

**BOARD OF HEALTH  
Agenda for June 24, 2021 at 9:00 AM**

1. Call to Order
  - a. Opening ceremonies – Pledge Allegiance to the Flag of the United States of America
  - b. Roll Call
  - c. Approval of the Agenda\*
  - d. Approval of the Minutes\*
2. Public Comment
  - a. MERS Actuarial Report Presentation
3. Health Officer's Report
4. Medical Director's Report
5. Committee Reports
  - a. Finance Committee – Did not meet
  - b. Program, Policies, and Appeals – June 10, 2021 Meeting
6. Financial Reports
  - a. Approve Payments\*
  - b. Review Financials
7. Unfinished Business
  - a.
8. New Business
  - a. Medical Director\*
  - b. Purchase Cards\*
  - c. FY2022 Annual Implementation Plan\*
9. Departmental Reports
  - a. Area Agency on Aging
  - b. Personal Health & Disease Prevention
  - c. Environmental Health
10. Adjournment - Next meeting: July 22, 2021

## May 27, 2021 – Board of Health Meeting Minutes

The Branch-Hillsdale-St. Joseph Community Health Agency Board of Health meeting was called to order by Chair, Kathy Pangle at 9:00 a.m. with the Pledge of Allegiance to the Flag of the United States and roll call as follows: Kathy Pangle, Tom Matthew, Jon Houtz, Jared Hoffmaster, and Brent Leininger. Mark Wiley joined the meeting at 9:06 during the Health Officer's report.

Also present from BHSJ: Rebecca Burns, Dr. Vogel, Theresa Fisher, Paul Andriacchi, Laura Sutter, and Kali Nichols.

Mr. Houtz moved to approve the agenda with support from Mr. Matthew and the motion passed.

Mr. Houtz moved to approve the minutes from the previous meetings with support from Mr. Wiley and the motion passed.

Public comment:

- None

Rebecca Burns, Health Officer, reviewed her monthly report. Items discussed: Vaccinations Continue, COVID-19 Cases, American Rescue Plan Funds, New Medical Director Candidate, Mobile Clinic Van, COVID-19 testing, Board of Health Education, Health Education and Promotion Updates, and Strategic Planning.

Dr. Vogel, Medical Director, reviewed the Medical Director's monthly report. This month's report was on Vaccine Hesitancy in the COVID-19 Pandemic.

Financial Reports/Expenditures

- Mr. Houtz moved to approve the expenditures as reported and place the financials on file with support from Mr. Matthew. A roll call vote was taken and the motion passed 6-0 (Mr. Wiley, yes; Ms. Pangle, yes; Mr. Matthew, yes; Mr. Houtz, yes; Mr. Hoffmaster, yes; Mr. Leininger, yes).

Unfinished Business

- Mr. Houtz moved to continue the past practice of approving minutes from the BOH sub-committees at the next full Board of Health Meeting, with support from Mr. Matthew. A roll call vote was taken and the motion passed 5-1 (Mr. Wiley, yes; Ms. Pangle, yes; Mr. Matthew, yes; Mr. Houtz, yes; Mr. Hoffmaster, yes; Mr. Leininger, no).

Committee Reports:

- Finance Committee –Mr. Hoffmaster moved to approve the minutes from the May 12, 2021 Finance Committee meeting with support from Mr. Houtz. The motion passed.

- Program, Policy, and Appeals Committee – Mr. Wiley moved to approve the minutes from the April 22, 2021 Program, Policy, and Appeals Committee meeting with support from Mr. Hoffmaster. The motion passed.

New Business:

- Mr. Houtz moved amend the current 2021 Board of Health Meeting Schedule to hold the remainder of this year's meetings to in person, in the Coldwater office. The motion was supported by Mr. Wiley. A roll call vote was taken and the motion passed 6-0 (Mr. Wiley, yes; Ms. Pangle, yes; Mr. Matthew, yes; Mr. Houtz, yes; Mr. Hoffmaster, yes; Mr. Leininger, yes).
- Mr. Wiley moved to approve payment of \$2 per hour hazard pay, calculated retroactively based on the number of hours actually worked between October 1, 2020 and June 18, 2021, to all employees who receive payment for hours worked in the payroll ending June 18, 2021. The motion was supported by Mr. Hoffmaster. A roll call vote was taken and the motion passed 5-1 (Mr. Wiley, yes; Ms. Pangle, yes; Mr. Matthew, yes; Mr. Houtz, yes; Mr. Hoffmaster, yes; Mr. Leininger, no).
- Mr. Houtz moved to temporarily remove the vacation accrual maximum cap, retroactively from October 1, 2020 through September 30, 2021, with support from Mr. Hoffmaster. A roll call vote was taken and the motion passed 6-0 (Mr. Wiley, yes; Ms. Pangle, yes; Mr. Matthew, yes; Mr. Houtz, yes; Mr. Hoffmaster, yes; Mr. Leininger, yes).
- Mr. Houtz moved to approve payments up to \$750,000 to the under-funded MERS DB Retirement plan by September 30, 2021, with support from Mr. Leininger. A roll call vote was taken and the motion passed 6-0 (Mr. Wiley, yes; Ms. Pangle, yes; Mr. Matthew, yes; Mr. Houtz, yes; Mr. Hoffmaster, yes; Mr. Leininger, yes).
- 

Departmental Reports:

- Personal Health & Disease Prevention
- Environmental Health
- Area Agency on Aging

With no further business the meeting was adjourned at 10:54 AM.

Respectfully Submitted by:  
Theresa Fisher, BS





# Municipal Employees' Retirement System of Michigan

Annual Actuarial Valuation Report

December 31, 2020 - Branch-Hillsdale-St Joseph Comm Hlth  
Agcy (1202)





Spring, 2021

Branch-Hillsdale-St Joseph Comm Hlth Agcy

In care of:  
Municipal Employees' Retirement System of Michigan  
1134 Municipal Way  
Lansing, Michigan 48917

This report presents the results of the Annual Actuarial Valuation, prepared for Branch-Hillsdale-St Joseph Comm Hlth Agcy (1202) as of December 31, 2020. The report includes the determination of liabilities and contribution rates resulting from the participation in the Municipal Employees' Retirement System of Michigan ("MERS"). This report contains the minimum actuarially determined contribution requirement, in alignment with the MERS Plan Document, Actuarial Policy, the Michigan Constitution, and governing statutes. Branch-Hillsdale-St Joseph Comm Hlth Agcy is responsible for the employer contributions needed to provide MERS benefits for its employees and former employees.

The purposes of this valuation are to:

- Measure funding progress as of December 31, 2020,
- Establish contribution requirements for the fiscal year beginning January 1, 2022,
- Provide information regarding the identification and assessment of risk,
- Provide actuarial information in connection with applicable Governmental Accounting Standards Board (GASB) statements, and
- Provide information to assist the local unit of government with state reporting requirements.

This valuation assumed the continuing ability of the plan sponsor to make the contributions necessary to fund this plan. A determination regarding whether or not the plan sponsor is actually able to do so is outside our scope of expertise and was not performed.

The findings in this report are based on data and other information through December 31, 2020. The valuation was based upon information furnished by MERS concerning Retirement System benefits, financial transactions, plan provisions and active members, terminated members, retirees and beneficiaries. We checked for internal reasonability and year-to-year consistency, but did not audit the data. We are not responsible for the accuracy or completeness of the information provided by MERS.

The Municipal Employees' Retirement Act, PA 427 of 1984 and the MERS' Plan Document Article VI sec. 71 (1)(d), provides the MERS Board with the authority to set actuarial assumptions and methods after consultation with the actuary. As the fiduciary of the plan, MERS Retirement Board sets certain assumptions for funding and GASB purposes. These assumptions are checked regularly through a comprehensive study, called an Experience Study. Studies were completed in 2018 and 2020, and are the basis of the economic and demographic assumptions and methods currently in place. Updated economic assumptions were adopted by the MERS Retirement Board at the February 28, 2019 board meeting and were effective with the December 31, 2019 annual actuarial valuation. **At the February 27, 2020 board meeting, the MERS Retirement Board adopted demographic assumptions effective with the December 31, 2020 annual actuarial valuation, which will impact contributions beginning in 2022.**

The Michigan Department of Treasury provides required assumptions to be used for purposes of Public Act 202 reporting. These assumptions are for reporting purposes only and do not impact required contributions. Please refer to the State Reporting page found at the end of this report for information for this filing.

For a full list of all the assumptions used, please refer to the division-specific assumptions described in table(s) in this report, and to the Appendix on the MERS website at:

<http://www.mersofmich.com/Portals/0/Assets/Resources/AAV-Appendix/MERS-2020AnnualActuarialValuation-Appendix.pdf>

**The actuarial assumptions used for this valuation, including the assumed rate of investment return, are reasonable for purposes of the measurement.**

**This report reflects the impact of COVID-19 experience through December 31, 2020. It does not reflect the ongoing impact of COVID-19, which is likely to influence demographic and economic experience, at least in the short-term. We will continue to monitor these developments and their impact on the MERS Defined Benefit and Hybrid plans. Actual future experience will be reflected in each subsequent annual valuation, as experience emerges.**

This report has been prepared by actuaries who have substantial experience valuing public employee retirement systems. To the best of our knowledge the information contained in this report is accurate and fairly presents the actuarial position of Branch-Hillsdale-St Joseph Comm Hlth Agcy as of the valuation date. All calculations have been made in conformity with generally accepted actuarial principles and practices, with the Actuarial Standards of Practice issued by the Actuarial Standards Board, and with applicable statutes.

David T. Kausch, Rebecca L. Stouffer, and Mark Buis are members of the American Academy of Actuaries. These actuaries meet the Academy's Qualification Standards to render the actuarial opinions contained herein. The signing actuaries are independent of the plan sponsor. GRS maintains independent consulting agreements with certain local units of government for services unrelated to the actuarial consulting services provided in this report.

The Retirement Board of the Municipal Employees' Retirement System of Michigan confirms that the System provides for payment of the required employer contribution as described in Section 20m of Act No. 314 of 1965 (MCL 38.1140m).



This information is purely actuarial in nature. It is not intended to serve as a substitute for legal, accounting or investment advice.

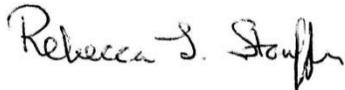
This report was prepared at the request of the MERS Retirement Board and may be provided only in its entirety by the municipality to other interested parties (MERS customarily provides the full report on request to associated third parties such as the auditor for the municipality). GRS is not responsible for the consequences of any unauthorized use. This report should not be relied on for any purpose other than the purposes described herein. Determinations of financial results, associated with the benefits described in this report, for purposes other than those identified above may be significantly different.

If you have reason to believe that the plan provisions are incorrectly described, that important plan provisions relevant to this valuation are not described, that conditions have changed since the calculations were made, that the information provided in this report is inaccurate or is in anyway incomplete, or if you need further information in order to make an informed decision on the subject matter in this report, please contact your Regional Manager at 1.800.767.MERS (6377).

Sincerely,



David T. Kausch, FSA, FCA, EA, MAAA



Rebecca L. Stouffer, ASA, FCA, MAAA



Mark Buis, FSA, FCA, EA, MAAA



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# Executive Summary

## Funded Ratio

The funded ratio of a plan is the percentage of the dollar value of the actuarial accrued liability that is covered by the actuarial value of assets. While funding ratio may be a useful plan measurement, understanding a plan's funding trend may be more important than a particular point in time. Refer to Table 7 to find a history of this information.

|               | 12/31/2020 | 12/31/2019 |
|---------------|------------|------------|
| Funded Ratio* | 83%        | 83%        |

\* Reflects assets from Surplus divisions, if any.

Throughout this report are references to valuation results generated prior to the 2018 valuation date. Results prior to 2018 were received directly from the prior actuary or extracted from the previous valuation system by MERS's technology service provider.

## Required Employer Contributions

Your required employer contributions are shown in the following table. Employee contributions, if any, are in addition to the employer contributions.

Effective for the December 31, 2020 valuation, the MERS Retirement Board has adopted updated demographic assumptions. Changes to these assumptions are effective for contributions beginning in 2022. Effective with the 2019 valuation, the MERS Retirement Board adopted updated economic assumptions. The combined impact of these assumption changes may be phased in. This valuation reflects the second year of phase-in for the economic assumption update and the first year of phase-in for the demographic assumption update. The remaining combined phase-in period is four years for all assumption changes.

By default, MERS will invoice you based on the amount in the “No Phase-in” columns. This amount will be considered the minimum required contribution unless you request to be billed the “Phase-in” rates. If you wish to be billed using the phased-in rates, please contact MERS, at which point the alternate minimum required contribution will be the amount in the “Phase-in” columns.

|                                | Percentage of Payroll |                 |                 |                 | Monthly \$ Based on Projected Payroll |                 |                 |                 |
|--------------------------------|-----------------------|-----------------|-----------------|-----------------|---------------------------------------|-----------------|-----------------|-----------------|
|                                | Phase-in              | No Phase-in     | Phase-in        | No Phase-in     | Phase-in                              | No Phase-in     | Phase-in        | No Phase-in     |
| Valuation Date:                | 12/31/2020            | 12/31/2020      | 12/31/2019      | 12/31/2019      | 12/31/2020                            | 12/31/2020      | 12/31/2019      | 12/31/2019      |
| Fiscal Year Beginning:         | January 1, 2022       | January 1, 2022 | January 1, 2021 | January 1, 2021 | January 1, 2022                       | January 1, 2022 | January 1, 2021 | January 1, 2021 |
| Division                       |                       |                 |                 |                 |                                       |                 |                 |                 |
| 01 - Gnrl                      | -                     | -               | -               | -               | \$ 39,596                             | \$ 49,349       | \$ 31,252       | \$ 34,933       |
| Total Municipality -           |                       |                 |                 |                 |                                       |                 |                 |                 |
| Estimated Monthly Contribution |                       |                 |                 |                 | \$ 39,596                             | \$ 49,349       | \$ 31,252       | \$ 34,933       |
| Total Municipality -           |                       |                 |                 |                 |                                       |                 |                 |                 |
| Estimated Annual Contribution  |                       |                 |                 |                 | \$ 475,152                            | \$ 592,188      | \$ 375,024      | \$ 419,196      |

Employee contribution rates:

| Valuation Date: | Employee Contribution Rate |            |
|-----------------|----------------------------|------------|
|                 | 12/31/2020                 | 12/31/2019 |
| Division        |                            |            |
| 01 - Gnrl       | 3.00%                      | 3.00%      |

The employer may contribute more than the minimum required contributions, as these additional contributions will earn investment income and may result in lower future contribution requirements. Employers making contributions in excess of the minimum requirements may elect to apply the excess contribution immediately to a particular division, or segregate the excess into one or more of what MERS calls “Surplus” divisions. An election in the first case would immediately reduce any unfunded accrued liability and lower the amortization payments throughout the remaining amortization period. An election to set up Surplus divisions would not immediately lower future contributions, however the assets from the Surplus division could be transferred to an unfunded division in the future to reduce the unfunded liability in future years, or to be used to pay all or a portion of the minimum required contribution in a future year. For purposes of this report, the assets in any Surplus division have been included in the municipality’s total assets, unfunded accrued liability and funded status, however, these assets are not used in calculating the minimum required contribution.

**MERS strongly encourages employers to contribute more than the minimum contribution shown above.**



Assuming that experience of the plan meets actuarial assumptions:

- To accelerate to a 100% funding ratio in 10 years, estimated monthly employer contributions for the fiscal year beginning in 2022 for the entire employer would be \$57,925, instead of \$49,349.

### How and Why Do These Numbers Change?

In a defined benefit plan, contributions vary from one annual actuarial valuation to the next as a result of the following:

- Changes in benefit provisions (see Table 2),
- Changes in actuarial assumptions and methods (see the Appendix), and
- Experience of the plan (investment experience and demographic experience); this is the difference between actual experience of the plan and the actuarial assumptions.

These impacts are reflected in various tables in the report. For more information, please contact your Regional Manager.

