

State of Wisconsin

SENATE CHAIR
Howard Marklein

316 East, State Capitol
P.O. Box 7882
Madison, WI 53707-7882
Phone: (608) 266-0703



ASSEMBLY CHAIR
Mark Born

308 East, State Capitol
P.O. Box 8952
Madison, WI 53708-8953
Phone: (608) 266-2540

Joint Committee on Finance

MEMORANDUM

To: Members
Joint Committee on Finance

From: Senator Howard Marklein
Representative Mark Born

Date: May 2, 2023

Re: s. 16.515/16.505(2), Stats. Request

Attached is a copy of a request from the Department of Administration, received May 2, 2023, pursuant to s. 16.515/16.505(2), Stats., on behalf of the Board on Aging and Long-Term Care.

Please review the material and notify **Senator Marklein** or **Representative Born** no later than **Friday, May 19, 2023**, if you have any concerns about the request or if you would like the Committee to meet formally to consider it.

Also, please contact us if you need further information.


Attachments

HM:MB;jm



STATE OF WISCONSIN
DEPARTMENT OF ADMINISTRATION

Tony Evers, Governor
Kathy Blumenfeld, Secretary

Date: May 2, 2023
To: The Honorable Howard Marklein, Co-Chair
Joint Committee on Finance
The Honorable Mark Born, Co-Chair
Joint Committee on Finance
From: Kathy K. Blumenfeld, Secretary 
Department of Administration
Subject: s. 16.515/16.505(2) Request(s)

MAY 02 2023
St. Finance

Enclosed are request(s) that have been approved by this department under the authority granted in s. 16.515 and s. 16.505(2). The explanation for each request is included in the attached materials. Listed below is a summary of each item:

AGENCY	DESCRIPTION	2021-22		2022-23	
		AMOUNT	FTE	AMOUNT	FTE
BOALTC 20.432(1)(k)	Contracts with other state agencies				1.0*

* Project position ending September 30, 2025

As provided in s. 16.515, the request(s) will be approved on May 23, 2023, unless we are notified prior to that time that the Joint Committee on Finance wishes to meet in formal session about any of the requests.

Please contact Kirsten Grinde at (608) 266-1353, or the analyst who reviewed the request in the Division of Executive Budget and Finance, if you have any additional questions.

Attachments

CORRESPONDENCE/MemorandumState of Wisconsin
Department of Administration

Date: May 1, 2023
To: Brian Pahnke
From: Cory Stinebrink
Subject: Section 16.515/16.505(2) Request(s)

Attached is a s. 16.515/505(2) request analysis for your approval and processing.
 Listed below is a summary of each item:

DOA RECOMMENDATION:

<u>AGENCY</u>	<u>DESCRIPTION</u>	<u>2021-22</u>		<u>2022-23</u>	
		<u>AMOUNT</u>	<u>FTE</u>	<u>AMOUNT</u>	<u>FTE</u>
BOALTC 20.432(1)(k)	Contracts with other state agencies				1.00*

* Project position ending 9/30/2025

AGENCY REQUEST:

<u>AGENCY</u>	<u>DESCRIPTION</u>	<u>2021-22</u>		<u>2022-23</u>	
		<u>AMOUNT</u>	<u>FTE</u>	<u>AMOUNT</u>	<u>FTE</u>
BOALTC 20.432(1)(k)	Contracts with other state agencies				1.00*

* Project position ending 9/30/2025

BP APPROVAL 



STATE OF WISCONSIN
DEPARTMENT OF ADMINISTRATION

Tony Evers, Governor
Kathy Blumenfeld, Secretary
Brian Pahnke, Administrator

Date: May 1, 2023

To: Kathy Blumenfeld, Secretary
Department of Administration

From: Cory Stinebrink
Executive Policy and Budget Analyst

Subject: Request Under s. 16.505(2) from the Board on Aging and Long-Term Care for the Creation of 1.0 FTE Program Revenue Project Position.

Request:

The Board on Aging and Long-Term Care requests the creation of 1.0 FTE program revenue-service project position to support the expansion of long-term care programming under the Volunteer Ombudsman Program, as a result of continued increasing demands for assisted living communities. The position would be funded from the contracts with other state agencies appropriation under s. 20.432 (1)(k) and would expire on September 30, 2025.

Revenue Sources for Appropriation(s):

Funding for the position would be provided through contractual services from the Department of Health Services from grant awards under the Social Security Administration Title XX Section 2043(a)(1)(A) Block Grants and Programs for Social Services and Elder Justice from the Administration for Community Living within the U.S. Department of Health and Human Services.

