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# ALLEGAN COUNTY COMMISSION ON AGING

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3255 122nd Avenue, Suite 200  
Allegan, MI 49010  
269.673.3333 - Office  
269.673.0569 - Fax  
[www.allegancounty.org/seniors](http://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, November 19, 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 – 10/15/25
- Directors Report
- Marketing Report – October
- Finance & Service Delivery Metrics Report – September
- COA Planning Calendar
- Subcommittee Reports (*AAAWM Advisory & Additional Committees – J. VerBeek; Policy & Procedure Committee – S. Heavener; 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:** Community Action of Allegan County, Home Repair Program

**PUBLIC PARTICIPATION:**

**MEMBERS AT  
LARGE**

Richard Butler  
616 902-0046  
Plainwell

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**ACTION ITEMS:**

**DISCUSSION ITEMS:**

- Senior Services Finance Review
- Strategic Planning

Sally Heavener  
616-355-3494  
Holland

**FUTURE AGENDA ITEMS:**

Patricia Petersen  
616-644-8059  
Allegan

**ROUND TABLE:**

Jo VerBeek  
616-403-9319  
Hamilton

**ADJOURNMENT:**

Next meeting: Wednesday, December 3, 2025 at 9:00 AM  
Human Services Building, Zimmerman Room  
COA Strategic Planning Session to Follow Public Meeting

**DIRECTOR**

Jen Garcia  
269-686-5144

## Commission on Aging Meeting

### **Attendance Options & Joining Instructions:**

1) **In Person: Allegan County Human Services Building – Zimmerman Room, 3255 122<sup>nd</sup> 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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Allegan, MI 49010  
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<http://www.allegancounty.org>

**Chairperson: Rich Butler**  
**Vice Chairperson: Sally Heavener**

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## **COMMISSION ON AGING - MINUTES**

Chair Rich Butler called the meeting to order at 9:00 am on October 15, 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, Larry Ladenburger, Lue Phelps,  
Mary Campbell, Pat Petersen, Jo VerBeek

**ABSENT:** Vice-Chairperson Sally Heavener, Jim Storey

**OTHERS:** Director Jen Garcia, Teresa Galloway (Admin Asst), Judy Habetler (public attendee), Sallie  
Prins (public attendee, Holland PHO), Laura Hosler (GreenStreet Marketing)

**COMMUNICATIONS:** None

### **APPROVAL OF CONSENT AGENDA-**

Jo VerBeek submitted a question on the Finance & Service Delivery Metrics Report – August, moved to  
the discussion items. With that removed the consent agenda was moved by Larry Ladenburger,  
supported by Mary Campbell. All in favor, motion carried.

**PRESENTATIONS:** ACSS Marketing, Laura Hosler from GreenStreet Marketing reported on the  
August and September, 2025 Media Results. Laura gave some suggestions about possible updates to the  
Allegan County Senior Services web page, possibly including contractor links and easier navigation.  
She mentioned next year maybe adding some testimonial statements to the Facebook ads and other  
marketing materials.

**PUBLIC PARTICIPATION:** Judy Habetler, interested in Senior needs. She is also, part of the  
Allegan Food Alliance. Allegan Food Alliance has put together listening sessions to work  
collaboratively to find out what the needs are around food/access in the community.

Sallie Prins, Holland PHO. She wanted to let COA know about the home community programs that are  
available through insurance carriers.

### **ACTION ITEMS:** Home Delivered Meals Contract Extension

Motion made by Pat Petersen, supported by Lue Phelps to recommend the Home Delivered Meals  
service delivery contracts be extended through 3/31/26. All in favor, motion carried.

This will allow time to develop the Home Delivered Meals Request for Proposal (RFP).

## **DISCUSSION ITEMS:**

- Finance & Service Delivery Metrics Report – August  
Jo VerBeek questioned why Salaries & Wages – Per DIEM went into a negative status. The explanation is that in January, 2025, the Board of Commissioners approved an increase from \$50 a meeting to \$55 a meeting. Plus, with new members on the COA board, the increase in the number of miles was not considered in the budget. This will be corrected for future budgets. Even though this line item is over budget, the overall senior service budget is not over budget. The other negative is in the contractual services for \$3,193.51, this was put in the incorrect contractual service line. Finance has been instructed to move it to the correct line item. Jo VerBeek mentioned the Community Listening Session, which has been posted on our Facebook page. She also mentioned about the bill for Telehealth.
- Senior Day at the Fair 9/9/25 Debrief  
We served 212 seniors; it was chilly but a very well attended event. We were very thankful for Biggby of Allegan for supplying coffee. Everything was turn key and went really well.
- Allegan County Libraries Presentation 9/17/25 Debrief  
Director Jen did a presentation to 6 of the 12 libraries to partner with them to have a corner at the library to share our senior information. Approximately 20 people were in attendance. Starting January 1, 2026, there has been an Outreach Coordinator position approved that will report to the Deputy Administrator of Services and support all County Services, including Senior & Veteran Services. This position will be responsible for building relationships with Allegan County libraries and establishing a consistent senior presence across all County libraries. Jo VerBeek mentioned having Pop-up lunches and presentations by AAAM & ACSS.
- ACSS County Website Enhancements: Feedback from COA, Jo VerBeek stated the paragraph on the Senior page is too long. Need to look at clear, easy to read messaging.
- COA Strategic Planning: Set date & priorities; the date will be December 3, 2025, Zimmerman Room of the Human Services Building. Starting time will be 9:00am with lunch provided.
- COA Terms Expiring: Sally Heavener, Larry Ladenburger they have submitted applications, per Commissioner DeYoung, both were approved by the Board of Commissioners at the October 9 meeting.

Director Jen Garcia informed the COA members that Senior Services just onboarded Continuum Home Health for In Home Supports and are onboarding Comfort Keepers the following week. Senior Services Counselor interviews have wrapped up, decision on hiring and onboarding plan will be forthcoming.

## **FUTURE AGENDA ITEMS:**

- Community Action of Allegan County program presentation
- Budget details for strategic planning purposes
- Bus Buddy concept through Allegan County Transportation
- Reserved funding amounts will be included in the future finance reports
- Chairperson Rich Butler asked Commissioner DeYoung, when do we have to have the information to get the millage on the ballot for voting. Information will follow.

**ROUND TABLE (COA MEMBER TIME):**

Commissioner DeYoung informed COA that the Board of Commissioners approved a contractor to do remodeling at the Medical Care Facility. He also, spoke about a gun safety person from the Wayland that would like

to do some presentations. Seniors may not be aware of the new safety laws.

**ADJOURNMENT UNTIL:**

Motion to adjourn by Pat Petersen, supported by Mary Campbell. All in favor, motion carried.

The meeting adjourned at 10:56 am. Next Meeting November 19, 2025 from 9:00 am-11:00 am in the Zimmerman Room at the Human Services Building

DRAFT

## Commission on Aging - Director's Report November 19, 2025

### Service Contracts

Below is the Senior Services contract schedule:

Project #	Service	Contract Began	Contract Expires	Notes
1431	<b>Adult Day Services</b>			Two current providers
	Generations	5/1/2025	12/31/2027	
	Evergreen Commons	5/1/2025	12/31/2027	
1432	<b>Home Delivered Meals</b>			Two current providers
	Community Action	1/1/2023	12/31/2025; 3/31/26	
	Milestones	1/1/2023	12/31/2025; 3/31/26	
*HDM RFP scheduled to open bidding 12/1/25				
*Contracts extended three months – Approved 10/15/25 by COA				
1430	<b>In-Home Supports</b>			Five current providers
	Atrio Help at Home	1/1/2019	12/31/26	2-year contract thru 12/31/26
	Help at Home LLC	1/1/2019	12/31/26	2-year contract thru 12/31/26
	HomeJoy	9/30/2022	12/31/26	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
*Onboarded Comfort Keepers & Continuum in October				
14047	<b>PERS</b>			Sole source provider
	Connect America	4/1/2016	12/31/2027	
14033	<b>Senior Transportation</b>			Sole source provider
	Allegan County Transportation	Direct Service - No Contract		
	<b>Caseworthy CXM (ST Legacy)</b>	7/1/2024	6/30/2027	
*Internal Client Database; Legacy Platform Sunset Legacy 8/31/25; 14 active licenses				

Comfort Keepers and Continuum Home Health Care onboarded at the end of September and early October. Both agencies were able to take a sizeable group of clients from Senior Services waitlist for In Home Supports, service intake is already underway and going smoothly. Ongoing contractor meetings are taking place with Help at Home as their agency is undergoing strategic reorganization.

Annual provider audits are scheduled throughout November and into early December. Audits are a time for Senior Service staff to meet onsite at the contractor/provider agency to audit operations and customer service expectations.

### Senior Service Position Transition

Senior Services is pleased to welcome Hailey Pearson, Senior Service Counselor, who started officially with the team on November 3, 2025. Hailey previously worked for Allegan County in Administration supporting the Office of the Administrator and will oversee the Home Delivered Meals and Personal Emergency Response System (PERS) programs. Ashley Dever, currently in this role through December 5, along with Katie Cole, Senior Services Counselor, will be training with Hailey throughout the month of November.

Starting in January 2026, Senior & Veteran Services will have event, outreach and communication support from a Community Coordinator who will report to the Deputy Administrator of Services, Dan Wedge. For Senior Services, this role will serve to support Senior Expo and Senior Day at the Fair events, along with outreach efforts focused with Allegan County Libraries and professional partners.

### Survey of Older Adult & Caregivers:

As the Bureau of Aging, Community Living, and Supports continues with our statewide needs assessment in preparation for the development of regional multi-year plans and the next three-year State Plan on Aging, I am pleased to share this link and a printable copy of the survey (as a PDF and in Word) for older adults and caregivers. Please share the link and the electronic copy far and wide, within and beyond your networks. Your assistance in printing copies for those who may not have internet access is appreciated. We also welcome your assistance in helping seniors return the completed paper copies by scanning them and returning to me via email, faxing them to my attention at 517-335-7959, or mailing them back to my attention via PO Box 30676, Lansing, MI 48909. The survey will be available in Spanish, Arabic, and Mandarin upon request. If you have any questions about the State Plan on Aging or the needs assessment, please contact Tammy Lemmer via email at [LemmerT1@michigan.gov](mailto:LemmerT1@michigan.gov) or by calling 517-230-9707.

The following can be included in newsletters or other communication regarding the survey:

### Survey of Older Adults and Caregivers

Michigan's Department of Health and Human Services (MDHHS) is seeking input by inviting responses to a survey regarding the needs of older adults and caregivers as well as the programs and services that impact their quality of life. The information gathered from will be used to identify priorities for the State Unit on Aging for a three-year State Plan on Aging in support of the health and well-being of Michigan's older adult population. The survey is available online at <https://bit.ly/olderadultsurvey2729> and will remain open until December 15, 2025. Paper copies are available for printing at: [State Plan on Aging](#).

*Below is what Allegan County Senior Services shared on its Facebook Page and with partners.*



### SURVEY OF OLDER ADULT AND CAREGIVERS

Michigan's Department of Health and Human Services (MDHHS)  
Bureau of Aging, Community Living, and Supports would like to  
hear from you!

What are your needs as  
an older adult in Michigan ?

What is most important to you ?

What services may be missing ?

This survey should take about 15 minutes to  
complete. Please complete it by no later than  
December 15th.

Complete the survey at the link  
above or Scan the QR code



SCAN ME

## **Outreach & Important Meetings:**

- 10/6-10/14: Senior Service Counselor candidate interviews
- 10/9: Continuum Home Health Care Contractor Onboarding for In Home Supports
- 10/15: COA Meeting
- 10/16: Senior & Veteran Services Team Meeting
- 10/17: Comfort Keepers of Holland Contractor Onboarding for In Home Supports
- 10/20: COA Chair & Vice Chair Planning Meeting
- 10/21: Multi Agency Collaborative Council Membership Meeting
- 10/22: AAAWM Meet & Greet with Brandon Beck, Contract Administrator
- 10/23: Allegan County Veteran Stand Down Event
- 10/28: Heart of West Michigan United Way Board of Directors Meeting
- 10/20: Leelanau County Commission on Aging Touchbase, Lena Vander Meulen
- 11/3: Hailey Pearson Senior Services Counselor Start Date

## **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

## MEDIA RESULTS: 10/1-10/31

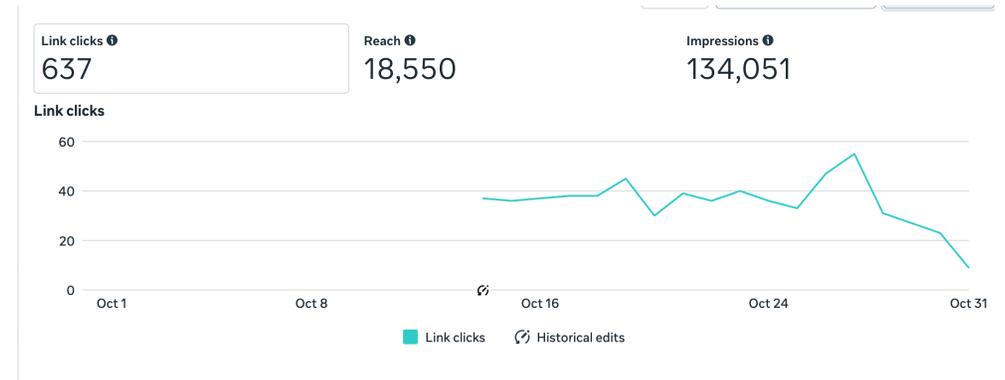


**Support, Activities, and Community**

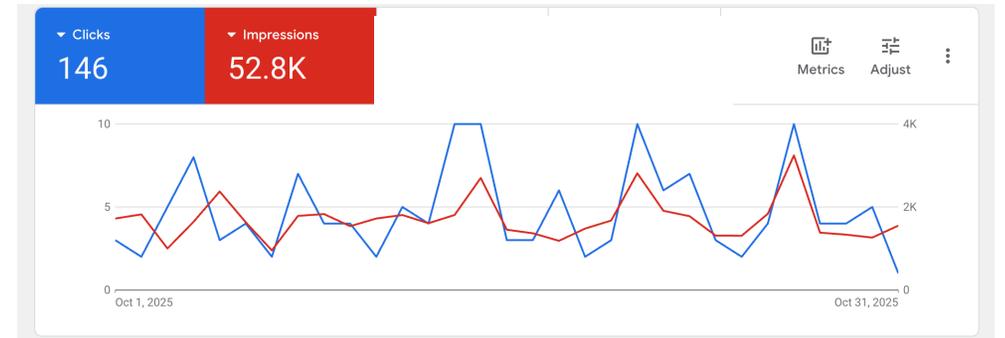
**Adult Day Services**

This service offers daytime care for seniors in need of continuous support in a welcoming group setting. Participants enjoy nutritious meals, stimulating activities, exercise programs, opportunities to socialize, and access to on-site personal care services.