### Comments on Investment Rate of Return Assumption

A defined benefit plan is funded by employer contributions, participant contributions, and investment earnings. Investment earnings have historically provided a significant portion of the funding. The larger the share of benefits being provided from investment returns, the smaller the required contributions, and vice versa. Determining the contributions required to prefund the promised retirement benefits requires an assumption of what investment earnings are expected to add to the fund over a long period of time. This is called the **Investment Return Assumption**.

The MERS Investment Return Assumption is **7.35%** per year. This, along with all of our other actuarial assumptions, is reviewed at least every five years in an Experience Study that compares the assumptions used against actual experience and recommends adjustments if necessary. If your municipality would like to explore contributions at lower assumed investment return assumptions, please review the “what if” projection scenarios later in this report.

### Assumption Change in 2020

A 5-year experience study analyzing historical experience from 2013 through 2018 was completed in February 2020. In addition to changes to the economic assumptions which took effect with the fiscal year 2021 contribution rates, the experience study recommended updated demographic assumptions, including adjustments to the following actuarial assumptions: mortality, retirement, disability, and termination rates. Changes to the demographic assumptions resulting from the experience study have been approved by the MERS Retirement Board and are effective beginning with the December 31, 2020 actuarial valuation, first impacting 2022 contributions. A complete description of the assumptions may be found in the Appendix to the valuation.

### Comments on Asset Smoothing

To avoid dramatic spikes and dips in annual contribution requirements due to short term fluctuations in asset markets, MERS applies a technique called **asset smoothing**. This spreads out each year’s investment gains or losses over the prior year and the following four years. This smoothing method is used to determine your actuarial value of assets (valuation assets), which is then used to determine both your funded ratio and your



required contributions. **The (smoothed) actuarial rate of return for 2020 was 8.17%, while the actual market rate of return was 12.70%.** To see historical details of the market rate of return, compared to the smoothed actuarial rate of return, refer to this report's Appendix, or view the "[How Smoothing Works](#)" video on the [Defined Benefit resource page](#) of the MERS website.

As of December 31, 2020, the actuarial value of assets is 97% of market value due to asset smoothing. This means that the rate of return on the actuarial value of assets should exceed the actuarial assumption in the next few years provided that the annual market returns exceed the 7.35% investment return assumption. When all assumptions are met, contribution rates are expected to stay approximately level as a percent of payroll (dollar amounts are expected to increase with wage inflation of 3.0% each year).

If the December 31, 2020 valuation results were based on market value instead of actuarial value:

- The funded percent of your entire municipality would be 86% (instead of 83%); and
- Your total employer contribution requirement for the fiscal year starting January 1, 2022 would be \$550,332 (instead of \$592,188).

## **Alternate Scenarios to Estimate the Potential Volatility of Results ("What If Scenarios")**

The calculations in this report are based on assumptions about long-term economic and demographic behavior. These assumptions will never materialize in a given year, except by coincidence. Therefore, the results will vary from one year to the next. The volatility of the results depends upon the characteristics of the plan. For example:

- Open divisions that have substantial assets compared to their active employee payroll will have more volatile employer contribution rates due to investment return fluctuations.
- Open divisions that have substantial accrued liability compared to their active employee payroll will have more volatile employer contribution rates due to demographic experience fluctuations.
- Small divisions will have more volatile contribution patterns than larger divisions because statistical fluctuations are relatively larger among small populations.
- Shorter amortization periods result in more volatile contribution patterns.

Many assumptions are important in determining the required employer contributions. In the following table, we show the impact of varying the Investment Return assumption. Lower investment returns would result in higher required employer contributions, and vice-versa. The three economic scenarios below provide a quantitative risk assessment for the impact of investment returns on the plan's future financial condition for funding purposes.

The relative impact of the economic scenarios below will vary from year to year, as the participant demographics change. The impact of each scenario should be analyzed for a given year, not from year to year. The results in the table are based on the December 31, 2020 valuation, and are for the municipality in total, not by division. These results do not reflect a phase-in of the impact of the new actuarial assumptions.

It is important to note that calculations in this report are mathematical estimates based upon assumptions regarding future events, which may or may not materialize. Actuarial calculations can and do vary from one valuation to the next, sometimes significantly depending on the group's size. Projections are not predictions. Future valuations will be based on actual future experience.



| 12/31/2020 Valuation Results                   | Lower Future Annual Returns | Lower Future Annual Returns | Valuation Assumptions |
|--|-----------------------------|-----------------------------|-----------------------|
| <b>Investment Return Assumption</b>            | <b>5.35%</b>                | <b>6.35%</b>                | <b>7.35%</b>          |
| Accrued Liability                              | \$ 22,623,507               | \$ 20,130,001               | \$ 18,048,699         |
| Valuation Assets <sup>1</sup>                  | \$ 15,017,999               | \$ 15,017,999               | \$ 15,017,999         |
| Unfunded Accrued Liability                     | \$ 7,605,508                | \$ 5,112,002                | \$ 3,030,700          |
| <b>Funded Ratio</b>                            | 66%                         | 75%                         | 83%                   |
| Monthly Normal Cost                            | \$ 20,871                   | \$ 15,641                   | \$ 11,698             |
| Monthly Amortization Payment                   | \$ 69,129                   | \$ 52,857                   | \$ 37,651             |
| <b>Total Employer Contribution<sup>2</sup></b> | \$ 90,000                   | \$ 68,498                   | \$ 49,349             |

<sup>1</sup> The Valuation Assets include assets from Surplus divisions, if any.

<sup>2</sup> If assets exceed accrued liabilities for a division, the division may have an overfunding credit to reduce the division's employer contribution requirement. If the overfunding credit is larger than the normal cost, the division's full credit is included in the municipality's amortization payment above but the division's total contribution requirement is zero. This can cause the displayed normal cost and amortization payment to not add up to the displayed total employer contribution.

## Projection Scenarios

The next two pages show projections of the plan's funded ratio and computed employer contributions under the actuarial assumptions used in the valuation and alternate economic assumption scenarios. All three projections take into account the past investment experience that will continue to affect the actuarial rate of return in the short term.

The 7.35% scenario provides an estimate of computed employer contributions based on current actuarial assumptions, and a projected 7.35% market return. The other two scenarios may be useful if the municipality chooses to budget more conservatively, and make contributions in addition to the minimum requirements. The 6.35% and 5.35% projection scenarios provide an indication of the potential required employer contribution if these assumptions were met over the long-term.

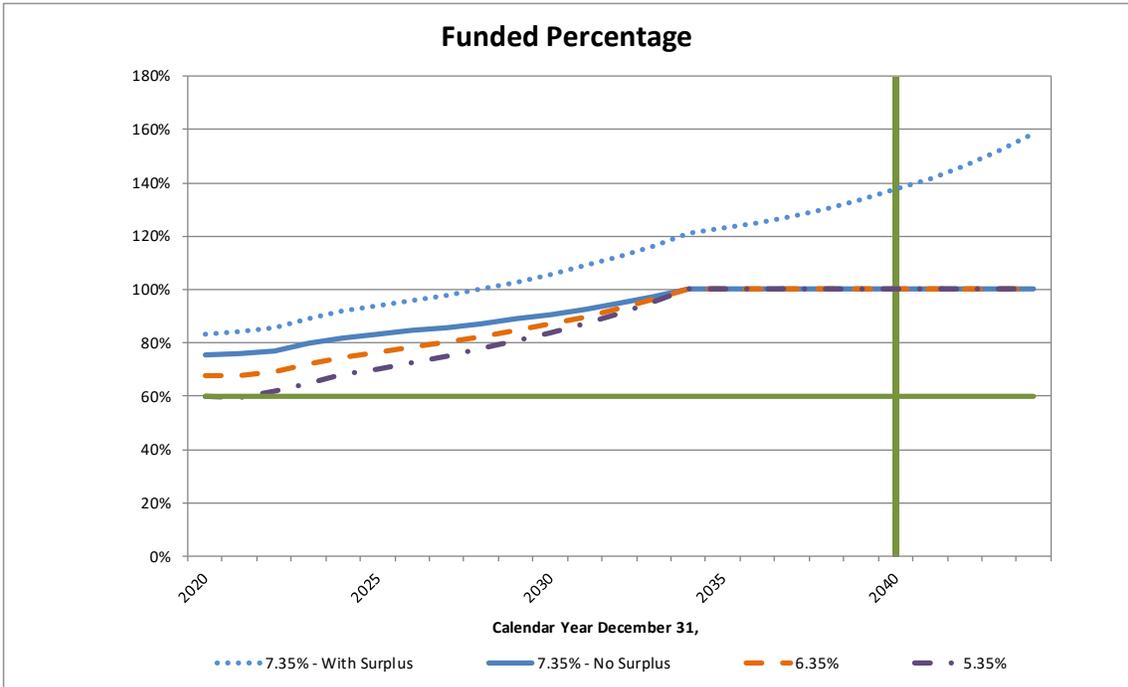
Your municipality includes one or more Surplus divisions. The assets in a Surplus division may be used to reduce future employer contributions or to accelerate the date by which the municipality becomes 100% funded. The timing and use of these Surplus assets is discretionary.

The Funded Percentage graph shows projections of funded status under the 7.35% investment return assumption, both including the Surplus assets (contributed as of the valuation date), and without the Surplus assets. The graph including the Surplus assets assumes these Surplus assets grow with interest and are not used to lower future employer contributions. We modeled the projections including the Surplus assets in this fashion because the use of these assets is discretionary by the employer and we do not know when and how the employer will use them. Once the employer uses these Surplus assets, any future employer contributions are expected to be lower than those shown in the projections.

| Valuation Year Ending 12/31            | Fiscal Year Beginning 1/1 | Actuarial Accrued Liability | Valuation Assets <sup>2</sup> | Funded Percentage | Estimated Annual Employer Contribution |
|--|---------------------------|-----------------------------|-------------------------------|-------------------|--|
| <b>7.35%<sup>1</sup> - NO PHASE-IN</b> |                           |                             |                               |                   |  |
| 2020                                   | 2022                      | \$ 18,048,699               | \$ 13,590,913                 | 75%               | \$ 592,188                             |
| 2021                                   | 2023                      | \$ 18,500,000               | \$ 14,000,000                 | 76%               | \$ 589,000                             |
| 2022                                   | 2024                      | \$ 18,900,000               | \$ 14,500,000                 | 77%               | \$ 595,000                             |
| 2023                                   | 2025                      | \$ 19,200,000               | \$ 15,300,000                 | 80%               | \$ 564,000                             |
| 2024                                   | 2026                      | \$ 19,500,000               | \$ 15,900,000                 | 82%               | \$ 544,000                             |
| 2025                                   | 2027                      | \$ 19,700,000               | \$ 16,400,000                 | 83%               | \$ 548,000                             |
| <b>6.35%<sup>1</sup> - NO PHASE-IN</b> |                           |                             |                               |                   |  |
| 2020                                   | 2022                      | \$ 20,130,001               | \$ 13,590,913                 | 68%               | \$ 821,976                             |
| 2021                                   | 2023                      | \$ 20,500,000               | \$ 13,900,000                 | 68%               | \$ 827,000                             |
| 2022                                   | 2024                      | \$ 20,900,000               | \$ 14,500,000                 | 69%               | \$ 836,000                             |
| 2023                                   | 2025                      | \$ 21,300,000               | \$ 15,300,000                 | 72%               | \$ 810,000                             |
| 2024                                   | 2026                      | \$ 21,500,000               | \$ 16,100,000                 | 75%               | \$ 795,000                             |
| 2025                                   | 2027                      | \$ 21,700,000               | \$ 16,600,000                 | 77%               | \$ 803,000                             |
| <b>5.35%<sup>1</sup> - NO PHASE-IN</b> |                           |                             |                               |                   |  |
| 2020                                   | 2022                      | \$ 22,623,507               | \$ 13,590,913                 | 60%               | \$ 1,080,000                           |
| 2021                                   | 2023                      | \$ 23,000,000               | \$ 13,700,000                 | 60%               | \$ 1,090,000                           |
| 2022                                   | 2024                      | \$ 23,400,000               | \$ 14,500,000                 | 62%               | \$ 1,100,000                           |
| 2023                                   | 2025                      | \$ 23,800,000               | \$ 15,400,000                 | 65%               | \$ 1,080,000                           |
| 2024                                   | 2026                      | \$ 24,000,000               | \$ 16,300,000                 | 68%               | \$ 1,070,000                           |
| 2025                                   | 2027                      | \$ 24,200,000               | \$ 17,000,000                 | 70%               | \$ 1,080,000                           |

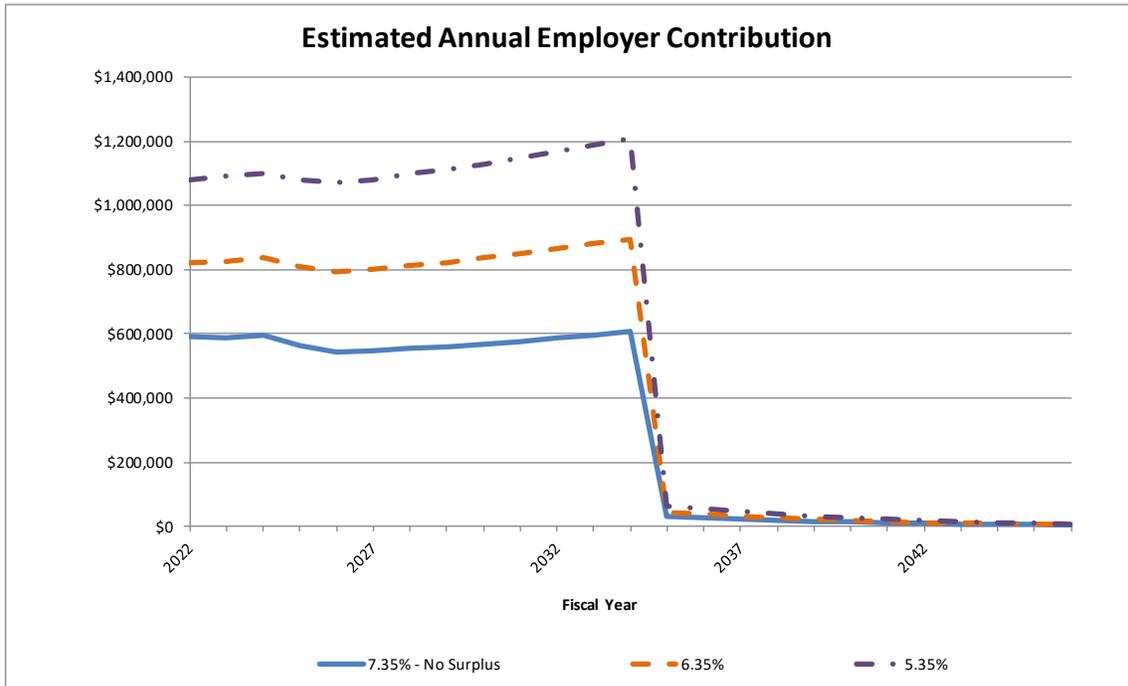
<sup>1</sup> Represents both the interest rate for discounting liabilities and the future investment return assumption on the Market Value of assets.

<sup>2</sup> Valuation Assets do not include assets from Surplus divisions, if any.



**Notes:**

All projected funded percentages are shown with no phase-in.  
 Assumes assets from Surplus divisions will not be used to lower employer contributions during the projection period.  
 The green indicator lines have been added at 60% funded and 20 years following the valuation date for PA 202 purposes.



**Notes:**

All projected contributions are shown with no phase-in.  
 Projected employer contributions do not reflect the use of any assets from the Surplus divisions.



