



ALLEGAN COUNTY COMMISSION ON AGING

3255 122nd Avenue, Suite 200
Allegan, MI 49010
269.673.3333 - Office
269.673.0569 - Fax
www.allegancounty.org/seniors

Chair: Richard Butler
Vice Chair: Sally Heavener

**COUNTY
COMMISSIONER**

Mark DeYoung
616-318-9612
Dorr

COMMISSION ON AGING MEETING - AGENDA

Wednesday, October 15, 2025 | 9:00 AM – 11:00 AM
Attendance Options Attached

**SENIOR
MEMBERS**

Mary Campbell
269-655-8000
Pullman

CALL TO ORDER:

ROLL CALL:

PLEDGE OF ALLEGIANCE:

COMMUNICATIONS:

CONSENT AGENDA: (Approve)

- Meeting Minutes – 8/20/25
- Directors Report
- Finance & Service Delivery Metrics Report – August
- COA Planning Calendar
- Subcommittee Reports (*AAAWM Board of Directors – M. Campbell*)

Larry Ladenburger
269-673-6200
Allegan

Luesettie Phelps
269-870-3710
Plainwell

Jim Storey
616-848-9767
344 W 35th St.
Holland

PRESENTATIONS: ACSS Marketing, Laura HoslerGreenStreet Marketing

PUBLIC PARTICIPAT, ION:

**MEMBERS AT
LARGE**

Richard Butler
616 902-0046
Plainwell

ACTION ITEMS: In Home Support Services Contracting

-Sample Motion: Recommend the Home Delivered Meals service delivery contracts be extended through 3/31/25 to allow time to develop the Home Delivered Meals Request for Proposal (RFP).

Sally Heavener
616-355-3494
Holland

DISCUSSION ITEMS:

- Senior Day at the Fair 9/9/25 Debrief
- Allegan County Libraries Presentation 9/17/25 Debrief
- ACSS County Website Enhancements; Feedback from COA
- COA Strategic Planning: Set date & priorities
- COA Terms Expiring: Sally Heavener, Larry Ladenburger

Patricia Petersen
616-644-8059
Allegan

FUTURE AGENDA ITEMS:

Jo VerBeek
616-403-9319
Hamilton

ROUND TABLE:

DIRECTOR

Jen Garcia
269-686-5144

ADJOURNMENT:

Next meeting: Wednesday, November 19, 2025 at 9:00 AM,
Human Services Building, Zimmerman Room

Commission on Aging Meeting

Attendance Options & Joining Instructions:

1) In Person: Allegan County Human Services Building – Zimmerman Room, 3255 122nd Ave., Allegan MI, 49010

2) Online: Connect via Zoom (see connection instructions below)

• OPTION 1: Zoom over Web browser

- Open Internet Explorer or Chrome
- Click the link to join the meeting direct:

<https://us02web.zoom.us/j/82375478232?pwd=NnNsUEhwZnhWVlFpNjAyNkRZNjkzZz09>

- Or navigate to Zoom: <https://app.zoom.us/wc/home>

- Click Join+

- Type in Meeting ID: 823 7547 8232

- Type in Meeting Password: 622040

• OPTION 2: Zoom over Telephone

- Call 1-312-626-6799

- Type in Meeting ID: 823 7547 8232, then #, then # again

- Type in Meeting Password: 622040, then #

- To raise your hand to speak, press *9

- To Mute and Unmute, press 6*

Allegan County Commission on Aging



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<http://www.allegancounty.org>

Chairperson: Rich Butler
Vice Chairperson: Sally Heavener

COMMISSION ON AGING - MINUTES

Chair Rich Butler called the meeting to order at 9:02 am on August 20, 2025 - Pledge of Allegiance,
Roll call

The Commission of Aging met in the Zimmerman Room of the Human Services Building.

