



# 2023 CCLS ANNUAL REPORT

# Table of Contents

Letter from Board Chair and CEO	_____	1
Mission, Vision, and Philosophy	_____	2
CCLS History	_____	3
Celebrating Our 50th Anniversary	_____	4
Fundraising Highlights	_____	5
Fast Pace Medical Staffing & Creative Living Environments	_____	6
CCLS Training and Nursing	_____	7
Key Financial Data	_____	8
Donor Thank You	_____	9
Award Winners	_____	10
CCLS Board Members and Executive Staff	_____	11
Office Information	_____	12
Event Sponsor Acknowledgment	_____	13

# MESSAGE FROM CCLS CEO & BOARD CHAIR

2023 marked the 50th anniversary for Creative Community Living Services (CCLS) providing care and support to people with developmental disabilities, the frail, and elderly. We are indebted to the four men who many years ago had a vision that people with developmental disabilities had a right to better living conditions and to be part of the larger community.

Over the past five decades there have been changes to CCLS, including the restructuring of reimbursement, policies, rules, and regulations. However, the one constant we have stayed true to is the mission: *To establish individualized community support that will preserve and enhance the dignity and rights of those who rely on others while seeking their own level of independence.*

We also continue to have a strong commitment from our Board of Directors and staff, some who have been part of CCLS for many decades! We are fortunate to have individuals who care deeply about the people we assist and are passionate about improving their health and wellbeing.

In 2023, we celebrated our 50 years by hosting fun activities, including coloring contests, planting flowers, an ice cream social, a sock hop, and decorating quilt squares for the large and beautiful 50th anniversary quilt, which now hangs in the Watertown office. The activities culminated with an event held on October 11 at the Watertown Library bringing together community members, donors, staff, and sponsors to celebrate 50 years of commitment and support. Through this event, we were able to raise over \$10,000 that went to support the people we serve.

We also took some time to reflect on the past five decades and think about the future of the organization. The Board of Directors and staff believe in staying true to the organization's mission and becoming more innovative and growing our current services, including nursing, training, and quality assurance. To this end, we are embarking on a marketing campaign to reach new providers and businesses needing the services we provide.

As you read the annual report, you will learn more about the excellent work we do at CCLS and how over the past 50 years, we have continued to be a crucial partner in the developmental disability community. Your generosity and support continue to allow us to meet individuals where they are and provide the services they need to be part of the larger community.

Thank you for caring, thank you for your support, and thank you for believing in our mission.

Kathleen J. Roach, MPH, MBA, President and CEO  
David Morstad, Board of Directors Chair

# WHO WE ARE

Creative Community Living Services is a Wisconsin based nonprofit organization that provides a wide range of services and supports for adults with intellectual and developmental disabilities.

## OUR MISSION

Our mission is to establish individualized community supports that will preserve and enhance the dignity and rights of those who rely on others while seeking their own level of independence.

## OUR VISION

We strive to be the premier provider of creative and innovative services reflecting excellence and integrity.