Background:

The Board on Aging and Long-Term Care was created in 1981 with the mission to advocate for the interests of the state's long-term care consumers, to inform those consumers of their rights, and to educate the public at large about health care systems and long-term care. The board's state and federal mandate is to monitor quality of care and to advocate for the health, safety, welfare and protection of rights of older adult long-term care residents.

The board operates three primary programs: the Ombudsman Program, the Volunteer Ombudsman Program and the Medigap Helpline. The Ombudsman Program provides statewide advocacy services to residents age 60 and older of skilled nursing facilities, assisted living homes and community-based programs, such as Family Care and IRIS (Include, Respect, I Self-Direct). The Volunteer Ombudsman Program leverages volunteers to conduct visits to skilled nursing homes to assist residents with support on issues, concerns or complaints. The Medigap Helpline provides counseling services and assistance with questions about Medicare and various health insurance topics at no cost to callers.

Kathy Blumenfeld, Secretary
Page 2
May 1, 2023

Analysis:

The board's request is to support expanding services provided by the Volunteer Ombudsman Program to older adults residing in assisted living homes. Since its establishment, the program has primarily focused on providing support to skilled nursing facilities in order to service the largest number and concentration of long-term care residents. The program's goal is to expand services to assisted living home residents.

Due to the distinct regulatory landscapes and differences between skilled nursing facilities and assisted living homes, the Volunteer Ombudsman Program has not yet expanded to support assisted living homes. New training materials and processes would need to be created and then implemented in order to build the necessary tailored knowledge and skillsets. The program does not currently have the ability to absorb the associated targeted training efforts with currently existing duties and workloads.

The requested position would be an ombudsman services specialist – advanced position and would be responsible for expanding the Volunteer Ombudsman Program to support assisted living homes through:

- Developing tailored training materials, policies and procedures;
- Developing and implementing the new training program;
- Providing technical assistance to other volunteer coordinators for program expansion in their regions;
- Training volunteers; and
- Coordinating and providing oversight of Volunteer Ombudsman Program staff assigned to the multicounty regions in their provision of support services to assisted living homes and skilled nursing facilities.

With the anticipated continued growth of long-term care statewide, the program's goal of expansion is necessary to sufficiently support long-term care for the state. Additional volunteer program planning and oversight would create optimal service delivery for providing expanded support to the growing population of aging Wisconsin residents.

The board has been contracted a one-time amount of \$329,641 PR-S by the Department of Health Services as supplemental funding to the Long-Term Care Ombudsman program from the American Rescue Plan Act of 2021 to support operations for the expanded long-term care population. These funds would be used to support this position. The appropriation from which this position would be funded is a continuing, all moneys received appropriation. As such, expenditure authority for the position can be adjusted administratively in the accounting system.

The position will expire on September 30, 2025.

Recommendation:

Approve the request.



STATE OF WISCONSIN
BOARD ON AGING AND LONG TERM CARE

1402 Pankratz Street, Suite 111
Madison, WI 53704-4001

Ombudsman Program (800) 815-0015
Medigap Helpline (800) 242-1060
Part D Helpline (855) 677-2783
Fax (608) 246-7001
<http://longtermcare.wi.gov>

MEMBERS of the BOARD
Abigail Lowery
Tanya L. Meyer
Dr. Valerie A. Palarski
James Surprise
Dr. Dale B. Taylor

EXECUTIVE DIRECTOR
and
STATE OMBUDSMAN
Jessica L. Trudell

Date: April 7th, 2023
To: Brian Pahnke, Administrator
Division of Executive Budget and Finance
From: Jessica Trudell, Executive Director/State Ombudsman
Board on Aging and Long Term Care
Subject: Request for Project Position Authority Under s. 16.505

DocuSigned by:
Jessica Trudell
04C3F8C5728E4HE

Request

The Board on Aging and Long Term Care (BOALTC) requests the creation of 1.00 FTE program revenue-services (PR-S) project position under s. 20.432(1)(k), Wis. Stats., *Contracts with other state agencies* (numeric 131). The requested 1.00 PR-S FTE Ombudsman Services Specialist - Advanced is necessary to support the expansion of long-term care programming under the Volunteer Ombudsman Program (VOP), as a result of continued increasing demands for assisted living communities.

Funding for the position would be provided through contractual services from the Wisconsin Department of Health Services (DHS) from grant awards under the Social Security Administration (SSA) Title XX Section 2043(a)(1)(A) Block Grants and Programs for Social Services and Elder Justice from the Administration for Community Living (ACL) within the U.S. Department of Health and Human Services (HHS).

Please review the proposed organizational chart, position description, and grant agreement (Attachments 1., 2. and 3., respectively), in conjunction with the following information.