ROLL CALL:

PRESENT: Commissioner Mark DeYoung, Chairperson Rich Butler, Vice-Chairperson Sally Heavener, Larry Ladenburger, Lue Phelps, Mary Campbell, Jo VerBeek, Jim Storey, Pat Petersen

OTHERS: Director Jen Garcia and Teresa Galloway

ZOOM: Judy Habetler (public attendee, Cheshire Township), Sallie Prins (public attendee, Holland PHO)

COMMUNICATIONS: None

APPROVAL OF CONSENT AGENDA- ADOPTED AS PRESENTED

Approval of the agenda moved by Jim Storey, supported by Larry Ladenburger. All in favor, motion carried.

PRESENTATIONS: ACSS Presentation by Director Jen Garcia. Outreach presentation included an overview of COA, millage renewals, senior millage services, events, and upcoming outreach work. Director Garcia plans to share this presentation at the Allegan County Library Association Training Day on September 17, 2025.

PUBLIC PARTICIPATION: Judy Habetler, Cheshire Township, spoke about the distribution of ACSS brochures around downtown Allegan. Sallie Prins from Holland PHO updated us that she is disbursing our information throughout Holland PHO and Holland Hospital. Sallie mentioned that primary care office in Saugatuck is a very busy office. The clinic continues to promote ACSS.

ACTION ITEMS: In Home Support Services Contracting

MOTION: Motion to amend the current and future contracts for In Home Support Services to reflect a 3-hour service window when appropriate, effective 9/1/25 with transitional period to 12/31/25.

Motion made by Sally Heavener, supported by Jo VerBeek. All in favor, motion carried.

MOTION: Recommend the approval of contracting with Comfort Keepers and Continuum Home Health for In Home Support Services effective 9/1/25 thru 12/31/26 as stated in the proposal

Motion made by Lue Phelps, supported by Sally Heavener. All in favor, motion carried.

Mission Statement

“Dedicated to serving Allegan County seniors by developing and coordinating services that support their independence, maintain their dignity, and preserve their quality of life”

DISCUSSION ITEMS:

-Allegan County Libraries Presentation 9/17/25: Director Garcia along with Chairman Butler are presenting to Allegan County adult programmers at the Library Training Day for Allegan County Library Association members.

-ACSS County Website Enhancements: Chairman Butler requested COA members to audit the current Allegan County Senior Services website along with other similar county COA sites and provide feedback by the next meeting for possible website enhancements.

-Senior Day at the Fair 9/9/25: Biggby of Allegan is partnering to provide coffee for breakfast; COA members are asked to arrive by 6:45/7:00a to help with vendor setup and breakfast setup; Breakfast service from 8:00-10:00a followed by clean up of the tent/breakfast area. Parking passes will be emailed out one week prior to COA members for admittance to the Fairgrounds for the event.

FUTURE AGENDA ITEMS:

ROUND TABLE (COA MEMBER TIME):

ADJOURNMENT UNTIL:

Motion to adjourn by Jim Storey, supported by Lue Phelps. All favor, motion carried.

The meeting adjourned at 10:41 am. Next Meeting September 17, 2025 from 9:00 am-11:00 am in the Zimmerman Room at the Human Services Building

Commission on Aging - Director's Report October 15, 2025

Senior Services: Senior Day at the Fair Recap – The Commission on Aging (COA) and team members from Allegan County Senior Services hosted a continental breakfast and vendor fair for Senior Day at the Allegan County Fair, September 9, 2025, serving over 200 seniors. Breakfast highlights included coffee donated from Allegan Biggby and donuts compliments of Crane's Orchard & Pie Pantry. Senior service vendors and community partners, 35 in total including Senior Service millage providers, shared information and giveaways for seniors throughout the morning. Seniors enjoyed Bingo with prizes following the COA hosted breakfast.