## OUR PHILOSOPHY

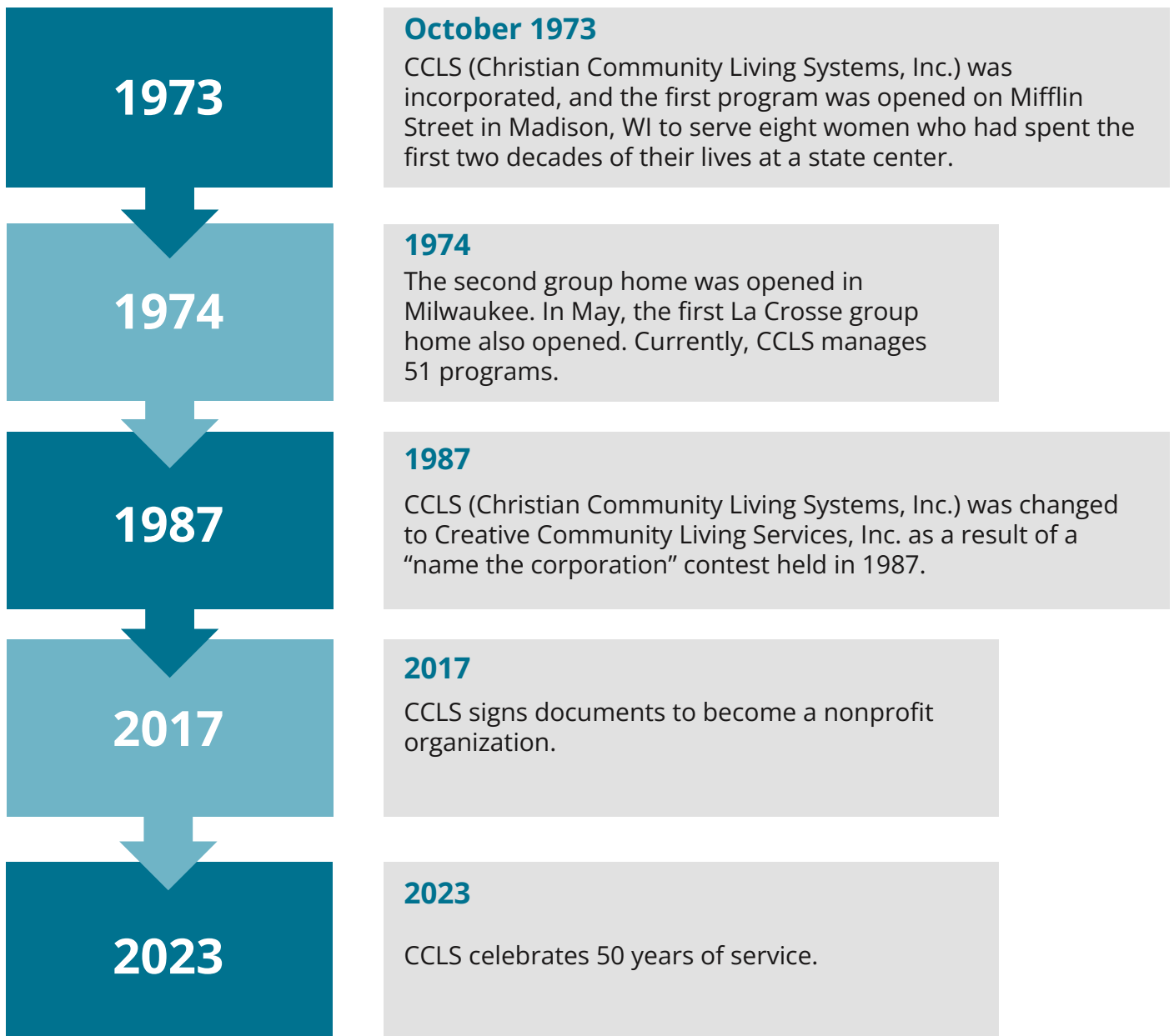
We believe that every person is a valuable human being, and therefore must be treated with respect and dignity. We believe that all people deserve to live in and be a part of the community. We believe that all people deserve the right to choose, guide, and/or direct the way they live.





# OUR HISTORY

CCLS was incorporated on October 1, 1973, as the result of over a year of planning by four individuals—John Hunt, Jon Nelson, James Esmeier, and Joseph Bissen. The four believed that individuals with developmental disabilities would have a better chance of growing to their fullest potential if they were served in a small community setting rather than in an institution. Due to this innovative concept that was outside the status-quo of the time period, others were reluctant to take on this new opportunity. The four decided to form their own corporation for the purpose of providing community living arrangements for persons with developmental disabilities.



# CELEBRATING 50 YEARS OF SERVICE



In 2023, we celebrated CCLS' 50th Anniversary! We celebrated all year long with monthly activities and with a 50 Years of Service fundraiser in October, the month CCLS was founded.



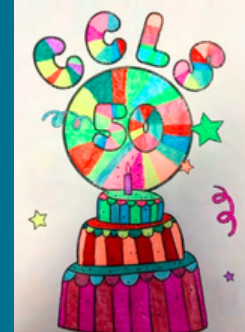
The fundraiser took place at the Watertown Public Library on October 11th. Speakers included CCLS CEO Kathleen Roach, CCLS Founder Jon Nelson, CCLS Board Chair Dave Morstad, and key note speaker Senator John Jagler. Thanks to our generous sponsors and through community donations, we raised over \$10,000 for our clients and programs.

During the year, we celebrated our 50th Anniversary each month with activities clients and staff could enjoy! This included:

- Word search activity
- Coloring contest
- Spring planting activity
- Jump Around
- Regional ice cream socials
- Creating a 50th Anniversary Quilt
- 50's Sock Hop
- CCLS logo gear for staff



CCLS TURNS 50!



# FUNDRAISING HIGHLIGHTS

CCLS received three major grants in 2023. In April, Portage County awarded CCLS a \$30,000 grant. The funds from this grant and several other generous donations we received helped us purchase a new 15-passenger van for our day service program in Portage County.