## Facebook Results

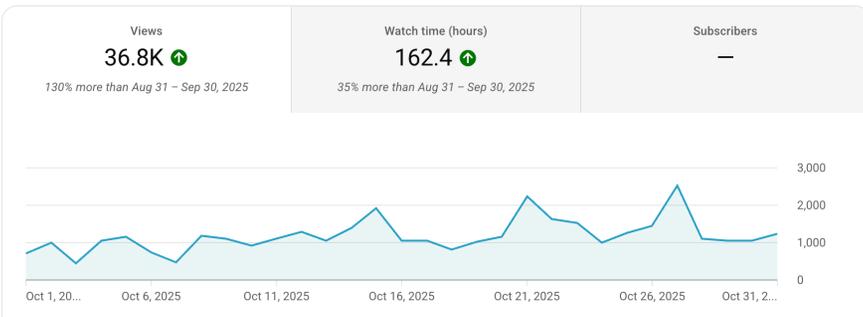


## Google Ad Results



## YouTube Results

**In October, people watched this video 36,770 times**



## Locations(Geographic)

Location Name	Clicks
49010	14
49070	2
49078	2
49080	8
49323	4
49328	2
49348	9
49406	2
49408	5
49419	3
49423	33
49424	20
49450	2
49453	3

## Allegan County Senior Services: September Service Delivery Report

ADULT DAY SERVICES (ADS) - Two Providers							WAITLIST GEN   EGC	Current waitlist: 11/1/2025
	CLIENTS	REFERRAL	INTAKE	DC	UNITS #1 Generations	UNITS #2 Evergreen		
2024 YE	33	40	12	8	11,488	-	17	
SEPT	38	4	2	2	873	464	1	
2025 YTD	52	59	29	16	7,490	1,824	7   1	

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

PERSONAL EMERGENCY RESPONSE SYSTEM (PERS) - Sole Provider						
	CLIENTS	REFERRAL	INTAKE	DC	UNITS	NO TEST*
2024 YE	1,115	378	430	356	1,115	-
SEPT	808	33	33	46	808	62
2025 YTD	1,000	319	350	300	6,925	-

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

HOME DELIVERED MEALS (HDM) - Two Providers						
	CLIENTS	REFERRAL	INTAKE	DC	UNITS	DONATIONS
2024 YE	535	293	198	260	84,399	\$976.00
SEPT	307	19	19	21	7,002	\$0.00
2025 YTD	478	210	162	190	64,834	\$1,003.80

IN HOME SUPPORTS (IHS) - Five Providers								WAITLIST*	Current waitlist: 11/1/2025
	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	
SEPT	331	35	14	11	1,890	381	842	14	
2025 YTD	458	317	138	112	16,678	3,492	7,358	6	

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
SEPT	80	7	1	256	174	\$17,612.00	9,251	\$6,475.70	\$432.63	\$0.00
2025 YTD	689	69	7	2,078	1,435	\$124,180.00	71,494	\$50,045.80	\$1,864.63	\$185.00

\*Waitlist numbers reported end of every month

2025 YTD

Clients = January 2024 Starting # + Total 2025 Intake

Riders = Total Monthly 2025 Riders

### 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

Senior Services Fund Balance 11/10/25:

\$2,118,112.57

**Expenditure Status Report**

Allegan County  
 9/1/2025 through 12/31/2025

**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 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	35,496.26	150,440.83	0.00	35,322.17	80.99
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	1,255.20	5,218.05	0.00	-1,402.05	136.74
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	63.00	210.00	0.00	42.00	83.33
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	2,816.78	11,727.58	0.00	2,559.42	82.09
298-672.000-716.000 HEALTH INSURANCE	58,162.00	14,309.27	48,915.15	0.00	9,246.85	84.10
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	2,484.72	10,530.75	0.00	2,577.25	80.34
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	44.78	149.20	0.00	29.80	83.35
298-672.000-724.000 WORKERS COMPENSATION INS.	150.00	18.12	76.32	0.00	73.68	50.88
298-672.000-725.000 DISABILITY INSURANCE	1,108.00	282.53	941.82	0.00	166.18	85.00
298-672.000-727.000 OFFICE SUPPLIES	1,060.00	139.04	328.84	0.00	731.16	31.02
298-672.000-730.000 POSTAGE	750.00	151.98	562.65	0.00	187.35	75.02
298-672.000-818.000 CONTRACTUAL SERVICES	10,000.00	1,764.16	6,013.86	0.00	3,986.14	60.14
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	14,396.25	129,688.34	0.00	95,311.66	57.64
298-672.000-818.030 CONTRACTUAL - Home Del Meals	820,800.00	73,536.29	680,830.80	0.00	139,969.20	82.95
298-672.000-818.040 CONTRACTUAL - In Home Support	1,657,800.00	30,303.00	909,034.20	0.00	748,765.80	54.83
298-672.000-818.050 CONTRACTUAL - Pers Emerg Response System	218,400.00	16,947.00	145,152.00	0.00	73,248.00	66.46
298-672.000-818.060 CONTRACTUAL - Transportation	246,240.00	19,594.71	165,486.71	0.00	80,753.29	67.21
298-672.000-861.000 TRAVEL EXPENSES	2,820.00	28.00	28.00	0.00	2,792.00	0.99
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	86.10	86.10	0.00	3,485.90	2.41

Expenditure Status Report

Allegan County  
 9/1/2025 through 12/31/2025

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>
298-672.000-861.030 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	9,029.88	38,553.54	0.00	11,446.46	77.11
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	19,495.26	71,482.62	0.00	28,363.38	71.59
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	289.87	1,002.36	0.00	-1,002.36	0.00
298-672.000-986.000 COMPUTER SOFTWARE	0.00	0.00	0.00	0.00	0.00	0.00
<b>Total SENIOR SERVICES FUND</b>	<b>3,624,620.00</b>	<b>242,532.20</b>	<b>2,380,472.38</b>	<b>0.00</b>	<b>1,244,147.62</b>	<b>65.68</b>
<b>Grand Total</b>	<b>3,624,620.00</b>	<b>242,532.20</b>	<b>2,380,472.38</b>	<b>0.00</b>	<b>1,244,147.62</b>	<b>65.68</b>

## Jo VerBeek's October Committee Updates

### AAAWM Advisory Council Meeting: November 3, 2025

**Legislative Speaker:** Representative Nancy DeBoer; Michigan House 86<sup>th</sup> District (Allegan and Ottawa County)  
We asked some questions on different topics – strengthen direct care workforce and address shortages in home and community-based services, expand access to the long-term care home and community-based services, better support family and informal caregivers, create age-friendly communities, innovation in healthcare and energy policy to ensure affordable and sustainable services for aging residents, especially in rural areas.

Responses were vague and abstract without specific details, except for strengthening workforce with high schools developing career tracks (examples welding, electricians - then needed some prompting to address caregiving)

**Legislative Advocacy** – Kendrick Heinlein

- State FY26 Advocacy Priorities: The committee needs to come to the next meeting in December with ideas.
- Federal Issues: OAA Reauthorization on hold with Shut Down and FY26 Budget is a “wait and see”

**AAAWM Update:** Kendrick Heinlein

The agency is in the process of hiring a new staff person for the Advocacy position. Hopefully he will be able to announce it at the December meeting.

**Current Local/County Activities:** All

The following activities/programs/PR suggestions I found interesting

- Emergency Preparedness – what to have ready for an emergency etc.
- Stop the Bleed – how to provide care for an open wound or gun shot
- CPR training
- Marketing Services to city council or township meetings

### State Advisory Council on Aging: October 16, 2025

**Senior Project Fresh (SPF):** Excerpts from a Letter Response from Scott Wamsley, Director Aging, Community Living, & Supports Bureau

“We acknowledge that agencies have expressed challenges with the launch of the SPF e-solution. Despite these concerns, we are encouraged by the strong engagement from both older adults and farmers. As of October 1, 2025, a total of 13,738 older adults successfully applied through the online system and received benefits. Additionally, over 300 farmers across the state have enrolled, and over \$167,000 in funds have been redeemed to support local agriculture.

We understand that requiring a cell phone or email for notifications presents a barrier for many older adults, particularly in communities with limited Wi-Fi access. To address this, we strongly encourage community partners to recruit local farmers and explore creative ways to host markets in locations frequented by older adults. The more we collaborate to bring farmers into the program, the greater the impact on the communities we serve.

We also hear your request to return to agency-led enrollment using paper forms. While we are unable to reinstate the paper-based system, we are actively pursuing approvals to establish a partnership model that allows lead agencies to enroll participants using the new e-solution. We recognize the critical role agencies play in educating and supporting older adults, and we are committed to reintegrating that component into the process.”

**State Plan on Aging:** Tammy Lemmer, State Assistant Administrator ACLS Bureau

Will be coming to all 16 AAA regions interviewing the communities for input. Then they will be taking data, goals and objectives from AAA plans and collaborating these plans for the Federal and State Plan. This plan will be presented to the CSA for approval at their June meeting.

**ACLS Bureau Update:** Scott Werner, Director OANS Division

Michigan Overall: No cuts

Federal Shut Down: Interim Caring Forward with 13 million allocated on September 15<sup>th</sup>. 15 AAA caring on with services, and 1 needed some assistance. Strong opinion that services will decrease if shut down continues into 2026.

### **Advocacy Committee of Commission of Service to the Aging (CSA)**

A letter was sent from the **CSA on October 1, 2025**, to Members of the Michigan Congressional Delegation regarding **Reauthorization of the Older Americans Act**

“Our experience, especially during the COVID pandemic, has reinforced our belief that local agencies are in the best position to determine the appropriate mix of nutrition services for their communities. Therefore, we **encourage you to combine home delivered meals and congregate meals into a single “nutrition services” funding category**. We recommend that the new “nutrition services” category include, at a minimum, options for home-delivered meals, congregate meals, and carry-out meals. This change will allow local area agencies on aging the flexibility to design nutrition programs that best meet local needs and local priorities.”

### **Advocacy Committee Meeting October 23, 2025**

#### **FY 2027 Budget Recommendations for Governor**

- Dementia Funding\*
- Caregiver Supports\*
- Family Caregiver Tax Credit\*
- Wait Lists (especially related to nutrition programs)\*
- Spenddown Expansion\*
- DCW Wages and Other Supports\*
- Inflation and/or Population Adjustment
- Funding Equity for Home and Community Based Care\*
- Senior Volunteer programs
- Protection of Medicaid and SNAP
- MIChoice Waiver risk pool

The committee also discussed strategies for determining which of these issues to advance to the Governor for (re)consideration. The committee supports repeating the FY 2026 recommendations again in FY 2027, since those items are still important but did not make it into the 2026 enacted budget.

#### **Alert System for Missing Vulnerable Adults (*Amber Alert*)**

The committee approved the draft letter to House and Senate committees with jurisdiction on the pending bills (HB 4362 and SB 456);

#### **Feedback on Public Hearings/Listening Sessions Changes**

- Some committee members expressed disappointment in the small turnout despite significant outreach by local committee members; it was noted, however, that there was a conflicting local meeting that may have impacted attendance [NOTE: the routine timing of CSA hearings (mid-day on a Friday) may also negatively impact attendance on an ongoing basis]
- All agreed that the testimony itself was relevant and helpful
- There was general agreement that the new format (and PowerPoint presentation) was helpful and should be used at future listening sessions
- Suggestions for bolstering future attendance included piggybacking on existing local meetings and input structures, including outreach to local AAA advisory committee members; outreach to and through SAC members; sharing the CSA brochure and fact sheets locally at least 4 weeks before the hearing

#### **Designation of November as Caregiver Month**

- the draft proclamation is awaiting action in the Governor's Office

Policy & Procedure Committee Update – 11/5/2025  
Jo VerBeek, Jen Garcia, & Sally Heavener & Rich Butler

We have met several times since my last report in September. We have been focusing on Home Delivered Meals. We have revised Appendix I, and are working through revisions to the existing 96 page RFP. Rich was asked to join the sub-committee to understand the obstacles we have faced. Current schedule call for the recommendation to come to the COA at the 2/18/26 meeting.

Submitted by: Sally Heavener



*The Source for Seniors*

October 10, 2025

Dear Board Member:

The AAWM Board of Directors meeting will be held:

DATE: Monday, October 27, 2025

Lunch: 12:30 p.m.

Board Meeting Time: 1:30 p.m.

PLACE: AAWM Office  
3215 Eaglecrest Drive NE  
Grand Rapids MI 49525

All Board members are invited to lunch at 12:30 p.m. on Monday, October 27. The regular Board meeting will begin at 1:30 p.m.

Enclosed with this meeting notice is the Board packet. Please bring the full packet to the meeting.

If you will be absent from the meeting, please leave me a message at 616.222.7018 or [KendrickH@aaawm.org](mailto:KendrickH@aaawm.org). Thank you.

Sincerely,

Kendrick Heinlein  
President/CEO

Enclosure

**EXECUTIVE COMMITTEE**

**CHAIRPERSON**  
*Bill Routley*

**VICE CHAIRPERSON**  
*Carol Hennessy*

**SECRETARY**  
*Ron Bacon*

**TREASURER**  
*Chuck Hazekamp*

**MEMBER-AT-LARGE**  
*Nancy Nielsen*  
*Marilyn Burns*

**ADVISORY COUNCIL CHAIRPERSON**  
*Barbara Hazlett*

**CEO**  
*Kendrick Heinlein*

**BOARD OF DIRECTORS**

**ALLEGAN COUNTY**  
*Com. Mark DeYoung*  
*Mary Campbell*

**IONIA COUNTY**  
*Com. Larry Tiejema*  
*Edna Albert*

**KENT COUNTY**  
*Com. Carol Hennessy*  
*Nancy Nielsen*

**LAKE COUNTY**  
*Com. Kristine Raymond*  
*Marilyn Burns*

**MASON COUNTY**  
*Com. Ron Bacon*

**MECOSTA COUNTY**  
*Com. Bill Routley*  
*Sharon Bongard*

**MONTCALM COUNTY**  
*Com. Nathan Alexander*  
*Chuck Hazekamp*

**NEWAYGO COUNTY**  
*Com. Lori Tubbergen-Clark*  
*Richard Fitzpatrick*

**OSCEOLA COUNTY**  
*Com. Russ Nehmer*  
*Dawn Montague*

**CITY OF GRAND RAPIDS**  
*Com. Lisa Knight*  
*Jane DeVries*

[3215 EAGLECREST DR NE](#)

**GRAND RAPIDS, MI**

49525-7005

Ph: 616.456.5664

Fx: 616.456.5692

1.888.456.5664

[www.aaawm.org](http://www.aaawm.org)

**AGENDA**  
**Area Agency on Aging of Western Michigan**  
**Board of Directors**

**October 27, 2025 – 1:30 P.M.**  
**3215 Eaglecrest Drive NE, Grand Rapids MI 49525**

	Item/Topic	Action Item	Staff or Presenter
<b>I.</b>	<b>Roll Call</b>		Jessica Torpey
<b>II.</b>	<b>Agenda Approval</b>	X	
<b>III.</b>	<b>Minutes of the September 2025 Meeting</b>	X	
<b>V.</b>	<b>Mission Moment</b>		
<b>VI.</b>	<b>Reports</b>		
A.	<b>Advisory Council Report</b>		Barb Hazlett
B.	<b>Finance Reports</b>		
	<i>FY 2025 September Financial Reports</i>		Scott Russett
C.	<b>Medicaid Overview</b>		Cheryl Christiansen and Jody McGlinchey
D.	<b>Claims Overview</b>		Bill Boes and Rondi Bodnar
E.	<b>Corporate Compliance Report</b>		Holly Williams
F.	<b>AAAWM Marketing Update</b>		Emily Armstrong and Liz Barnett
G.	<b>CEO's Report</b>		Kendrick Heinlein
	FY26 Strategic Plan Goals	X	
<b>VII.</b>	<b>Other</b>		
A.	<b>Bureau of Aging, Community Living and Supports</b>		Ashley Ellsworth
B.	<b>Public Comments – Three Minute Limit</b>		
C.	<b><i>Board Member scheduled to attend the next Advisory Council meeting November 3, 2025 at 1:00 pm. – Chuck Hazekamp and Nathan Alexander</i></b>		
D.	<b>Next Meeting – November 24, 2025</b>		

BOARD OF DIRECTORS

MINUTES

AREA AGENCY ON AGING OF WESTERN MICHIGAN

September 22<sup>nd</sup>, 2025

Area Agency on Aging of Western Michigan Office  
3215 Eaglecrest Drive NE, Grand Rapids MI 49525

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<b>UNIT OF GOVERNMENT</b>	<b>MEMBERS PRESENT</b>	<b>MEMBERS ABSENT</b>
ALLEGAN COUNTY	Mark DeYoung Mary Campbell	
GRAND RAPIDS, CITY		Jane DeVries Lisa Knight
IONIA COUNTY	Larry Tiejema Edna Albert	
KENT COUNTY	Carol Hennessy Nancy Nielsen	
LAKE COUNTY	Marilyn Burns	Kristine Raymond
MASON COUNTY	Ron Bacon	
MECOSTA COUNTY	Bill Routley	Sharon Bongard
MONTCALM COUNTY	Chuck Hazekamp	Nathan Alexander
NEWAYGO COUNTY	Richard Fitzpatrick	Lori Tubbergen-Clark
OSCEOLA COUNTY	Dawn Montague Russ Nehmer	

**Staff Present:** Kendrick Heinlein, Scott Russett, Laura Dobrzelewski, Holly Williams, Cassie Caple, Jessica Torpey, Sheri Harris

**Guests Present:** Barb Hazlett – AAAWM Advisory Council Chairperson

## **I. Roll Call and Agenda Approval**

Chairperson, Bill Routley called the meeting to order at 1:30 pm.

Kendrick Heinlein proposed an amendment to the agenda-Scott Russett will present his section of the agenda in the following order: FY26 Operating Budget, FY25 Budget Revision, and FY25 August Financial Reports.

Ron Bacon moved, and Russ Nehmer seconded the approval of the agenda as amended. Motion carried.

## **II. Minutes of the August 25<sup>th</sup>, 2025 Meeting**

Larry Tiejema moved and Ron Bacon seconded the motion to approve the August 25<sup>th</sup>, 2025 Minutes. Motion carried.

## **III. Reports**

### **A. Advisory Council Report**

Barb Hazlett, Advisory Council Chair, gave report from August's Advisory Council meeting. Unfortunately, there was no Legislative presentation at the meeting – Representative Outman did not show to the meeting as planned and did not return communication as to why. Matt Sienkowski, Practice Manager, brought the Connect for Health Act Bill to the Council and presented risks if the bill is not approved. The Advisory Council agreed to write and send letters in support of the bill being passed. At the state level of Advocacy, the focus right now is to “watch and see” what is happening prior to determining advocacy efforts.

Barb took a moment to recognize Sheri Harris, Director of Advocacy and Planning, who is leaving the agency to pursue a career in Georgia, as a pastor. Barb thanked Sheri for all of her efforts on behalf of the Advisory Council and BOD at AAAWM.

### **B. Financial Reports**

Scott Russett, CFO, reviewed the following and guided discussion while answering questions from the Board:

#### **FY 2026 Operating Budget**

AAAWM is still awaiting approval of the final State budget. Scott is confident based on historical data with the estimates he is presenting being accurate. The Waiver program was awarded a 7.9% increase with the potential of an additional 12% increase due to a risk sharing mechanism the state is implementing, if the draft rates are approved as they were presented. Purchase of Service (PoS) is anticipated to be lower in FY26 based on actual costs. The milage saw an increase right around \$1M for the new FY. Salaries is one area that will have a significant impact on the agency's budget, this is primarily due to two new positions in the Primary Care at Home program. Overall, Scott

is cautiously optimistic about the FY26 budget and will keep the Board abreast of pertinent information from the state as we await a finalized budget.