Service Contracts

Below is the Senior Services contract schedule:

Project #	Service	Contract Began	Contract Expires	Notes
1431	Adult Day Services			
	Generations	5/1/2025	12/31/2027	2-year contract thru 12/31/27
	Evergreen Commons	5/1/2025	12/31/2027	2-year contract thru 12/31/27
1432	Home Delivered Meals			3-year contract thru 12/31/25
	Community Action	1/1/2023	12/31/2025	
	Milestones	1/1/2023	12/31/2025	
*Propose 3-month contract extension through 3/31/26; Motion provided at 10/15/25 COA Mtg.				
1430	In-Home Supports			Three current providers
	Atrio Help at Home	1/1/2019	12/31/2024	2-year contract thru 12/31/26
	Help at Home LLC	1/1/2019	12/31/2024	2-year contract thru 12/31/26
	HomeJoy	9/30/2022	12/31/2024	2-year contract thru 12/31/26
	Comfort Keepers	9/1/2025	12/31/26	1-year contract thru 12/31/26
	Continuum Home Health Care	9/1/2025	12/31/26	1-year contract thru 12/31/26
*Onboarding Comfort Keepers and Continuum Oct.				
14047	PERS			Sole source provider
	Connect America	4/1/2016	12/31/2027	3-year contract thru 12/31/27
14033	Senior Transportation			Sole source provider
	Allegan County Transportation	Direct Service - No Contract		
	Caseworthy CXM (ST Legacy)	7/1/2024	6/30/2027	3-year contract thru 6/30/27

Senior Service Counselor Position Posting

This position will be responsible for overseeing two service delivery lines: Home Delivered Meals and Personal Emergency Response Systems. Interviews began October 6 and will end on October 13 with a determination planned for October 15. Onboarding, training and staff transitions will occur in early November.

Senior Transportation: Volunteer Driver Recruitment Efforts

Volunteer Drivers are needed, as long-time drivers transition to retirement. Tammy Chapin who currently oversees this program does a wonderful job manager the volunteers who transport seniors in and out of Allegan County – over 1,700 trips and 80,000 miles annually!

Allegan County Transportation is promoting Senior Transportation and our Volunteer Driver program with advertisements at the Regent Theater and Allegan County News. See updated advertisement below:

VOLUNTEER DRIVERS URGENTLY NEEDED



Do you enjoy driving and helping others? Join our Volunteer Driver Program and provide essential transportation for neighbors in need. This program offers a flexible, meaningful way to help support seniors who are living independently at home.



Your time and compassion help people live more independently and access the care and resources they need.

- Mileage reimbursement provided at IRS rate (\$.70/mile)
- Must have a Michigan license, good driving record and a dependable, insured automobile.
- Volunteer Background checks provided by Allegan County Human Resources.



MAKE AN IMPACT TODAY, CALL (269) 686 - 5164.

Outreach & Important Meetings:

- 8/14: COA Senior Workgroup Meeting
- 8/15: Senior & Veteran Services Budget Review with County Finance
- 8/18: In Home Support RFP Review
- 8/20: ServTracker CXM Training with Senior Transportation/Katie Cole Trainer
- 8/20: COA Meeting
- 8/22: Michigan Directors of Services to the Aging Board of Directors Meeting
- 8/25: Senior & Veteran Services Team Meeting
- 8/26: Heart of West Michigan United Way Board Retreat – Meijer Headquarters
- 8/28: Board of Commissioners Meeting, DHHS Introduction
- 9/2: Holland PHO Meeting with Sallie Prins
- 9/4: COA Policy & Procedure Committee Meeting
- 9/9: Senior Day at the Fair
- 9/11: Veteran’s Day at the Fair
- 9/17: COA Policy & Procedure Committee Meeting
- 9/17: Allegan County Library Association, COA/Senior Services Presentation
- 9/18: Senior Transportation Volunteer Appreciation Event attended by Teresa Galloway
- 9/23: COA Policy & Procedure Committee Meeting
- 9/26: Michigan Directors of Services to the Aging Board of Directors Meeting
- 9/29: Access to Care Meeting with Beacon Health Community Impact Team
- 9/29: Leelanau County Commission on Aging/Senior Services Meet & Greet