The Greater Watertown Community Health Foundation awarded CCLS a Capacity Building Grant of \$15,500. We used the grant for strategic planning for our organization, which will allow us to maximize our impact in the future.

Finally, CCLS received a \$10,000 grant from the Wispact Foundation. This gift will help us purchase a new car for our program in Wood County.

On October 11, CCLS hosted 50 Years of Service, a fundraiser to celebrate our 50th anniversary, at the Watertown Public Library. Eighty people attended the event, including local government officials and leaders in the business community. Nineteen companies sponsored our 50th anniversary celebration, which raised more than \$10,500 in net income for CCLS.

Our 2023 Annual Fund Appeal mailing was also very successful. Our year-end appeal generated over \$5,000 in net income for CCLS from dozens of individuals, organizations, and companies.

Thank you to all our donors for your generous support of our organization.





# Fast Pace Medical Staffing

In 2023, Fast Pace Medical Staffing, Inc. (FPMS) increased business by 3% overall from 2022. We focused on hiring quality staff and placing these professionals on contracts, rather than total number of staff hired. The year had many challenges, including sourcing and retaining quality talent, increasing efficiencies within the office, and staying ahead of the competition. As a team, we worked through these challenges and were able to end the year on a positive note with net profit of \$121,000.



## Creative Living Environments (CLE)

In 2023, CLE operated three eight-bed CBRFs and one 20 bed CBRF. A highlight for the year is that we were able to secure rate increases through My Choice Wisconsin family care of 12% in each program. These increases assisted with CLE ending the year with a profit. The remodel for Clarion Manor was completed in the first quarter of 2023. Bayside received new flooring in all common spaces along with a few resident bedrooms. These improvements have made a drastic improvement to the community.

CLE made several staffing adjustments in the year. We added a program director to oversee the small CBRFs in the region. The van driver position was eliminated for the region. The Bayside manager position was reduced to part time evenings. The position was quickly filled and will improve resident care in the evenings and reduce expenses for the community.



# CCLS Training

For 50 years, CCLS has supported individuals with a wide range of disabilities. Over the years, long-term care providers have come to rely on CCLS' experience to train their staff. CCLS has also been providing training to internal staff. In 2001, we expanded our training to outside agencies. Most recently, efforts have been made to expand training into new markets. In 2023, CCLS has further expanded training to additional audiences such as Corrections, Therapists and Child Welfare Facilities.



# CCLS Nursing



**Creative Nurse Consulting**  
DIVISION OF CCLS

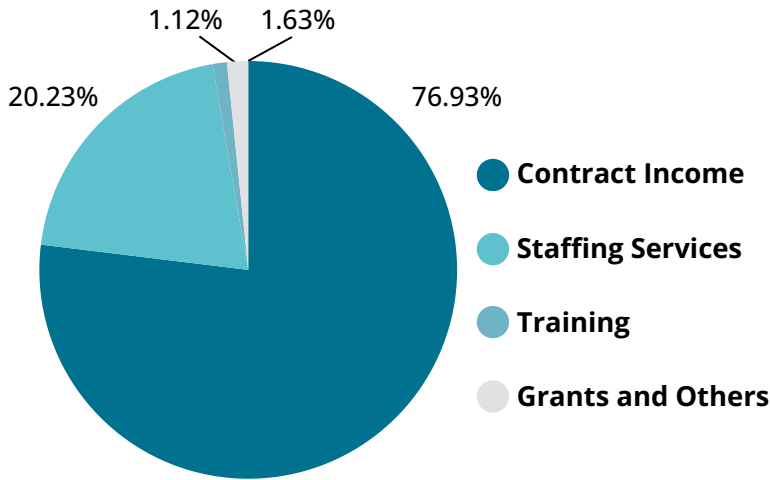
In 2023, the CCLS Nurse Department made great progress in many areas. The Regional Nurses continued to practice a Preventive Model of Care by completing initial and annual body, pain, wandering, Braden scale and elopement risk assessments to all licensed clients. The Regional Nurses also visited each licensed program, at least monthly, and met with clients and the team and completed medication cart/cabinet audits. In addition to these visits, the Chief Nursing Officer also completed quarterly regional home visits to meet with clients and provided appreciation gifts to staff.

The Nurse Department also met the goal of generating and implementing a caregiver educational platform available to caregivers throughout CCLS. The educational platform provides protocols, quizzes, and answer keys for a variety of psychological and physiological disease processes. The fourteen topics chosen were determined through a companywide chart review audit, and from responses that were obtained through an anonymous CCLS survey. Some of these topics include Diabetes, Alzheimer's, Dysphagia, Urinary Health, and Bowel Health. Our 2024 goal is to increase the number of topics and their efficiency.