## Table 1: Employer Contribution Details for the Fiscal Year Beginning January 1, 2022

| Division  | Total Normal Cost | Employee Contribut. Rate | Employer Contributions <sup>1</sup> |  |  | Computed Employer Contribut. With Phase-In | Blended ER Rate No Phase-In <sup>5</sup> | Blended ER Rate With Phase-In <sup>5</sup> | Employee Contribut. Conversion Factor <sup>2</sup> |
|---|-------------------|--------------------------|-------------------------------------|--|--|--|--|--|--|
|   |                   |                          | Employer Normal Cost <sup>6</sup>   | Payment of the Unfunded Accrued Liability <sup>4</sup> | Computed Employer Contribut. No Phase-In |  |  |  |  |
| <b>Percentage of Payroll</b>                      |                   |                          |                                     |  |  |  |  |  |  |
| 01 - Gnrl   | 12.82%            | 3.00%                    | -                                   | -  | -  | -  |  |  |  |
| <b>Estimated Monthly Contribution<sup>3</sup></b> |                   |                          |                                     |  |  |  |  |  |  |
| 01 - Gnrl   |                   |                          | \$ 11,698                           | \$ 37,651  | \$ 49,349                                | \$ 39,596                                  |  |  |  |
| <b>Total Municipality</b>                         |                   |                          | <b>\$ 11,698</b>                    | <b>\$ 37,651</b>                                       | <b>\$ 49,349</b>                         | <b>\$ 39,596</b>                           |  |  |  |
| <b>Estimated Annual Contribution<sup>3</sup></b>  |                   |                          | <b>\$ 140,376</b>                   | <b>\$ 451,812</b>                                      | <b>\$ 592,188</b>                        | <b>\$ 475,152</b>                          |  |  |  |

- <sup>1</sup> The above employer contribution requirements are in addition to the employee contributions, if any.
- <sup>2</sup> If employee contributions are increased/decreased by 1.00% of pay, the employer contribution requirement will decrease/increase by the Employee Contribution Conversion Factor. The conversion factor is usually under 1%, because employee contributions may be refunded at termination of employment, and not used to fund retirement pensions. Employer contributions will all be used to fund pensions.
- <sup>3</sup> For divisions that are open to new hires, estimated contributions are based on projected fiscal year payroll. Actual contributions will be based on actual reported monthly pays, and will be different from the above amounts. For divisions that will have no new hires (i.e., closed divisions), invoices will be based on the above dollar amounts which are based on projected fiscal year payroll. See description of Open Divisions and Closed Divisions in the Appendix.
- <sup>4</sup> Note that if the overfunding credit is larger than the normal cost, the full credit is shown above but the total contribution requirement is zero. This will cause the displayed normal cost and unfunded accrued liability contributions to not add across.
- <sup>5</sup> For linked divisions, the employer will be invoiced the Computed Employer Contribution No Phase-in rate shown above for each linked division (a contribution rate for the open division; a contribution dollar for the closed-but-linked division), unless the employer elects to contribute the Blended Employer Contribution rate shown above, by contacting MERS at 800-767-MERS (6377).
- <sup>6</sup> For divisions with a negative employer normal cost, employee contributions cover the normal cost and a portion of the payment of any unfunded accrued liability.

**Please see the Comments on Asset Smoothing in the Executive Summary of this report.**



## Table 2: Benefit Provisions

### 01 - Gnrl: Closed to new hires

|                                      | 2020 Valuation            | 2019 Valuation            |
|--------------------------------------|---------------------------|---------------------------|
| <b>Benefit Multiplier:</b>           | 2.00% Multiplier (no max) | 2.00% Multiplier (no max) |
| <b>Normal Retirement Age:</b>        | 60                        | 60                        |
| <b>Vesting:</b>                      | 6 years                   | 6 years                   |
| <b>Early Retirement (Unreduced):</b> | 55/25                     | 55/25                     |
| <b>Early Retirement (Reduced):</b>   | 50/25                     | 50/25                     |
|                                      | 55/15                     | 55/15                     |
| <b>Final Average Compensation:</b>   | 5 years                   | 5 years                   |
| <b>COLA for Future Retirees:</b>     | 2.50% (Non-Compound)      | 2.50% (Non-Compound)      |
| <b>COLA for Current Retirees:</b>    | 2.50% (Non-Compound)      | 2.50% (Non-Compound)      |
| <b>Employee Contributions:</b>       | 3.00%                     | 3.00%                     |
| <b>DC Plan for New Hires:</b>        | 8/1/2015                  | 8/1/2015                  |
| <b>Act 88:</b>                       | Yes (Adopted 8/16/1963)   | Yes (Adopted 8/16/1963)   |

### Table 3: Participant Summary

| Division                   | 2020 Valuation |                             | 2019 Valuation |                             | 2020 Valuation |                                      |  |
|----------------------------|----------------|-----------------------------|----------------|-----------------------------|----------------|--------------------------------------|--|
|                            | Number         | Annual Payroll <sup>1</sup> | Number         | Annual Payroll <sup>1</sup> | Average Age    | Average Benefit Service <sup>2</sup> | Average Eligibility Service <sup>2</sup> |
| 01 - Gnrl                  |                |                             |                |                             |                |                                      |  |
| Active Employees           | 31             | \$ 1,590,755                | 32             | \$ 1,439,800                | 52.8           | 16.4                                 | 17.9                                     |
| Vested Former Employees    | 18             | 176,703                     | 20             | 196,248                     | 52.7           | 11.8                                 | 12.9                                     |
| Retirees and Beneficiaries | 69             | 1,004,974                   | 66             | 952,092                     | 71.6           |                                      |  |
| Pending Refunds            | 20             |                             | 20             |                             |                |                                      |  |
| <b>Total Municipality</b>  |                |                             |                |                             |                |                                      |  |
| Active Employees           | 31             | \$ 1,590,755                | 32             | \$ 1,439,800                | 52.8           | 16.4                                 | 17.9                                     |
| Vested Former Employees    | 18             | 176,703                     | 20             | 196,248                     | 52.7           | 11.8                                 | 12.9                                     |
| Retirees and Beneficiaries | 69             | 1,004,974                   | 66             | 952,092                     | 71.6           |                                      |  |
| Pending Refunds            | <u>20</u>      |                             | <u>20</u>      |                             |                |                                      |  |
| <b>Total Participants</b>  | <b>138</b>     |                             | <b>138</b>     |                             |                |                                      |  |

<sup>1</sup> Annual payroll for active employees; annual deferred benefits payable for vested former employees; annual benefits being paid for retirees and beneficiaries.

<sup>2</sup> Descriptions can be found under Miscellaneous and Technical Assumptions in the Appendix.

## Table 4: Reported Assets (Market Value)

| Division                              | 2020 Valuation                    |                       | 2019 Valuation                    |                       |
|---------------------------------------|-----------------------------------|-----------------------|-----------------------------------|-----------------------|
|                                       | Employer and Retiree <sup>1</sup> | Employee <sup>2</sup> | Employer and Retiree <sup>1</sup> | Employee <sup>2</sup> |
| 01 - Gnrl                             | \$ 13,001,612                     | \$ 975,675            | \$ 11,987,513                     | \$ 989,381            |
| S1 - Surplus Unassociated             | 1,467,656                         | 0                     | 340,678                           | 0                     |
| <b>Municipality Total<sup>3</sup></b> | <b>\$ 14,469,268</b>              | <b>\$ 975,675</b>     | <b>\$ 12,328,191</b>              | <b>\$ 989,381</b>     |
| <b>Combined Assets<sup>3</sup></b>    | <b>\$15,444,943</b>               |                       | <b>\$13,317,573</b>               |                       |

<sup>1</sup> Reserve for Employer Contributions and Benefit Payments.

<sup>2</sup> Reserve for Employee Contributions.

<sup>3</sup> Totals may not add due to rounding.

The December 31, 2020 valuation assets (actuarial value of assets) are equal to 0.972357 times the reported market value of assets (compared to 1.013179 as of December 31, 2019). Refer to the Appendix for a description of the valuation asset derivation and a detailed calculation of valuation assets.

Assets in the Surplus division(s) are employer assets that have been reserved separately and may be used within the plan at the employer's discretion at some point in the future. These assets are not used in calculating the employer contribution for the fiscal year beginning January 1, 2022.

### Table 5: Flow of Valuation Assets

| Year Ended 12/31 | Employer Contributions |            | Employee Contributions | Investment Income (Valuation Assets) | Benefit Payments | Employee Contribution Refunds | Net Transfers | Valuation Asset Balance |
|------------------|------------------------|------------|------------------------|--------------------------------------|------------------|-------------------------------|---------------|-------------------------|
|                  | Required               | Additional |                        |                                      |                  |                               |               |                         |
| 2010             | \$ 156,587             |            | \$ 72,902              | \$ 577,299                           | \$ (436,060)     | \$ (5,198)                    | \$ 0          | \$ 11,006,427           |
| 2011             | 151,695                | \$ 0       | 70,906                 | 563,898                              | (441,636)        | (20,994)                      | 0             | 11,330,296              |
| 2012             | 156,324                | 0          | 69,438                 | 519,180                              | (464,665)        | (18,180)                      | 0             | 11,592,393              |
| 2013             | 141,200                | 0          | 73,865                 | 688,536                              | (525,060)        | (1,511)                       | 0             | 11,969,423              |
| 2014             | 181,018                | 0          | 71,723                 | 681,958                              | (587,518)        | (3,183)                       | 0             | 12,313,421              |
| 2015             | 219,053                | 0          | 85,602                 | 609,083                              | (613,919)        | (2,351)                       | 0             | 12,610,889              |
| 2016             | 226,464                | 0          | 64,400                 | 640,744                              | (703,219)        | (12,094)                      | 0             | 12,827,184              |
| 2017             | 266,448                | 0          | 55,364                 | 763,561                              | (767,980)        | (9,208)                       | 0             | 13,135,369              |
| 2018             | 258,445                | 46,080     | 50,404                 | 471,387                              | (854,096)        | (6,575)                       | 0             | 13,101,014              |
| 2019             | 276,576                | 360,686    | 47,927                 | 622,746                              | (910,624)        | (5,240)                       | 0             | 13,493,085              |
| 2020             | 316,727                | 947,935    | 48,270                 | 1,173,623                            | (961,641)        | 0                             | 0             | 15,017,999              |

**Notes:**

Transfers in and out are usually related to the transfer of participants between municipalities, and to employer and employee payments for service credit purchases (if any) that the governing body has approved.

Additional employer contributions, if any, are shown separately starting in 2011. Prior to 2011, additional contributions are combined with the required employer contributions.

The investment income column reflects the recognized investment income based on Valuation Assets. It does not reflect the market value investment return in any given year.

The Valuation Asset balance includes assets from Surplus divisions, if any.

Years where historical information is not available will be displayed with zero values.



**Table 6: Actuarial Accrued Liabilities and Valuation Assets  
as of December 31, 2020**

| Division                  | Actuarial Accrued Liability |                               |                               |                    |                      | Valuation Assets     | Percent<br>Funded | Unfunded<br>(Overfunded)<br>Accrued<br>Liabilities |
|---------------------------|-----------------------------|-------------------------------|-------------------------------|--------------------|----------------------|----------------------|-------------------|--|
|                           | Active<br>Employees         | Vested<br>Former<br>Employees | Retirees and<br>Beneficiaries | Pending<br>Refunds | Total                |                      |                   |  |
| O1 - Gnrl                 | \$ 5,713,136                | \$ 1,655,052                  | \$ 10,632,268                 | \$ 48,243          | \$ 18,048,699        | \$ 13,590,913        | 75.3%             | \$ 4,457,786                                       |
| S1 - Surplus Unassociated | 0                           | 0                             | 0                             | 0                  | 0                    | 1,427,086            |                   | (1,427,086)  |
| <b>Total</b>              | <b>\$ 5,713,136</b>         | <b>\$ 1,655,052</b>           | <b>\$ 10,632,268</b>          | <b>\$ 48,243</b>   | <b>\$ 18,048,699</b> | <b>\$ 15,017,999</b> | <b>83.2%</b>      | <b>\$ 3,030,700</b>                                |

**Please see the Comments on Asset Smoothing in the Executive Summary of this report.**

The December 31, 2020 valuation assets (actuarial value of assets) are equal to 0.972357 times the reported market value of assets. Refer to the Appendix for a description of the valuation asset derivation and a detailed calculation of valuation assets.



## Table 7: Actuarial Accrued Liabilities - Comparative Schedule

| Valuation Date<br>December 31 | Actuarial<br>Accrued Liability | Valuation Assets | Percent<br>Funded | Unfunded<br>(Overfunded)<br>Accrued<br>Liabilities |
|-------------------------------|--------------------------------|------------------|-------------------|--|
| 2006                          | \$ 9,242,746                   | \$ 9,318,862     | 101%              | \$ (76,116)  |
| 2007                          | 9,482,221                      | 10,006,351       | 106%              | (524,130)  |
| 2008                          | 9,927,472                      | 10,353,922       | 104%              | (426,450)  |
| 2009                          | 10,250,691                     | 10,640,897       | 104%              | (390,206)  |
| 2010                          | 10,697,591                     | 11,006,427       | 103%              | (308,836)  |
| 2011                          | 10,827,507                     | 11,330,296       | 105%              | (502,789)  |
| 2012                          | 11,406,292                     | 11,592,393       | 102%              | (186,101)  |
| 2013                          | 12,163,363                     | 11,969,423       | 98%               | 193,940  |
| 2014                          | 12,735,860                     | 12,313,421       | 97%               | 422,439  |
| 2015                          | 14,333,735                     | 12,610,889       | 88%               | 1,722,846  |
| 2016                          | 14,703,549                     | 12,827,184       | 87%               | 1,876,365  |
| 2017                          | 15,161,226                     | 13,135,369       | 87%               | 2,025,857  |
| 2018                          | 15,274,448                     | 13,101,014       | 86%               | 2,173,434  |
| 2019                          | 16,238,893                     | 13,493,085       | 83%               | 2,745,808  |
| 2020                          | 18,048,699                     | 15,017,999       | 83%               | 3,030,700  |

Notes: Actuarial assumptions were revised for the 2008, 2009, 2010, 2011, 2012, 2015, 2019 and 2020 actuarial valuations.

The Valuation Assets include assets from Surplus divisions, if any.

Years where historical information is not available will be displayed with zero values.

Throughout this report are references to valuation results generated prior to the 2018 valuation date. Results prior to 2018 were received directly from the prior actuary or extracted from the previous valuation system by MERS's technology service provider.

# Tables 8 and 9: Division-Based Comparative Schedules

## Division 01 - Gnrl

**Table 8-01: Actuarial Accrued Liabilities - Comparative Schedule**

| Valuation Date<br>December 31 | Actuarial<br>Accrued Liability | Valuation Assets | Percent<br>Funded | Unfunded<br>(Overfunded)<br>Accrued<br>Liabilities |
|-------------------------------|--------------------------------|------------------|-------------------|--|
| 2010                          | \$ 10,697,591                  | \$ 11,006,427    | 103%              | \$ (308,836)                                       |
| 2011                          | 10,827,507                     | 11,330,296       | 105%              | (502,789)  |
| 2012                          | 11,406,292                     | 11,592,393       | 102%              | (186,101)  |
| 2013                          | 12,163,363                     | 11,969,423       | 98%               | 193,940  |
| 2014                          | 12,735,860                     | 12,313,421       | 97%               | 422,439  |
| 2015                          | 14,333,735                     | 12,610,889       | 88%               | 1,722,846  |
| 2016                          | 14,703,549                     | 12,827,184       | 87%               | 1,876,365  |
| 2017                          | 15,161,226                     | 13,135,369       | 87%               | 2,025,857  |
| 2018                          | 15,274,448                     | 13,101,014       | 86%               | 2,173,434  |
| 2019                          | 16,238,893                     | 13,147,917       | 81%               | 3,090,976  |
| 2020                          | 18,048,699                     | 13,590,913       | 75%               | 4,457,786  |

Notes: Actuarial assumptions were revised for the 2010, 2011, 2012, 2015, 2019 and 2020 actuarial valuations.