COA 2025 Identified Goals:

1.) ACSS Operations Review, Enhancement & Service Integration:

- a. Review Allegan County Senior Services Policy & Procedure Manual to ensure policy is relevant to existing service operations. [ACSS Team Responsible; Final review by Policy & Procedure Manual Review Committee.](#)
- b. Scope of Service/Standards/Policy & Procedure Manual Review. [ACSS Team Responsible; Final review by Policy & Procedure Manual Review Committee.](#)
- c. Review senior referral online process; address inroads to services and service execution with contracted providers. [ACSS Team Responsible](#)
- d. Continue service integration with Area Agency of Western Michigan (AAAWM) raising awareness of services available for Allegan County seniors. [ACSS Team Responsible; AAAWM Board & Advisory Council COA Representatives.](#)

2.) Continue Engagement & Outreach Efforts:

- a. Identify senior groups (partner agencies) in existence across Allegan County and engage for resource sharing. COA Committee Responsible: [Senior Services Workgroup.](#)
- b. Continue Marketing Efforts with GreenStreet Marketing - E-News launching Q1 [ACSS Team Responsible](#)
- c. Seek purposeful engagement opportunities for ACSS and COA including, but not limited to: [Senior Services Workgroup; ACSS Team Responsible](#)
 - i. Ongoing Events: Allegan County Senior Expo (formerly Boomer Bash), Senior Day at the Fair
 - ii. Hosting learning opportunities for topics such as Alzheimer’s & Dementia Training, Parkinson’s & ALS Training, Caregiver Training, Elder Law & MMAP

- iii. Look at school community model for senior engagement, learn for ways to replicate in other school districts (example: Wayland Leisure Life, Lifelong Learners in Plainwell/Otsego).

Respectfully submitted by,
Jen Garcia, Director

Allegan County Senior Services: JULY & AUG Service Delivery Report

ADULT DAY SERVICES (ADS) - Two Providers							WAITLIST GEN EGC
	CLIENTS	REFERRAL	INTAKE	DC	UNITS #1 Generations	UNITS #2 Evergreen	
2024 YE	33	40	12	8	11,488	-	17
JULY	47	6	8	1	883	489	5
AUGUST	39	8	3	5	841	416	8
2025 YTD	50	55	27	14	6,617	1,360	1 1

Current
waitlist:
10/1/2025

*Evergreen Commons started transitioning clients in May; Contract effective 5/1/25

SENIOR SERVICE METRICS KEY	
CLIENTS:	# of clients being served
WAITLIST:	# of clients waiting for service
REFERRAL:	# of clients requesting service
INTAKE:	# of clients being connected to service
DC:	Discharged - # of clients being discharged from service
VT:	Volunteer Driver
UNITS:	Unit of measurement varies per service (see below)
ADS:	# of ADS hours provided to clients
PERS:	# of PERS units in service
HDM:	# of HDM meals delivered
IHS:	# of IHS hours provided to clients
VT:	# of VT miles driven

PERSONAL EMERGENCY RESPONSE SYSTEM (PERS) - Sole Provider						
	CLIENTS	REFERRAL	INTAKE	DC	UNITS	NO TEST*
2024 YE	1,115	378	430	356	1,115	-
JULY	793	44	23	34	793	72
AUGUST	812	24	30	17	812	56
2025 YTD	967	286	317	254	6,117	-

*Monthly postcards are sent reminding clients to test units every month

HOME DELIVERED MEALS (HDM) - Sole Provider						
	CLIENTS	REFERRAL	INTAKE	DC	UNITS	DONATIONS
2024 YE	535	293	198	260	84,399	\$976.00
JULY	301	32	19	13	7,312	\$50.00
AUGUST	306	25	21	15	7,345	\$8.00
2025 YTD	459	191	143	169	57,832	\$1,003.80