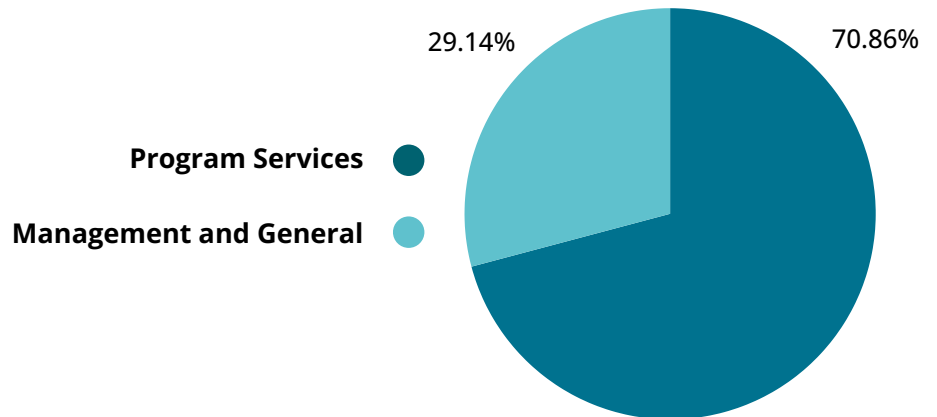
After much research and foundational work, in October Creative Nurse Consulting (CNC) opened to external organizations, offering nurse delegation services. CNC was marketed in Dane, Dodge, Jefferson, La Crosse, Milwaukee, and Waukesha counties with the aim to pilot in quarter 4. In October, the first contract was signed with an organization in Waukesha County, and in December a second contract was obtained with an organization in La Crosse County. In 2024, we plan to expand the nursing services that CNC offers throughout the state of Wisconsin.

# KEY FINANCIAL DATA

## 2023 Income by Category



## 2023 Expenses by Category



	2023	2022
<b>Total Revenue w/o Donor Restrictions</b>	19,897,064	20,463,235
<b>Total Revenue</b>	19,972,969	20,538,966
<b>Total Expenses</b>	19,924,567	20,846,299
<b>Year-End Net Gain/Loss</b>	48,402	(307,333)

# THANK YOU TO OUR DONORS

## \$10,000 or more

Greater Watertown Community  
Health Foundation  
Portage County  
Wispect Foundation

## \$100-\$499

Kristy Baum  
Kenneth Berg  
Sheri Berg  
Kevin Brown  
Kim Clarke  
Delta Dental of Wisconsin  
Eagle Automotive  
Enterprise Fleet Management  
EZ Office Products  
Marisa Flood  
Fort Community Credit Union  
TJ Goedheer  
Aaliyah Grandberry  
Grinwald Ford  
Ellen Haines  
Debbie Hemb  
Nettie & David Herman  
Angie Jopke  
Kaphengst Consulting, LLC  
Kleckers Heating & A/C, Inc.  
Larry & Terri Klubertanz  
Maas Brothers Construction  
Kevin & Cindy Mahony  
Sherry Marshall  
Janet Trostel Martin  
Pamela & Daniel Martin  
David Morstad  
Jon A. Nelson  
Paycor, Inc.  
PTZ Properties, LLC  
John Rademaker  
Kathleen Roach  
Dwan Schuck  
Janis Sierra  
Silica For Your Home  
Michele D. Sippola  
Veronica Slaby  
David Sudmeier  
Kelli Tourville  
Van Holtens, Inc.  
Walsh's Ace Hardware  
Zimmermann Brothers  
Construction

## \$99 or less

AmazonSmile Foundation  
Karen Amini  
Robert Bailey  
Jarred Burke  
Dennis D. Czlapski  
Dively Properties, LLC  
Brandy Dusenbery  
Jessene P. Flottmeier  
Amanda Franke  
Donna Hall  
Lawanda Horton  
Deairis Jackson  
Karen Krause  
Kathy Lance  
Nicole Matenaer  
Carol McCarrier  
Bruce & Lorna Mueller  
Randall J. Radtke  
Janice K. Ribbens  
Alan & Leslie Roberts  
Paige Shoemaker  
Matthew Smith  
Tashanna Williams  
Jim Zache  
George & Lynn Zenke

## \$1,000-\$9,999

Brian Andrew  
Fast Pace Medical Staffing, Inc.  
France Luke Silverman Foundation  
Green Bay Packers Foundation  
Harri Hoffman Family Foundation  
Ixon Bank  
Danna & Alyce Kuhr  
La Crosse County  
M3 Insurance Foundation  
Curtis & Kathy Shager  
USI Insurance Services  
Wisconsin State Council Knights of  
Columbus