**Action Item:** Larry Tiejema made a motion to approve the FY26 operating budget as presented. Ron Bacon seconded, and the others approved of the motion. Motion carried.

### **FY 2025 Budget Revision**

Reallocations were presented to help move money from underspent areas to overspent areas to give a better actual on the budget. These changes end at a net of zero and have no effect on the budget's overall bottom line.

**Action Item:** Dawn Montague made a motion to approve the FY25 budget revisions as presented. Ron Bacon seconded, and the others approved of the motion. Motion carried.

### **FY2025 August Financial Reports**

Report 1- Balance Sheet – the agency investments show a decrease of \$600,000 due to a withdraw that was made to cover end of fiscal year expenses. All other line items are where Scott would expect them to be. There were some additional revenues and applied from prior year Waiver findings.

Report 2 – Income Statement Report – The Waiver program is continuing to run a deficit as expected. OAA and KCSM are expected to breakeven by FY end. Special Grants & Others is also expected to breakeven, if not with a small surplus in funds.

Report 3 – Contractor Expenses – OAA – the FY is 92% of the way through. The budget is projected to be spent at 85% but is currently resting at 78%. This is slightly behind but there are some catch-up payments due to outside entities that should bring the budget closer to actual projection by the end of FY.

Report 4 – Summary Expense Report – with the FY being 92% of the way through, expenses are showing a total of 89.9% spent out. Scott is very happy with the agency's administration costs this FY. Any unspent OAA and KCSM unspent funds will be carried forward into the next FY starting this year.

### **C. OIG Overview and Training**

Holly Williams, VP of HR and Corporate Compliance Officer, and Laura Dobrzelewski, VP of Care Management & MI Choice Compliance Officer provided training on False Claims Information and Fraud, Waste, and Abuse. MDHHS requires AAAWM to have a program integrity program as a MiChoice provider. Staff are required to complete this training within 90-days of hire, and all staff and Board members are required to have an annual training. Laura led the training and shared information about the OIG, who the agency works with including required reports and frequencies, audits, and the multiple ways abuse can be reported. Laura also differentiated between her and Holly's roles regarding compliance. Holly reviewed required changes to the Conflict-of-Interest form and took questions from the Committee.

**Action Item:** Russ Nehmer made a motion to approve the changes to the Conflict-of-Interest form as presented. Ron Bacon seconded, and the others approved of the motion. Motion carried.

**D. FY26 Policy & Procedure**

Cassie Caple, VP of Contract Services & Program Development gave a general overview of necessary changes to the P&P manual. Changes are made annually at a minimum. Cassie and her team have worked to be more inclusive with partners on changes to ensure they reflect current services. The changes were also sent to Kent County Administrator's Office and to AAAWM's State Aging Representative for feedback.

**Action Item:** Dawn Montague made a motion to approve the policy and procedure changes as presented. Russ Nehmer seconded, and the others approved the motion. Motion carried.

**E. CEO's Report**

Kendrick Heinlein, CEO, provided the following updates and led discussion:

**FY26 Michigan Budget Update**-as of the time of presentation, there is no certainty about an impending government shutdown. Information about this is cloudy and inconsistent at best currently. The House, Senate, and Governor presented their versions of a budget and now it's onto negotiations. In the meantime, AAAWM is advocating and waiting. Updates will be given to staff, partners, and the Board as more information is finalized. AAAWM's current area of focus is primarily on the House version of potential cuts to the Medicaid Waiver program.

**Strategic Planning Update**-an update on the AAAWM FY25's Strategic Plan, each of its initiatives and current progress.

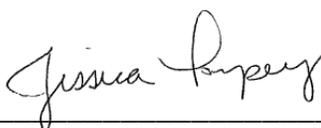
**IV. Other**

**A. Bureau of Aging, Community Living and Supports Comments:**

Ashley Ellsworth, ACLS Representative, could not attend the meeting today. The report she shared with Kendrick was that they are still waiting to see an update on the budget. They are working on implementing back-up plans in case there is a government shutdown and contingency plans for communication if needed.

**B. Public Comments:** None.

**C. Next Meeting Date:** Co-Chairperson, Carol Hennessy, stated the next Board of Directors meeting will be on October 27<sup>th</sup>, 2025, at the AAAWM building. The meeting adjourned at 2:39 p.m.



Jessica Torpey, Recorder



Ron Bacon, Secretary

**Area Agency on Aging of Western Michigan Inc.**  
**EXECUTIVE BOARD OF DIR REPORT - BALANCE SHEET (REPORT 1)**  
**FISCAL YEAR 2025 - PERIOD ENDING 9/30/2025 - FIRST CLOSE**

PAGE: 1

<u>ACCOUNT DESCRIPTION</u>	<u>AMOUNT</u>	<u>SUBTOTALS</u>
ASSETS		
CASH - FIFTH THIRD BANK	14,000	
CASH - PNC BANK	4,119,906	
PETTY CASH	175	
INVESTMENTS	4,580,070	
DEPOSIT - POSTAGE -KCI	1,500	
CASH & CASH EQUIVALENTS	8,715,651	8,715,651
ACCOUNTS RECEIVABLE - OTHER	6,823	
ACCRUED INVESTMENT INTEREST	47,533	
GRANTS RECEIVABLE	3,558,935	
RECEIVABLES	3,613,290	3,613,290
PREPAID EXPENSES	89,851	
PREPAID - POS KCSM - RELIANCE ADVANCE	94,485	
PREPAID - INSURANCE & WORKERS COMP	111,319	
PREPAID - WAIVER SELF DETERMINED ADVANCES	339,861	
PREPAIDS	635,516	635,516
LAND	586,625	
BUILDING	3,290,907	
ACCUMULATED DEPRECIATION	(1,452,184)	
FIXED ASSETS	2,425,347	2,425,347
TOTAL ASSETS		\$ 15,389,804

**Area Agency on Aging of Western Michigan Inc.**  
**EXECUTIVE BOARD OF DIR REPORT - BALANCE SHEET (REPORT 1)**  
**FISCAL YEAR 2025 - PERIOD ENDING 9/30/2025 - FIRST CLOSE**

<u>ACCOUNT DESCRIPTION</u>	<u>AMOUNT</u>	<u>SUBTOTALS</u>
LIABILITIES AND FUND BALANCE		
ACCOUNTS PAYABLE	2,416,037	
ACCRUED WAIVER POS EXPENSES	2,730,495	
PAYABLES	5,146,532	\$ 5,146,532
ACCRUED PAYROLL & PAYROLL TAXES	64,692	
ACCRUED PAYROLL - VACATION & SICK RESERVE	649,822	
ACCRUED PAYROLL	714,514	714,514
GRANTS PAYABLE	-	
GRANT ADVANCES PAYABLE	1,343,337	
LOANS PAYABLE	1,343,337	1,343,337
DEFERRED INCOME - LOCAL	348,705	
DEFERRED INCOME	348,705	348,705
GENERAL CONTRIBUTIONS - OTHER	24,999	
	24,999	24,999
DESIGNATED FUND BALANCE		
GENERAL RESERVES	12,266,743	
FY 2024 FUND BALANCE CHANGE - DEFICIT	(2,408,036)	
UNRESTRICTED FUND BALANCE	9,858,707	9,858,707
NET FUND BALANCE CHANGE - FY 2025	(2,046,989)	
FUND BALANCE	(2,046,989)	(2,046,989)
TOTAL LIABILITIES AND FUND BALANCE		\$ 15,389,804



**Report #2 - Income Statement  
Special Grants and Other Detail**

October 1, 2024 - September 30, 2025 - FIRST CLOSE  
100% of fiscal year

**AREA AGENCY ON AGING OF WESTERN MICHIGAN**

As of 24 - September 30, 2025 - FIRST CLOSE

	MMAP/ No Wrong Door				HCBS Veterans	Community Transitions (NFT)	Engaging Wellness	Elder Refugee	Family Caregiver University	Caregiver Resource Center	Michigan Health Endowment	AAAWM Reserves & Misc. Programs	FY 2025
	SMP	PCOC	SHIP	MIPPA									
<b>SUPPORT &amp; REVENUES</b>													
1 Federal Funding	\$35,966	\$110,431	\$78,836	\$17,250	\$726,320	\$0	\$0	\$135,567	\$0	\$320,216*	\$0	\$0	\$1,424,585 *
2 State Funding	\$0	\$0	\$0	\$0	\$0	\$453,909	\$0	\$0	\$0	\$0	\$358,303*	\$0	\$645,524 *
3 Local Match In-Kind	\$0	\$0	\$0	\$2,200	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2,200
4 Local Funding	\$0	\$0	\$4,845	\$0	\$0	\$0	\$22,981	\$0	\$982	\$0	\$0	\$1,670	\$30,478
5 Other Income	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$416,467	\$416,467
<b>TOTAL FUNDING</b>	<b>\$35,966</b>	<b>\$110,431</b>	<b>\$83,681</b>	<b>\$19,450</b>	<b>\$726,320</b>	<b>\$453,909</b>	<b>\$22,981</b>	<b>\$135,567</b>	<b>\$982</b>	<b>\$320,216</b>	<b>\$191,615</b>	<b>\$418,137</b>	<b>\$2,519,255</b>

	MMAP/ No Wrong Door				HCBS Veterans	Community Transitions (NFT)	Engaging Wellness	Elder Refugee	Family Caregiver University	Caregiver Resource Center	Michigan Health Endowment	AAAWM Reserves & Misc. Programs	FY 2025
	SMP	PCOC	SHIP	MIPPA									
<b>EXPENSES</b>													
1 Salaries & Wages	\$21,462	\$77,260	\$49,684	\$19,964	\$69,182	\$241,133	\$35,038	\$9,636	\$0	\$12,066	\$120,155	\$0	\$655,578
2 Fringes	\$5,309	\$30,916	\$14,863	\$9,866	\$24,055	\$76,946	\$23,713	\$4,091	\$0	\$3,779	\$32,013	\$0	\$225,554
3 Staff Travel	\$160	\$424	\$484	\$54	\$5,011	\$9,999	\$58	\$58	\$0	\$115	\$7,640	\$0	\$24,002
4 Accrued Vacation & Sick	\$557	(\$681)	\$1,345	\$465	(\$74)	\$4,812	\$104	\$113	\$0	(\$121)	\$4,113	\$0	\$10,633
5 Supplies & Miscellaneous	\$334	\$2,501	\$1,217	\$329	\$737	\$1,271	\$1,228	\$402	\$266	\$873	\$15,208	\$39,814	\$64,180
7 Depreciation	\$1,468	\$0	\$2,794	\$444	\$0	\$875	\$15,834	\$172	\$0	\$790	\$0	\$0	\$22,377
8 Maintenance & Utilities	\$4,563	\$0	\$5,206	\$0	\$0	\$1,255	\$24,736	\$90	\$0	\$1,120	\$0	\$0	\$36,969
9 Telephone & Internet	\$1,032	\$0	\$1,537	\$83	\$858	\$2,043	\$132	\$207	\$0	\$425	\$692	\$0	\$7,009
10 Marketing & Promotions	\$171	\$0	\$269	\$205	\$224	\$730	\$159	\$49	\$314	\$193	\$0	\$0	\$2,314
11 Postage	\$141	\$45	\$152	\$0	\$240	\$0	\$13	\$74	\$0	\$0	\$285	\$0	\$949
12 Copying & Printing	\$0	\$0	\$35	\$0	\$63	\$0	\$152	\$237	\$0	\$0	\$0	\$0	\$487
13 Insurance & Bond	\$365	\$0	\$621	\$101	\$73	\$401	\$3,497	\$31	\$0	\$176	\$2,988	\$0	\$8,253
14 Payroll Service	\$351	\$0	\$333	\$0	\$450	\$1,013	\$93	\$144	\$0	\$322	\$0	\$0	\$2,707
15 Contractual & Consultants	\$2,228	\$0	\$3,889	\$0	\$11,382	\$173	\$11,192	\$3,354	\$0	\$8,052	\$0	\$32,001	\$72,271
16 Memberships & Dues	\$207	\$0	\$240	\$0	\$646	\$1,108	\$174	\$261	\$0	\$541	\$0	\$0	\$3,177
17 Staff Development	\$170	\$0	\$190	\$22	\$238	\$550	\$110	\$96	\$0	\$185	\$3,227	\$0	\$4,788
18 Audit & Legal	\$105	\$0	\$269	\$0	\$0	\$0	\$0	\$0	\$0	\$754	\$5,294	\$0	\$6,421
19 Advocacy	\$0	\$9	\$0	\$157	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$165
20 Volunteer & Participant Exp.	\$325	\$0	\$693	\$96	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,114
21 Volunteers Time & Donation	\$0	\$0	\$0	\$2,200	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2,200
22 Purchased Programs	\$0	\$0	\$0	\$0	\$0	\$0	\$80	\$0	\$0	\$0	\$0	\$0	\$80
23 Contract Services & POS	\$0	\$0	\$0	\$0	\$616,960	\$114,566	\$10	\$116,591	\$0	\$302,967	\$0	\$15,053	\$1,166,136
<b>TOTAL EXPENSES</b>	<b>\$38,948</b>	<b>\$110,473</b>	<b>\$83,822</b>	<b>\$33,985</b>	<b>\$730,045</b>	<b>\$456,874</b>	<b>\$116,313</b>	<b>\$135,605</b>	<b>\$580</b>	<b>\$332,237</b>	<b>\$191,615</b>	<b>\$86,868</b>	<b>\$2,317,364</b>

\* Revenue for this program has been received during this fiscal year, but expenses will not occur until later in the year and into next year. We have deferred a portion of this revenue to display more accurate financial information. The additional revenue will be applied as expenses are incurred.

**Area Agency On Aging of Western Michigan Inc.**  
**EXEC BOARD OF DIR DETAIL CONTRACTOR EXPENSES-OAA (REPORT 3)**

FISCAL YEAR 2025 - PERIOD ENDING 09/30/2025

ACCOUNT DESCRIPTION	CURRENT MONTH	ANNUAL BUDGET	100% OF FISCAL YEAR		REMAINING BALANCE
			YTD EXPENSES	YTD %	
ALZHEIMERS ASSOC OF WEST MICHIGAN					
CAREGIVER TRAINING	\$5,246	\$5,250	\$5,246	99.93%	\$4
CAREGIVER COUNSELING	\$21,750	\$21,750	\$21,750	100.00%	\$0
CAREGIVER SUPPORT GROUP	\$48,000	\$48,000	\$48,000	100.00%	\$0
TOTAL ALZHEIMERS ASSOC OF WEST MI	\$74,996	\$75,000	\$74,996	100.00%	\$4
ASSOC. FOR THE BLIND & VISUALLY IMPAIRED					
COUNSELING	\$259	\$260	\$259	99.68%	\$1
ASSISTIVE DEVICES & TECHNOLOGIES	\$9,310	\$9,310	\$9,310	100.00%	\$0
TOTAL A.B.V.I.	\$9,569	\$9,570	\$9,569	99.99%	\$1
ATRIO HOME CARE					
HOMEMAKER	\$89,429	\$99,727	\$89,429	89.67%	\$10,298
IN-HOME RESPITE	\$3,189	\$11,079	\$3,189	28.79%	\$7,890
TOTAL ATRIO HOME CARE	\$92,618	\$110,806	\$92,618	83.59%	\$18,188
BALDWIN FAMILY HEALTH CARE					
IN-HOME RESPITE	\$127,217	\$130,449	\$127,217	97.52%	\$3,232
GRAND PARENTS PROGRAM	\$12,327	\$12,863	\$12,327	95.84%	\$536
TOTAL BALDWIN FAMILY HEALTH CARE	\$139,544	\$143,312	\$139,544	97.37%	\$3,768
CLAY STREET CENTER					
ADULT DAY CARE	\$78,282	\$82,992	\$78,282	94.32%	\$4,710
TOTAL CLAY STREET CENTER	\$78,282	\$82,992	\$78,282	94.32%	\$4,710
COMMUNITY ACTION OF ALLEGAN CO					
TRANSPORTATION ASST.	\$27,718	\$30,000	\$27,718	92.39%	\$2,282
TOTAL COMM. ACTION OF ALLEGAN CO	\$27,718	\$30,000	\$27,718	92.39%	\$2,282
ELDERS HELPERS					
ASSISTIVE DEVICES & TECHNOLOGIES	\$132,119	\$132,200	\$132,119	99.94%	\$81
TOTAL ELDERS HELPERS	\$132,119	\$132,200	\$132,119	99.94%	\$81
EVERGREEN COMMONS					
ADULT DAY CARE	\$47,458	\$57,723	\$47,458	82.22%	\$10,265
CAREGIVER EDUCATION	\$2,500	\$2,500	\$2,500	100.00%	\$0
CAREGIVER SUPPORT GROUP	\$1,140	\$1,140	\$1,140	100.00%	\$0
TOTAL EVERGREEN COMMONS	\$51,098	\$61,363	\$51,098	83.27%	\$10,265
G.R.C.C. OLDER LEARNERS					
DISEASE PREVENTION	\$9,055	\$9,900	\$9,055	91.46%	\$845
TOTAL G.R.C.C. OLDER LEARNERS	\$9,055	\$9,900	\$9,055	91.46%	\$845
IONIA CO. BOARD OF COMMISSIONERS					
TRANSPORTATION ASSISTANCE	\$42,000	\$42,000	\$42,000	100.00%	\$0

