVING TO COMMUNITIES

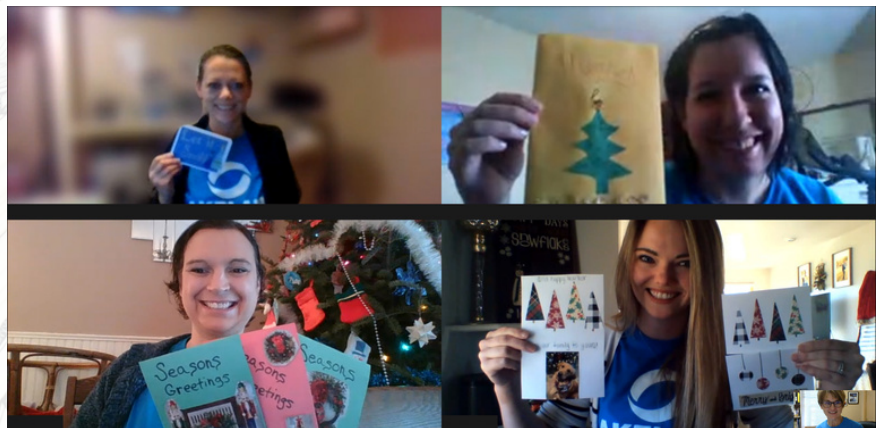
## 26 ORGANIZATIONS

1. Marinette Food Pantry
2. Foundations for Living Waupaca
3. Fox Valley Warming Shelter
4. Day by Day Warming Shelter
5. New Community Shelter
6. Camo Quilt Project
7. Paul's Pantry Green Bay
8. Shawano Area Food Pantry
9. Fond du Lac Food Pantry
10. Rhinelander Food Pantry
11. Peters Pantry Manitowoc
12. Oshkosh Area Food Pantry
13. Kewaunee County Food Pantry
14. Crivitz Food Pantry
15. Alzheimer's Association of Wisconsin
16. Cerebral Palsy, Inc.
17. Day by Day Warming Shelter
18. Care Committee
19. Merrill Community Homeless Center
20. Frederick Place
21. Our Sisters House
22. Envision Greater Fond du Lac
23. Hope House
24. Safe Haven
25. Solutions Center
26. Haven of Hope Marinette Homeless Shelter

For years, Lakeland Care employees have invested and volunteered to support causes throughout the communities that we, and our members, call home. Lakeland Care's Volunteer Time Off policy grants Lakeland Care employees paid time off to lend a helping hand at area nonprofits. Over the years, Lakeland Care's "CARE for a Cause" effort has raised over \$128,000 dollars to support hundreds of local charities.

# \$15,990.60

## DONATED IN 2020





# 2 YEAR TRIBAL PARTNERSHIP ANNIVERSARY

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In early 2018, Lakeland Care began a unique and groundbreaking journey in collaboration with the Menominee Indian Tribe of Wisconsin, Oneida Nation and Wisconsin Department of Health Services to facilitate the delivery of care management to eligible American Indian Family Care enrollees through a provider associated with a Native American Nation or Tribe.

This year, Lakeland Care celebrated our two year anniversary of partnerships with both Tribes.

In 2020, our tribal enrollments remained consistent throughout the year. We had 139 Menominee Indian Tribe of Wisconsin members enrolled and 13 Oneida Nation members enrolled.



A good mind. A good heart. A strong fire.





# PARTNERSHIPS WITH PROVIDERS



Lakeland Care has always enjoyed strong, positive relationships with the diverse array of providers with whom we partner to serve members and communities. This network of providers delivers high-quality, cost-effective care and supports to each person Lakeland Care serves. Our Lakeland Care team recognizes that partnership and collaboration with contracted service providers is an essential element of supporting members in reaching their goals.

This spirit of partnership with providers was never more important than in 2020, when the exceptional collaboration between Lakeland Care and service providers was tested by a threat of a magnitude never seen before. The COVID-19 pandemic presented tremendous challenges to service providers, and Lakeland Care is pleased to have been able to provide additional support to many providers through three different methods. In April, Lakeland Care purchased and distributed personal protective equipment to hundreds of providers. We also dispersed funding to some of our providers who experienced a reduction in utilization of services in order to sustain those businesses during the uncertain times of the pandemic.

Finally, Lakeland Care provided enhanced rates to many providers that experienced increased staffing demands and other challenges in responding to the unique conditions of mitigating risk to members and service provider personnel during the pandemic.

Our network of providers continues to honor the commitment of Lakeland Care to assist members in meeting their long-term care needs, seeking innovation and creativity in the name of excellent service and support, and delivering services that truly are tailored to the preferences and needs of the person receiving the service.