**Table 9-01: Computed Employer Contributions - Comparative Schedule**

| Valuation Date<br>December 31 | Active Employees |                   | Computed<br>Employer<br>Contribution <sup>1</sup> | Employee<br>Contribution<br>Rate <sup>2</sup> |
|-------------------------------|------------------|-------------------|---|---|
|                               | Number           | Annual<br>Payroll |   |   |
| 2010                          | 60               | \$ 2,289,722      | 6.79%   | 3.00%   |
| 2011                          | 59               | 2,294,630         | 5.76%   | 3.00%   |
| 2012                          | 64               | 2,374,536         | 7.60%   | 3.00%   |
| 2013                          | 61               | 2,317,690         | 9.00%   | 3.00%   |
| 2014                          | 61               | 2,383,929         | 9.50%   | 3.00%   |
| 2015                          | 58               | 2,408,692         | \$ 27,324   | 3.00%   |
| 2016                          | 49               | 1,974,029         | \$ 25,380   | 3.00%   |
| 2017                          | 42               | 1,727,981         | \$ 25,608   | 3.00%   |
| 2018                          | 40               | 1,673,482         | \$ 27,694   | 3.00%   |
| 2019                          | 32               | 1,439,800         | \$ 34,933   | 3.00%   |
| 2020                          | 31               | 1,590,755         | \$ 49,349   | 3.00%   |

1 For open divisions, a percent of pay contribution is shown. For closed divisions, a monthly dollar contribution is shown.

2 For each valuation year, the computed employer contribution is based on the employee rate. If the employee rate changes during the applicable fiscal year, the computed employer contribution will be adjusted.

Note: The contributions shown in Table 9 for the 12/31/2015 through 12/31/2020 valuations do not reflect the phase-in of the change in contribution requirements associated with the new actuarial assumptions. The full contribution without phase-in is shown in Table 9 above.

See the Benefit Provision History, later in this report, for past benefit provision changes.

Years where historical information is not available will be displayed with zero values.

## Division S1 - Surplus Unassociated

**Table 8-S1: Actuarial Accrued Liabilities - Comparative Schedule**

| Valuation Date<br>December 31 | Actuarial<br>Accrued Liability | Valuation Assets | Percent<br>Funded | Unfunded<br>(Overfunded)<br>Accrued<br>Liabilities |
|-------------------------------|--------------------------------|------------------|-------------------|--|
| 2010                          | \$ 0                           | \$ 0             |                   | \$ 0   |
| 2011                          | 0                              | 0                |                   | 0  |
| 2012                          | 0                              | 0                |                   | 0  |
| 2013                          | 0                              | 0                |                   | 0  |
| 2014                          | 0                              | 0                |                   | 0  |
| 2015                          | 0                              | 0                |                   | 0  |
| 2016                          | 0                              | 0                |                   | 0  |
| 2017                          | 0                              | 0                |                   | 0  |
| 2018                          | 0                              | 0                |                   | 0  |
| 2019                          | 0                              | 345,168          |                   | (345,168)  |
| 2020                          | 0                              | 1,427,086        |                   | (1,427,086)  |

Notes: Actuarial assumptions were revised for the 2010, 2011, 2012, 2015, 2019 and 2020 actuarial valuations.

Years where historical information is not available will be displayed with zero values.

## Table 10: Division-Based Layered Amortization Schedule

### Division 01 - Gnrl

**Table 10-01: Layered Amortization Schedule**

| Type of UAL  | Date Established | Original Balance <sup>1</sup> | Original Amortization Period <sup>2</sup> | Amounts for Fiscal Year Beginning 1/1/2022 |  |                             |
|--------------|------------------|-------------------------------|---|--|--|-----------------------------|
|              |                  |                               |   | Outstanding UAL Balance <sup>3</sup>       | Remaining Amortization Period <sup>2</sup> | Annual Amortization Payment |
| Initial      | 12/31/2015       | \$ 1,722,846                  | 21  | \$ 1,762,017                               | 13   | \$ 177,816                  |
| (Gain)/Loss  | 12/31/2016       | 35,723                        | 19  | 36,685                                     | 13   | 3,708                       |
| (Gain)/Loss  | 12/31/2017       | 138,446                       | 17  | 142,245                                    | 13   | 14,352                      |
| (Gain)/Loss  | 12/31/2018       | 137,878                       | 15  | 142,630                                    | 13   | 14,400                      |
| (Gain)/Loss  | 12/31/2019       | 391,419                       | 14  | 409,499                                    | 13   | 41,328                      |
| Assumption   | 12/31/2019       | 530,789                       | 14  | 545,687                                    | 13   | 55,068                      |
| Experience   | 12/31/2020       | 1,339,721                     | 13  | 1,438,191                                  | 13   | 145,140                     |
| <b>Total</b> |                  |                               |   | <b>\$ 4,476,954</b>                        |  | <b>\$ 451,812</b>           |

<sup>1</sup> For each type of UAL (layer), this is the original balance as of the date the layer was established.

<sup>2</sup> According to the MERS amortization policy, each type of UAL (layer) is amortized over a specific period (see Appendix on MERS website).

<sup>3</sup> This is the remaining balance as of the valuation date, projected to the beginning of the fiscal year shown above.

The unfunded accrued liability (UAL) as of December 31, 2020 (see Table 6) is projected to the beginning of the fiscal year for which the contributions are being calculated. This allows the 2020 valuation to take into account the expected future contributions that are based on past valuations. Each type of UAL (layer) is amortized over the appropriate period. Please see the Appendix on the MERS website for a detailed description of the amortization policy.

Note: The original balance and original amortization periods prior to 12/31/2018 were received from the prior actuary.

## GASB Statement No. 68 Information

The following information has been prepared to provide some of the information necessary to complete GASB Statement No. 68 disclosures. GASB Statement No. 68 is effective for fiscal years beginning after June 15, 2014. Additional resources, including an Implementation Guide, are available at <http://www.mersofmich.com/>.

|  |    |            |
|--|----|------------|
| Actuarial Valuation Date:  |    | 12/31/2020 |
| Measurement Date of the Total Pension Liability (TPL):                             |    | 12/31/2020 |
| At 12/31/2020, the following employees were covered by the benefit terms:          |    |            |
| Inactive employees or beneficiaries currently receiving benefits:                  |    | 69         |
| Inactive employees entitled to but not yet receiving benefits (including refunds): |    | 38         |
| Active employees:  |    | <u>31</u>  |
|  |    | 138        |
|  |    |            |
| Total Pension Liability as of 12/31/2019 measurement date:                         | \$ | 15,839,984 |
| Total Pension Liability as of 12/31/2020 measurement date:                         | \$ | 17,582,753 |
| Service Cost for the year ending on the 12/31/2020 measurement date:               | \$ | 184,846    |
| Change in the Total Pension Liability due to:                                      |    |            |
| - Benefit changes <sup>1</sup> :   | \$ | 0          |
| - Differences between expected and actual experience <sup>2</sup> :                | \$ | 423,704    |
| - Changes in assumptions <sup>2</sup> :  | \$ | 921,539    |
|  |    |            |
| Average expected remaining service lives of all employees (active and inactive):   |    | 2          |

<sup>1</sup>A change in liability due to benefit changes is immediately recognized when calculating pension expense for the year.

<sup>2</sup>Changes in liability due to differences between actual and expected experience, and changes in assumptions, are recognized in pension expense over the average remaining service lives of all employees.

|   |    |           |
|---|----|-----------|
| Covered employee payroll (Needed for Required Supplementary Information): | \$ | 1,590,755 |
|---|----|-----------|

Note: Covered employee payroll may differ from the GASB Statement No. 68 definition.

Sensitivity of the Net Pension Liability to changes in the discount rate:

|   | 1% Decrease<br><u>(6.60%)</u> | Current Discount<br>Rate <u>(7.60%)</u> | 1% Increase<br><u>(8.60%)</u> |
|---|-------------------------------|---|-------------------------------|
| Change in Net Pension Liability as of 12/31/2020: | \$ 1,991,801                  | \$ 0                                    | \$ (1,680,989)                |

Note: The current discount rate shown for GASB Statement No. 68 purposes is higher than the MERS assumed rate of return. This is because for GASB Statement No. 68 purposes, the discount rate must be gross of administrative expenses, whereas for funding purposes it is net of administrative expenses.

## GASB Statement No. 68 Information

This page is for those municipalities who need to “roll-forward” their total pension liability due to the timing of completion of the actuarial valuation in relation to their fiscal year-end.

The following information has been prepared to provide some of the information necessary to complete GASB Statement No. 68 disclosures. GASB Statement No. 68 is effective for fiscal years beginning after June 15, 2014. Additional resources, including an Implementation Guide, are available at [www.mersofmich.com](http://www.mersofmich.com).

|  |    |            |
|--|----|------------|
| Actuarial Valuation Date:  |    | 12/31/2020 |
| Measurement Date of the Total Pension Liability (TPL):                             |    | 12/31/2021 |
| At 12/31/2020, the following employees were covered by the benefit terms:          |    |            |
| Inactive employees or beneficiaries currently receiving benefits:                  |    | 69         |
| Inactive employees entitled to but not yet receiving benefits (including refunds): |    | 38         |
| Active employees:  |    | <u>31</u>  |
|  |    | 138        |
|  |    |            |
| Total Pension Liability as of 12/31/2020 measurement date:                         | \$ | 16,148,572 |
| Total Pension Liability as of 12/31/2021 measurement date:                         | \$ | 17,982,347 |
| Service Cost for the year ending on the 12/31/2021 measurement date:               | \$ | 182,185    |
| Change in the Total Pension Liability due to:                                      |    |            |
| - Benefit changes <sup>1</sup> :   | \$ | 0          |
| - Differences between expected and actual experience <sup>2</sup> :                | \$ | 551,604    |
| - Changes in assumptions <sup>2</sup> :  | \$ | 998,358    |
|  |    |            |
| Average expected remaining service lives of all employees (active and inactive):   |    | 2          |

<sup>1</sup> A change in liability due to benefit changes is immediately recognized when calculating pension expense for the year.

<sup>2</sup> Changes in liability due to differences between actual and expected experience, and changes in assumptions, are recognized in pension expense over the average remaining service lives of all employees.

|   |    |           |
|---|----|-----------|
| Covered employee payroll (Needed for Required Supplementary Information): | \$ | 1,590,755 |
|---|----|-----------|

Note: Covered employee payroll may differ from the GASB Statement No. 68 definition.

Sensitivity of the Net Pension Liability to changes in the discount rate:

|   | 1% Decrease<br><u>(6.60%)</u> | Current Discount<br>Rate <u>(7.60%)</u> | 1% Increase<br><u>(8.60%)</u> |
|---|-------------------------------|---|-------------------------------|
| Change in Net Pension Liability as of 12/31/2021: | \$ 2,001,605                  | \$ 0                                    | \$ (1,692,210)                |

Note: The current discount rate shown for GASB Statement No. 68 purposes is higher than the MERS assumed rate of return. This is because for GASB Statement No. 68 purposes, the discount rate must be gross of administrative expenses, whereas for funding purposes it is net of administrative expenses.

# Benefit Provision History

The following benefit provision history is provided by MERS. Any corrections to this history or discrepancies between this information and information displayed elsewhere in the valuation report should be reported to MERS. All provisions are listed by date of adoption.

## 01 - Gnrl

|           |   |
|-----------|---|
| 12/1/2020 | Non-Accelerated Amortization  |
| 1/1/2018  | Non Standard Compensation Definition                                |
| 1/1/2017  | Service Credit Purchase Estimates - No                              |
| 8/1/2015  | Option B Yes  |
| 8/1/2015  | Accelerated to 15-year Amortization                                 |
| 8/1/2015  | DC Adoption Date 08-01-2015   |
| 10/1/2012 | Exclude Temporary Employees requiring less than 12 months           |
| 1/1/2002  | 6 Year Vesting  |
| 1/1/2002  | Benefit B-2   |
| 1/1/1992  | E1 2.5% COLA for past retirees (01/01/1992)                         |
| 1/1/1992  | E2 2.5% COLA for future retirees (01/01/1992)                       |
| 1/1/1990  | Benefit F55 (With 25 Years of Service)                              |
| 1/1/1989  | Benefit B-1   |
| 1/1/1989  | Member Contribution Rate 3.00%                                      |
| 1/1/1988  | E1 2.5% COLA for past retirees (01/01/1988)                         |
| 1/1/1967  | Benefit C-1 (Old)   |
| 8/16/1963 | Covered by Act 88   |
| 7/1/1958  | Benefit FAC-5 (5 Year Final Average Compensation)                   |
| 7/1/1958  | 10 Year Vesting   |
| 7/1/1958  | Benefit C (Old)   |
| 7/1/1958  | Member Contribution Rate 3.00% Under \$4,200.00 - Then 5.00%        |
|           | Fiscal Month - January  |
|           | Defined Benefit Normal Retirement Age - 60                          |
|           | Early Reduced (.5%) at Age 50 with 25 Years or Age 55 with 15 Years |

## S1 - Surplus Unassociated

Fiscal Month - January



# Plan Provisions, Actuarial Assumptions, and Actuarial Funding Method

Details on MERS plan provisions, actuarial assumptions, and actuarial methodology can be found in the Appendix. Some actuarial assumptions are specific to this municipality and its divisions. These are listed below.

## Increase in Final Average Compensation

| Division      | FAC Increase Assumption |
|---------------|-------------------------|
| All Divisions | 2.00%                   |

## Miscellaneous and Technical Assumptions

Loads – None.

**Amortization Policy for Closed Not Linked Divisions:** The default funding policy for closed not linked divisions, including open divisions with zero active members, is to follow a non-accelerated amortization, where each closed period decreases by one-year each year until the period is exhausted. In select instances, closed not linked division(s) may follow an accelerated amortization policy.

## Risk Commentary

Determination of the accrued liability, the employer contribution, and the funded ratio requires the use of assumptions regarding future economic and demographic experience. Risk measures, as illustrated in this report, are intended to aid in the understanding of the effects of future experience differing from the assumptions used in the course of the actuarial valuation. Risk measures may also help with illustrating the potential volatility in the accrued liability, the actuarially determined contribution and the funded ratio that result from the differences between actual experience and the actuarial assumptions.

Future actuarial measurements may differ significantly from the current measurements presented in this report due to such factors as the following: plan experience differing from that anticipated by the economic or demographic assumptions; changes in economic or demographic assumptions due to changing conditions; increases or decreases expected as part of the natural operation of the methodology used for these measurements (such as the end of an amortization period, or additional cost or contribution requirements based on the Plan's funded status); and changes in plan provisions or applicable law. The scope of an actuarial valuation does not include an analysis of the potential range of such future measurements.

Examples of risk that may reasonably be anticipated to significantly affect the plan's future financial condition include:

- **Investment Risk** – actual investment returns may differ from the expected returns;
- **Asset/Liability Mismatch** – changes in asset values may not match changes in liabilities, thereby altering the gap between the accrued liability and assets and consequently altering the funded status and contribution requirements;
- **Salary and Payroll Risk** – actual salaries and total payroll may differ from expected, resulting in actual future accrued liability and contributions differing from expected;
- **Longevity Risk** – members may live longer or shorter than expected and receive pensions for a period of time other than assumed; and
- **Other Demographic Risks** – members may terminate, retire or become disabled at times or with benefits other than assumed resulting in actual future accrued liability and contributions differing from expected.

The effects of certain trends in experience can generally be anticipated. For example, if the investment return since the most recent actuarial valuation is less (or more) than the assumed rate, the cost of the plan can be expected to increase (or decrease). Likewise, if longevity is improving (or worsening), increases (or decreases) in cost can be anticipated.

## PLAN MATURITY MEASURES

Risks facing a pension plan evolve over time. A young plan with virtually no investments and paying few benefits may experience little investment risk. An older plan with a large number of members in pay status and a significant trust may be much more exposed to investment risk. Generally accepted plan maturity measures include the following:

|   | <u>12/31/2020</u> | <u>12/31/2019</u> | <u>12/31/2018</u> |
|---|-------------------|-------------------|-------------------|
| 1. Ratio of the market value of assets to total payroll   | 9.7               | 9.2               | 7.1               |
| 2. Ratio of actuarial accrued liability to payroll        | 11.3              | 11.3              | 9.1               |
| 3. Ratio of actives to retirees and beneficiaries         | 0.4               | 0.5               | 0.7               |
| 4. Ratio of market value of assets to benefit payments    | 16.1              | 14.5              | 13.9              |
| 5. Ratio of net cash flow to market value of assets (boy) | 2.6%              | -1.9%             | -3.9%             |

### RATIO OF MARKET VALUE OF ASSETS TO TOTAL PAYROLL

The relationship between assets and payroll is a useful indicator of the potential volatility of contributions. For example, if the market value of assets is 2.0 times the payroll, a return on assets 5% different than assumed would equal 10% of payroll. A higher (lower) or increasing (decreasing) level of this maturity measure generally indicates a higher (lower) or increasing (decreasing) volatility in plan sponsor contributions as a percentage of payroll.