**Area Agency On Aging of Western Michigan Inc.**  
**EXEC BOARD OF DIR DETAIL CONTRACTOR EXPENSES-OAA (REPORT 3)**

FISCAL YEAR 2025 - PERIOD ENDING 09/30/2025

ACCOUNT DESCRIPTION	CURRENT MONTH	ANNUAL BUDGET	100% OF FISCAL YEAR		REMAINING BALANCE
			YTD EXPENSES	YTD %	
HOMEMAKER	\$83,701	\$85,774	\$83,701	97.58%	\$2,073
IN-HOME RESPITE	\$47,886	\$51,229	\$47,886	93.47%	\$3,343
SENIOR CENTER STAFFING	\$11,719	\$11,719	\$11,719	100.00%	\$0
DISEASE PREVENTION	\$15,796	\$15,876	\$15,796	99.50%	\$80
CONGREGATE MEALS	\$59,507	\$61,583	\$59,507	96.63%	\$2,076
HOME DELIVERED MEALS	\$270,969	\$270,969	\$270,969	100.00%	\$0
CONGREGATE & HOME DELIVERED MEALS	\$36,638	\$36,638	\$36,638	100.00%	\$0
<b>TOTAL IONIA CO. BOARD OF COMM.</b>	<b>\$568,216</b>	<b>\$575,788</b>	<b>\$568,216</b>	<b>98.69%</b>	<b>\$7,572</b>
<b>KENT CO COMMUNITY ACTION</b>					
OUTREACH	\$98,544	\$100,000	\$98,544	98.54%	\$1,456
CONGREGATE & HOME DELIVERED MEALS	\$9,352	\$9,352	\$9,352	100.00%	\$0
<b>TOTAL KENT CO COMMUNITY ACTION</b>	<b>\$107,896</b>	<b>\$109,352</b>	<b>\$107,896</b>	<b>98.67%</b>	<b>\$1,456</b>
<b>LEGAL AID OF WESTERN MICHIGAN</b>					
LEGAL ASSISTANCE	\$136,998	\$137,000	\$136,998	100.00%	\$2
<b>TOTAL LEGAL AID OF WESTERN MICHIGAN</b>	<b>\$136,998</b>	<b>\$137,000</b>	<b>\$136,998</b>	<b>100.00%</b>	<b>\$2</b>
<b>LIFE THERAPEUTIC SOLUTIONS</b>					
CAREGIVER TRAINING - HEALTHY IDEAS	\$6,108	\$21,000	\$6,108	29.08%	\$14,892
<b>TOTAL LIFE THERAPEUTIC SOLUTIONS</b>	<b>\$6,108</b>	<b>\$21,000</b>	<b>\$6,108</b>	<b>29.08%</b>	<b>\$14,892</b>
<b>LUDINGTON CITY RECREATION DEPT</b>					
SENIOR CENTER STAFFING	\$18,000	\$18,054	\$18,000	99.70%	\$54
DISEASE PREVENTION	\$4,589	\$4,940	\$4,589	92.89%	\$351
<b>TOTAL LUDINGTON CITY RECREATION DEPT</b>	<b>\$22,589</b>	<b>\$22,994</b>	<b>\$22,589</b>	<b>98.24%</b>	<b>\$405</b>
<b>LUDINGTON MASS TRANSIT AUTHORITY</b>					
TRANSPORTATION - ASSISTED	\$12,979	\$16,000	\$12,979	81.12%	\$3,021
<b>TOTAL LUDINGTON MASS TRANSIT AUTHORITY</b>	<b>\$12,979</b>	<b>\$16,000</b>	<b>\$12,979</b>	<b>81.12%</b>	<b>\$3,021</b>
<b>MASON CO. CENTRAL SCHOOLS</b>					
TRANSPORTATION ASSISTANCE	\$15,516	\$15,516	\$15,516	100.00%	\$0
HOMEMAKER	\$68,294	\$66,000	\$68,294	103.48%	(\$2,294)
IN HOME RESPITE	\$15,811	\$16,675	\$15,811	94.82%	\$864
CONGREGATE MEALS	\$24,131	\$24,131	\$24,131	100.00%	\$0
HOME DELIVERED MEALS	\$225,330	\$225,330	\$225,330	100.00%	\$0
CONGREGATE & HOME DELIVERED MEALS	\$35,293	\$35,293	\$35,293	100.00%	\$0
GRANDPARENTS PROGRAM	\$4,800	\$4,800	\$4,800	100.00%	\$0
<b>TOTAL MASON CO. CENTRAL SCHOOLS</b>	<b>\$389,175</b>	<b>\$387,745</b>	<b>\$389,175</b>	<b>100.37%</b>	<b>(\$1,430)</b>
<b>MEALS ON WHEELS OF WESTERN MICHIGAN</b>					
CONGREGATE MEALS	\$502,791	\$502,791	\$502,791	100.00%	\$0
HOME DELIVERED MEALS	\$1,711,186	\$1,715,732	\$1,711,186	99.74%	\$4,546
CONGREGATE & HOME DELIVERED MEALS	\$318,935	\$318,935	\$318,935	100.00%	\$0

**Area Agency On Aging of Western Michigan Inc.**  
**EXEC BOARD OF DIR DETAIL CONTRACTOR EXPENSES-OAA (REPORT 3)**  
 FISCAL YEAR 2025 - PERIOD ENDING 09/30/2025

ACCOUNT DESCRIPTION	CURRENT MONTH	ANNUAL BUDGET	100% OF FISCAL YEAR		
			YTD EXPENSES	YTD %	REMAINING BALANCE
TOTAL MEALS ON WHEELS OF WESTERN MICH	\$2,532,912	\$2,537,458	\$2,532,912	99.82%	\$4,546
MECOSTA CO. BOARD OF COMMISSIONERS					
TRANSPORTATION ASSISTANCE	\$29,661	\$30,690	\$29,661	96.65%	\$1,029
DISEASE PREVENTION	\$5,194	\$5,393	\$5,194	96.31%	\$199
HOMEMAKER	\$82,552	\$72,119	\$82,552	114.47%	(\$10,433)
IN HOME RESPITE	\$30,554	\$34,724	\$30,554	87.99%	\$4,170
SENIOR CENTER STAFFING	\$20,000	\$20,000	\$20,000	100.00%	\$0
CONGREGATE MEALS	\$33,950	\$33,950	\$33,950	100.00%	\$0
HOME DELIVERED MEALS	\$200,772	\$200,772	\$200,772	100.00%	\$0
CONGREGATE & HOME DELIVERED MEALS	\$29,294	\$29,294	\$29,294	100.00%	\$0
TOTAL MECOSTA CO. BOARD OF COMM.	\$431,976	\$426,941	\$431,976	101.18%	(\$5,035)
MONTCALM CO. BOARD OF COMMISSIONERS					
TRANSPORTATION ASSISTANCE	\$25,243	\$25,243	\$25,243	100.00%	\$0
HOMEMAKER	\$62,768	\$65,394	\$62,768	95.98%	\$2,626
RESPIRE CARE	\$74,075	\$72,715	\$74,075	101.87%	(\$1,360)
CONGREGATE MEALS	\$45,000	\$45,000	\$45,000	100.00%	\$0
HOME DELIVERED MEALS	\$177,277	\$177,277	\$177,277	100.00%	\$0
CONGREGATE & HOME DELIVERED MEALS	\$23,244	\$23,244	\$23,244	100.00%	\$0
TOTAL MONTCALM CO. BOARD OF COMM.	\$407,607	\$408,873	\$407,607	99.69%	\$1,265
NEWAYGO CO. BOARD OF COMMISSIONERS					
TRANSPORTATION ASSISTANCE	\$25,500	\$25,500	\$25,500	100.00%	\$0
HOMEMAKER	\$93,314	\$92,686	\$93,314	100.68%	(\$628)
ADULT DAY CARE	\$41,578	\$41,512	\$41,578	100.16%	(\$66)
CONGREGATE MEALS	\$60,000	\$60,000	\$60,000	100.00%	\$0
HOME DELIVERED MEALS	\$149,731	\$149,731	\$149,731	100.00%	\$0
CONGREGATE & HOME DELIVERED MEALS	\$38,645	\$38,645	\$38,645	100.00%	\$0
TOTAL NEWAYGO CO. BOARD OF COMM.	\$408,768	\$408,074	\$408,768	100.17%	(\$694)
OSCEOLA CO. BOARD OF COMMISSIONERS					
TRANSPORTATION ASSISTANCE	\$42,395	\$42,395	\$42,395	100.00%	\$0
HOMEMAKER	\$50,256	\$49,864	\$50,256	100.79%	(\$392)
IN-HOME RESPITE	\$60,558	\$64,969	\$60,558	93.21%	\$4,411
DISEASE PREVENTION	\$5,167	\$6,000	\$5,167	86.12%	\$833
CONGREGATE MEALS	\$54,565	\$70,000	\$54,565	77.95%	\$15,435
HOME DELIVERED MEALS	\$175,647	\$175,647	\$175,647	100.00%	\$0
CONGREGATE & HOME DELIVERED MEALS	\$24,540	\$24,540	\$24,540	100.00%	\$0
SENIOR CENTER STAFFING	\$20,000	\$20,000	\$20,000	100.00%	\$0
TOTAL OSCEOLA CO. BOARD OF COMM.	\$433,128	\$453,415	\$433,128	95.53%	\$20,287
SALVATION ARMY					
CONGREGATE & HOME DELIVERED MEALS	\$2,904	\$2,904	\$2,904	100.00%	\$0

**Area Agency On Aging of Western Michigan Inc.**  
**EXEC BOARD OF DIR DETAIL CONTRACTOR EXPENSES-OAA (REPORT 3)**

FISCAL YEAR 2025 - PERIOD ENDING 09/30/2025

ACCOUNT DESCRIPTION	CURRENT MONTH	ANNUAL BUDGET	100% OF FISCAL YEAR		REMAINING BALANCE
			YTD EXPENSES	YTD %	
TOTAL SALVATION ARMY	\$2,904	\$2,904	\$2,904	100.00%	\$0
SARAHCARE - KNAPP					
ADULT DAY CARE	\$129,012	\$180,128	\$129,012	71.62%	\$51,116
TOTAL SARACARE - KNAPP	\$129,012	\$180,128	\$129,012	71.62%	\$51,116
SENIOR NEIGHBORS					
PUBLIC TRANSPORTATION	\$34,102	\$34,102	\$34,102	100.00%	\$0
OUTREACH & ASSISTANCE	\$126,218	\$126,218	\$126,218	100.00%	\$0
RESPIRE - SENIOR COMPANIONS	\$71,322	\$71,322	\$71,322	100.00%	\$0
SENIOR CENTER STAFFING	\$33,328	\$33,328	\$33,328	100.00%	\$0
DISEASE PREVENTION	\$7,597	\$7,597	\$7,597	100.00%	\$0
TOTAL SENIOR NEIGHBORS	\$272,567	\$272,567	\$272,567	100.00%	\$0
ST. ANN'S CHURCH					
TRANSPORTATION ASSISTANCE	\$11,500	\$11,500	\$11,500	100.00%	\$0
HOMEMAKER	\$40,907	\$55,129	\$40,907	74.20%	\$14,223
CONGREGATE MEALS	\$84,051	\$100,000	\$84,051	84.05%	\$15,949
HOME DELIVERED MEALS	\$140,543	\$140,543	\$140,543	100.00%	\$0
CONGREGATE & HOME DELIVERED MEALS	\$23,644	\$23,644	\$23,644	100.00%	\$0
SENIOR CENTER STAFFING	\$3,240	\$3,240	\$3,240	100.00%	\$0
DISEASE PREVENTION	\$4,800	\$4,800	\$4,800	100.00%	\$0
TOTAL ST. ANN'S CHURCH	\$308,685	\$338,856	\$308,685	91.10%	\$30,171
UNITED METHODIST COMMUNITY HOUSE					
TRANSPORTATION ASSISTANCE	\$25,000	\$25,000	\$25,000	100.00%	\$0
SENIOR CENTER STAFFING	\$8,989	\$9,000	\$8,989	99.88%	\$11
TOTAL UNITED METHODIST COMMUNITY HOUSE	\$33,989	\$34,000	\$33,989	99.97%	\$11
WELLSPRING ADULT DAY CENTER					
ADULT DAY CARE	\$36,657	\$38,828	\$36,657	94.41%	\$2,170
TOTAL WELLSPRING ADULT DAY CENTER	\$36,657	\$38,828	\$36,657	94.41%	\$2,170
CITY OF WYOMING					
PUBLIC TRANSPORTATION	\$13,591	\$14,800	\$13,591	91.83%	\$1,209
TOTAL CITY OF WYOMING	\$13,591	\$14,800	\$13,591	91.83%	\$1,209
TOTAL EXPENSES	\$6,870,758	\$7,041,866	\$6,870,758	97.57%	\$171,108

**Area Agency On Aging of Western Michigan Inc.**  
**BOARD OF DIRECTORS - EXPENSES (REPORT 4)**  
FISCAL YEAR 2025 - PERIOD ENDING 09/30/2025 - FIRST CLOSE

	ANNUAL BUDGET	100% OF FISCAL YEAR		REMAINING BALANCE
		YTD EXPENSES	YTD %	
OPERATING EXPENSES				
SALARIES & WAGES	\$7,450,324	\$7,285,857	97.79%	\$164,467
FRINGES - INSURANCE	\$2,799,200	\$2,869,881	102.53%	(\$70,681)
STAFF TRAVEL	\$156,207	\$163,047	104.38%	(\$6,840)
ACCRUED VACATION & SICK	\$155,000	\$24,606	15.87%	\$130,394
SUPPLIES & MISCELLANEOUS	\$166,156	\$171,699	103.34%	(\$5,543)
DEPRECIATION	\$141,000	\$141,092	100.07%	(\$92)
MAINTENANCE & UTILITIES	\$240,300	\$225,431	93.81%	\$14,869
TELEPHONE & INTERNET	\$54,319	\$63,086	116.14%	(\$8,767)
MARKETING & PROMOTION	\$29,495	\$25,097	85.09%	\$4,398
POSTAGE	\$13,500	\$16,634	123.22%	(\$3,134)
COPYING & PRINTING	\$19,000	\$21,871	115.11%	(\$2,871)
INSURANCE & BOND	\$32,700	\$38,785	118.61%	(\$6,085)
PAYROLL SERVICE	\$25,000	\$28,290	113.16%	(\$3,290)
CONTRACTUAL & CONSULTANTS	\$470,511	\$452,661	96.21%	\$17,850
MEMBERSHIP & DUES	\$38,613	\$38,959	100.89%	(\$346)
STAFF DEVELOPMENT	\$30,050	\$25,444	84.67%	\$4,606
AUDIT & LEGAL	\$104,009	\$90,871	87.37%	\$13,139
ADVOCACY	\$27,953	\$25,856	92.50%	\$2,097
VOLUNTEERS & PARTICIPANT EXP.	\$11,000	\$9,970	90.64%	\$1,030
VOLUNTEERS' TIME & DONATIONS	\$75,465	\$78,118	103.52%	(\$2,653)
UNALLOCATED	\$0	\$0	\$0	\$0
SUBTOTAL EXPENSES	\$12,039,803	\$11,797,255	97.99%	\$242,548
TOTAL ADMIN. & DIRECT SERVICE EXPENSE	\$12,039,803	\$11,797,255	97.99%	\$242,548

SERVICES

OLDER AMERICANS SERVICES				
CONTRACTED SERVICES				
ALZHEIMERS ASSOCIATION	\$75,000	\$74,996	100.00%	\$4
ASSOC. FOR THE BLIND & VISUALLY IMPAIF	\$9,570	\$9,569	99.99%	\$1
ATRIO HOME CARE	\$110,806	\$92,618	83.59%	\$18,188
BALDWIN FAMILY HEALTH CARE	\$143,312	\$139,544	97.37%	\$3,768
CLAY STREET CENTER	\$82,992	\$78,282	94.32%	\$4,710
COMMUNITY ACTION ALLEGAN	\$30,000	\$27,718	92.39%	\$2,282
ELDERS HELPERS	\$132,200	\$132,119	99.94%	\$81
EVERGREEN COMMONS	\$61,363	\$51,098	83.27%	\$10,265
G.R.C.C. - OLDER LEARNER CENTER	\$9,900	\$9,055	91.46%	\$845
IONIA CO BOARD OF COMMISSIONERS	\$575,788	\$568,216	98.69%	\$7,572
KENT COUNTY COMMUNITY ACTION	\$109,352	\$107,896	98.67%	\$1,456
LEGAL AID OF WESTERN MICHIGAN	\$137,000	\$136,998	100.00%	\$2
LIFE THERAPEUTIC SOLUTIONS, INC.	\$21,000	\$6,108	29.08%	\$14,892
LUDINGTON AREA SENIOR CENTER	\$22,994	\$22,589	98.24%	\$405
LUDINGTON MASS TRANSIT AUTHORITY	\$16,000	\$12,979	81.12%	\$3,021
MASON CO CENTRAL SCHOOLS	\$387,745	\$389,175	100.37%	(\$1,430)
MEALS ON WHEELS WESTERN MICHIGAN	\$2,537,458	\$2,532,912	99.82%	\$4,546
MECOSTA CO BOARD OF COMMISSIONERS	\$426,941	\$431,976	101.18%	(\$5,035)
MONTCALM CO BOARD OF COMMISSIONERS	\$408,873	\$407,607	99.69%	\$1,265
NEWAYGO CO BOARD OF COMMISSIONERS	\$408,074	\$408,768	100.17%	(\$694)
OSCEOLA CO BOARD OF COMMISSIONERS	\$453,415	\$433,128	95.53%	\$20,287
SALVATION ARMY	\$2,904	\$2,904	100.00%	\$0
SARAH CARE KNAPP CORNER	\$180,128	\$129,012	71.62%	\$51,116
SENIOR NEIGHBORS, INC	\$272,567	\$272,567	100.00%	(\$0)
ST ANN'S CHURCH	\$338,856	\$308,685	91.10%	\$30,171
UNITED METHODIST COMMUNITY HOUSE	\$34,000	\$33,989	99.97%	\$11
WELLSPRING ADULT DAY SERVICES	\$38,828	\$36,657	94.41%	\$2,170
CITY OF WYOMING	\$14,800	\$13,591	91.83%	\$1,209
TOTAL OAA CONTRACTED SERVICES	\$7,041,866	\$6,870,758	97.57%	\$171,108
TOTAL CONTRACTED: OAA	\$7,041,866	\$6,870,758	97.57%	\$171,108