Background

BOALTC was created by the Wisconsin Legislature in 1981 with the mission to advocate for the interests of the state's long-term care consumers, to inform those consumers of their rights, and to educate the public at large about health care systems and long-term care. BOALTC's state and federal mandate is to monitor quality of care and to advocate for the health, safety, welfare, and protection of rights of older adult long-term care residents.

To carry forward its mission and responsibilities, BOALTC operates three primary programs: the Ombudsman Program, VOP, and the Medigap Helpline and Part D Helpline. The Ombudsman Program provides statewide advocacy services to residents age 60 and older of skilled nursing

facilities (SNFs), assisted living homes (ALHs) and community-based programs (i.e., Family Care and IRIS [Include, Respect, 1 Self-Direct]); VOP leverages volunteers to conduct visits to skilled nursing homes to assist residents with support on issues, concerns, or complaints; and the Medigap Helpline and Part D Helpline provides counseling services and assistance with questions about Medicare and various health insurance topics at no cost to callers.

VOP was established in 1994 to support the Ombudsman Program and to enhance its advocacy through the recruitment and training of volunteers from the community. The Ombudsman Program has 17.00 Regional BOALTC Ombudsman FTE assigned to support SNFs and ALHs statewide and VOP currently has 5.00 FTE staff and 1.00 FTE supervisor.

VOP volunteers function as skilled BOALTC representatives and undergo intensive screening prior to being selected; candidates are required to apply, complete a conflict-of-interest screening form, pass a criminal background check, provide references, and to be interviewed by a Volunteer Coordinator. Once a volunteer has been successfully screened and has received the required training under the HHS ACL training standards, they are able to serve as a Volunteer Ombudsman (VO) and as a certified Representative of BOALTC.

The VOs make weekly unannounced visits to their assigned nursing home(s) and serve as liaisons of important care and treatment issues, as well as to provide notes on facility closures to BOALTC Regional Ombudsmen for further investigation and support. With resident consent, the VOs also bring care and treatment concerns to the attention of facility leadership or administration. The VOs are trusted support for residents and are oftentimes the sole point of contact for discussing long-term care issues.

Since its establishment, VOP has primarily focused on providing volunteer support to SNFs in order to service the largest number and concentration of long-term care residents. VOP began by serving four counties of the state and has since expanded, currently servicing SNF residents in 32 counties of the state. VOP's ultimate goal is to expand services to ALH residents and to provide a structure for volunteers to serve SNF residents in every county.

SNFs and ALHs vary in a number of ways; while SNFs typically provide care in a medical setting and serve a larger number of residents, individual ALH settings may serve fewer residents and provide more of a traditional home-like setting in the form of Adult Family Homes (AFHs), Residential Care Apartment Complexes (RCACs) or Community Based Residential Facilities (CBRFs). Regardless of the size or location of a long-term care home, each resident has the same right to receive advocacy services from BOALTC.

Due to the distinct regulatory landscapes and differences between SNFs and ALHs, VOP has not yet expanded to support ALHs due to the new training materials and processes that would need to be created and then implemented in order to build the necessary tailored knowledge and skillsets for support provision. VOP staff do not currently have the ability to absorb the associated targeted training efforts with currently existing duties and workloads.

As shown in Table 1 the number of long-term care residents and facilities has steadily increased over time. From 1990 to 2020, there has been a 291% and 355% increase in the number and

capacity of ALHs, respectively, while a decrease of (19%) and (43%) has been experienced for SNFs under the same.

As of February 27th, 2023, there are nearly 6,000 long-term care homes and nearly 90,000 licensed or certified beds. Based on the Institute of Medicine Study (1995), the recommended ratio of Ombudsman to client is 1:2000. Wisconsin’s current Ombudsman to client ratio is 1:6700.

Table 1. Assisted Living Home and Skilled Nursing Facility Data 1990 - 2020

Provider Type	1990		2000		2010		2020	
	Number	Capacity	Number	Capacity	Number	Capacity	Number	Capacity
Assisted Living Home[1]	1,084	13,960	2,165	30,145	3,261	45,932	4,239	63,455
Skilled Nursing Facility	446	49,686	424	46,147	399	36,022	360	28,171

Source: Wisconsin Department of Health Services; Division of Quality Assurance (DQA) as viewed February 27th, 2023.

[1] Assisted Living Home data excludes Adult Family Homes that are certified to care for 1-2 residents due to lack of tabulated data available prior to April 2022 from the DQA. As of April 2022, there were 1,590 1-2 resident AFH facilities.

With the anticipated continued growth of long-term care statewide, VOP’s goal of expansion is necessary to sufficiently support long-term care for the state. The vast regions of service across the state make it critical for local volunteers to be deployed in support of the observed expansion in the number of facilities and residents served. Additional volunteer program planning and oversight would create optimal service delivery for providing expanded support to the growing population of aging Wisconsin residents.