### RATIO OF ACTUARIAL ACCRUED LIABILITY TO PAYROLL

The relationship between actuarial accrued liability and payroll is a useful indicator of the potential volatility of contributions for a fully funded plan. A funding policy that targets a funded ratio of 100% is expected to result in the ratio of assets to payroll and the ratio of liability to payroll converging over time.

### RATIO OF ACTIVES TO RETIREES AND BENEFICIARIES

A young plan with many active members and few retirees will have a high ratio of actives to retirees. A mature open plan may have close to the same number of actives to retirees resulting in a ratio near 1.0. A super-mature or closed plan may have significantly more retirees than actives resulting in a ratio below 1.0.

### RATIO OF MARKET VALUE OF ASSETS TO BENEFIT PAYMENTS

The MERS' Actuarial Policy requires a total minimum contribution equal to the excess (if any) of three times the expected annual benefit payments over the projected market value of assets as of the participating municipality or court's Fiscal Year for which the contribution applies. The ratio of market value of assets to benefit payments as of the valuation date provides an indication of whether the division is at risk for triggering the minimum contribution rule in the near term. If the division triggers this minimum contribution rule, the required employer contributions could increase dramatically relative to previous valuations.

### RATIO OF NET CASH FLOW TO MARKET VALUE OF ASSETS

A positive net cash flow means contributions exceed benefits and expenses. A negative cash flow means existing funds are being used to make payments. A certain amount of negative net cash flow is generally expected to occur when benefits are prefunded through a qualified trust. Large negative net cash flows as a percent of assets may indicate a super-mature plan or a need for additional contributions.



## State Reporting

The following information has been prepared to provide some of the information necessary to complete the Public Act 202 pension reporting requirements for the State of Michigan’s Local Government Retirement System Annual Report (Form No. 5572). Additional resources are available at [www.mersofmich.com](http://www.mersofmich.com) and on the State [website](#).

| Form 5572      |   |               |
|----------------|---|---------------|
| Line Reference | Description   | Result        |
| <b>10</b>      | <b>Membership as of December 31, 2020</b>   |               |
| 11             | Indicate number of active members   | 31            |
| 12             | Indicate number of inactive members (excluding pending refunds)   | 18            |
| 13             | Indicate number of retirees and beneficiaries   | 69            |
| <b>14</b>      | <b>Investment Performance for Calendar Year Ending December 31, 2020<sup>1</sup></b>                            |               |
| 15             | Enter actual rate of return - prior 1-year period   | 13.59%        |
| 16             | Enter actual rate of return - prior 5-year period   | 9.35%         |
| 17             | Enter actual rate of return - prior 10-year period  | 7.91%         |
| <b>18</b>      | <b>Actuarial Assumptions</b>  |               |
| 19             | Actuarial assumed rate of investment return <sup>2</sup>  | 7.35%         |
| 20             | Amortization method utilized for funding the system's unfunded actuarial accrued liability, if any              | Level Percent |
| 21             | Amortization period utilized for funding the system's unfunded actuarial accrued liability, if any <sup>3</sup> | 13            |
| 22             | Is each division within the system closed to new employees? <sup>4</sup>  | Yes           |
| <b>23</b>      | <b>Uniform Assumptions</b>  |               |
| 24             | Enter retirement pension system's actuarial value of assets using uniform assumptions                           | \$14,912,988  |
| 25             | Enter retirement pension system's actuarial accrued liabilities using uniform assumptions <sup>5</sup>          | \$18,735,713  |
| 27             | Actuarially Determined Contribution (ADC) using uniform assumptions, Fiscal Year Ending December 31, 2021       | \$672,756     |

1. The Municipal Employees’ Retirement System’s investment performance has been provided to GRS from MERS Investment Staff and is included here for reporting purposes. The investment performance figures reported are net of investment expenses on a rolling calendar-year basis for the previous 1-, 5-, and 10-year periods as required under PA 530.
2. Net of administrative and investment expenses.
3. Populated with the longest amortization period remaining in the amortization schedule, across all divisions in the plan. This is when each division and the plan in total is expected to reach 100% funded if all assumptions are met.
4. If all divisions within the employer are closed, “yes.” If at least one division is open (including shadow divisions) indicate “no.”
5. Line 25 actuarial accrued liability is determined under PA 202 uniform assumptions which differ from the valuation assumptions. In particular, the assumed rate of return for PA 202 purposes is 7.00%.



**Health Officer's Report to the Board of Health for June 24, 2021**  
**Prepared by: Rebecca A. Burns, M.P.H., R.S.**

**Agency Updates**

**COVID-19 Vaccination Continues:** The Agency is continuing to offer vaccination opportunities. Once each week in our offices and also at community events. Last weekend we were at Strawberry Fest in Coldwater and at the Three Rivers Water Festival. Vaccine appointments can be made from our website at [www.bhsj.org/scheduling](http://www.bhsj.org/scheduling) and we have opportunities to get vaccinated available in each county each week. The Agency has all three vaccines available, so individuals can choose the one they are interested in receiving.

**COVID-19 Cases:** Generally, the trends are continuing this past month downward with the exception of Branch County which saw a brief uptick but in recent days is looking better. Overall risk levels for each county today are Branch = D, Hillsdale = B, and St. Joseph = C.

**New Medical Director Candidate:** Program, Policy and Appeals Committee have completed their interviews of the candidates for Medical Director and have requested that I engage in contract negotiations with Dr. Karen Luparello, DO. I'm pleased today to bring to the full board a draft contract for your action. The terms of the contract have been reviewed by the committee members and received their approval. Dr. Luparello has agreed to come on-board as of July 1, 2021 so that she can meet with, learn from, and provide the smoothest transition from Dr. Vogel. This period of overlap will also allow the Agency the time to transition to a new billing provider. Once approved by the full board, formal approval by MDHHS will be sought. MDHHS has indicated that conditional approval can be granted for Dr. Luparello to assume the Medical Director position at our Agency. Conditional approval is routinely granted when a new Medical Director does not currently hold the degree required in the Public Health Code (an MPH) and is provided a period of time in which to obtain that degree. During the conditional approval timeframe, the new Medical Director is assigned a mentoring Medical Director who works for another local health department in Michigan.

**Board of Health Education:** Not a scheduled education session today, but we will be joined by our MERS representative Marne Daggett. Ms. Daggett will be available to discuss the status of our defined benefit plan and answer any of your questions.

**Clinic Changes:** Our waiver to see WIC clients remotely ends in August, so as we prepare to start seeing clients in the office we are moving to begin bringing in our 1 year old's as of July 19<sup>th</sup>. We will also begin seeing STD clients in our offices on July 9<sup>th</sup>. Our WIC program also received a good news letter this week, when we received word that the Management Evaluation done in 2020 has received final approval and the corrective action plan that was put in place has been completed. Congratulations to our WIC team!

**Grants to Improve Vaccination Rates:** I'm aware of two grants that have been received recently by partner organizations with the goal to increase the vaccination rate for COVID-19. Hillsdale Hospital

has been funded as well as the St. Joseph County United Way. Hillsdale Hospital has invited me to attend a meeting on Friday to discuss their project and plans. The St. Joseph County United Way Director, Kelly Hostetler, mentioned receipt of the grant and for initial suggestions just yesterday.

**Coldwater Office Event:** On June 16<sup>th</sup>, our team members in Coldwater noted an odd odor in the building when they reported to work. The building was cleared and the fire department was called to investigate. What they found were the batteries used in our Vectorborne program which had been charging overnight had overheated, were emitting a gaseous odor, and were bulging. They were immediately disconnected from the charging devices and taken outside the building. Fans were used to move fresh air into the building and remove the bad odor. The fire department advised that the Environmental Health department area of the building where the batteries were located could be re-occupied by noon. Paul has reported the incident to our state partner at EGLE and those particular batteries and charging devices are no longer being used pending their investigation.

**Improving Access to Vaccine and Reducing Waste:** We are continuing to encourage local providers to offer COVID vaccination during visits to their offices and upon discharge from the hospital. Recently, Three Rivers Health and Sturgis Hospital have both accepted vials of the J&J vaccine from our office so that they can offer vaccination to patients they are discharging. We are also encouraging providers to use us as their “hub” for the Pfizer vaccine and get what they need every week or so, so that we can provide more opportunities to vaccinate adolescents.

**Delta Variant:** The Delta variant of the COVID-19 virus is more highly contagious and was first found in India. Within the district there have now been 8 cases of COVID that have been determined to be from the Delta variant, 4 each in St. Joseph and Branch counties. Because this variant is more highly contagious and because of the low vaccination rate in the tri-county area, this Delta variant could cause an increase in cases which is worrying.

**October Board of Health Meeting:** This year the Michigan Premiere Public Health Conference is planned in October on the Board of Health meeting day. Last year the meeting was cancelled due to COVID and I'd really like to get staff from our Agency back to this conference. It is in Grand Rapids. I would like to request that this meeting be moved to either October 21<sup>st</sup> or November 4<sup>th</sup>. This will take Board action to move this.

**Committee Meeting Request:** I am requesting a Finance Committee meeting in advance of the July meeting. Items for discussion include; original budget for FY22, budget amendment for FY 21, health insurance for FY22, and AAA3C provider amendments.

**Mobile Clinic Van:** The mobile clinic van and our nurse who is in charge of it, Carol Drews, was featured in the paper recently. Carol has been busy getting too homebound and businesses to provide COVID vaccination. Soon, we will be looking at how we can use this resource to do offsite WIC and childhood immunizations.

**COVID-19 Testing:** We continue to offer COVID-19 testing at our facility in Coldwater on Thursday's but have expanded to providing testing in Hillsdale on Friday's as of 5/21 and in Three Rivers as of 5/28. Honu is providing no-cost rapid testing in addition to the PCR test. Providing this opportunity in each county involves no staff time from our Agency team and supports existing testing available in the community. This arrangement is working out well and individuals are utilizing the testing sites.

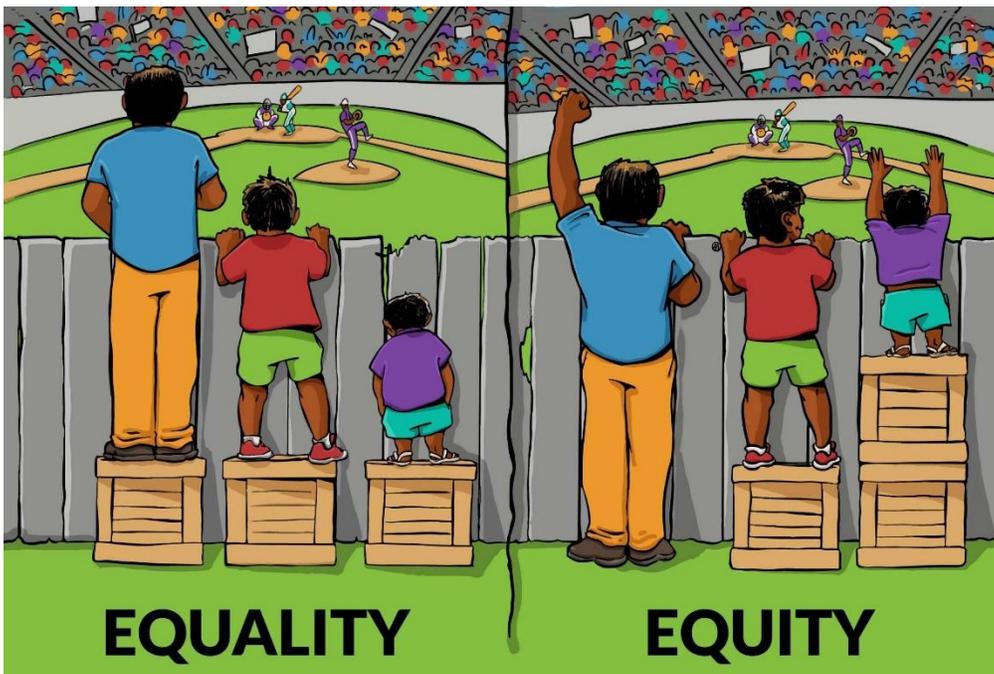
**American Rescue Plan Funds:** As the counties make plans for these funds, Your Local Health Department asks that you keep our Agency in mind. We currently have grant funds that are coming to the Agency for COVID-19 work, for example, work in Case Investigation and Contact Tracing and a separate grant for COVID Immunization, but these funds have specific uses attached. As we look to the

future and the public health needs in the tri-county area we would like to be funded to meet those needs. I am available to be present for any discussions at the county level on how some of these dollars can be used for public health and safety and support for our programs targeted at Aging. Thank you.

**Health Promotion & Education Updates** – Beginning next month, I will be bringing you a separate report from this section of our Agency. The health educators were at both Strawberry Fest and Three Rivers Water Festival to engage with community members. They have written and sent out several press releases.

**Strategic Planning:** This continues to be paused.

Because I find it helpful to be reminded to consider equity in all we do in Public Health, I'm keeping this graphic on my report.



**Medical Director's Report to the Board of Health**  
**H. Lauren Vogel, D.O., M.P.H.**  
**June 2021 - Adolescent Vaccination COVID-19**

In the US the SARS-CoV-2 pandemic has evolved. The WHO declared the infection a pandemic in March 2020. The novel mRNA vaccines were released in December 2020. Some 5 months later we have administered over 300 millions doses - 44.4% of our population. In Michigan we have fully vaccinated 44.9% of our population (June 8, 2021). Infection rates are declining and the current Michigan infection rate is measured at 1.85%.<sup>1</sup>

In the earlier days of the pandemic vaccines were in limited supply and the public struggled to find vaccination sites. Now, we have more than adequate supplies of the three EUA approved vaccines but the public vaccination response has fallen over 70%. With immunity either from infection and recovery or vaccination increasing, guidelines for social distancing and masking are relaxing.

WHO and CDC data document that the vaccines are safe and effective (~95% effective) and reinfection from SARS-CoV-2 is about 0.4% of the vaccinated population. Propagation of the virus continues and variants continue to evolve and risk of primary infection continues. There are some persons that cannot or will not vaccinate against SARS-CoV-2. It is this population that has increased risk for infection and adverse outcomes. Within this group are the children and adolescents.

A recent article reported a disturbing trend of increasing spikes of covid19 infection among children and teens.<sup>2</sup> As of May 2021, 4 million children in the US have been infected with COVID-19. The Delta variant (B.1.617.2) is increasing in the US and is now the dominant circulating variant in the UK. This variant is more contagious and transmissible and poses a significant risk to children with children aged 7-20 years of age.<sup>3,4</sup> This variant rate is doubling every two weeks in the US currently and is now infecting over 10% of the new cases.

The recent increases of covid19 in the pediatrics population may be because earlier in the pandemic quarantines and school closures reduced community exposure to the infection. Many of the recent outbreaks in teens have been associated with extracurricular activities, youth sports, social gatherings or travel versus exposure during in-person school or from the classroom.

SARS-CoV-2 infection in the pediatric population is not a benign phenomenon. About one-third of children with the infection require ICU support and about 5% require ventilator care.<sup>4</sup> The majority of pediatric infections are mild but during recovery MIS-C is a risk occurring in about 150 Michigan children to date. MIS-C is a severe delayed immune response to COVID-19 marked by shock, fever, and multi-organ inflammation. Permanent damage to the heart, lungs, blood vessels, kidneys, digestive system, brain, skin or eyes can also occur.<sup>5</sup>

Lingering symptoms after SARS-CoV-2 infection occurs in about one-half of the pediatric population with symptoms impairing daily activities lasting several months.<sup>6</sup> Symptoms have included fatigue, headache and upper respiratory and gastrointestinal complaints. Relapses after improvement from the lingering symptoms are not uncommon. An effective treatment to relieve the chronic symptoms has not been determined. As the frequency of infectivity increases in the pediatric population "long covid19 syndrome" follows.