IN HOME SUPPORTS (IHS) - Three Providers								WAITLIST*
	CLIENTS	REFERRAL	INTAKE	DC	UNITS #1 HAH	UNITS #2 ATRIO	UNITS #3 HOMEJOY	
2024 YE	466	363	164	134	20,583	6,386	5,417	34
JULY	336	44	15	13	2,001	385	888	15
AUGUST	340	41	24	8	1,953	372	858	9
2025 YTD	444	282	124	101	14,788	3,111	6,516	14

Current
waitlist:
10/1/2025

SENIOR/VOLUNTEER TRANSPORTATION (VT) - Sole provider										
	# RIDERS	# NEW	UNMET	BUS TRIPS	VT TRIPS	BUS COST	VT UNITS	VT COST	ADDL COSTS	DONATIONS
2024 YE	923	85	9	2,198	3,895	\$115,163.00	84,707	\$98,753.69	\$2,224.40	\$189.00
JULY	78	9	1	274	190	\$16,949.00	9,642	\$6,749.00	\$179.00	\$10.00
AUGUST	90	-	0	287	171	-	8,657	\$6,059.00	\$179.00	\$10.00
2025 YTD	612	50	6	1,850	1,261	\$89,500.00	62,243	\$43,568.80	\$1,432.00	\$185.00

*Waitlist numbers reported end of every month

2025 YTD

Clients = January 2024 Starting # + Total 2025 Intake

Riders = Total Monthly 2025 Riders

Expenditure Status Report

Allegan County
 8/1/2025 through 8/31/2025

298 SENIOR SERVICES FUND

<u>Account Number</u>	<u>Adjusted Appropriation</u>	<u>Expenditures</u>	<u>Year-to-date Expenditures</u>	<u>Year-to-date Encumbrances</u>	<u>Balance</u>	<u>Prct Used</u>
298-000.000 FUND BALANCE						
298-000.000 FUND BALANCE						
298-000.000-999.900 ENDING FUND BALANCE	0.00	0.00	0.00	0.00	0.00	0.00
Total FUND BALANCE	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000 SENIOR SERVICES						
298-672.000 SENIOR SERVICES						
298-672.000-701.000 TOTAL COMP	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-703.000 SALARIES & WAGES - FULL TIME	185,763.00	14,198.52	114,944.57	0.00	70,818.43	61.88
298-672.000-705.010 SALARIES & WAGES - Comp Time Payout	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-706.000 SALARIES & WAGES - PER DIEM	3,816.00	1,722.40	3,962.85	0.00	-146.85	103.85
298-672.000-708.000 SALARIES & WAGES - TEMPORARY	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-710.000 OTHER COMPENSATION	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-710.010 STIPEND	252.00	0.00	147.00	0.00	105.00	58.33
298-672.000-710.030 OPT OUT	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-715.010 FICA TAXES	14,287.00	1,195.87	8,910.80	0.00	5,376.20	62.37
298-672.000-716.000 HEALTH INSURANCE	58,162.00	456.54	34,605.88	0.00	23,556.12	59.50
298-672.000-717.000 DENTAL INSURANCE - EMPLOYER	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-718.000 RETIREMENT DEFINED CONTRIBUTION	13,108.00	993.89	8,046.03	0.00	5,061.97	61.38
298-672.000-718.045 457 RETIREMENT FUND	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-721.000 LONGEVITY	1,490.00	0.00	0.00	0.00	1,490.00	0.00
298-672.000-722.000 LIFE INSURANCE	179.00	0.00	104.42	0.00	74.58	58.34
298-672.000-724.000 WORKERS COMPENSATION INS.	150.00	7.06	58.20	0.00	91.80	38.80
298-672.000-725.000 DISABILITY INSURANCE	1,108.00	0.00	659.29	0.00	448.71	59.50
298-672.000-727.000 OFFICE SUPPLIES	1,060.00	27.19	189.80	0.00	870.20	17.91
298-672.000-730.000 POSTAGE	750.00	0.00	410.67	0.00	339.33	54.76
298-672.000-818.000 CONTRACTUAL SERVICES	10,000.00	4,092.50	4,249.70	0.00	5,750.30	42.50
298-672.000-818.010 CONTRACTUAL SERVICES	0.00	0.00	3,193.51	0.00	-3,193.51	0.00
298-672.000-818.020 CONTRACTUAL - Adult Daycare	225,000.00	21,980.25	115,292.09	0.00	109,707.91	51.24
298-672.000-818.030 CONTRACTUAL - Home Del Meals	820,800.00	77,143.34	607,294.51	0.00	213,505.49	73.99