The requested 1.00 project Ombudsman Services Specialist - Advanced would be responsible for the extension of VOP support to ALHs by: developing tailored training materials, policies, and procedures; developing and implementing the new ALH training program; providing technical assistance to other Volunteer Coordinators for program expansion in their regions; training volunteers; and coordinating and providing oversight of VOP staff assigned to the multi-county regions in their provision of ALH and SNF support services.

Analysis

The 1.00 PR-S FTE project position would be authorized under appropriation numeric 131; the projected annualized cost of the position is \$77,000 PR-S, which can be seen in Table 2. below. This includes \$10,200 annually for estimated personnel-variable supplies and services expenditures including travel. Salary costs identified for the position are derived from the scheduled minimum hourly rate of the position classification. The structure of appropriation numeric 131 is continuing and therefore no commensurate budget authority is requested.

Table 2. Estimated Project Position Expenditures

Position	FTE	Approximate Annual Cost	Project (3-Year) Cost
Ombudsman Services Specialist – Advanced	1.00		
Salary		45,000	141,500
Fringe		21,800	68,600
Supplies and Services		10,200	30,600
Total	1.00	\$77,000	\$240,700

The total projected cost for a maximum 36-month duration (three years) of the 1.00 PR-S FTE project position would be \$240,700 PR-S, as can be seen above. This cost assumes 2.0% general

wage adjustments in January of 2024 and 2025 and the 27th pay period that will occur in state fiscal year 2023-24.

BOALTC has been contracted a one-time amount of \$329,641 PR-S by DHS as supplemental funding to the Long Term Care Ombudsman program under SSA Title XX HHS from the American Rescue Plan Act of 2021 (ARPA) to support operations for the expanded long-term care population. This contracted amount would be used to fund the three-year project position, which currently must be expended by September 30th, 2025, which is the end of the period of performance. As such, the position authorization is requested for the aforementioned maximum of three years, assuming a start date of May 2023 or as soon as practical, through September 30th, 2025.

Please note that while funding would be utilized on a limited term basis to fund the project position, VOP's overall program model results in cost savings due to its primary use of unpaid volunteers. According to the Independent Sector, in Wisconsin, the current value per hour for volunteer time is \$29.95¹; with the current 66 volunteers, the cost avoidance to the State associated with VOP is an estimated \$29,000 annually.

Request

The Board on Aging and Long Term Care requests the creation of 1.0 FTE program revenue-services project position under s. 20.432(1)(k), Wis. Stats., from a period of the date of hire to no later than the ending of the performance period (of September 30th, 2025), to support the expanding services provided by the Volunteer Ombudsman Program to older adults residing in assisted living homes.

Please contact Executive Director and State Ombudsman, Jessica Trudell, at Jessica.Trudell@wisconsin.gov, with any questions related to this request.

cc: Travis Martin, Budget and Policy Analyst, Bureau of Financial Management, DOA