The EUA for Pfizer covid19 vaccine is approved for children aged 12 and above. Moderna approval for the same is anticipated soon. With 22% of our population being children, providing vaccinations against SARS-CoV-2 not only benefits the child but also contributes to community protection by increasing herd immunity. Our current community data does not document significant recovery from SARS-CoV-2 pandemic.

## REFERENCE

1. COVID Data Tracker. CDC. June 2021. [https://covid.cdc.gov/covid-data-tracker/#cases\\_casesper100klast7days](https://covid.cdc.gov/covid-data-tracker/#cases_casesper100klast7days). Accessed June 2021.
2. Mostafaci B. COVID Upticks Among Kids and Teens: What Parents Should Know. University of Michigan Health. April 2021. <https://healthblog.uofmhealth.org/childrens-health/covid-upticks-among-kids-and-teens-what-parents-should-know>. Accessed June 2021.
3. COVID-19: Delta Variant Is Now UK's Most Dominant Strain And Spreading Through Schools. BMJ. June 2021. <https://www.bmj.com/content/373/bmj.n1445>. Accessed June 2021.
4. Hospitalization of Adolescents Aged 12-17 Years with Laboratory-Confirmed COVID-19 — COVID-NET, 14 States, March 1, 2020-April 24, 2021. CDC. June 2021.

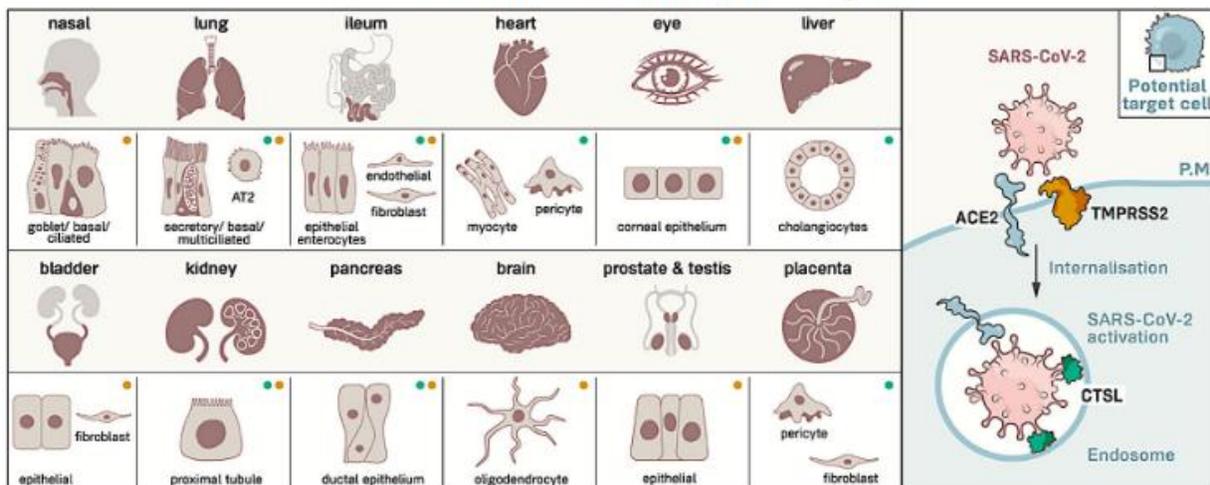
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5. Mostafaci B. MIS-C: The COVID-Related Condition Parents Need to Know About. March 2021. <https://healthblog.uofmhealth.org/childrens-health/mis-c-covid-related-condition-parents-need-to-know-about>. Accessed June 2021.

6. Thompson H. Children With Long Covid. NIH. February 2021. <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC7927578/>. Accessed June 2021.

# Long-Term Effects of Covid-19 Infection

## COVID-19 Affects Multiple Organs



## June 2021 – Pediatrics and SARS-CoV-2

H. Lauren Vogel, D.O., M.P.H.



### SARS-CoV-2 Evolution

- First cases announced December 2019 in China.
- February 2020 – US declares SARS-CoV-2 a public health emergency.
- March 2020 – WHO declares the infection a pandemic.
- December 2020 - Moderna and Pfizer receive approval for the vaccine distribution.
- March 2021 – J&J vaccine is granted EUA approval.
- June 2021 – Michigan complete vaccination is 44.9%.

### Infection Complications

- 35% - Asymptomatic recovery
- 58% - Mild symptoms
- 5% - Severe Disease
- 33% required ICU care if severely affected
- 50% - Developed lingering symptoms
- 0.5% - Developed MIS-C

### Pediatrics SARS-CoV-2 Trends

- May 2021 – Over 4 Million children have been infected with SARS-CoV-2.
- Children comprise 22% of the U.S. population.
- Cases in children in the US have been steadily increasing since March 2020.
- Delta variant (B.1.617.2) is increasing in the US and may become the dominant variant.
- Children ages 7-20 are at higher risk for infection especially from Delta.

### MIS-C

- Post infection severe immune response
- Systemic altered immune response
- Multiple organ failure common
- Onset after recovery from COVID-19
- Treatment as for Kawasaki syndrome

### Long COVID-19 Syndrome

- Probably post-infection inflammation.
- Affects about 50% of children recovering from SARS-CoV-2.
- Most common symptoms: Fatigue, headache, upper respiratory and GI symptoms.
- Impairs daily activities and can last for several months.

### References

- [1] COVID Data Tracker. CDC. June 2021. [https://covid.cdc.gov/covid-data-tracker/#cases\\_casesper100klast7days](https://covid.cdc.gov/covid-data-tracker/#cases_casesper100klast7days).
- [2] COVID-19: Delta Variant Is Now UK's Most Dominant Strain June 2021. <https://www.bmj.com/content/373/bmj.n1445>
- [3] Hospitalization of Adolescents Aged 12–17 Years. [https://www.cdc.gov/mmwr/volumes/70/wr/mm7023e1.htm?s\\_cid=mm7023e1\\_w](https://www.cdc.gov/mmwr/volumes/70/wr/mm7023e1.htm?s_cid=mm7023e1_w).
- [4] MIS-C. <https://healthblog.uofmhealth.org/childrens-health/mis-c-covid-related-condition-parents-need-to-know-about>.

## June 10, 2021 – Board of Health Program, Policy, and Appeals Committee Meeting Minutes

The meeting was called to order at 10:30 a.m. by Chairman, Kathy Pangle, with roll call as follows: Kathy Pangle, Tom Matthew, and Mark Wiley.

Also present from BHSJ: Rebecca Burns, and Theresa Fisher.

### New Business:

- The Program, Policy, and Appeals Committee, by consensus, recommends the full board approve entering into contract with the candidate that was selected as the new Medical Director.
- The Program, Policy, and Appeals Committee, by consensus, recommends the full board approve the Agency to obtain purchase cards.
- Employment issues were discussed but no action was taken.

With no further business the meeting was adjourned at 11:49 AM.

Respectfully Submitted by:

Theresa Fisher, BS



| May 1 through May 31, 2021          |   |           |
|-------------------------------------|---|-----------|
| 2nd Story Marketing, LLC.           | LARA Grant Marketing                                      | 3,000.00  |
| A+ Nursing                          | Care Management   | 324.77    |
| ACD.Net                             | Telephones 3 offices                                      | 2,601.50  |
| Action Quick Print Plus             | Permits & Covid Flyers                                    | 2,203.00  |
| AFLAC                               | Payroll Deduction   | 1,181.74  |
| Aimmee Mullendore                   | Covid Clinic Reimbursements                               | 9.98      |
| Alerus Financial (Retirement)       | Payroll Deduction   | 2,326.00  |
| Amazon                              | Office Supplies - 1 invoice                               | 137.97    |
| Amazon                              | Medical Supplies - 6 invoices                             | 1,646.23  |
| Area Agencies On Aging              | License for Self-Management Resource Center 5/1/21-5/1/24 | 500.00    |
| Armstrong Health Care               | WIC / AAA Contractual Consultant                          | 3,938.47  |
| Availity                            | Eligibility Software - EMR                                | 55.00     |
| Blue Cross Blue Shield              | Health Insurance  | 57,959.92 |
| Branch Area Transit Authority       | Elderly Transportation Service                            | 435.42    |
| Branch County Commission COA        | Home & Community Based Services                           | 8,487.59  |
| Branch County Complex               | Rent - Coldwater Office                                   | 5,694.28  |
| Branch County Fair                  | 3/18-5/12/21 Dearth Rental                                | 1,100.00  |
| CAA of South Central                | Home & Community Based Services                           | 17,920.31 |
| Carol Drews                         | Fuel Reimbursement for Mobile Unit                        | 298.46    |
| Century Bank - Master Card          | Newspaper Subscription                                    | 49.99     |
| Century Bank - Master Card          | Office Supplies   | 55.38     |
| Century Bank - Master Card          | Covid Lunches   | 503.76    |
| Century Bank - Master Card          | Zoom Annual Subscription                                  | 1,648.90  |
| Century Bank Basic Flex Health Plan | Payroll Deduction   | 1,284.62  |
| Century Bank EFPTS                  | Federal & Fica Taxes                                      | 49,683.01 |
| Century Bank Mers                   | MERS DB /Retirement                                       | 40,360.79 |
| Century Bank State                  | Michigan Tax  | 8,090.90  |
| Charter Communications              | Sturgis Internet & Phone Line                             | 137.97    |
| Cintas                              | Lab Coats/Rugs - Cleaning                                 | 133.43    |
| City of Jonesville                  | Water Lab Test  | 60.00     |
| City Of Three Rivers                | Water / Sewage  | 207.74    |
| Companion Life Insurance Co.        | Life Insurance Premiums                                   | 989.70    |
| Crossroads Health & Home Services   | Care Management   | 2,517.83  |
| CSHCS Client                        | Refund - Out of Pocket Expense                            | 199.00    |
| CSHCS Client                        | Out of Pocket Expense                                     | 285.00    |
| Current Office Solutions            | Copier Charges & Office Supplies - 4 Invoices             | 2,253.10  |
| David Fowler                        | Fuel Reimbursement for Mobile Unit                        | 67.07     |

| May 1 through May 31, 2021              |   |           |
|---|---|-----------|
| Dr. Vogel                               | Medical Director - Contractual                | 4,296.15  |
| Erich Petushek                          | Analysis & collation of data                  | 6,000.00  |
| Frontier                                | Sensaphone & Fax Line Service                 | 305.05    |
| GDI                                     | Building Supplies Expense - TR                | 87.62     |
| GDI                                     | Building Supplies Expense - HD                | 183.16    |
| GDI                                     | Building Cleaning Expense - TR                | 1,749.00  |
| GDI                                     | Building Cleaning Expense - HD                | 2,649.00  |
| Graphics 3                              | Printing - Rack Cards                         | 1,066.70  |
| Heartsmart.com                          | AED   | 1,358.98  |
| Hillsdale Board Of Utilities            | Building Expense - HD                         | 1,441.18  |
| Hillsdale County Treasurer              | Building Supplies Expense - HD                | 42.26     |
| Hillsdale County Treasurer              | Building Labor Expense - HD                   | 160.00    |
| Hillsdale County Treasurer              | Building Refuse Expense - HD                  | 165.00    |
| Hillsdale County Treasurer              | Building Supplies Expense - HD - Gas 2 months | 165.68    |
| Hillsdale County Treasurer              | Building Snow/Mow Expense - HD                | 225.00    |
| Home Care Wellness                      | Care Management                               | 816.12    |
| HomeJoy Care-N-Assist                   | Care Management                               | 2,607.51  |
| Hospital Network Health                 | Medical Waste Removal                         | 715.00    |
| Indiana Michigan Power                  | Building Expense - TR                         | 813.56    |
| Internal Revenue Service                | 941 Fee                                       | 529.59    |
| Jackson Publishing Co.                  | Senior Preferences Ad                         | 625.00    |
| Karri Doty                              | Contracted Services                           | 1,838.96  |
| Katelyn Hamlin                          | Contracted Services                           | 395.98    |
| Kevin Piggott, MD, MPH                  | Analysis & collation of data                  | 6,000.00  |
| Legal Service Of South Central Mi.      | Older Adult Legal Assistance                  | 1,210.00  |
| Macks Fire Protection                   | Fire Extinguisher Inspection Three Rivers     | 205.00    |
| Maplecrest                              | Rent - Sturgis Office                         | 590.00    |
| Marana Group                            | Postage Pick Up Service                       | 142.00    |
| Maxim Healthcare Staffing Services Inc. | Contracted Services                           | 17,668.54 |
| McKesson                                | Medical Supplies - 5 Invoices                 | 620.94    |
| McKibbin Media Group                    | Covid Clinic Advertising                      | 390.00    |
| Medical Care Alert                      | Care Management                               | 359.60    |
| MediSys                                 | Billing Service                               | 782.93    |
| Mers 5% Alerus Financial DC             | Defined Contributions 5% EES                  | 10,448.61 |
| Michigan Center for Rural Health        | RCOR Planning                                 | 2,500.00  |
| Michigan Public Health                  | Workforce Contract                            | 3,306.11  |

| May 1 through May 31, 2021          |                                     |            |
|-------------------------------------|-------------------------------------|------------|
| Michigan State Disbursement Unit    | Payroll Deduction                   | 380.22     |
| Minimed Distribution                | CSHCS Client - Diabetic Pump        | 438.70     |
| Nationwide                          | Payroll Deduction                   | 2,380.00   |
| OfficeTeam                          | Contracted Covid                    | 12,941.10  |
| Perspective Enterprise              | Calibration                         | 1,030.00   |
| Prompt Care                         | Drug Testing - 3 Employees          | 207.00     |
| Reserve Account                     | Postage                             | 3,000.00   |
| Richard Clark                       | Building Cleaning Expense - Sturgis | 325.00     |
| Richard Clark                       | Building Cleaning Expense - CW      | 1,940.00   |
| Riley Pumpkin Farm                  | TR Building Expense - Winter Care   | 700.00     |
| Ronald Rayba                        | EH Refund                           | 186.00     |
| Rosati Schultz Joppich Amtsbueshler | Attorney                            | 3,368.80   |
| Rose Exterminator                   | Building Maintenance - TR Quarterly | 207.00     |
| Ruth Brown                          | Contractual                         | 4,224.19   |
| Sanofi Pasture                      | Medical Supplies - 1 Invoice        | 812.50     |
| SEMCO Energy                        | Building Expense - TR               | 79.44      |
| Shred It                            | Document Destruction                | 90.00      |
| St Joseph County COA                | Home & Community Based Services     | 20,201.88  |
| St Joseph County Grange Fair        | 2021 Fair Booth Rental              | 90.00      |
| St Joseph Trans Authority           | Older Adult Transportation          | 1,344.50   |
| St. Joseph County United Way        | 4/17-5/3/21 Covid Clinic Lunches    | 740.81     |
| Staples                             | Office Supplies - 6 Invoices        | 1,224.61   |
| State Of Michigan                   | STD Lab Fees                        | 53.01      |
| State Of Michigan                   | Food Licenses Surcharge             | 111.00     |
| State Of Michigan                   | CSHCS Client Fees                   | 372.00     |
| State Of Michigan EGLE              | Water Lab Test                      | 90.00      |
| Steve Laring                        | EH Refund                           | 69.00      |
| Stratus Video                       | Translator - 3/21 & 4/21            | 2,766.87   |
| Sturgis Hospital                    | X-Ray                               | 137.00     |
| Swick Broadcasting                  | Advertising - Covid Vaccine         | 689.00     |
| Three Rivers Health                 | Rent - Dental Clinic                | 2,775.00   |
| Three Rivers Petty Cash             | Petty Cash                          | 33.27      |
| Thurston Woods                      | Home & Community Based Services     | 1,833.08   |
| Verizon                             | Cell Phones                         | 977.98     |
| VRI Lifeline Of Michigan            | Care Management                     | 562.00     |
| Wal Mart                            | Covid Clinic Supplies               | 705.42     |
|                                     |                                     | 357,895.44 |