KENT CO. SENIOR MILLAGE SERVICES

A.B.V.I.	\$71,222	\$71,207	99.98%	\$15
ATRIO HOME CARE	\$103,950	\$99,448	95.67%	\$4,502
ALZHEIMER'S ASSOC. OF WEST MI	\$9,914	\$9,914	100.00%	(\$0)
CARE RESOURCES	\$29,167	\$26,189	89.79%	\$2,978
CHERRY STREET HEALTH SERVICES	\$114,939	\$114,757	99.84%	\$182
COMMUNITY FOOD CLUBS	\$242,000	\$237,222	98.03%	\$4,778
DEAF AND HARD OF HEARING SERVICES	\$116,389	\$111,485	95.79%	\$4,904
DISABILITY ADVOCATES OF KENT CO.	\$321,511	\$318,509	99.07%	\$3,002
ELDERS' HELPERS	\$657,677	\$639,564	97.25%	\$18,113
EXALTA HEALTH	\$120,225	\$117,257	97.53%	\$2,968
FAIR HOUSEING CENTER OF WEST MI.	\$49,228	\$49,228	100.00%	(\$0)
GRCC OLDER LEARNER CENTER	\$17,700	\$17,376	98.17%	\$324
GR NEHEMIAH PROJECT	\$175,000	\$173,752	99.29%	\$1,248
HISPANIC CENTER OF WESTERN MICHIGAN	\$42,911	\$42,911	100.00%	(\$0)
HOME REPAIR SERVICES	\$794,997	\$792,997	99.75%	\$2,000
HOPE NETWORK WEST MICHIGAN	\$1,287,675	\$1,287,675	100.00%	(\$0)
KENT CO COMMUNITY ACTION	\$784,886	\$731,338	93.18%	\$53,548
KENT COUNTY PROBATE COURT	\$259,776	\$257,048	98.95%	\$2,728
LEGAL AID OF WESTERN MICHIGAN	\$90,000	\$89,994	99.99%	\$6
LIFE THERAPEUTIC SOLUTIONS	\$175,000	\$161,317	92.18%	\$13,683
MEALS ON WHEELS WESTERN MICHIGAN	\$2,771,722	\$2,771,715	100.00%	\$7
THE RAPID	\$174,149	\$171,268	98.35%	\$2,881
RELIANCE COMMUNITY CARE PARTNERS	\$754,247	\$739,592	98.06%	\$14,655
RENEW MOBILITY	\$45,822	\$45,822	100.00%	\$0
REVIVE & THRIVE	\$62,173	\$61,992	99.71%	\$181
SALVATION ARMY	\$140,994	\$138,810	98.45%	\$2,184
SARAH CARE - KNAPPS CORNER	\$109,389	\$106,807	97.64%	\$2,582
SENIOR NEIGHBORS, INC.	\$2,007,417	\$1,993,417	99.30%	\$14,000
STEEPLETOWN NEIGHBORHOOD ASSOC.	\$65,440	\$61,801	94.44%	\$3,639
UNITED METHODIST COMM. HOUSE	\$136,532	\$136,527	100.00%	\$5
UNITED WAY: HEART OF W. MI	\$79,750	\$79,750	100.00%	(\$0)
<b>Total TOTAL CONTRACTED: KCSM</b>	<b>\$11,811,802</b>	<b>\$11,656,692</b>	<b>98.69%</b>	<b>\$155,110</b>

(NOTE: POS = PURCHASE OF SERVICE)

TOTAL POS: RESPITE CERTIFICATES	\$65,000	\$40,157	61.78%	\$24,843
TOTAL POS: MEDICAID WAIVER	\$32,768,112	\$36,179,594	110.41%	(\$3,411,482)
TOTAL POS: CTS/NFT	\$113,434	\$114,566	101.00%	(\$1,132)
TOTAL POS: VETERANS HCBS PROGRAM	\$696,000	\$668,060	95.99%	\$27,940
TOTAL POS: KENT COUNTY SENIOR MILLAG	\$3,224,543	\$3,001,462	93.08%	\$223,081
TOTAL POS: OLDER AMERICANS ACT	\$1,694,000	\$1,225,178	72.32%	\$468,822
TOTAL POS: AAAWM RESERVES	\$100,000	\$15,415	15.41%	\$84,585
TOTAL POS: LOCAL GRANTS	\$288,199	\$320,614	111.25%	(\$32,414)
<b>SUBTOTAL</b>	<b>\$38,949,288</b>	<b>\$41,565,045</b>	<b>110.16%</b>	<b>(\$2,615,757)</b>
<b>TOTAL SERVICE EXPENSE (CONTRACT &amp; POS)</b>	<b>\$57,802,956</b>	<b>\$60,092,495</b>	<b>106.20%</b>	<b>(\$2,289,539)</b>
<b>TOTAL OPERATING &amp; SERVICE EXPENSES</b>	<b>\$69,842,759</b>	<b>\$71,889,749</b>	<b>104.76%</b>	<b>(\$2,046,991)</b>

## **Area Agency on Aging of Western Michigan**

### **FY2026 Original Operating Budget**

#### **Details of Significant Changes from FY2025 Budget – October 2025 Update**

##### **October, 2025 Update:**

The FY2026 Budget remains unchanged, however we have received new information that we would like to share in this update. I have highlighted the significant developments for our three largest programs below:

##### **Older Americans Act (OAA):**

We received our first OAA Statement of Grant Award (SGA) for FY2026. In this SGA, we received one month of State funding and no Federal funding. In our experience, it is common to receive prorated State and Federal funds for the first SGA's of a new fiscal year. We anticipate receiving the remaining State and Federal funding, once the State receives their own set of awards from the Federal Government. In lieu of Federal funds on this SGA, the State has expedited our access to Federal carryforward funds, which are unspent funds from Fiscal Year (FY) FY2025. This will be extremely beneficial as it will allow us to continue receiving reimbursement for the services we provide.

##### **Kent County Senior Millage (KCSM)**

No changes to report regarding our Kent County Senior Millage (KCSM) award.

##### **Medicaid Waiver:**

The Medicaid Waiver program has seen significant change for FY2026. The two most significant changes are summarized below.

##### **Reimbursement Rates:**

MDHHS has increased the Medicaid Waiver reimbursement rates by 9.8% for all agencies in FY2026 Medicaid program. In addition, MDHHS also introduced an Acuity Factor. This Acuity Factor is a % multiplier to the reimbursement rates. Each Wavier agent is provided with their own unique Acuity Factor, based on the historical cost of providing Medicaid service in their geographic region. AAAMM received an Acuity Factor of 12.23%. This additional percentage is added to the base increase of 9.8%. In total, AAAMM's Medicaid Waiver reimbursement has increased 22.03% from FY2025 levels. This enhanced reimbursement will aid in AAAMM's ability to fully cover costs associated with the program's operations and service costs.

##### **Rate Cell categories & Risk Pool:**

In prior years, participants of the Medicaid Waiver program were classified into 6 different categories, based on the individuals care needs and age, then Waiver

agencies received a set reimbursement (Capitated payments) for each of the categories. For participants who required significant levels of support and care, it was common for the costs of their care to exceed the reimbursement provided. In these situations, there was a state-wide pool of funds that was distributed to help offset the significant costs. This mechanism was called the Risk Pool.

For FY2026, MDHHS has eliminated the Risk Pool and also reduced the 6 possible categories down to 3, subsequently adjusting the set reimbursement for each category. The loss of the Risk Pool is significant, as many agencies relied on these funds to offset the costs that exceeded the capitated reimbursement. There has been little guidance provided for how this will be implemented and how this will truly impact the program.

At this time, it is difficult to assess the full impact of these changes until we see how they are truly implemented. We intend to provide updates on these changes as we progress through the this fiscal year, however until we have more information, AAAWM's FY2026 Medicaid Waiver budget will remain unchanged.

The narrative below summarizes prior FY26 Budget updates given to AAAWM's Board of Directors and is unchanged from when those remarks were given.

### **Federal & State Funding**

The FY2026 Budget shows a minor increase in Federal & State funding, which is primarily driven by a slight increase in Older American Act funding and Medicaid Waiver program. The FY2026 budget includes estimates for the Older Americans Act funding, as we have not received the FY2026 Statement of Grant Award (SGA), which would confirm the totals of our award amounts from Aging and Community Living Supports (ACLS) Bureau. This budget contains our best estimates for those funds but may require an update once the final Statement of Grant Award (SGA) is received and once the Older Americans Act (OAA) carryforward amounts are confirmed and awarded.

For the FY2026 Medicaid Waiver program, we were notified by MDHHS that waiver agents will receive a 7.9% composite increase on Waiver capitation payments. In addition to the standard rate increase, the FY26 year also includes two significant changes to the reimbursement that AAAWM will receive. First, a new risk sharing method was introduced, which changes the payment structure from 6 possible payments, down to 3. This change was implemented to address High-Cost participants, with a new high-reimbursement rate cell. Additionally, regional acuity factors were also implemented. The goal of the acuity factors is to address regions of the state with historically higher costs. Since Grand Rapids has a significantly higher cost for medical services & equipment, we will receive an increase of approximately 12% in addition to the 7.9% increase that was given to all Waiver agents.

Estimates for the FY2026 Medicaid Waiver program's Purchase of Service expenses are budgeted slightly lower than current FY2025 budget, due to closer review of the actual expenditures in the program. The current FY2025 budget for Purchase of Service expenses is higher than our actual incurred expenses, which led to a decision to reduce the budget for FY2026, to become more in-line with actual expenses. Throughout FY2025, we closely monitored several new aspects of the Medicaid Waiver program, including Utilization, Unit Rate agreements with partners and actual expenses on a per-participant level. This additional insight into the expenditures has provided AAAWM leadership with much more accurate information to build projections from. Based on the information gathered from these review & all other reviews performed in the normal course of business, has provided confidence in the FY2026 budget.

The full impact of those changes is still being evaluated, however initial projections are positive. With the initial projections, we expect the Medicaid Waiver program revenues to cover all costs associated with the program, including the Purchase Of Service (POS). Traditionally, the costs associated with providing service have been the leading factor of AAAWM's financial deficit, however with anticipated FY2026 rate increases, our initial projections expect the Purchase Of Service (POS) expenses to break even.

### **Kent County Senior Millage Funding**

Our Kent County funding levels have increased for FY2026 after we submitted requests for funding increases to offset higher costs. AAAWM received an increased budget for Ombudsman staff and Purchases of Services (POS), to support our Care Management and Home Support programs. It is also important to note that the Kent County Senior Millage's fiscal year now aligns with our fiscal year.

### **Other Expenses and notes**

The FY2026 budget increased in several areas when compared to FY2025. Primarily salary and wage, which is reflective of the addition of two new Primary Care at Home employees and a standard across-the-board annual salary increase for all staff. With the increase of administrative revenue from OAA, KCSM, Waiver and the inclusion of investment interest, we expect the true expenditures of FY2026 to trend in the same direction as this budget. With several expense lines receiving an increased budget, we fully expect the additional revenue to cover those increased budgets. In the event that AAAWM receives additional funding not included in this budget, we will look to remove investment interest from the revenue budget.

Investment interest was incorporated into the FY2026 budget to bring the total budget amount up to its anticipated level. However we intend to remove the investment income from the budget as more funding opportunities are awarded. At this time, there

are several additional funding opportunities that will become more clear within the first two quarters of FY2026. One possibility is an infrastructure grant that would cover all costs with AAAWM purchasing building improvements, laptops and other tech related purchases. This opportunity is pending approval in the State's supplemental budget package, but is expected to pass. Another possibility for additional funds will be carryforward funds from the Older Americans Act and MI Options program (formally: No Wrong Door).

Overall, I am very happy with where the Draft budget lies and I will continue to update our estimates as we progress closer to Fiscal Year start. Thank you to our Board's advocacy efforts for increases in the Medicaid Waiver program. It appears your voices were heard and the outlook for the FY2026 Medicaid Waiver program is very positive. I look forward to sharing more updates with you as we continue to evaluate the impact of FY2026 rate changes.



*The Source for Seniors*

# AAAWM Report

**To:** AAWM Board of Director

**From:** Cheryl Christensen, Medicaid Supervisor and Jody McGlinchey, Eligibility Manager

**Date:** 10-27-2025

**RE:** Medicaid Team at AAWM

**Informational Report:** We are presenting on the Medicaid team within the Care Management Department of Area Agency on Aging of Western MI. The Medicaid team assists prospective MI Choice Waiver participants apply for the correct type of long term care Medicaid. The team also assists current participants in maintaining their Medicaid or applying for additional benefits. The Medicaid team is responsible for tracking MI Choice Waiver participants' eligibility to ensure proper coding is applied so that reimbursement can occur for their MI Choice Waiver enrollment.

**Description:** We will present on the structure of the department including roles and responsibilities of team members. We will also present information on the importance of Medicaid as well as challenges faced in 2025 with Medicaid policy changes.

**Data:** We will show the number of applications completed in a year as well as the length of time to complete applications.

**Future Outlook:** The Medicaid team continues to be a major asset within the Care Management Department. The team's support and assistance allows Supports Coordinators to focus on the care needs and day to day facilitation required for participants. The Medicaid team will continue to have a major impact on ensuring our participants maintain Medicaid coverage and AAWM is reimbursed for MI Choice Waiver services.

# Area Agency on Aging of Western Michigan



Medicaid Team for Board of  
Directors October 27, 2025

# Who we are



**Jody McGlinchey** – Eligibility Manager of Care Management since September 2023, previously Area Agency on Aging Supports Coordinator . With agency 12 years.

**Cheryl Christiansen** – Medicaid Supervisor. With agency 15 years. Retired supervisor from Michigan Department of Health and Human Services.

# Members of the Medicaid Team



The Medicaid Team Supervisor reports to the Eligibility Manager within the Care Management Department. On the Medicaid Team are the following positions:

- **Medicaid Supervisor** – Reviews all applications prior to approval. Assigns/designates a Medicaid Specialist to applications. Reviews Medicaid policy that effects eligibility.
- **Medicaid Team Lead** – Supports Medicaid Specialists for complex situations. Assists on attorney applications. Assists in enrollment or payment issues. Oversees the work of the Medicaid Support Specialist.
- **Medicaid Specialists (2)** – Complete Medicaid applications, state emergency relief applications. food stamp applications and annual redeterminations.
- **Medicaid Support Specialist** – Maintains lists of all participants. Confirms enrollment and tracks Department of Human Services worker name and/or eligibility issues.

# Why does Medicaid Matter?



- Individuals enrolled in the MI Choice Waiver program must have the correct type of Medicaid for their enrollment to be registered.
- The enrollment being active allows AAAM to bill and be reimbursed for their MI Choice Waiver services.
- There are many types of Medicaid. Medicaid staff must determine if an applicant has the proper type of Medicaid and if not, additional documentation may need to be provided to Michigan Department of Health and Human Services (MDHHS) in order to get the correct type of Medicaid active so that an enrollment into MI Choice can be entered.
- The type of Medicaid needed for MI Choice has many specific rules and eligibility components that traditional community based Medicaid does NOT have.

# Medicaid Eligibility Criteria 2025



- **MI Choice Waiver Income limit** \$2901 Gross income (300 percent of the SSI Federal Benefit Rate)
- **MI Choice Waiver Asset Limit**
  - **Married couple:** If one spouse is on MI Choice Waiver then asset limit is \$9660 (for the Medicaid spouse) and the community spouse can keep a maximum of \$157,920. If both spouses are utilizing Medicaid long term care benefits then the each person is considered a group of 1 and can each have \$9660.
  - **Single person:** maximum assets for a single person is \$9660
- **Community/Regular Medicaid**
  - **Single person:** Income limit is \$1,325 and asset limit is \$9,660
  - **Married couple:** Income limit is \$1,783 and asset limit is \$14,470

# Participant's Served



The Medicaid team provides assistance to a variety of participants in the Care Management programs AAAWM has to offer.