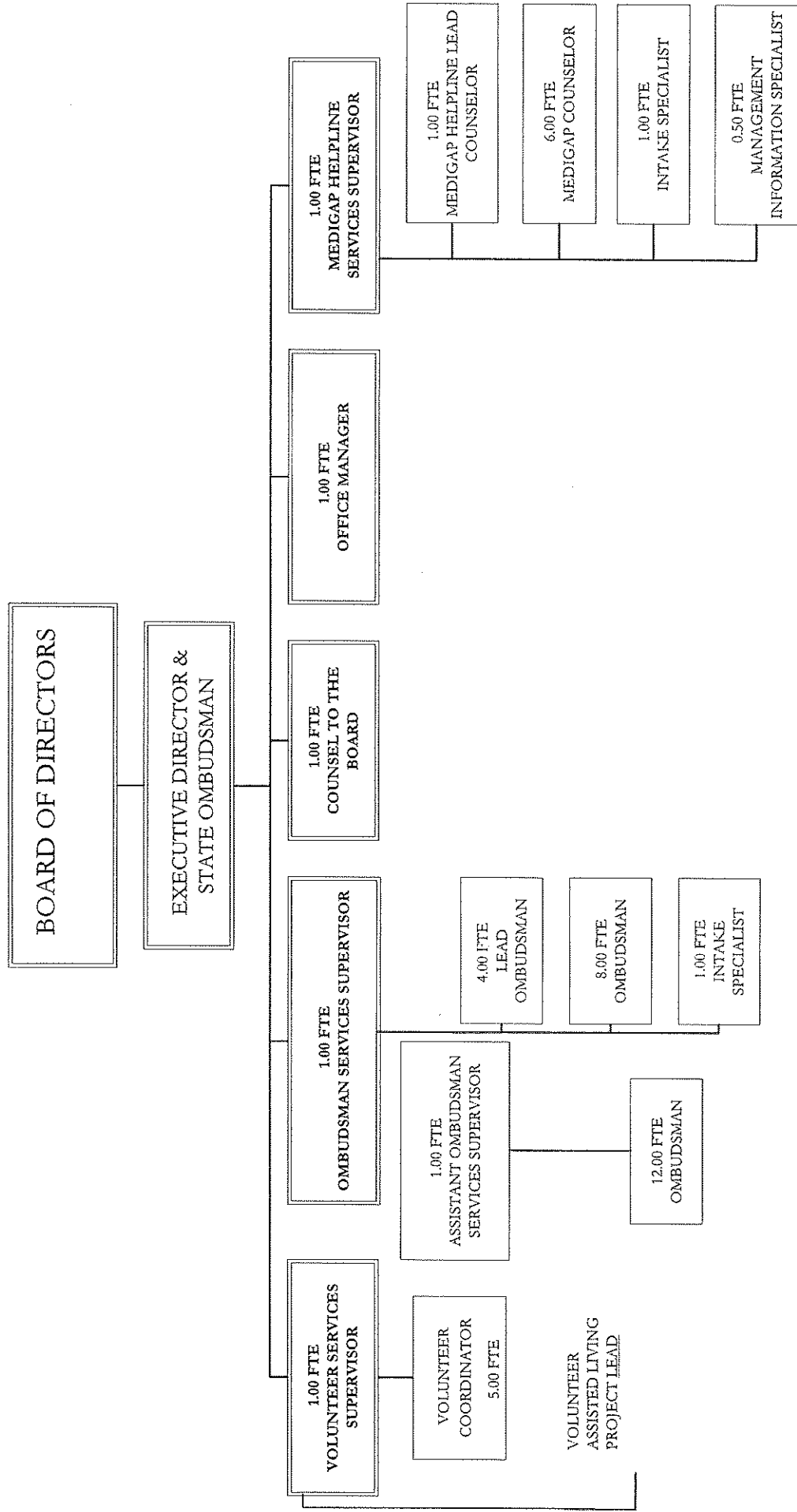
Attachments: Attachment 1. Proposed Organizational Chart
Attachment 2. Position Description
Attachment 3. Grant Agreement

¹ Value of Volunteer Time. Independent Sector, 2022, <https://independentsector.org/resource/value-of-volunteer-time/>. Accessed Feb. 2, 2023.



Board on Aging and Long Term Care

Proposed Organization Chart



**Working title: Assisted Living Volunteer Project Coordinator
(Ombudsman Services Specialist - Advanced)
Volunteer Ombudsman Program
Board on Aging and Long Term Care
Position Description - PROJECT**

Position Summary:

Under the general supervision of the Volunteer Services Supervisor, this position will be responsible for the expansion of the Volunteer Ombudsman Program into assisted living homes. This position provides technical assistance to other Volunteer Coordinators and will be responsible for training volunteers and for coordinating and overseeing the activities of volunteer ombudsmen in the assigned multi-county regions. Once the assisted living program has been established, this position will provide expertise and technical assistance to expand the volunteer ombudsman program to assisted living homes in other regions of the state.

This position supports the Ombudsman Program (Ch. 16.009(2)(b) and (4). *Wis. Stats.*), as mandated by the Older Americans Act (42 USC 3058f – h) and as implemented by federal rule at 45 CFR 1321 and 45 CFR 1324. The Volunteer Coordinator serves as the liaison between the Volunteer Ombudsmen and the Regional Ombudsmen. The position requires the ability to self-prioritize, document work, collect data and manage time efficiently.

This position is located in a satellite office and is responsible for their own administrative and operational support without onsite technical or supervisory staff.

Goals and Worker Activities:

A. Recruitment and Screening of Volunteers

Time: 20%

- A1. Recruit appropriate potential volunteers to serve in assisted living homes in the assigned regional counties.
- A2. Utilize a variety of media outlets, public presentations, exhibit fairs, conferences, networking sessions, current volunteers, posting of recruitment posters, and word of mouth to recruit potential volunteer ombudsmen.
- A3. Screen all potential recruits via telephone and by using the Board on Aging screening process and tools. Discuss, with the Supervisor, all applicants' suitability upon each applicant's completion of formal application, any conflict of interest concerns, and any issues arising from the applicant's Background Information Disclosure (BID) form processed by the Legal Counsel.
- A4. Provide the Volunteer Services Supervisor with regular updates specifically including the number of contacts from persons inquiring about the VOP and the number of these contacts who are qualified and scheduled for training.

B. Training, Placement and Management of Volunteers

Time: 20%

B1. In consultation with the Volunteer Services Supervisor, Legal Counsel and the State Ombudsman, create and implement a training program and training manual for volunteer recruitment and training in assisted living homes; create and implement program policies for assisted living homes.