Branch-Hillsdale-St Joseph Community Health Agency  
 Balance Sheet  
 As of 5/31/2021

Assets

|                                |                            |
|--------------------------------|----------------------------|
| Cash on Hand                   | 4,221.83                   |
| Cash with County Treasurer     | 4,862,340.46               |
| Community Foundation Grant     | 309,955.94                 |
| Accounts Receivable            | 89,208.32                  |
| Due from State                 | (890,380.13)               |
| Due from Other Funding Sources | 239,568.70                 |
| Prepaid Expenses               | 114,979.06                 |
| Biologic Inventory             | <u>71,678.84</u>           |
| <b>Total Assets</b>            | <b><u>4,801,573.02</u></b> |

Liabilities

|                          |                            |
|--------------------------|----------------------------|
| Accounts Payable         | 149,931.93                 |
| Payroll Liabilites       | 104,483.62                 |
| Capital Improvements     | 25,000.00                  |
| Deferred Revenue         | 1,256,389.69               |
| Deferred Revenue BR      | 17,829.00                  |
| Deferred Revenue HD      | 19,531.00                  |
| Deferred Revenue SJ      | 25,642.00                  |
| Biologics                | <u>71,678.84</u>           |
| <b>Total Liabilities</b> | <b><u>1,670,486.08</u></b> |

Net Assets

|                         |                            |
|-------------------------|----------------------------|
| Operation Fund Balance  | 734,855.43                 |
| Restricted Fund Balance | 419,189.55                 |
| Designated Fund Balance | <u>1,977,041.96</u>        |
| <b>Total Net Assets</b> | <b><u>3,131,086.94</u></b> |

|   |                            |
|---|----------------------------|
| <b>Total Liabilities and Net Assets</b> | <b><u>4,801,573.02</u></b> |
|---|----------------------------|

**Prior Year Fund Balance Comparison at 5/31/2020:**

|                              |                            |
|------------------------------|----------------------------|
| Operation Fund Balance       | 610,285.63                 |
| Restricted Fund Balance      | 438,827.04                 |
| Designated Fund Balance      | <u>1,753,399.19</u>        |
| <b>Total Fund Balance \$</b> | <b><u>2,802,511.86</u></b> |

BHSJ Community Health Agency  
Schedule of Cash Receipts and Disbursements  
December 31, 2020 thru  
May 31, 2021

|   |                        |
|---|------------------------|
| Plus: Cash Receipts                     | \$ 737,139.69          |
| Less: Cash Disbursements For Payroll/AP | \$ (786,499.45)        |
| <b>12/31/2020 Cash Balance</b>          | <b>\$ 2,964,751.13</b> |
|   |                        |
| Plus: Cash Receipts                     | \$ 1,634,935.97        |
| Less: Cash Disbursements For Payroll/AP | \$ (609,594.00)        |
| <b>1/31/2021 Cash Balance</b>           | <b>\$ 3,990,093.10</b> |
|   |                        |
| Plus: Cash Receipts                     | \$ 541,765.32          |
| Less: Cash Disbursements For Payroll/AP | \$ (570,712.10)        |
| <b>2/28/2021 Cash Balance</b>           | <b>\$ 3,961,146.32</b> |
|   |                        |
| Plus: Cash Receipts                     | \$ 1,095,594.79        |
| Less: Cash Disbursements For Payroll/AP | \$ (500,209.66)        |
| <b>3/31/2021 Cash Balance</b>           | <b>\$ 4,556,531.45</b> |
|   |                        |
| Plus: Cash Receipts                     | \$ 1,208,125.34        |
| Less: Cash Disbursements For Payroll/AP | \$ (657,784.61)        |
| <b>4/30/2021 Cash Balance</b>           | <b>\$ 5,106,872.18</b> |
|   |                        |
| Plus: Cash Receipts                     | \$ 586,165.15          |
| Less: Cash Disbursements For Payroll/AP | \$ (520,740.93)        |
| <b>5/31/2021 Cash Balance</b>           | <b>\$ 5,172,296.40</b> |

# BRANCH HILLSDALE ST JOSEPH COMMUNITY HEALTH AGENCY

## Expense by Program - 5/1/2021 - 5/31/2021

| Program | Program Title                                   | Current Month | Year to Date | Total Budget - Amendment2 | Percent Total Expended Amend2 |
|---------|---|---------------|--------------|---------------------------|-------------------------------|
| 008     | Salary & Fringe Payoff                          | 8,746.93      | 73,297.88    | 70,000.00                 | 104.71%                       |
| # 353   | CRFLCT Contact Tracing                          | 0.00          | 322,774.81   | 322,808.00                | 99.98%                        |
| # 354   | CRF LHD Testing                                 | 0.00          | 151,669.77   | 152,120.00                | 99.70%                        |
| * 362   | COVID Immunizations                             | 26,227.48     | 112,648.78   | 120,254.00                | 93.67%                        |
| * 010   | Agency Support                                  | 12,618.08     | 22,255.19    | 26,728.00                 | 83.26%                        |
| ** 032  | Emergency Preparedness                          | 11,012.01     | 94,836.42    | 117,406.00                | 80.77%                        |
| ** 326  | Vision (ELPHS)                                  | 4,845.49      | 60,049.30    | 86,603.00                 | 69.33%                        |
| * 200   | ELPHS Marketing                                 | 1,651.50      | 15,013.59    | 21,919.00                 | 68.49%                        |
| 021     | Dental Clinic - Three Rivers                    | 2,775.00      | 22,200.00    | 33,300.00                 | 66.66%                        |
| 012     | Area Agency on Aging                            | 77,487.69     | 839,551.06   | 1,275,371.00              | 65.82%                        |
| 745     | Type II Water                                   | 6,799.82      | 54,796.75    | 83,945.00                 | 65.27%                        |
| 327     | Hearing (ELPHS)                                 | 4,051.77      | 54,042.82    | 83,736.00                 | 64.53%                        |
| 325     | CSHCS   | 17,105.27     | 119,832.10   | 187,311.00                | 63.97%                        |
| 338     | Immunization Vaccine Handling                   | 27,759.63     | 218,719.54   | 344,597.00                | 63.47%                        |
| 029     | Dental Clinic - Hillsdale                       | 743.96        | 5,048.74     | 8,000.00                  | 63.10%                        |
| 345     | Lead Testing                                    | 1,741.29      | 13,604.96    | 22,044.00                 | 61.71%                        |
| 605     | General EH Services                             | 2,705.16      | 21,727.11    | 35,484.00                 | 61.23%                        |
| 714     | Onsite Sewage Disposal                          | 25,698.97     | 206,407.41   | 337,097.00                | 61.23%                        |
| 721     | Drinking Water Supply                           | 25,698.97     | 206,407.41   | 337,097.00                | 61.23%                        |
| 351     | CELC Infection Prevention                       | 6,121.47      | 53,452.36    | 91,721.00                 | 58.27%                        |
| 704     | Food Service                                    | 33,473.52     | 240,243.87   | 416,148.00                | 57.73%                        |
| 331     | STD   | 10,943.15     | 70,603.13    | 122,540.00                | 57.61%                        |
| 360     | CRFIMM - Immunization COVID Response            | 0.00          | 34,661.72    | 61,989.00                 | 55.91%                        |
| 321     | CHC Tele-A-Health                               | 17.32         | 22,918.84    | 42,782.00                 | 53.57%                        |
| 109     | WIC   | 69,812.73     | 495,139.50   | 924,737.00                | 53.54%                        |
| 341     | Infectious Disease                              | 18,692.25     | 139,604.98   | 269,355.00                | 51.82%                        |
| 108     | WIC Breastfeeding                               | 7,245.16      | 51,803.34    | 100,799.00                | 51.39%                        |
| 201     | CSF Carseats                                    | 1,057.20      | 10,429.38    | 20,370.00                 | 51.19%                        |
| 332     | HIV Prevention                                  | 2,094.56      | 13,190.99    | 27,872.00                 | 47.32%                        |
| 101     | Workforce Development                           | 3,410.23      | 19,936.87    | 44,135.00                 | 45.17%                        |
| 329     | MCH Enabling Children                           | 3,123.14      | 17,168.75    | 39,034.00                 | 43.98%                        |
| 352     | ELCCT Contact Tracing, testing doord, violation | 52,949.97     | 373,143.03   | 869,197.00                | 42.92%                        |
| 275     | Medical Marijuana SJ                            | 1,096.34      | 3,391.94     | 8,402.00                  | 40.37%                        |
| 014     | VOCA  | 7,563.04      | 83,158.65    | 226,338.00                | 36.74%                        |
| 138     | Immunization IAP                                | 19,126.69     | 233,401.27   | 721,359.00                | 32.35%                        |
| 115     | MCH Enabling Women                              | 1,779.56      | 17,517.98    | 55,375.00                 | 31.63%                        |
| 400     | HRSA 20RCORP                                    | 15,963.97     | 57,250.77    | 197,642.00                | 28.96%                        |

|     |                                    |                   |                     |                     |               |
|-----|------------------------------------|-------------------|---------------------|---------------------|---------------|
| 723 | PFAS Response - White Pigeon       | 3,209.96          | 4,639.24            | 17,721.00           | 26.17%        |
| 363 | 363 CVDIMS Covid Immz Supplemental | 19,553.26         | 174,489.00          | 674,831.00          | 25.85%        |
| 230 | Medical Marijuana HD               | 1,065.77          | 3,571.26            | 14,034.00           | 25.44%        |
| 212 | Medical Marijuana BR               | 1,338.00          | 4,524.39            | 23,152.00           | 19.54%        |
| 107 | Medicaid Outreach                  | 1,036.93          | 10,548.36           | 80,440.00           | 13.11%        |
| 035 | Vector Borne Disease Surveillance  | 2,229.18          | 2,229.18            | 27,000.00           | 8.25%         |
| 024 | MERS Pension Underfunded Liability | 0.00              | 5,818.99            | 122,590.00          | 4.74%         |
| 722 | PFAS Response                      | 32.67             | 32.67               | 1,028.00            | 3.17%         |
| 023 | Capital Expenditures               | 0.00              | 0.00                | 128,000.00          | 0.00%         |
| 038 | COVID-19                           | 0.00              | 0.00                | 263,415.00          | 0.00%         |
| 112 | CSHCS Medicaid Outreach            | 0.00              | 0.00                | 36,276.00           | 0.00%         |
| 361 | CVIS Covid/Flu Immz                | 0.00              | 0.00                | 55,371.00           | 0.00%         |
|     | Total Total Expense                | <u>540,605.09</u> | <u>4,757,754.10</u> | <u>9,349,473.00</u> | <u>50.89%</u> |

The Agency is currently 15.77% under budget.

\*8/12 Months = 66.66%

\*\*8/9 Months = 88.88%

# 3/3 Months = 100% \*CRF Ended 1/31/2021

\*\*9-Month Program

# 3-Month Program

### Programs Over Budget as of 5/31/2021

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**RU 008:** Over budget due to annual Sick Time Payout and staff leaving employment. This will be addressed at the upcoming budget amendment.  
**104.71%**

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**RU 362:** Grant deadline was expected to end on 6/30/21 but has now been extended. We are currently on track to spend the grant by the original deadline.  
**93.67%**

---

**RU 010:** Program shows as over budget due to the indirect cost not being spread to the other programs. Indirect costs are spread based on salary projections and many programs are under budget at this time. Expenses are within budget. Will address during amendment.  
**83.26%**

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**RU 032:** 9-Month Program - under budget by 8.11%  
**80.77%**

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**RU 326:** 9-Month Program - under budget by 19.55%  
**69.33%**

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**RU 200:** Over budget due to an increase in staff time - will monitor and adjust in amended budget  
**68.49%**

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### *CRF - 3 Month Grant Programs Ended 1-31-21*

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**RU 353:** 3-Month Program - Within budget, Grant Deadline was Feb 15th  
**99.98%**

---

**RU 354:** 3-Month Program - Within budget, Grant Deadline was Feb 15th  
**99.70%**

---

**RU 360:** 3-Month Program - Within budget, Grant Deadline was Feb 15th  
**55.91%**

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Contractual Agreement for Public Health Medical Direction  
between the  
Branch-Hillsdale-St. Joseph Community Health Agency  
and  
Dr. Karen Luparello, D.O.

I. Purpose

This contract is executed by and between the Branch-Hillsdale-St. Joseph Community Health Agency (Agency) and Dr. Karen Luparello (Medical Director) for the purpose of providing qualified Public Health Medical Direction to the Agency as required by the Public Health Code (Act 368 of Public Acts of 1978). The term of this Agreement shall be for three (3) years and 3 months beginning July 1, 2021 through September 30, 2024.

II. Responsibilities of the Branch-Hillsdale-St. Joseph Community Health Agency

The Agency shall supply the following accommodations and personnel for the Medical Director.

- a. Access to office space in the Agency's buildings;
- b. Office supplies and materials necessary to discharge responsibilities as the Agency's Medical Director;
- c. Technical assistance in the form of data collection, research, and report preparation.

III. Responsibilities of the Medical Director

The Medical Director is responsible for developing and reviewing policies, providing advice, and issuing medical orders to Agency's personnel with reference to public health medical concerns.

The Medical Director will serve as the medical consultant for the Board of Health and the Agency's Administrative team and the direct service personnel. The Medical Director will also be a resource for communication with other health care providers.

Specifically, the Medical Director shall:

- a. Function as part of the administrative team by providing appropriate medical input to the administrative decision-making process as it relates to the health of the community and the functioning of the Agency. Collaborate with and be responsible to the Health Officer.
- b. Review, revise and update medical policies and procedures and sign guidelines, protocols, and standing orders for services provided by the Agency; including Communicable Disease Control, Immunizations, etc.
- c. Evaluate medical components of clinical programs and make recommendations to Health Officer.
- d. Will be a medical liaison for the Agency with the physician community; provide advice and consultation on public health issues, respond to inquiries from physicians on medical matters.
- e. Assist administrative personnel in assessing continuing education needs of professional staff; provide necessary training and/or make recommendations for meeting continuing education needs.
- f. Serve in the capacity as Lab Director for Agency for CLIA/Accreditation purposes.

- g. Assist the Agency personnel in determining public health trend analysis.
- h. Maintain reliable contact methods such that the Agency personnel are able to establish contact at all times.
- i. Provide for a qualified back-up in the event that reliable contact is not possible.
- j. Pursue continuing medical education to maintain licensure.
- k. Maintain current Drug Control licenses for each the Agency's sites.
- l. Function as an integral member of the Agency's Emergency Preparedness Team addressing the medical and health components of an All Hazards plan, which includes, but is not limited to, WMD, CBRNE and other public health threats.

The above list of job areas is intended to describe the general nature and level of work performed by the Medical Director and is not intended to be an exclusive list of responsibilities.

#### IV. Time Commitment of Medical Director to Agency

The Medical Director shall commit such time and effort as may be required to discharge medical director duties as described above in a professional and competent manner.

It is understood by the parties to this Agreement that the average documented direct and indirect medical direction time committed to the Agency shall be no less than sixteen (16) hours per week. Indirect time refers to those medical direction activities which apply to development of a communicable disease control policy, attending Public Health related meeting, attending the Board of Health meeting, and completing and maintaining educational courses necessary to comply with the requirements of a local public health Medical Director. It is specifically understood and agreed that a minimum of four hours per week will be performed on-site at one of the Agency's facilities.

#### V. Professional Liability Insurance

The Medical Director shall be covered by the Agency's malpractice liability insurance while performing duties & activities as the Agency's Medical Director. The insurance coverage shall be in effect for the term of this Agreement.