## \$500-\$999

Fast Action Realty, LLC  
Karen Foelker  
Jeffrey W. Kaphengst  
Opportunities, Inc.  
ORBIS Corporation  
Solarus  
Kyle Stiemsma  
Wegner CPAs  
Zieman Commercial Properties





# Barbara Fox and Jon Nelson Award Winners

The awards are given annually to those staff members who best represent the values, vision, and mission of CCLS. Staff are nominated by staff and selected by the Board of Directors. The Jon Nelson award winner is provided with a check for \$500 and the Barbara Fox award winner is provided with \$500 towards professional development. Award winners receive recognition on plaques, in local media, and in the CCLS newsletter.

## Tammy Binkley

Southern Region Program Director

Barbara Fox Award Winner



## Gregory King

NC Region Residential Coordinator

Jon Nelson Award Winner



Leadership from the executive team to Program Directors and Program Managers from around the state gathered to share ideas and engage in team building activities for the annual CCLS Best Practice Day at the Watertown Public Library on October 11th, 2023. Topics for the 2023 event included a DSPN news and Industry trends update, a CSL Programs Panel Discussion, effective Community Outreach, a presentation on setting professional goals, and how to create a healthy work culture. Winners of the CCLS Barb Fox Memorial and Jon Nelson awards were also recognized at the 2023 Best Practice Day.



# CCLS Board Members

**Dave Morstad**  
Board Chair

**Jeff Kaphengst**  
Board Vice Chair

**Randy Radtke**  
Treasurer

**Barb LeDuc**  
Secretary

**Kristi Scheunemann**  
Secretary

**Vincent Hein, JD/MBA**  
Director

**Russell Robers**  
Director

**Erin Smith**  
Director

## Executive Staff

**Kathleen J. Roach MPH, MBA**  
President & CEO

**Dwan Schuck, MBA, CPA**  
Chief Financial Officer

**Sherry Marshall**  
Chief Human Resources Officer

**Kristy J. Baum, MSN, RN**  
Chief Nursing Officer

**Rick Czerwan**  
Senior Director of Operations

**Kathie Beaumont**  
Executive Assistant



**CCLS 50th  
Anniversary  
Client Quilt**

# CCLS Office Information

## **Corporate Office**

500 E. Main Street  
Watertown, WI 53094  
Phone: 920-261-1345

## **Central Region**

138 Front St, Suite 204  
Beaver Dam, WI 53916  
Phone: 920-356-0053

## **Eastern and Eastern Metro Regions**

165 Bishops Way, Suite 100  
Brookfield, WI 53005  
Phone: 262-549-9491

## **North Central Region**

2821 8th Street So  
Wisconsin Rapids, WI 54494  
Phone: 715-318-0960

## **North Central Day Services**

41 Park Ridge Drive  
Stevens Point, WI 54481  
Phone: 715-303-0171

## **Northwestern Region**

221 Fillmore Street  
P.O. Box 1143  
Black River Falls, WI 54615  
Phone: 715-318-0960

## **South Central Region**

2985 Triverton Pike, Suite 101  
Fitchburg, WI 53711  
Phone: 608-222-2071

## **Southern Region**

101 S Main St, Suite 350  
Janesville, WI 53546  
Phone: 608-754-5400

## **Western Region**

2031 South 32nd St, Suite 111  
La Crosse, WI 54601  
Phone: 608-779-4118  
Training: 920-342-8835

## **Creative Living Environments, A Division of CCLS, Inc.**

225 E. Brown Deer Rd  
Bayside, WI 53217  
Phone: 414-930-4874  
Toll Free: 888-557-0872

## **Fast Pace Medical Staffing**

165 Bishops Way, Suite 100  
Brookfield, WI 53005  
Phone: 414-875-3345

## **Creative Nurse Consulting**

500 E. Main Street  
Watertown, WI 53094  
Phone: 920-261-1345 x 1232



# THANK YOU TO OUR EVENT SPONSORS

## Platinum Sponsors



*Brian Andrew*



## Gold Sponsors







## Silver Sponsors



*John Rademaker*



-  920-261-1345
-  [www.cclswi.org](http://www.cclswi.org)  
[www.cclswi.org/donate.html](http://www.cclswi.org/donate.html)
-  [info@cclswi.org](mailto:info@cclswi.org)
-  500 East Main St.  
Watertown, WI 53094