Expenditure Status Report

Allegan County
 8/1/2025 through 8/31/2025

298 SENIOR SERVICES FUND

<u>Account Number</u>	<u>Adjusted Appropriation</u>	<u>Expenditures</u>	<u>Year-to-date Expenditures</u>	<u>Year-to-date Encumbrances</u>	<u>Balance</u>	<u>Prct Used</u>
298-672.000-818.040 CONTRACTUAL - In Home Support	1,657,800.00	116,100.00	878,731.20	0.00	779,068.80	53.01
298-672.000-818.050 CONTRACTUAL - Pers Emerg Response System	218,400.00	17,010.00	128,205.00	0.00	90,195.00	58.70
298-672.000-818.060 CONTRACTUAL - Transportation	246,240.00	6,056.90	139,642.00	0.00	106,598.00	56.71
298-672.000-861.000 TRAVEL EXPENSES	2,820.00	0.00	0.00	0.00	2,820.00	0.00
298-672.000-861.010 TRAVEL - ROOM/BOARD	3,795.00	0.00	0.00	0.00	3,795.00	0.00
298-672.000-861.020 TRAVEL - MILEAGE/FUEL	3,572.00	0.00	0.00	0.00	3,572.00	0.00
298-672.000-861.030 TRAVEL - CONF/REGISTRATION/TRAINING	3,042.00	0.00	0.00	0.00	3,042.00	0.00
298-672.000-900.000 PRINTING & BINDING	1,060.00	0.00	160.90	0.00	899.10	15.18
298-672.000-901.000 ADVERTISING	50,000.00	2,362.88	29,523.66	0.00	20,476.34	59.05
298-672.000-920.000 PUBLIC UTILITIES	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-934.000 OFFICE EQUIP. REPAIRS & MAINT.	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-955.000 LOW VALUE EQUIPMENT	1,590.00	0.00	658.25	0.00	931.75	41.40
298-672.000-956.000 MISCELLANEOUS	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-956.010 MISCELLANEOUS	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-958.000 MEMBERSHIPS & SUBSCRIPTIONS	530.00	0.00	0.00	0.00	530.00	0.00
298-672.000-960.000 INDIRECT EXP	99,846.00	6,498.42	51,987.36	0.00	47,858.64	52.07
298-672.000-961.000 LIABILITY INSURANCE	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-964.000 REFUNDS AND REBATES	0.00	-70.31	712.49	0.00	-712.49	0.00
298-672.000-986.000 COMPUTER SOFTWARE	0.00	0.00	0.00	0.00	0.00	0.00
Total SENIOR SERVICES FUND	3,624,620.00	269,775.45	2,131,690.18	0.00	1,492,929.82	58.81
Grand Total	3,624,620.00	269,775.45	2,131,690.18	0.00	1,492,929.82	58.81