- The primary function is assisting applicants interested in the MI Choice program with applying for Medicaid.
- Medicaid team staff also assist MI Choice participants in maintaining their Medicaid by completing yearly redeterminations and reporting asset changes to MDHHS.
- Medicaid team staff can assist participants in any of the AAAWM Care Management programs with applying for food assistance programs (FAP), Medicare Savings Programs (MSP), State of Emergency Relief applications (SER) or community Medicaid (for Non-Waiver participants).

# Number Served and Length of Time



**For Fiscal Year 2025**

- **New Medicaid Applications Completed – 178.**
  - Average length of time from referral to completion is 30-45 days.
- **Redeterminations Completed – 354**
- **Food Assistance Applications Completed – 74**

# Complications Faced in 2025



- Some Medicaid redeterminations are passively renewed while a majority are not and require further assistance from the Medicaid Specialists to assist with the redeterminations. Medicaid recipients must prove they remain income and asset eligible for the Medicaid assistance. As we have moved further away from the Public Health Emergency, we are seeing less leniency through the Department of Health and Human Services which can put recipients at risk of losing benefits.
- A Medicaid program type has also created complications in enrolling. **Plan First** is a Medicaid benefit that does not need an income or asset test. As a result enrollee's benefits are limited to Family Planning products. Beneficiaries believe they have Medicaid but in reality they only have a benefit that allows for the purchase of family planning products and no other benefits.



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# AAAWM Report

**To: AAWM Board of Directors**

**From: Bill Boes – Manager of Claims and Data Systems**

**Rondi Bodnar – Claims Supervisor**

**Date: 10/27/2025**

**RE: Claims & Data Systems Department Overview**

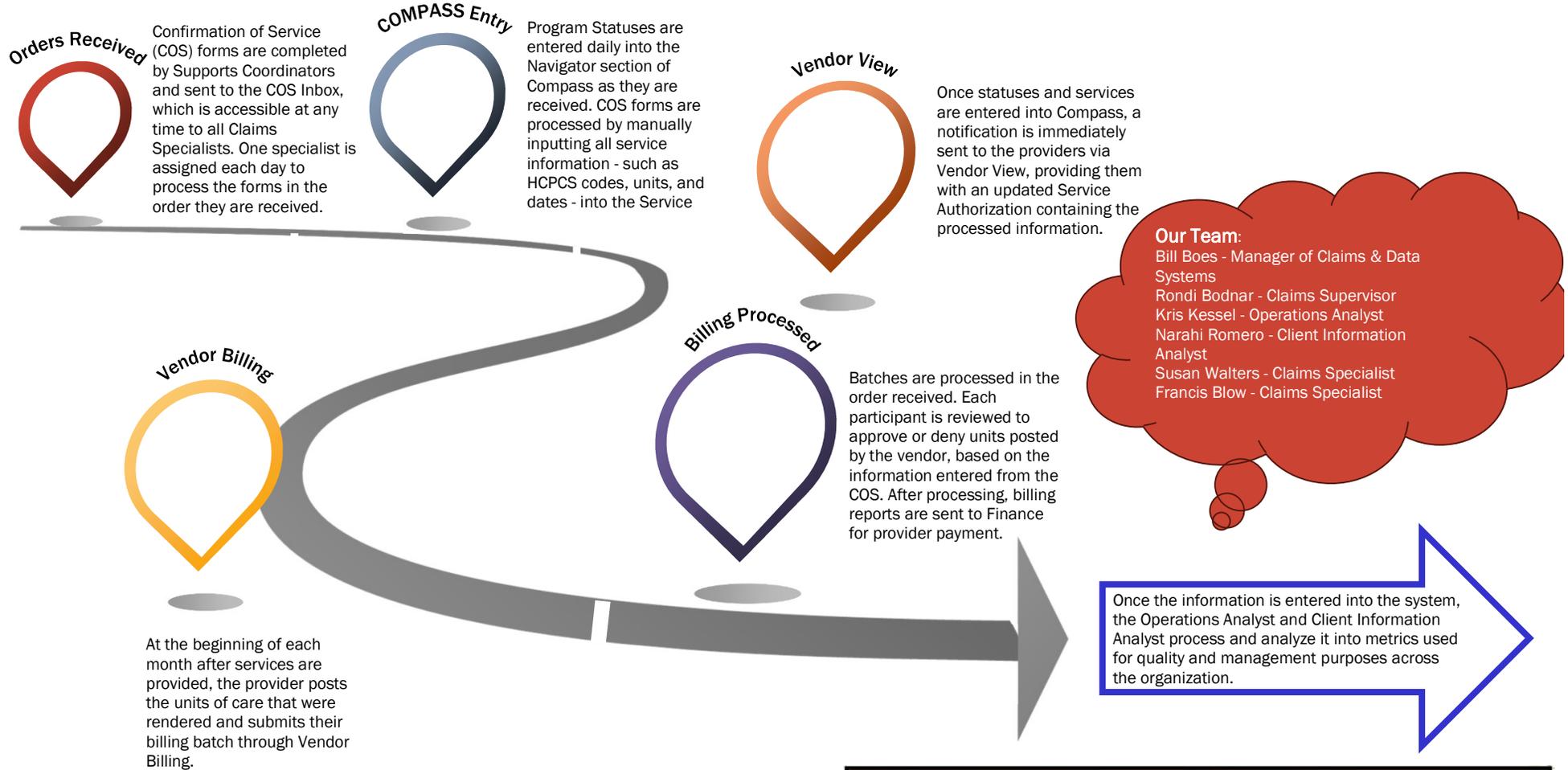
**Foundation Report:** We are here today to give an overview of the Claims & Data Systems Department. We are part of the Finance department but work closely with Care Management daily. The Claims & Data Systems Department is responsible for receipt of services orders, processing orders in COMPASS, approval of the corresponding billing from providers and analyzing all COMPASS data for consistency. These services can be funded through MI Choice Waiver, Older Americans Act, Kent County Senior Millage or other funding sources.

**Description:** Claims responsibilities start when a Confirmation of Service (COS) or Status form is received from a Supports Coordinator. These forms are reviewed by the Claims Specialist for accuracy, then entered into the corresponding section of COMPASS. Forms are reviewed on a first come first serve basis, and generally take 1-3 days from receipt to entry. Services ordered can include Home Delivered Meals, Personal Care, Home Making Services and many other services. COMPASS automatically alerts providers of any services to be rendered. Once services are rendered, providers bill AAWM for the services in a module of COMPASS called Vendor Billing. Providers are given 15 days to submit billing for services, and AAWM reserves another 30 days for processing (45-day total timeframe). All billing is reviewed line by line by the Claims specialist to ensure accuracy and eliminate errors. Once complete, billing is sent directly to the finance department for payment. The Analytics Team reviews any necessary data, in any part of this process, to provide double checks and useful information for management of all programs.

**Data:** We have provided a flow chart to depict the basic flow of data in the Claims & Data Systems Department. Also included are metrics supporting the thoroughness of our process in catching discrepancies, using monthly state reported encounters and errors caught pre submission. And a brief overview on emergency preparedness.

**Future Outlook:** Moving forward the goal of this department is to maintain timely and accurate processing of services and billing to ensure participants receive prompt care, and our providers receive prompt compensation.

# Claims and Data Systems Department Process



**Emergency Planning**  
 MDHHS requires AAAWM to maintain an emergency plan for evacuations of locations such as Palisades Nuclear Power Plant and Hardy Dam. Client Information Analyst maintains procedures and scripts to ensure timely information can be provided for zone evacuation.

Month	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
<b>Data Errors:</b>	13	6	10	12	12	9	5	7	21	5	3	13
<b>Total Encounters:</b>	30,532	27,492	29,819	29,609	29,296	26,928	28,946	29,663	28,706	29,663	29,663	28,706
<b>Percentage of Errors:</b>	0.04%	0.02%	0.03%	0.04%	0.04%	0.03%	0.02%	0.02%	0.07%	0.02%	0.01%	0.05%



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# AAAWM Report

**To: AAWM Board of Directors**

**From: Holly Williams, Vice President of Human Resources & Corporate Compliance Officer**

**Date: October 27, 2025**

**Re: Annual Corporate Compliance Report (FY 2025)**

**Action Required: N/A**

1. This Annual Report to the Board of Directors is to detail a summary of corporate compliance activities and Agency updates for 2025. I am happy to report there have been no allegations, investigations or complaints relating to fraud, fiscal management, or misappropriation of funds. The Agency has checks and balances in place to help safeguard against fraud and financial mismanagement.
2. This year the Equal Employment Opportunity Commission (EEOC) calendar year 2024 report EEO-1 submission window opened up on May 20, 2025. AAWM's 2024 EEO-1 report was submitted to the EEOC on June 2, 2025. The submission was expected and no issues or errors were found.
3. We are required to supply Medicare notifications to those employees a year away from age 65 and those age 65+. These notices are required to be sent to individuals no later than October 15<sup>th</sup> of each year. This required information is being provided annually to all staff as part of the open enrollment material Human Resources gives to each staff member.
4. The System for Award Management (SAM) has a database of individuals and companies debarred, suspended or otherwise excluded from receiving Federal contracts, Federally approved subcontracts, or certain types of Federal financial and non-financial assistance and benefits. The purpose of this system is to protect the public interest; the Federal Government ensures the integrity of Federal programs by conducting business only with responsible persons. The agency Debarment Certification process was completed in early May 2025. AAWM contractors, AAWM Board members and all AAWM staff have not received any debarment charges and no further action is required for this year.

5. Initial background checks are preformed upon hire for all new staff, and interns and upon start date for new volunteers. Thereafter, background checks are performed on all staff, interns and volunteers annually. Starting at the end of FY 25 we are now required to run monthly background checks on staff working in our Primary Care at Home department. As this newer department began to grow, this monthly requirement was imposed by insurance carriers that we work with. This new requirement is only for the Primary Care at Home department and not all staff. All background checks are pulled from three sites for all groups and they are: Michigan iChat, the Michigan Sex Offender Registry and the National Sex Offender Registry. All three of these annual checks were completed for all staff, interns and volunteers in April 2025. There were no issues to be noted from this annual review or the new monthly reviews.
6. Our fourth year of all staff trainings through Relias was rolled out to staff in Mid-January of 2025. Staff were required to complete 7 courses, which totaled about 2 ½ hours of training time in a variety of topics. Those trainings topics focused on HIPAA, LGBTQ+, Fraud, Waste, and Abuse, Unconscious Bias, Humility and Respect, and Time Management.
7. AAAWM's overall culture continues to trend towards the positive. The office consolidation to the lower level and some general updates have helped to boost the agency's office culture and add value for those staff working in the office or dropping by the office. The Employee Engagement Survey rolled out to all staff on March 5, 2025, and the window to complete it closed on March 19, 2025. Our participation rate was 87.8%. AAAWM's overall engagement score was 4.22%, which was well above the National average of 3.80% and the Non-profit average of 3.60%. The survey helped to identify the areas that are working well and some areas for improvement and clarification. We are now in the process of developing and applying strategies to address the areas identified by the survey. We plan to continue to work on, improve, and clarify those identified areas over the coming year. Overall, the Employee Engagement Survey was very positive and reinforces that we are on the right path.

If there are ever any questions about this compliance report, feel free to contact me at [HollyW@aaawm.org](mailto:HollyW@aaawm.org) or 616-222-7067.



*The Source for Seniors*

# AAAWM Board Report

**To: AAWM Board of Directors**

**From: Emily Armstrong, Director of Communications and Liz Barnett, Outreach Specialist**

**Date: 10/27/2025**

We will share *what* our communication roles are and *how* what we do is much like throwing a “pebble in a pond” causing a ripple effect. Through intentional points of communication “the ripple effect” begins and ultimately grows to impact the lives of older adults through learning, engagement and connection.

The unique position of Outreach Specialist is an exciting role—who’s main purpose is to form connections. Those connections with individuals and agencies help to build bridges for education, referrals, information sharing, and maintaining professional relationships and partnerships in serving older adults in our 9-county region. In the past year alone, this has meant hundreds of outreach visits, presentations, and touchpoints with professionals across senior centers, churches, and healthcare organizations. The main parts of Outreach include wearing 4 different hats.

- Networking with senior care professionals
- Table representations at senior Expo’s in each county
- Marketing to Nursing Facility Social Workers and meeting with residents to share information about AAWM services
- Educational presentations in our 9-county region.

Alongside this role, the Director of Communications provides the strategy and tools that allow these connections to push the ripples farther into our 9-county region. This includes content creation, graphic design, event planning, social media management, website creation and maintenance, and media relationships. These efforts ensure that older adults, their families, and community partners hear about AAWM services in consistent, accessible, and engaging ways. Communications amplify outreach, taking a personal connection made at an expo or visit and reinforcing it with a flyer, a social media post, a news story, or an email follow-up.

Together, these roles directly advance AAWM’s mission of promoting independence, dignity, and quality of life for older adults. They make referrals possible by turning awareness into action: communications spark recognition of a need, outreach builds trust and connection, and from there a referral is made into services that support independence. This work matters because each year, over 35,000 older adults across West Michigan rely on these essential services, services that are cost-effective, proven, and provided at a fraction of the cost of nursing home care.

By engaging in these varied connections and communications time and again, the lives of older adults are being impacted. They are learning about what may be available, getting connected with potential resources, plugging into services, and sharing what they have learned with others.

These paragraphs are meant to serve as a short summary. At the Advisory Council meeting, we will also provide a presentation that walks through a “Day in the Life” of a senior in more detail, illustrating the touchpoints and referral process that connect individuals to services.



*The Source for Seniors*

# AAAWM Report

**To: AAWM Board of Directors**  
**From: Kendrick Heinlein, President and CEO**  
**Date: October 27, 2025**  
**Action: FY26 Strategic Plan Goals**  
**Re: Informational Updates**

## **FY26 Strategic Plan Goals**

### **Engage in New Initiatives & Partnerships**

- Expand access to Primary Care at Home by increasing geographic reach and diversifying the provider pool
- Secure sustainable funding for Palliative Care services, including capitated payments.
- Establish a reporting mechanism to track internal and external unmet needs to inform program development and funding priorities.
- Obtain funding and initiate implementation for a Dual Eligible Special Needs Plan (D-SNP).

### **Build Brand Awareness and Strengthen Public Perception**

- Launch an integrated referral system that tracks client service connections.
- Develop a consistent internal review process to regularly analyze referral trends and waitlist data to identify service gaps, improve coordination, and inform outreach strategies.

### **Enhance Advocacy**

- Ensure that at least 75% of Staff, Advisory Council, and Board Members participate in at least one advocacy activity.
- Implement a targeted outreach campaign to legislators highlighting the essential role of the MI Choice Medicaid Waiver program.

### **Collaborative & Productive Workforce**

- Distribute a new monthly internal newsletter to improve staff communication and engagement.
- Standardize the onboarding process to ensure consistency and support new employee success.
- Develop and implement a staff retention strategy aimed at increasing employee tenure to five years or more.

## **FY26 Budget:**

Several key items impacting aging network programs and services were finalized with the passage of the FY2025 State Budget (HB 4706). Below is a summary of the outcomes and their implications for AAAM and partner agencies:

- **Direct Care Worker (DCW) Agency Overhead Reduction**

The proposed reduction to agency overhead included in the House-passed version of the budget was eliminated in the final bill (HB 4706). This outcome helps maintain stability for provider agencies by ensuring that administrative reimbursement levels are not reduced, preserving their ability to manage staffing, compliance, and service delivery functions.

- **Meals Funding**

The Senate-passed proposal that included \$1 million for senior meals did not make it into the final budget. As a result, local agencies will not see an increase in state-level funding support for congregate and home-delivered meals, despite continued growth in service demand and rising food and delivery costs.

- **MI Choice Risk Pool Funding**

The proposed \$14 million for a MI Choice risk pool was not included in the final budget. The absence of this funding means that there will not be a dedicated financial buffer to offset unexpected cost variances among waiver agencies, increasing the need for ongoing monitoring of utilization trends and cost management.

- **Medicaid Managed Care Cost Adjustments**

The final bill includes funding to support cost adjustments for Medicaid managed care organizations, which encompasses MI Choice. This ensures continued alignment of program reimbursement rates with actuarial analyses and inflationary pressures.

- **Home and Community-Based Services (HCBS) Infrastructure Projects**

The budget includes \$54.9 million in supplemental funding to support HCBS infrastructure projects in FY2025. This investment will assist with initiatives that strengthen the long-term care continuum, expand access to services, and modernize systems supporting community-based care.

- **Funding for Minimum Wage and ESTA Adjustments**

Funding was also included to cover cost increases related to required minimum wage and Earned Sick Time Act (ESTA) adjustments. According to Milliman's actuarial estimates, approximately \$17.2 million of this total is attributed to the MI Choice program. This ensures that provider agencies can meet new wage requirements without compromising service availability.

- **Direct Care Worker Premium Pay**

The final budget's boilerplate language confirms that the \$3.40 per hour DCW premium pay is fully funded. This ongoing commitment continues to support the recruitment and retention of direct care workers, a critical component of maintaining service continuity across home and community-based programs.