B2. Plan, implement and conduct initial training classes for all new volunteer recruits. A minimum of two classes per year is required.

B3. Review the list of new volunteer recruits with the Regional Ombudsman prior to and following completion of each class for appropriate facility placement.

B4. Conduct facility on-site placement with each new volunteer to orient them to their volunteer duties at each individual's assigned facility.

B5. Demonstrate the process of resident interactions, the focal points for observations, how to engage in exit interviews with assisted living staff, and all responsibilities that a volunteer ombudsman has during the facility visit.

B6. Plan and implement, with supervisor approval, continuing education in-services (a minimum of 3 per year) and routine coffee klatches for volunteers in all assigned regions.

B7. Communicate with each volunteer routinely, in person when possible, and with a minimum monthly phone call to discuss the volunteer monthly reports. Support communication with follow-up e-mail contact.

B8. Consult with, and support individual volunteers regarding concerns, comments, and observations made during their facility visits including, but not limited to, resident rights issues and possible resolutions.

B9. Provide education about the Volunteer Ombudsman Program to assisted living management and staff, potential volunteers and the public at large.

B10. Make routine unannounced joint visits to the assisted living home with each volunteer and assist the volunteers in skill development, on-site problem resolution, and communications with assisted living residents and staff.

B11. Serve as Volunteer Ombudsman Program liaison with the Regional Ombudsman (RO). Communicate with RO routinely and consistently regarding program and volunteer updates.

B12. Maintain a current and accurate Volunteer Ombudsman roster and provide this roster to Volunteer Services Supervisor monthly, and upon request.

C. Volunteer Ombudsman Program Technical Assistance

Time: 25%

- C1. Provide technical assistance to Volunteer Coordinators and Volunteer Ombudsmen with a focus on resident rights in assisted living facilities.
- C2. Provide support and assistance to Volunteer Coordinators in other regions of the state on program expansion into assisted living facilities, best practices for volunteer recruitment and complaint resolution in assisted living homes.
- C3. Assist Volunteer Services Supervisor with orientation of new staff and expansion of the Volunteer Ombudsman Program into assisted living homes.
- C4. Provide technical assistance to elected officials, state agencies, county benefit specialists and others at the direction of and with the permission of the Volunteer Ombudsman Services Supervisor and State Ombudsman.
- C5. Understand and maintain expertise and inform program of changes to the federal and state laws and regulations generally relating to long-term care of older adults, assisted living regulations, and the Long Term Care Ombudsman Program.

D. Program Quality Monitoring, Quality Improvement and Reporting

Time 20%

- D1. Develop a data collection methodology, review and analyze data for program improvement; monitor achievement of goals and key milestones; identify issues and provide recommendations for resolution.
- D2. Ensure the Volunteer Ombudsman Program's quality effectiveness by regularly monitoring the program's database and ensuring timely and accurate data reporting; identify trends and work with the Volunteer Services Supervisor and State Ombudsman on trend analysis and required action toward improved systems advocacy in assisted living homes and improved volunteer recruitment and retention.
- D3. Provide periodic, and upon request, verbal and written reports to the Volunteer Services Supervisor, State Ombudsman and Executive Director about the operational effectiveness of the program in the region.
- D4. As directed, participate in the collection, analysis, and formatting of data for inclusion in agency reports.
- D5. Assist with development of staff orientation and continuing education materials; evaluate continuing education needs of staff toward the provision of highest quality advocacy based on current trends, recommend specific training topics, and participate in the presentation of the program content.
- D6. Assist in the development of performance standards for Volunteer Coordinators, Volunteer Ombudsmen, and quality outcomes measures for the Volunteer Ombudsman program expansion into assisted living facilities.

D7. Distribute satisfaction survey to Volunteer Ombudsmen upon each volunteer's departure from program, and on an annual basis. Provide satisfaction survey report results to Volunteer Services Supervisor, State Ombudsman and Executive Director with recommendations for program improvement.

D8. Contribute to the Volunteer Ombudsman Program Board report, attend Board meetings, and present to the Board of Directors as requested.

E. Administrative responsibilities:

Time: 5%

E1. Maintain a current and timely schedule, entering all required data activities, including Medicaid time reporting into the database and the Department of Administration Human Resources Production Timesheet System (STAR).

E2. Enter and submit all required agency data to include STAR, monthly travel vouchers, and weekly schedules.

E3. Maintain working knowledge, skills, and ability to use a computer, e-mail, Microsoft365, virtual meetings and other necessary applications to enable compliance with the responsibilities of the position.

E4. Compliance with all documentation required by the agency and proper maintenance of database records.