Expenditure Status Report

Allegan County
 7/1/2025 through 7/31/2025

298 SENIOR SERVICES FUND

<u>Account Number</u>	<u>Adjusted Appropriation</u>	<u>Expenditures</u>	<u>Year-to-date Expenditures</u>	<u>Year-to-date Encumbrances</u>	<u>Balance</u>	<u>Prct Used</u>
298-000.000 FUND BALANCE						
298-000.000 FUND BALANCE						
298-000.000-999.900 ENDING FUND BALANCE	0.00	0.00	0.00	0.00	0.00	0.00
Total FUND BALANCE	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000 SENIOR SERVICES						
298-672.000 SENIOR SERVICES						
298-672.000-701.000 TOTAL COMP	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-703.000 SALARIES & WAGES - FULL TIME	185,763.00	14,198.51	100,746.05	0.00	85,016.95	54.23
298-672.000-705.010 SALARIES & WAGES - Comp Time Payout	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-706.000 SALARIES & WAGES - PER DIEM	3,816.00	0.00	2,240.45	0.00	1,575.55	58.71
298-672.000-708.000 SALARIES & WAGES - TEMPORARY	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-710.000 OTHER COMPENSATION	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-710.010 STIPEND	252.00	21.00	147.00	0.00	105.00	58.33
298-672.000-710.030 OPT OUT	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-715.010 FICA TAXES	14,287.00	1,064.07	7,714.93	0.00	6,572.07	54.00
298-672.000-716.000 HEALTH INSURANCE	58,162.00	4,845.86	34,149.34	0.00	24,012.66	58.71
298-672.000-717.000 DENTAL INSURANCE - EMPLOYER	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-718.000 RETIREMENT DEFINED CONTRIBUTION	13,108.00	993.90	7,052.14	0.00	6,055.86	53.80
298-672.000-718.045 457 RETIREMENT FUND	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-721.000 LONGEVITY	1,490.00	0.00	0.00	0.00	1,490.00	0.00
298-672.000-722.000 LIFE INSURANCE	179.00	14.93	104.42	0.00	74.58	58.34
298-672.000-724.000 WORKERS COMPENSATION INS.	150.00	7.12	51.14	0.00	98.86	34.09
298-672.000-725.000 DISABILITY INSURANCE	1,108.00	94.18	659.29	0.00	448.71	59.50
298-672.000-727.000 OFFICE SUPPLIES	1,060.00	29.07	162.61	0.00	897.39	15.34
298-672.000-730.000 POSTAGE	750.00	0.00	410.67	0.00	339.33	54.76
298-672.000-818.000 CONTRACTUAL SERVICES	10,000.00	0.00	157.20	0.00	9,842.80	1.57
298-672.000-818.010 CONTRACTUAL SERVICES	0.00	0.00	3,193.51	0.00	-3,193.51	0.00
298-672.000-818.020 CONTRACTUAL - Adult Daycare	225,000.00	24,100.88	93,311.84	0.00	131,688.16	41.47
298-672.000-818.030 CONTRACTUAL - Home Del Meals	820,800.00	76,788.19	530,151.17	0.00	290,648.83	64.59