## **2026 Commissioner Meetings:**

I am interested in presenting at upcoming commission meetings throughout our nine-county region to share program updates and partnership opportunities. Please bring your community commission schedules and best contact information to the November Board meeting so we can begin coordinating outreach plans.

# PEOPLE HELPING PEOPLE

NOVEMBER 20TH @ 12:00 PM



You're invited to enjoy some savory meatloaf w/ gravy, mashed potatoes, green beans and a fruit side while connecting with others in a welcoming space. Come for the dinner, stay for the community.



Join us for some savory meatloaf w/ gravy, mashed potatoes, green beans and a fruit side



November 20, 2025  
Lunch served at 12:00 pm



People Helping People  
925 56<sup>th</sup> St, Pullman, MI 49450

Over 60: Suggested donation of \$3.50 for the meal  
Under 60: Required fee of \$5.00 for the meal

**RSVP**  
Please RSVP by November 17<sup>th</sup> so we have enough food for everyone.  
Call 616-459-3111 ext 143

**LET'S EAT!**



## Survey about Older Adult Services in Michigan

The Michigan Department of Health and Human Services (MDHHS) Bureau of Aging, Community Living, and Supports would like to hear from you!

### What is this survey about?

- To understand your needs as an older adult in Michigan.
- To find out what is most important to you.
- To learn what services may be missing.

Your views are important, and we appreciate your participation in this survey. Your responses will help us make a better State Plan on Aging for Michigan, which will start in October 2027. Participating in this survey is completely voluntary. You may decide to stop at any time, even after starting the survey, and you are free to skip any question for any reason. All responses will be kept private and will only be shared as a summary, not as individual responses.

If you complete the entire survey, you have a chance to receive a \$50 gift card. If you would like to be considered for the gift card, please include your contact information in a separate link at the end of the survey.

**This survey should take about 15 minutes to complete. Please complete it by no later than December 15<sup>th</sup>.**

### Options for submitting your completed survey include:

1. Completing the survey online via this link <https://bit.ly/olderadultssurvey2729>
2. Turning the survey in where you picked it up
3. Mailing it to:

MDHHS, ACLS Bureau attention Tammy Lemmer  
PO Box 30676  
Lansing, MI 48909



SCAN ME

This project has been approved by the Institutional Review Boards of the University of Michigan Medical School Office of Research Michigan (IRBMED) HUM00281004.

## Section 1: Screening

1. Do you live in Michigan?\*

*\*Indicates required questions*

- Yes
- No (If selected, please end the survey)

2. What county do you live in?\* (If you live in Wayne County, please also provide your 5-digit zip code)

County: \_\_\_\_\_

Zip code: \_\_\_\_\_

3. What is your age?\*

- Younger than 55
- 55 - 64
- 65 - 74
- 75 - 84
- 85+

4. Do you currently provide unpaid care or assistance to a family member, friend, or other individual who needs help for a health condition or disability?\*

- No, I do not provide unpaid care
- Yes, I provide care for an adult older than 60
- Yes, I provide full-time care for a minor under age 18

*If you are younger than 55 and you DO provide unpaid care to a loved one, please skip to **Section 9: Caregiving**, and answer only those questions.*

*If you are younger than 55 but you DO NOT provide unpaid care to a loved one, please **end the survey**. Currently we are only accepting responses from those younger than 55 who are caregivers to an older adult.*

## Section 2: Housing

5. As you get older, do you plan to continue living in your current home or move somewhere else?

- Stay in my current home (If selected, answer questions 6 and 7 below. Do not answer question 8.)
- Move somewhere else (If selected, skip to question 8)
- Does not apply (please specify): (If selected, skip to question 9) \_\_\_\_\_

6. Do you have concerns with staying in your current home?

- Yes
- No

7. Which of the following services would most help you stay in your current home? (Select up to two responses)

- Will not need any services to help stay in home
- Help paying for rent or mortgage
- Help with bathing, dressing, or administering medications
- Housekeeping or chore assistance (e.g., cleaning, laundry, yard work)
- More social activities in my community
- Home repair programs
- Home modification (e.g., installation of grab bars, no step shower, wider doorways, ramp)
- Other (please specify): \_\_\_\_\_

**8. What are the main reasons you plan to move somewhere else? (Select up to three responses)**

- Home maintenance or upkeep is too difficult
- Desire to move to smaller space
- Want to live in a community with people my age
- Need access to more support and care (e.g., in-home support, assisted living, or nursing care)
- Current home is not accessible or suitable for my needs
- Desire to be closer to family or friends
- Financial reasons (e.g., cost of current home)
- Safety or security concerns
- Other (please specify): \_\_\_\_\_

**Section 3: Health and Health Care**

**9. In general, would you say your health is...**

- Excellent
- Very Good
- Good
- Fair
- Poor

**10. In the past 12 months, circle “yes” or “no” for whether you experienced challenges accessing any of the following health care services? If yes, check the box for the main problems you experienced accessing the health care services? (Select up to three responses for each service)**

<b>Health Care Service</b>	<b>Experienced challenges?</b>	<b>Main problems experienced</b> (Select up to three for each service)
Medical Visits	Yes / No	<input type="checkbox"/> Transportation <input type="checkbox"/> Clinic or healthcare provider is too far away <input type="checkbox"/> Cost/Insurance <input type="checkbox"/> Timely appointments <input type="checkbox"/> Difficulty leaving home <input type="checkbox"/> Communication/language <input type="checkbox"/> Other (please specify): _____
Prescription medications	Yes / No	<input type="checkbox"/> Transportation <input type="checkbox"/> Pharmacy is too far away <input type="checkbox"/> Cost/Insurance <input type="checkbox"/> Timely filling of prescriptions <input type="checkbox"/> Difficulty leaving home <input type="checkbox"/> Communication/language <input type="checkbox"/> Prescription isn't available at pharmacy <input type="checkbox"/> Other (please specify): _____
Dental care	Yes / No	<input type="checkbox"/> Transportation <input type="checkbox"/> Dentist is too far away <input type="checkbox"/> Cost/Insurance <input type="checkbox"/> Timely appointments <input type="checkbox"/> Difficulty leaving home <input type="checkbox"/> Communication/language <input type="checkbox"/> Other (please specify): _____

Health Care Service	Experienced challenges?	Main problems experienced (Select up to three for each service)
Vision care	Yes / No	<input type="checkbox"/> Transportation <input type="checkbox"/> Eye care provider is too far away <input type="checkbox"/> Cost/Insurance <input type="checkbox"/> Timely appointments <input type="checkbox"/> Difficulty leaving home <input type="checkbox"/> Communication/language <input type="checkbox"/> Other (please specify): _____
Medical devices (e.g., glucose monitor, hearing aide)	Yes / No	<input type="checkbox"/> Transportation <input type="checkbox"/> Provider or store is too far away or could not deliver <input type="checkbox"/> Cost/Insurance <input type="checkbox"/> Timely receipt <input type="checkbox"/> Difficulty leaving home <input type="checkbox"/> Communication/language <input type="checkbox"/> Other (please specify): _____
Assistive equipment (e.g., walker, tablet)	Yes / No	<input type="checkbox"/> Transportation <input type="checkbox"/> Provider or store is too far away or could not deliver <input type="checkbox"/> Cost/Insurance <input type="checkbox"/> Timely receipt <input type="checkbox"/> Difficulty leaving home <input type="checkbox"/> Communication/language <input type="checkbox"/> Other (please specify): _____

11. In the past 12 months, how often have you worried about having enough food to eat?

- Every day
  Some days
  Never

12. In the past 12 months, have you experienced any problems getting healthy food? (Select up to three responses)

- |  |  |
|--|--|
| <input type="checkbox"/> No problems experienced                         | <input type="checkbox"/> Foods related to my dietary needs are not available in my store |
| <input type="checkbox"/> I cannot afford healthy food                    | <input type="checkbox"/> Physical difficulty cooking/preparing meals                     |
| <input type="checkbox"/> Difficulty getting to the grocery store/market  | <input type="checkbox"/> Other (please specify): _____                                   |
| <input type="checkbox"/> Lack of fresh fruits and vegetables in my store | _____  |

13. In the past 12 months, have you used any of the following food or nutrition programs? (Select all that apply)

- I do not use any of these programs  
 Meals on Wheels/home delivered meals  
 Congregate/community meals  
 SNAP/EBT benefits  
 Food pantries  
 Senior Project Fresh  
 Home-delivered groceries  
 Other (please specify): \_\_\_\_\_

14. In the past 12 months, have you needed help because you were feeling sad, stressed, worried, or upset, but were not able to get it?

- Yes
- No (If selected, go to question 16)

15. If you could not get help, what was the main reason? (Select one response)

- I didn't know where to go for help
- I couldn't afford it
- I didn't have transportation or a way to get there
- I didn't have time
- I was embarrassed or worried about what others would think
- There was no help available nearby
- Other (please specify): \_\_\_\_\_

16. Do you feel that you have enough opportunities to spend time with or talk with family, friends, or neighbors who do not live with you?

- Yes
- No

#### Section 4: Transportation

17. Do you need transportation services?

- Yes
- No (If selected, go to Section 5)

18. Which transportation service do you need the most but do not have access to? (Select up to three responses)

- I can access the transportation services I need
- Public bus
- Door-to-door or paratransit service (a shared ride service for people with disabilities)
- Rides to medical appointments
- Rides to grocery stores or shopping
- Rides to social or community activities
- Accessible transportation (e.g., wheelchair-accessible vans)
- Affordable taxi or ride-sharing options (e.g. Uber, Lyft)
- Help arranging rides
- Other (please specify): \_\_\_\_\_

#### Section 5: Employment and Volunteering

19. Are you employed?

- Yes (If selected, go to question 21)
- No

**20. Would you like to be employed?**

- Yes
- No

**21. Do you volunteer your time to an organization or individual?**

- Yes *(If selected, go to question 23)*
- No

**22. Would you like to volunteer?**

- Yes
- No

**Section 6: Service Use**

**23. Have you used any services or supports for older adults?**

- Yes
- No *(If selected, go to question 28)*

**24. What services and supports for older adults have you ever used? (Select all that apply)**

- Adult day programs
- Caregiver education or resources
- Care management
- Chore Services
- Dementia resources
- Financial assistance (e.g. utilities, prescription costs)
- Health and wellness education programs
- Home modifications and assistive devices
- Information and assistance
- In-home services (e.g., help bathing, grooming, feeding)
- Legal assistance
- Medicaid programs
- Medicare enrollment assistance
- Nutrition services
- Senior community service employment
- Senior companion program
- Telephone reassurance/friendly caller support
- Transportation
- Volunteer programs
- Other (please specify):

---

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**25. How satisfied are you with the overall services and supports for older adults in your community?**

- Very satisfied
- Satisfied
- Neutral
- Dissatisfied
- Very dissatisfied

**Section 7: Information and Resources**

26. **Select your top two needs from the list below:**

- Barrier-free spaces
- Caregiver support
- Food
- Healthcare
- Housing
- Information about older adult resources
- In-home services (e.g., help bathing, grooming, feeding)
- Legal and elder rights
- Social connectedness
- Transportation

27. **When you have a health problem that requires services, which of these sources help you get information about services and supports? (Select all that apply)**

- |  |   |
|--|---|
| <input type="checkbox"/> 211                           | <input type="checkbox"/> Local Health Department              |
| <input type="checkbox"/> Area Agency on Aging          | <input type="checkbox"/> Local Senior Center                  |
| <input type="checkbox"/> Community Newsletter          | <input type="checkbox"/> Newspaper                            |
| <input type="checkbox"/> Doctor                        | <input type="checkbox"/> Organization website                 |
| <input type="checkbox"/> Faith Community               | <input type="checkbox"/> Social Media                         |
| <input type="checkbox"/> Family member                 | <input type="checkbox"/> Television/Radio                     |
| <input type="checkbox"/> Friend/Neighbor               | <input type="checkbox"/> I don't need information on services |
| <input type="checkbox"/> Library                       |   |
| <input type="checkbox"/> Other (please specify): _____ |   |

28. **In the past 12 months, circle “yes” or “no” if it was hard to find information about any of the following services. If yes, check the box for the main problems you experienced accessing the health care services. (Select up to three responses for each service)**

<b>Service</b>	<b>Hard to find information</b>	<b>Main problems experienced</b> (Select up to three for each service)
Food and nutrition services	Yes / No	<input type="checkbox"/> Not knowing where to look <input type="checkbox"/> Limited internet access <input type="checkbox"/> Identifying organizations and resources <input type="checkbox"/> Information is too difficult to understand <input type="checkbox"/> Information is not available in my primary language <input type="checkbox"/> Information is not formatted in an accessible way (e.g., font is too small, layout is confusing) <input type="checkbox"/> Looking for information in my community but cannot find it (e.g., bulletins, flyers) <input type="checkbox"/> Not able to talk to a real person <input type="checkbox"/> Other (please specify): _____

Service	Hard to find information	Main problems experienced (Select up to three for each service)
Health and wellness education	Yes / No	<input type="checkbox"/> Not knowing where to look <input type="checkbox"/> Limited internet access <input type="checkbox"/> Identifying organizations and resources <input type="checkbox"/> Information is too difficult to understand <input type="checkbox"/> Information is not available in my primary language <input type="checkbox"/> Information is not formatted in an accessible way (e.g., font is too small, layout is confusing) <input type="checkbox"/> Looking for information in my community but cannot find it (e.g., bulletins, flyers) <input type="checkbox"/> Not able to talk to a real person <input type="checkbox"/> Other (please specify): _____
In-home services (e.g., help bathing, grooming, feeding)	Yes / No	<input type="checkbox"/> Not knowing where to look <input type="checkbox"/> Limited internet access <input type="checkbox"/> Identifying organizations and resources <input type="checkbox"/> Information is too difficult to understand <input type="checkbox"/> Information is not available in my primary language <input type="checkbox"/> Information is not formatted in an accessible way (e.g., font is too small, layout is confusing) <input type="checkbox"/> Looking for information in my community but cannot find it (e.g., bulletins, flyers) <input type="checkbox"/> Not able to talk to a real person <input type="checkbox"/> Other (please specify): _____
Home modifications (e.g., installation of grab bars, no step shower, wider doorways, ramp)	Yes / No	<input type="checkbox"/> Not knowing where to look <input type="checkbox"/> Limited internet access <input type="checkbox"/> Identifying organizations and resources <input type="checkbox"/> Information is too difficult to understand <input type="checkbox"/> Information is not available in my primary language <input type="checkbox"/> Information is not formatted in an accessible way (e.g., font is too small, layout is confusing) <input type="checkbox"/> Looking for information in my community but cannot find it (e.g., bulletins, flyers) <input type="checkbox"/> Not able to talk to a real person <input type="checkbox"/> Other (please specify): _____
Mental health services (e.g., counseling, 988)	Yes / No	<input type="checkbox"/> Not knowing where to look <input type="checkbox"/> Limited internet access <input type="checkbox"/> Identifying organizations and resources <input type="checkbox"/> Information is too difficult to understand <input type="checkbox"/> Information is not available in my primary language <input type="checkbox"/> Information is not formatted in an accessible way (e.g., font is too small, layout is confusing) <input type="checkbox"/> Looking for information in my community but cannot find it (e.g., bulletins, flyers) <input type="checkbox"/> Not able to talk to a real person <input type="checkbox"/> Other (please specify): _____

<b>Service</b>	<b>Hard to find information</b>	<b>Main problems experienced</b> (Select up to three for each service)
Assistive technology/Adaptive equipment (e.g., walker, tablet)	Yes / No	<input type="checkbox"/> Not knowing where to look <input type="checkbox"/> Limited internet access <input type="checkbox"/> Identifying organizations and resources <input type="checkbox"/> Information is too difficult to understand <input type="checkbox"/> Information is not available in my primary language <input type="checkbox"/> Information is not formatted in an accessible way (e.g., font is too small, layout is confusing) <input type="checkbox"/> Looking for information in my community but cannot find it (e.g., bulletins, flyers) <input type="checkbox"/> Not able to talk to a real person <input type="checkbox"/> Other (please specify): _____
Technology support (e.g., computers, laptops, internet)	Yes / No	<input type="checkbox"/> Not knowing where to look <input type="checkbox"/> Limited internet access <input type="checkbox"/> Identifying organizations and resources <input type="checkbox"/> Information is too difficult to understand <input type="checkbox"/> Information is not available in my primary language <input type="checkbox"/> Information is not formatted in an accessible way (e.g., font is too small, layout is confusing) <input type="checkbox"/> Looking for information in my community but cannot find it (e.g., bulletins, flyers) <input type="checkbox"/> Not able to talk to a real person <input type="checkbox"/> Other (please specify): _____
Legal services (e.g., wills, power of attorney)	Yes / No	<input type="checkbox"/> Not knowing where to look <input type="checkbox"/> Limited internet access <input type="checkbox"/> Identifying organizations and resources <input type="checkbox"/> Information is too difficult to understand <input type="checkbox"/> Information is not available in my primary language <input type="checkbox"/> Information is not formatted in an accessible way (e.g., font is too small, layout is confusing) <input type="checkbox"/> Looking for information in my community but cannot find it (e.g., bulletins, flyers) <input type="checkbox"/> Not able to talk to a real person <input type="checkbox"/> Other (please specify): _____
Elder abuse services and prevention	Yes / No	<input type="checkbox"/> Not knowing where to look <input type="checkbox"/> Limited internet access <input type="checkbox"/> Identifying organizations and resources <input type="checkbox"/> Information is too difficult to understand <input type="checkbox"/> Information is not available in my primary language <input type="checkbox"/> Information is not formatted in an accessible way (e.g., font is too small, layout is confusing) <input type="checkbox"/> Looking for information in my community but cannot find it (e.g., bulletins, flyers) <input type="checkbox"/> Not able to talk to a real person <input type="checkbox"/> Other (please specify): _____

## Section 8: Service Needs

29. Which needs do you think the Bureau of Aging, Community Living, and Supports should address to improve the lives of older adults in your community? (Select top three responses)

- Access to clear and understandable information about my options as I age
  - Access to interpreters or translated materials for non-English speakers
  - Assistance for veterans or military families
  - Assistance with managing medications
  - Congregate/community meal programs
  - Dental care services
  - Financial counseling or help with budgeting
  - Fitness, exercise, or wellness classes
  - Grocery shopping or meal delivery programs (e.g., Meals on Wheels)
  - Programs addressing food insecurity or SNAP enrollment
  - Hearing care services (e.g., exams, hearing aids, etc.)
  - Help navigating or applying for benefits (e.g., Medicare, Medicaid) and programs
  - Home modification for accessibility or safety (e.g., ramps, grab bars, etc.)
  - Home repair and maintenance programs
  - Housekeeping or chore assistance
  - In-home personal care (e.g., help with bathing, dressing, mobility, etc.)
  - Legal assistance (e.g., wills, power of attorney, tenant rights, etc.)
  - Medical and primary health care services
  - Mental health care or counseling
  - Services for protection from elder abuse, neglect, or exploitation
  - Social activities, clubs, or support for staying connected with others
  - Support for family caregivers (including respite care)
  - Technology training or support (using computers, phones, internet)
  - Transportation services
  - Vision care services
  - Other (please specify): \_\_\_\_\_
- 

## Section 9: Caregiving

This section has questions about your role as a caregiver. Please answer these questions from your perspective as someone who provides care for another person. Skip to Section 10: Demographics, if you are not a caregiver.

