

A-Team Meeting
July 23, 2013 1 – 3:00 pm
Northwoods Inc.

Present: Carol Aerts, Deana Stankey, Sandra Pitsch, Joel Caulum, Jolene Wheeler, Dallas Kerzan, John Kerzan, Joyce Felician, Thomas Cook, Jack Longert-speaker

Attorney Jack Longert was our speaker, and he provided information on guardianship and trusts. His informal discussion was presented with down-to-earth explanations that were easy to understand. Questions were fielded throughout his talk as members requested more details. Jack stated that guardianship is a more formal approach requiring a lawyer's help, has costs involved and requires yearly reporting. Power of attorney can be accomplished without a lawyer, no court date and is cheaper. He gave examples of the guardian ad litem process.

Attorney Longert also mentioned the Wisconsin Guardianship Support Center (GSC) as a good resource, specifically if abuse is observed. It provides information and assistance on issues related to guardianship, protective placement, advance directives, and more. Operated by the Greater Wisconsin Agency on Aging Resources, Inc., the GSC is staffed by attorneys who respond to requests for information through a toll-free helpline or by email. (855) 409-9410, email guardian@gwaar.org

Trusts were also a topic of Attorney Longert's. He discussed special needs trusts, which, when created correctly are not considered divestment. Jack noted that trusts are helpful when a disabled individual receives unexpected money such as a payout of a life insurance policy, inheritance, accident settlement or even money from a fundraiser. Trusts protect SSI or Medical Assistance benefits in the event of a financial windfall. Irrevocable, third party and unfunded trusts were also discussed. Attorney Longert shared that WISPACT, www.wispact.org is an available resource for setting up trusts.

Attorney Longert's email: jakmocha@yahoo.com

Legislative Update by Thomas Cook:

- Family Care expansion to 7 counties near Green Bay was not approved. DHS is to report to the Joint Finance Committee on alternatives to Family Care and cost effectiveness.
- The proposed federal legislation (H.R. 831) that would deny the severely disabled the option to work in skill development centers and disability-focused non-profit businesses at a wage that reflects their productivity will not proceed.
- The Olmstead Initiative, New Jersey's plan for moving 1,850 residents from its seven developmental centers into the community, has been in the news all year. The initiative hit a roadblock when participants and their families rallied the New Jersey Legislature to keep the state's sheltered workshop program in place.
- New York State's end of admissions to sheltered workshops and timeline for closure of sheltered workshops affecting 8000 people in NY who work in 115 sheltered workshops.
- Division of Long Term Care: The Wisconsin Medicaid waiver is due for renewal. DHS will probably hold a forum in the next 6 months to collect public input.
- A federal judge ruled in a case over unpaid internships. The judge said the interns should be paid because they did the same work as regular paid employees. This could impact the expectation that the disabled would work for no pay in the community, doing a task that would otherwise be done by a paid employee.

General Discussion

- Carol Aerts shared that 50% of Northwoods' revenue is raised through their entrepreneurial activities, e.g. the new Northwoods Bakery & Sandwich Makery Shop, rest area maintenance, kitchen, sub-contracts, fundraisers and donations. Jeff & Carol continue to research and nurture opportunities of employment for their clients.
- Online Grassroots Action Center: Kevin Lozada will be at the A-Team meeting on August 27th to give an overview of the website and help members sign-up. www.ateamwisconsin.org
- How do we get Transition Coordinators involved in the A-Team?
- A-Team will submit application for a SPARKS Grant by August 2nd.
- When is best time for monthly A-Team meetings?
- The A-Team mailing project is nearly completed.
- Continuum (formerly Southwest Family Care Alliance) is now available in our area. Teri Buros, CEO, has agreed to speak at our September 24th A-Team meeting. This meeting will be 6:30-8:30 pm at Northwoods.

Informal discussions continued until 4:15.