E5. Program a summary of the activities of the program for inclusion in the Volunteer Program Newsletter and contribute to the newsletter development; in consultation with the supervisor and Legal Counsel, author press releases regarding topics of interest to volunteers, long-term care residents and the public at large.

F. Professional Development

Time: 5%

F1. Attend required agency staff in-services including all supervisor assigned and approved self-development opportunities.

F2. Participate in local and statewide professional volunteer management organizations with approval of the Volunteer Services Supervisor.

F3. Prepare and make presentations regarding the Volunteer Ombudsman Program to the community at large, with supervisor approval.

G. Other Duties as Assigned

Time: 5%

G1. Participate in agency equity & inclusion training and initiatives and other trainings required of state employees. Support and encourage an inclusive work environment.

G2. Manage records created as a state employee and comply with records retention and disposition schedules; assisted Legal Counsel with records searched as requested.

G3. Additional duties in furtherance of the mission of the program as assigned.

Required Knowledge, Skills, and Ability:

1. Project management or experience performing supervision or lead worker activities such as program monitoring and evaluation, creation of training programs and manuals, developing and implementing policies and procedures.
2. Experience with program quality monitoring, data collection and analysis and implementing program improvements.
3. Demonstrated professional experience advocating on behalf of long-term care consumers, individuals with developmental disabilities, marginalized communities or those in Home and Community Based service programs Family Care or IRIS.
4. Ability to organize program logistics, conduct trainings, and ensure compliance to agency policies, state and federal law.
5. Knowledge of modern recruitment, retention, and supervision methods of volunteers; previous experience working with volunteers.
6. Experience building and maintaining relationships with internal and external partners.
7. Working knowledge of statutes, rules and regulations pertaining to long-term care homes and advocacy, with specific knowledge regarding assisted living communities: Community Based Residential Facilities (CBRFs), licensed and certified Adult Family Homes (AFHs) and Residential Care Apartment Complexes (RCACs), home and community based services (HCBS) as well as patient rights, mental illness and developmental disabilities.
8. Working knowledge of statutes governing care for the older adults in long-term care, including Wis. Stats. chs. 50-55, DHS Admin. Code chs. DHS 83, 88, 89, 132, 42 § USC 1396r(c) & 42 § CFR 483.10.
9. Knowledge of and ability to use Microsoft365 and other necessary applications for documentation, volunteer recruitment and data entry.
10. Effective oral and written communication skills.
11. Effective conflict resolution and problem-solving skills.
12. Experience in public speaking to both large and small groups of professionals or consumers.
13. Ability to work independently and effectively.
14. Ability to prioritize job responsibilities including meeting deadlines and complying with directives and requests from Supervisor.
15. Ability to work cooperatively and collaboratively as part of a team.

Special Requirements

- The ability to independently travel periodically within the State of Wisconsin for outreach and training events. A valid Wisconsin driver's license that meets the State's Risk Management requirements or the ability to obtain one's own reliable transportation on a consistent basis.



Notice of Award

Title of Program: (LOC6) American Rescue Plan (ARP) for LTCO under SSA Title XX Section 2043(a)(1)(A)

Award Authority: P.L. 117-2 under P.L. 115-123 (SSA)

Grantee:

Wisconsin
Wisconsin Department of Health and Social Services
Director
1 West Wilson Street
Suite 450
MADISON, WISCONSIN 53707

Date: August 1, 2022

Grant No.: 2201WILOC6-00

Award Instrument: Grant (Formula)

Project Period: 08-01-2022 - 09-30-2025

Budget Period: 08-01-2022 - 09-30-2025

EIN: 1396006469B1

DUNS#: 036448835

CFDA: 93.747

UEI#: CG2SZ7HCNV54

Object Class Code: 41.15

Appropriation	CAN	Award This Action	Cumulative Grant Award to Date
75-X-0142	2022,299C6J2	\$329,641.00	\$329,641.00
	Total	\$329,641.00	\$329,641.00

ACL Contact Information:

Please find your assigned ACL programmatic and fiscal contacts on ACL's website at <https://www.acl.gov/grants/acl-mandatory-grants-programmatic-and-fiscal-contacts>.

Emmanuel Ekwo
ACL Grants Officer

Terms and Conditions:

1. This grant is issued under the authority of the American Rescue Plan Act of 2021 (P.L. 117-2) for activities authorized under the Elder Justice Act Section 2043(a)(1)(A) of Title XX of the Social Security Act [Public Law 74-271] [As Amended Through P.L. 115-123, Enacted February 9, 2018]. The terms and conditions of this Notice of Award (NoA) and other requirements have the following order of precedence: (1) statute; (2) executive order; (3) program regulation; (4) administrative regulation found in 45 CFR Part 75; (5) agency policies; and (6) Any additional terms and conditions and remarks on NoA.