Expenditure Status Report

Allegan County
 7/1/2025 through 7/31/2025

298 SENIOR SERVICES FUND

<u>Account Number</u>	<u>Adjusted Appropriation</u>	<u>Expenditures</u>	<u>Year-to-date Expenditures</u>	<u>Year-to-date Encumbrances</u>	<u>Balance</u>	<u>Prct Used</u>
298-672.000-818.040 CONTRACTUAL - In Home Support	1,657,800.00	116,352.00	762,631.20	0.00	895,168.80	46.00
298-672.000-818.050 CONTRACTUAL - Pers Emerg Response System	218,400.00	16,653.00	111,195.00	0.00	107,205.00	50.91
298-672.000-818.060 CONTRACTUAL - Transportation	246,240.00	7,223.10	116,636.10	0.00	129,603.90	47.37
298-672.000-861.000 TRAVEL EXPENSES	2,820.00	0.00	0.00	0.00	2,820.00	0.00
298-672.000-861.010 TRAVEL - ROOM/BOARD	3,795.00	0.00	0.00	0.00	3,795.00	0.00
298-672.000-861.020 TRAVEL - MILEAGE/FUEL	3,572.00	0.00	0.00	0.00	3,572.00	0.00
298-672.000-861.030 TRAVEL - CONF/REGISTRATION/TRAINING	3,042.00	0.00	0.00	0.00	3,042.00	0.00
298-672.000-900.000 PRINTING & BINDING	1,060.00	0.00	160.90	0.00	899.10	15.18
298-672.000-901.000 ADVERTISING	50,000.00	2,846.52	27,160.78	0.00	22,839.22	54.32
298-672.000-920.000 PUBLIC UTILITIES	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-934.000 OFFICE EQUIP. REPAIRS & MAINT.	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-955.000 LOW VALUE EQUIPMENT	1,590.00	0.00	658.25	0.00	931.75	41.40
298-672.000-956.000 MISCELLANEOUS	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-956.010 MISCELLANEOUS	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-958.000 MEMBERSHIPS & SUBSCRIPTIONS	530.00	0.00	0.00	0.00	530.00	0.00
298-672.000-960.000 INDIRECT EXP	99,846.00	6,498.42	45,488.94	0.00	54,357.06	45.56
298-672.000-961.000 LIABILITY INSURANCE	0.00	0.00	0.00	0.00	0.00	0.00
298-672.000-964.000 REFUNDS AND REBATES	0.00	0.00	782.80	0.00	-782.80	0.00
298-672.000-986.000 COMPUTER SOFTWARE	0.00	0.00	0.00	0.00	0.00	0.00
Total SENIOR SERVICES FUND	3,624,620.00	271,730.75	1,844,965.73	0.00	1,779,654.27	50.90
Grand Total	3,624,620.00	271,730.75	1,844,965.73	0.00	1,779,654.27	50.90

Notes from the August 26 and September 22, 2025 Board Meetings

A significant amount of time at both the August and September Board Meetings in reviewing Financial Reports. A short-fall in coverage for in recovery of MI Choice reimbursements resulted in having to dip into reserves to cover close to 2 million in expenditures. This is projected to be at a lower amount for 2026 due to a projected increase in reimbursement levels. The agency has also taken actions to reduce their expenditures by renting the upper floor of the building and consolidating staff offices in the lower level.

Brandon Beck, Contract Administrator for Dementia Friends gave an overview of FY24 metrics for Dementia Friends at the August meeting. Eighteen new facilitators were trained . Fifty five percent of attendees at the sessions are caregivers from 25-49. Brandon will be taking over all caregiver programs and he is currently focused on reevaluating the Respite Program, presenting to the Gun Lake Tribe and reconnecting with the Hispanic Center.

Results of the AAAMW Employee Engagement Study were also shared at the August meeting. Very positive results were obtained with the greatest area for improvement is staff compensation.

State and Federal Budget approvals and details on the impact of the One Big Beautiful bill are still awaited at the time of both the August and September meetings although some informal positive news has been heard from state legislators.

The September meeting including a detailed analysis of the August Financial Reports, the Fy 25 Budget Revision and review and approval of the FY 26 operating Budget.

The Michigan Department of Health and Human Services requires each agency administering the MI Choice Waiver Program to have a Program Integrity process for the detection of waste, fraud, and abuse. There is an annual requirement for the Board and all staff to complete the compliance requirement on the AAAMW Code of Ethics, prevention and detection of fraud, waste, and abuse and ways to report it and the Federal and State of Michigan False Claims Acts. The Board completed these requirements and provided feedback on the training.

Proposed Changes to the AAAMW Policy and Procedures Manual were also reviewed at the September Meeting. These changes included a wide range of topics including Client Intake Procedures, Orientation & Training, Contracts. Record Retention, Audits, Adult Day Service Standards, Guardianship Service Standard, Nutrition Standards, and Transportation.