# 2020 C.A.R.E. AWARDS

Lakeland Care continues to recognize outstanding providers through the C.A.R.E. (Compassion, Accountability, Respect and Enrichment) Award. The C.A.R.E. Award is a way for our care teams to recognize the outstanding service of our providers and individual caregivers. Each quarter an internal Lakeland Care committee chooses three providers/caregivers from all care team submissions and the committee utilizes the C.A.R.E. principles to honor the recognized providers.



Touch Of Care

Touch of Care - John J.



Supportive Learning Care - Courtney K.



Villa Hope - Bill D.



Centennial Inn - Elizabeth Z.



Mahlstedt AFH - Bob and Judy M.



Fountainhead - Dan P.



GT Independence/GT Financial Services - Kay N.



Hands with Heart - Jill L.



Lakes Mobility Services, LLC - Scott H.



Colley Homecare - Mo C.



Supportive Learning Care - Shannan B.



Thoughts, LLC - Lance A.

# 2020 CAREGIVER OF THE YEAR

Each year Lakeland Care highlights a “Provider/Caregiver of the Year Award” to one provider who has consistently shown an exceptional level of C.A.R.E. and quality service over the past year.

In 2020, Robert and Judith Mahlstedt AFH, was awarded the Caregiver of the Year Award.

A Lakeland Care member who has lived with Bob and Judy for almost 20 years, recently had to be admitted to a nursing home for rehab. Bob and Judy have gone above and beyond to ensure that her needs are being met, and the nursing home staff have a better understanding of who she is. Due to COVID-19, they are unable to visit her face-to-face, so they worked with the nursing home to set up a video call. Being able to see them, as well as her long-term housemates really helped perk our member up. Bob and Judy are so much more than just providers or caregivers to our members who live with them. They work tirelessly to provide a loving, compassionate, and nurturing environment for the women in their care. They are also fierce advocates for the health and wellbeing of each woman. Words cannot express how thankful Lakeland Care is that our member and her housemates have you in their lives.



# COMPETITIVE INTEGRATED EMPLOYMENT

Over the course of 2020, the Employment Specialists focused on strengthening their relationships with external stakeholders such as Chambers of Commerce, Competitive Integrated Employment (CIE) Service Providers, school districts, and area communities. While the pandemic may have limited in person events and meetings, the Employment Specialists utilized a variety of virtual platforms to stay connected with external partners and service providers in growing inclusive program models and increasing employment opportunities for LCI members.

- Co-hosted a Community Conversation on the benefits of hiring individuals with disabilities.
- Partnered with Wisconsin Board for People with Developmental Disabilities (WI-BPDD) on a training series, Supporting Individuals to Achieve CIE
- As part of National Disability Employment Awareness Month, hosted a virtual event that included a panel of employers sharing their positive stories in hiring individuals with disabilities, and individuals with disabilities sharing their CIE success stories.
- Partnered with WI-BPDD and CIE service providers in piloting Partners with Business Model
- Employment Specialists obtained certification as CESP™ Certified Employment Support Professionals
- Project SEARCH: Nine members participated at sites in Appleton, Green Bay, Oshkosh, and Wausau
- Development of an internal quarterly CIE Newsletter to promote CIE, feature current events & activities, new information, and showcase member CIE success stories.

## PROVIDERS THAT EXPANDED INTO COMMUNITY-BASED MODELS

3

BUILDING FULL LIVES

4

PARTNERS WITH  
BUSINESS

3

COMMUNITY-BASED  
PREVOCATIONAL SERVICES

1

COMMUNITY-BASED  
DAY SERVICES

350

Lakeland Care members  
employed in Competitive  
Integrated Employment



# EXECUTIVE LEADERSHIP



Sara Muhlbauer  
Chief Executive Officer



Dan Bizub  
Chief Financial Officer



Jen Harrison  
Chief Operations Officer



Suzanne Sinjakovic  
Chief Administrative Officer

# BOARD OF DIRECTORS

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Jim Brey  
Board President



Allen Buechel  
Fond du Lac County



Judy Goldsmith  
Fond du Lac County



Mike Konecny  
Brown County



Barbara Larson-Herber  
Marinette County



Larry Lautenschlager  
Winnebago County



Todd Moely  
Fond du Lac County



Judy Ruggirello  
Manitowoc County



Bob Ziegelbauer  
Manitowoc County



Tom Otto

Lakeland Care would like to honor Tom Otto who unexpectedly passed away this year. Tom dedicated 7 years of service to Lakeland Care's Board of Directors.



Jim Kozickowski

Thank you to, Jim Kozickowski who retired from our Board of Directors in 2020. Thank you for dedicating 11 years to Lakeland Care's Board of Directors.