Terms and Conditions: Please visit ACL's website at <https://www.acl.gov/grants/managing-grant> to view the terms and conditions, including but not limited to:

- Prohibition on certain telecommunications and video surveillance services or equipment

ACL Title of Program: American Rescue Plan (ARP) for LTCO under SSA Title XX Section 2043(a)(1)(A)
Grant No.: 2201WILOC6-00
Date: August 1, 2022

- SAM.gov / DUNS Requirement
- Latest Consolidated Appropriations Act
- National Policies including Trafficking Victims Protection Act, Whistleblower Protections, DOMA: Implementation of Same-Sex Spouses/Marriages, Stevens Amendment, and Antidiscrimination.

Federal Funding Requirements: Please visit ACL's website at <https://www.acl.gov/grants/managing-grant> to view the federal funding requirements, including but not limited to:

- Federal Funding Accountability and Transparency Act (FFATA)
- Federal Awardee Performance and Integrity Information System (FAPIS)

2. Award Acceptance: Initial withdrawal of funds by the recipient, constitutes acceptance of the terms and conditions of this award. By requesting or receiving funds under this award, the recipient assures that it will carry out the project/program described in its approved state plan(s) as amended by the State Ombudsman plan submitted in response to the funding opportunity and will comply with the terms and conditions and other requirements of this award.

3. Withdrawals of funds are not to exceed the total grant award shown above under provisions of Treasury Circular No. 1075. Failure to adhere to these requirements may cause the suspension of grant funds.

4. SF-425 Financial Reporting: Grantee is required to submit SF-425s on a semi-annual basis. The SF-425 shall be submitted using the HHS' Payment Management System (PMS). PMS website is located at: <https://pms.psc.gov>. The first semi-annual report is for the first 8 months (8/1/2022 - 3/31/2023). All subsequent reports cover 6-month periods. Reports are due within 30 days for the periods ending 3/31 and 9/30 (due 4/30 and 10/30) through September 30, 2025, a final SF-425 is due within 120 days after 9/30/2025 (due 1/31/2026). If a final SF-425 report will be submitted January 31, 2026, a semi-annual report for September 30, 2025 is not required.

5. Programmatic Reporting: Grantee is required to submit programmatic reports in the National Ombudsman Reporting System by January 31 of each year.

6. Spending Plans: Grantee is required to update the spending plans as state plans by March 1, 2023 for use of funds changes or funding amount changes.

Remarks:

1. The grant award for this program to your state has been approved for the project period; August 1, 2022 - September 30, 2025 after review of the Ombudsman plans and letter of assurance. The period for liquidation of the obligations is through December 31, 2025, 90 days after the project end date.

2. Payment under this award will be made available through the HHS Departmental Payment Management System (PMS). PMS provides instructions for making withdrawals of Federal funds. When requesting payment from PMS, please use your P account login and reference the Grant No. listed above for payment. Instructions regarding payments can be obtained at <https://pms.psc.gov/training/pms-user-guide.html#Request>, or contact your PSC Account Liaison; 1-877-614-5533; PMSSupport@psc.gov.

3. Beginning April 1, 2022, ACL grant recipients are no longer required to complete the cash transaction section (lines 10a - c) of the SF425 Federal Financial Report (FFR) in the Payment Management System (PMS). New functionality within PMS will pre-populate the information with data reported from grantee's cash drawdown requests. As a result, this will help reduce burden and redundancy of data entries for recipients.

Additional and detailed information can be found on [acl.gov](https://acl.gov/grants/notification-recipients-retirement-pms-federal-cash-transaction-reports-fctrs): <https://acl.gov/grants/notification-recipients-retirement-pms-federal-cash-transaction-reports-fctrs>.

4. Special Clause for Change in Key Personnel: Per 2 CFR 200.308, recipients of federal funds must request approval from the grantor for a number of changes related to the grant, including a Change in Key Personnel identified in the application for federal funds or in the grant award. The regulation defines a Change in

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Key Personnel as the replacement or change in status (such as an absence for any continuous period of 3 months or more, or reduction of time devoted to the project by 25 percent or more from the level in the approved application) of the Principal Investigator/Project Director (PI/PD).

Please click on following link for ACL process to request Change in Key Personnel:
https://acl.gov/sites/default/files/grants/Mandatory_Formula%20Grantee%20Notice_Mandatory_Formula%20Grants%20Module%20in%20GrantSolutions_Final.pdf.

5. Federal requirements regarding Cash Drawdowns listed in 2 CFR Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements can be found on acl.gov:
<https://acl.gov/grants/memorandum-grantees-acl-mandatoryformula-grants>.