30. What is your relationship to the care recipient?

- Parent
  - Spouse/Partner
  - Child
  - Other relative
  - Friend/Neighbor
  - Other (please specify): \_\_\_\_\_
-

**31. What kind of care do you provide? (Select all that apply)**

- Cooking, cleaning, or other household chores
  - Dressing, bathing, toileting, or other personal care
  - Managing financial or legal matters
  - Managing medications or medical care
  - Running errands, shopping, or transportation
  - Socialization
  - Other (please specify): \_\_\_\_\_
- 

**32. What is the biggest problem you face in your caregiving role?**

- Time management
- Emotional stress
- Physical demands
- Financial strain

**33. Are you satisfied with the support you receive in your caregiving role?**

- Yes
- No

**34. In the past 12 months, have you used any of the following caregiver resources or supports? (Select all that apply)**

- Information or educational resources for yourself as a caregiver
- Information, advice, or support to meet your loved one's needs
- Respite services (paid or unpaid), so someone can care for your loved one while you take a break
- Individual counseling, peer support, or support groups
- I have not used any caregiver resources or supports (*If selected, go to Section 10*)

**35. What are the main reasons you have not used caregiver resources or supports? (Select up to three responses)**

- Do not have the time to search for resources or supports
  - Was not aware of available services
  - Services are not available in my area
  - Do not know how to access these services
  - Cost
  - Services do not fit my caregiving needs or schedule
  - Waiting lists are too long
  - Do not feel comfortable using these services
  - Do not need caregiver support at this time
  - Other (please specify): \_\_\_\_\_
-

## Section 10: Demographics

We ask questions about things like your age, gender, and background to better understand the group of people taking this survey. This helps us make sure our information includes a wide range of experiences and needs among older adults. Answering these questions is optional. **No individual information will be shared.**

36. **Do you have any disabilities or chronic diseases that keep you from fully participating in work, school, housework, or other activities?**

- Yes
- No
- Prefer not to answer

37. **I am:**

- Female
- Male
- Non-binary
- I prefer to self-describe: \_\_\_\_\_
- Prefer not to answer

38. **What is your current marital status?**

- Single, never married
- Married
- Civil Union
- Not married, living with your partner or significant other
- Separated
- Divorced
- Widowed
- Prefer not to answer

39. **What is your sexual orientation?**

- Asexual
- Bisexual
- Gay or Lesbian
- Queer
- Questioning
- Straight/Heterosexual
- Other (please specify): \_\_\_\_\_
- Prefer not to answer

40. **What is the highest level of education you completed?**

- Less than high school
- High School
- Some College
- College Degree
- Graduate degree
- Prefer not to answer

**41. What is your primary language spoken at home?**

- English
- Spanish
- Arabic
- Other (please specify): \_\_\_\_\_
- Prefer not to answer

**42. What is your race/ethnicity? (Select all that apply)**

- American Indian or Alaska Native
- Asian
- Black or African American
- Hispanic, Latino, or Spanish
- Middle Eastern or North African
- Native Hawaiian or Other Pacific Islander
- White
- Other (please specify): \_\_\_\_\_
- Prefer not to answer

**43. Which health insurance do you have? (Select all that apply)**

- Medicaid
- Medicare
- Private/commercial insurance
- I do not have health insurance (Uninsured)
- Prefer not to answer

**Thank you very much for taking the time to answer these questions.**

To show our appreciation, a limited number of randomly chosen participants will receive a \$50 gift card. If you would like to be eligible for a gift card, please provide your contact information at this link:

<https://bit.ly/entry2729>

**If you have any questions about this survey or need assistance accessing the online link, please contact Tammy Lemmer. You may also call to provide your contact information by phone.**

Tammy Lemmer, State Assistant Administrator, MDHHS  
517-230-9707  
[LemmerT1@michigan.gov](mailto:LemmerT1@michigan.gov)

Allegan County  
 2020 through 2021

FUND: 2950 SENIOR MILLAGE

	2021	2020
<b>REVENUES</b>		
2950.672.403.00.00 CURRENT PROPERTY TAX	2,512,313.63	2,414,600.03
2950.672.427.00.00 PAYMENTS IN LIEU OF TAXES	33,344.60	25,114.17
2950.672.573.00.00 State Grant - Local Comm Stabilization	185,012.18	174,459.46
2950.672.665.00.00 INTEREST EARNED - DEPOSITS	432.44	13,419.76
2950.672.675.00.00 CONTRIBUTIONS & DONATIONS	4,498.14	3,412.71
<b>TOTAL REVENUES</b>	<b>2,735,600.99</b>	<b>2,631,006.13</b>
<b>EXPENDITURES</b>		
2950.672.703.00.00 SALARIES & WAGES - PERMANENT	133,620.01	128,507.77
2950.672.706.00.00 SALARIES & WAGES - PER DIEM	2,835.00	1,015.00
2950.672.710.00.00 OTHER COMPENSATION	173.53	0.00
2950.672.710.01.00 Stipend	554.40	554.40
2950.672.715.01.00 SOCIAL SECURITY -FICA TAXES-	10,106.43	9,663.67
2950.672.716.00.00 HOSP INSURANCE - EMPLOYER	36,445.37	35,322.40
2950.672.718.00.00 RET. FUND CONT. - EMPLOYER	9,353.41	8,995.43
2950.672.722.00.00 LIFE INSURANCE	150.48	174.29
2950.672.724.00.00 WORKERS COMPENSATION INS.	122.38	141.11
2950.672.725.00.00 DISABILITY INSURANCE	815.74	864.28
2950.672.727.00.00 OFFICE SUPPLIES	578.97	591.77
2950.672.730.00.00 POSTAGE	223.24	345.22
2950.672.811.00.00 MEMBERSHIPS & SUBSCRIPTIONS	150.00	0.00
2950.672.818.00.00 Outside Contractual Services	8,841.63	6,096.00
2950.672.818.01.00 Outside Contractual Service	4,992.50	5,834.00
2950.672.818.02.00 Outside Contractual Serv - Adult Daycare	79,123.69	106,031.06
2950.672.818.03.00 Outside Contractual Serv - Hm Del Meals	630,461.76	711,074.15
2950.672.818.04.00 Outside Contract Serv - In Hm Support	1,114,277.58	1,193,126.28
2950.672.818.05.00 Outside Contract Serv - Per Emeryg Respo	168,378.00	159,797.00
2950.672.818.06.00 Outside Contract Serv - Transportation	178,080.67	129,562.54
2950.672.820.00.00 Indirect Cost Allocation	57,384.00	55,031.04
2950.672.861.00.00 TRAVEL EXPENSES-ROUTINE/OPERATI	578.68	212.75
2950.672.861.01.00 Educ/Train Rm & Bd	0.00	577.40
2950.672.861.02.00 Educ/Train/Conf Travel	0.00	221.16
2950.672.861.03.00 Educ/Train/Conf - Registration	150.00	80.00
2950.672.901.00.00 ADVERTISING	17,698.63	561.62

Allegan County  
2020 through 2021

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FUND: 2950 SENIOR MILLAGE

(Continued)

	2021	2020
<b>EXPENDITURES</b>		
2950.672.954.00.00 EQUIPMENT	432.42	180.05
2950.672.964.00.00 REFUNDS AND REBATES	3,175.87	879.53
<b>TOTAL EXPENDITURES</b>	<u>2,458,704.39</u>	<u>2,555,439.92</u>
 <b>EXCESS OF REVENUES OVER EXPENDITURES</b>	 <u>276,896.60</u>	 <u>75,566.21</u>

Allegan County  
2020 through 2021

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GRAND TOTALS

TOTAL REVENUES	2,735,600.99	2,631,006.13
TOTAL EXPENDITURES	2,458,704.39	2,555,439.92
EXCESS OF REVENUES OVER EXPENDITURES	276,896.60	75,566.21

Allegan County  
 2022 through 2025

FUND: 298 SENIOR SERVICES FUND

	2025	2024	2023	2022
<b>REVENUES</b>				
298-672.000-403.000 CURRENT PROPERTY TAX	3,376,406.36	3,134,855.38	2,868,985.00	2,607,883.50
298-672.000-432.000 PAYMENTS IN LIEU OF TAXES	7,050.24	31,167.98	29,916.03	29,567.07
298-672.000-569.000 STATE GRANT - OTHER	2,884.83	0.00	0.00	0.00
298-672.000-573.000 STATE GRANT- Local Comm Stabilizator	110,619.94	163,887.52	187,486.56	177,941.41
298-672.000-665.000 INTEREST EARNED - DEPOSITS	0.00	70,198.12	49,686.19	-6,653.53
298-672.000-674.000 CONTRIBUTIONS & DONATIONS	10,038.80	9,475.00	1,686.00	3,149.20
<b>TOTAL REVENUES</b>	<b>3,507,000.17</b>	<b>3,409,584.00</b>	<b>3,137,759.78</b>	<b>2,811,887.65</b>
<b>EXPENDITURES</b>				
298-672.000-703.000 SALARIES & WAGES - FULL TIME	143,341.58	174,794.77	162,529.61	151,344.64
298-672.000-705.010 SALARIES & WAGES - Comp Time Payor	0.00	0.00	0.00	16.34
298-672.000-706.000 SALARIES & WAGES - PER DIEM	5,218.05	4,386.75	4,811.91	3,370.00
298-672.000-710.010 STIPEND	189.00	252.00	84.00	554.40
298-672.000-710.030 OPT OUT	0.00	0.00	749.99	200.00
298-672.000-715.010 FICA TAXES	11,195.53	13,546.41	12,693.42	11,651.84
298-672.000-716.000 HEALTH INSURANCE	44,297.59	57,438.29	46,191.43	36,020.65
298-672.000-718.000 RETIREMENT DEFINED CONTRIBUTIOI	10,033.81	12,275.77	11,513.96	10,654.94
298-672.000-721.000 LONGEVITY	0.00	572.00	836.50	944.00
298-672.000-722.000 LIFE INSURANCE	134.28	178.53	182.52	158.12
298-672.000-724.000 WORKERS COMPENSATION INS.	72.77	137.82	137.88	137.09
298-672.000-725.000 DISABILITY INSURANCE	847.64	1,057.45	1,057.70	898.54
298-672.000-727.000 OFFICE SUPPLIES	328.84	612.71	692.27	795.34
298-672.000-730.000 POSTAGE	562.65	776.58	540.17	92.62
298-672.000-818.000 CONTRACTUAL SERVICES	6,013.86	17,024.96	4,159.44	7,620.00
298-672.000-818.010 CONTRACTUAL SERVICES	3,193.51	3,244.50	5,339.50	6,058.00
298-672.000-818.020 CONTRACTUAL - Adult Daycare	129,688.34	98,392.33	96,332.08	68,477.32
298-672.000-818.030 CONTRACTUAL - Home Del Meals	680,830.80	883,486.53	963,435.58	673,610.67
298-672.000-818.040 CONTRACTUAL - In Home Support	909,034.20	1,122,406.25	1,162,262.14	1,218,232.56
298-672.000-818.050 CONTRACTUAL - Pers Emerg Response	145,152.00	159,000.00	134,185.00	115,608.00
298-672.000-818.060 CONTRACTUAL - Transportation	164,541.00	199,490.00	170,541.91	170,399.23
298-672.000-861.000 TRAVEL EXPENSES	28.00	0.00	0.00	1,580.38
298-672.000-861.020 TRAVEL - MILEAGE/FUEL	86.10	0.00	66.15	0.00
298-672.000-861.030 TRAVEL - CONF/REGISTRATION/TRAIN	0.00	0.00	120.00	285.00
298-672.000-900.000 PRINTING & BINDING	160.90	848.30	0.00	1,846.23

Allegan County  
 2022 through 2025

FUND: 298 SENIOR SERVICES FUND

(Continued)

	2025	2024	2023	2022
<b>EXPENDITURES</b>				
298-672.000-901.000 ADVERTISING	37,553.54	47,706.39	45,189.57	62,654.94
298-672.000-955.000 LOW VALUE EQUIPMENT	658.25	0.00	0.00	370.94
298-672.000-958.000 MEMBERSHIPS & SUBSCRIPTIONS	0.00	150.00	150.00	150.00
298-672.000-960.000 INDIRECT EXP	64,984.20	99,846.00	31,433.00	61,013.00
298-672.000-964.000 REFUNDS AND REBATES	1,002.36	30.03	871.35	534.92
<b>TOTAL EXPENDITURES</b>	<b>2,359,148.80</b>	<b>2,897,654.37</b>	<b>2,856,107.08</b>	<b>2,605,279.71</b>
<b>EXCESS OF REVENUES OVER EXPENDITURES</b>	<b>1,147,851.37</b>	511,929.63	281,652.70	206,607.94

Allegan County  
2022 through 2025

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GRAND TOTALS

TOTAL REVENUES	3,507,000.17	3,409,584.00	3,137,759.78	2,811,887.65
TOTAL EXPENDITURES	2,359,148.80	2,897,654.37	2,856,107.08	2,605,279.71
EXCESS OF REVENUES OVER EXPENDITURES	1,147,851.37	511,929.63	281,652.70	206,607.94

APPENDIX 6.A  
Table of Minimum Fund Balances

<b>Fund Title</b>	<b>Fund #</b>	<b>Types of Uses</b>	<b>Minimum Threshold</b>	<b>Distribution of Funds in Excess of Minimum Threshold and Other Transfers</b>
General	101	General County Operations	Fund Balance – 11% of G. F. expense budget	Refer to Budget Policy text
Budget Stabilization	102	May be used to cover a General Fund deficit, prevent a reduction in services, cover expenses of a natural disaster, and more	Maximum allowed by statute	Refer to Budget Policy text
Sick & Vacation Liability	252	To fund the accrued personnel liabilities (i.e., PTO, post-employment benefits, etc.)	Fully fund the PTO Liability per the most recent financial audit	Refer to Budget Policy text
Delinquent Tax Revolving	516	Monies are used to settle delinquent taxes with the local taxing units. The county purchases the delinquent taxes from the local units.	The annual debt service payment for the Sheriff's Office and Corrections Center Bond shall be transferred to the Debt Service fund.  Ending cash balance shall be a minimum of 115% of the prior year's settlement	Transfer to the Liability Sinking Fund 259
Central Dispatch	261		Fund Balance – 10% of current year operating expenses.  Capital Min - \$250,000, shall be part of the surcharge formula. If the reserve may be utilized, in part or in whole, it shall be restored over a maximum of three years utilizing the capital surcharge formula.	

Child Care	292		Fund Balance – 5% of current year operating expenses.	
Senior Services	298		Fund Balance – 10% of current year operating expenses.	
Health Fund	221		Fund balance shall be maintained at 5% of the current year operating expenses or a percentage necessary to meet the annual requirements of the State's Maintenance of Effort (MOE), whichever is less.	
Local Government Revenue Sharing	104		10% of current-year revenue plus an Additional \$20,000 reserved annually for DNR Trust Fund match until \$100,000 is saved.	Transfer out to Parks fund to balance the operating budget. The remaining fund balance may be utilized for Parks Capital and/or Economic Development Initiatives as approved by the BOC.