#### VI. Compensation

Compensation to the Medical Director shall be \$50,000 per fiscal year. The first 3 months of the contract (July 1, 2021 through September 30, 2021) will be compensated at \$4166.00 per month. The Agency shall process payment on a monthly basis. Reimbursement for travel that is necessary to perform the duties as the Agency's Medical Director shall be paid at the Agency's mileage rate as set by the Agency's Board of Health. Mileage will be calculated from the Medical Director's residence. The amount of the mileage reimbursement paid to the Medical Director may not exceed \$6,000 in any fiscal year and for the first three months of the contract (July 1, 2021 through September 30, 2021) not exceed \$500 per month. A cell phone allowance of \$20.00 per month will be paid to the Medical Director.

#### VII. Educational Reimbursement

In order for the Medical Director to obtain the required Master of Public Health degree (as outlined in P.A. 368 of 1978 as amended), a tuition reimbursement program is offered by the Agency as follows:

- Medical Director must maintain employment throughout the degree program.
- The Medical Director is eligible for reimbursement of courses taken, not to exceed \$12,000 in any academic year (including the Fall, Winter, and Summer semesters). Maximum reimbursement is \$36,000.
- Pre-approval from the Health Officer for expenses must be obtained prior to the beginning of the school term.
- Covered course expenses are tuition and books.
- All courses must be through an accredited institution.
- Reimbursement for all courses is to be submitted to accounting with a copy of the receipt showing that the fee had been paid by the employee along with the following:
  - The Medical Director must obtain a grade of “B” or better.
  - Upon the completion of the course(s) and the posting of grades the employee must present the grades to the Health Officer.
- Should the Medical Director leave before one year’s time after the last staff development reimbursement payment is received, the Medical Director must reimburse the agency a pro-rate share of that last payment.

#### VIII. Changes in the Agreement

Any changes which will significantly affect the provision of medical direction services shall be agreed upon, in writing, by the parties prior to implementation of the changes with an appropriate addendum attached to this Agreement.

#### IX. Independent Contractor Status.

The parties agree that Medical Director is an independent contractor. In her capacity as an independent contractor, Medical Director agrees to and represents the following:

- Medical Director has the right and does fully intend to perform services for third parties during the term of this Agreement.
- Medical Director has the sole right to control and direct the means, manner, and method by which the services required by this Agreement will be performed.
- Subject to the limitations set forth in this agreement, Medical Director has the right to perform the services required by this Agreement at any place or location and at such times as she may determine.

The parties acknowledge and agree that Health Department is entering into this Agreement with reliance on the representations made by the Medical Director relative to its independent contractor status.

#### X. With Holding of State and Federal Taxes.

Health Department will not withhold FICA (Social Security and Medicare taxes) from Medical Director’s payments or make FICA payments on his behalf, or make state or federal unemployment compensation contributions on Medical Director’s behalf, or withhold state or federal income tax from his payments. Medical Director shall pay all taxes incurred while performing services under this Agreement.

XI. Fringe Benefits.

Medical Director is not eligible to participate in the Agency's employee pension, health, vacation pay, sick pay, or other fringe benefit plan the Agency may offer.

XII. Insurance.

Medical Director, as an independent contractor, agrees to indemnify, defend, and hold harmless Health Department from any and all liability arising out of or in any way related to Medical Director's performance of services during the term of this Agreement.

XIII. Termination

It is agreed upon by both parties that the Medical Director shall meet all Federal, State and local license authorization requirements to practice medicine. Failure to obtain and or maintain said license and authorization requirements to practice medicine and or loss of the same shall result in the immediate termination of this agreement.

It is agreed upon by both parties that the Medical Director shall be approved by the Michigan Department of Health & Human Services to serve as the Medical Director for this agency.

This Agreement may be terminated by either party by giving sixty (60) days written notice of the intention to terminate.

The individual or officer signing this Agreement certifies by his/her signature that he/she is authorized to sign on behalf of the responsible governing board, individual, official, or agency.

\_\_\_\_\_  
Agency  
Rebecca A. Burns, MPH, RS, Health Officer

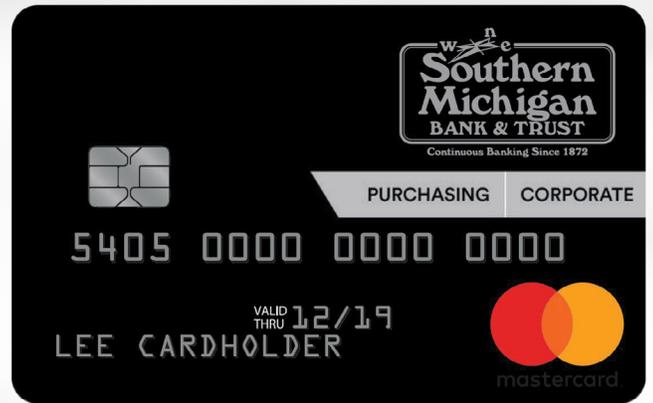
\_\_\_\_\_  
Date

\_\_\_\_\_  
Medical Director  
Karen Luparello, D.O.

\_\_\_\_\_  
Date

*Your business  
Your control*

# Mastercard Purchase Card



## What is a P-Card?

Purchase cards-also known as P-Cards or procurement cards -provide businesses with significant opportunities to streamline processing and improve working capital.

By replacing paper invoices and manual systems, P-Cards help businesses cut operating costs, automate expense reconciliation processes and provide valuable insights on spend patterns. In addition, risk controls are enhanced and quicker payments improve supplier relations and help businesses earn valuable rebates and discounts.

## Three Options:

- Fuel Only
- Fuel, Car Rental, Hotels & Restaurants
- Business or Travel & Entertainment

## Benefits:

- Simplify your purchasing and accounting process
- Increase control over spend
- Strengthened fraud monitoring capabilities
- Electronic control & accountability through 360Control site\*
- Faster payment transactions
- Access 24/7 customer service

## Improved Working Capital

Delaying the payment of purchases for up to 30 days increases working capital.

## Enhanced Expense Management

Automation of expense reconciliation processes provides more transaction data and better spend analysis.

## Employees Refocused on Value-Added Work

Reduced overhead and administrative costs in an accounts payable department frees up resources for other priorities.

## Strengthened Fraud Monitoring Capabilities

Real-time on line tools can improve account-level controls.

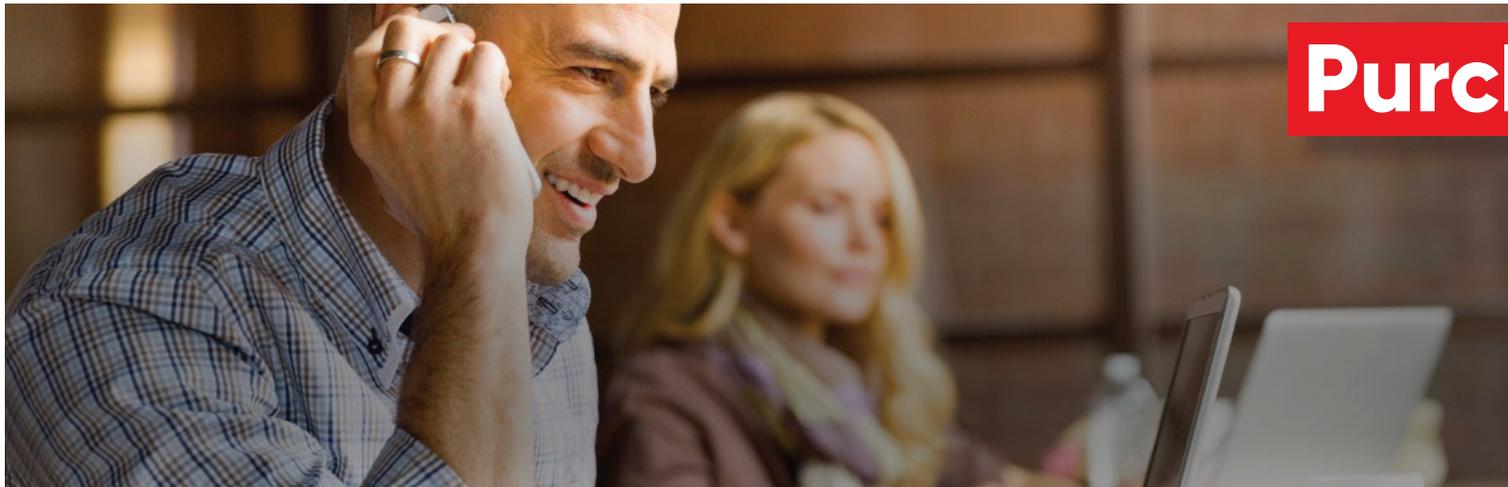
## Faster Payment Transactions

Quicker payments can lead to preferred vendor status.

## Potential Economic Incentives

P-Cards provide the opportunity for revenue share in the form of a cash rebate back to the buying organization.

**Please contact SMB&T for a P-Card Application.**



# Purchase Card

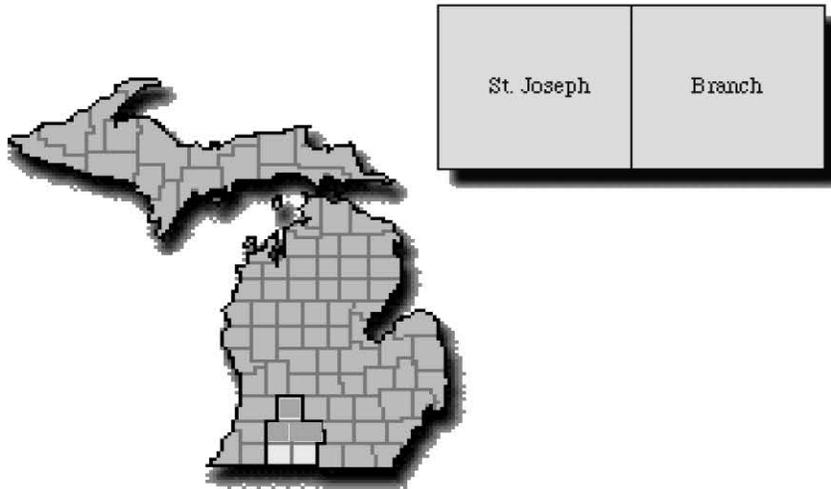
## Overview



|                                   | Purchase Card*             |
|-----------------------------------|----------------------------|
| Rewards/Cash Back                 | N/A - Pay in Full Required |
| MasterRent <sup>®</sup> Insurance | ✓                          |
| MasterAssist                      | ✓                          |
| Mastercard VAT Reclaim Service    | ✓                          |
| Mastercard Global Service         | ✓                          |
| Mastercard Easy Savings           | ✓                          |
| ID Theft Protection <sup>™</sup>  | ✓                          |
| APR - Purchase                    | N/A                        |
| APR - Balance Transfer            | N/A                        |
| APR - Cash Advance                | N/A                        |
| APR - Penalty                     | 2.99%                      |
| Annual Fee                        | \$0                        |
| Additional Card Fee               | \$0                        |
| Balance Transfer Fee              | \$0                        |
| Cash Advance Fee                  | N/A                        |
| Foreign Transaction Fee           | 0%                         |

\*Applicants should read the application disclosure for complete terms and conditions. APR will vary with the market based on the Prime Rate. Cardholders should read the Guide to Benefits that they receive with their credit card for a full and detailed description of all benefits, terms and conditions. Benefits are effective as of July 1, 2019 and are subject to change. For the most up to date list of benefits, please refer to the Guide to Benefits that came with your card.

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**BRANCH-ST. JOSEPH AREA AGENCY ON AGING 3-C**



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**Planning and Service Area**  
Branch, St. Joseph

**Branch-St. Joseph Area Agency on Aging 3-C**

Branch-Hillsdale-St. Joseph  
Community Health Agency  
570 N. Marshall Road  
Coldwater, MI 49036  
517-278-2538 (phone)  
888-615-8009 (toll-free)  
517-278-2494 (fax)  
Rebecca A. Burns, Health Officer  
Laura Sutter, Director  
Area Agency on Aging  
[www.bhsj.org/aaa](http://www.bhsj.org/aaa)

**Field Representative Ashley Ellsworth**

[ellsworthA2@michigan.gov](mailto:ellsworthA2@michigan.gov)  
517-241-4100

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**Executive Summary**

The Branch-St. Joseph Area Agency on Aging (IIC) mission is to provide a full range of high quality services, programs and opportunities which promote the independence and dignity of older adults while supporting those who care for them throughout Branch and St. Joseph Counties. As an autonomous department within the Branch-Hillsdale-St. Joseph Community Health Agency, our agency has held this mission since our designation as an Area Agency on Aging in 1996. We are one of 16 AAA's in the State of Michigan responsible for administering Older Americans Act and Older Michigianians Act funding to address the needs of older adults , age 60 and over, and family caregivers living in Branch & St. Joseph Counties. The two-county planning and service area is completely rural yet we have a diverse population and a wide continuum of agencies providing supports and services. The Plan outlines a few new approaches to deliver access services and offer outreach to our diverse communities. IIC is not planning any new program development objectives in FY2022, just continuing our MYP and FY21 goals which include efforts surrounding diversity, equity and inclusion. Friendly Reassurance and Gap Filling are services that were added in FY20 under AASA waiver and have remained viable, needed and well-utilized throughout 2021. We have again included these services (under contract as well as to provide directly) in the FY22 AIP. The Plan does not outline significant new priorities, plans or objectives for the use of Older Americans Act (OAA) or state funding during FY 2022. Other federal funding, of course, is evolving as we are all planning for the new "American Recovery Plan Act" to be issued. As always, we will work with providers, AASA and our leadership team to plan and address its best use according to local needs across Branch and St. Joseph counties.

The COVID-19 pandemic is something that our agency responded to directly because the AAA is a division within local public health . Our operations remained open and fully functioning, continuity of our operations was prioritized so we could work remotely and then we re-integrated back into the workplace seamlessly. During 2021 we remained active in our local vaccination efforts while remaining responsive to all inquiries within our area agency division. In November/December of 2020 we braced for vaccine deployment and were asked to develop & maintain a waiting list for those who couldn't make their own appointment or didn't have access to the internet. In addition, our team answered COVID related "hotline" calls. From January 2021 through April 2021 we addressed over 10,000 calls and scheduled over 3,000 appointments - all with a team of 5 staff. This was a tremendous effort of monumental proportions! In addition, we kept up with Friendly Reassurance calls, intakes/referrals as well as on-going AAA business and communication with all of our network providers. The new community partnerships that were built as we addressed food insecurity, housing crisis and service delays/pauses during the height of the pandemic (summer 2020) gave the opportunity to develop new ways of delivering services. Better communication, use of volunteers and efficient sharing of resources are all ways in which we rose as a network to solve complex issues and are 'take-aways' as we reflect back upon the past two years. Personal protective equipment issued by AASA was also distributed to agencies providing direct care throughout 2021. This will continue throughout 2022, as long as we have it available as reopening of services & community facilities occur. We will also continue to address social isolation and the lack of available technology/devices to connect with people virtually. The ADRC initiative has been of great resource, technical assistance and support for this effort. Sharing of best-practices and testing new products/services/practices are priorities of this initiative. Another initiative underway in FY2021 that will continue through most of FY2022 is the "Age-Friendly Public Health" project. Region IIC Area Agency on Aging, the Branch-Hillsdale-St. Joseph Community Health Agency and Region 2 Area Agency on Aging collaborated on submission of a mini-grant to examine & revise our current Emergency Preparedness documents, perform specific community needs

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assessments and share best practices as it relates to our work together as aging and public health partners. We are excited to continue valuable partnerships across the two-county PSA and the three-county public health jurisdiction to address ongoing needs and solutions to potential needs as pandemic restrictions are lifted and we experience a "new normal".

Throughout fiscal year 2021 our advocacy remained consistent with our state/federal agencies and associations: do not cut home and community based services and enhance direct care worker wages. Our local Michigan Senior Advocate delegate and State Advisory Council member both remained active in meetings and offered regular updates to our local Advisory Committee. Funding as we near the end of FY21 and going into 2022 sounds to be almost plentiful to address the increase in demand for services. We will remain fully engaged in local, state and federal advocacy efforts and hope to resume in-person meetings with legislators to introduce them formally to our network partners and participants.

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The Branch-St. Joseph Area Agency on Aging's approach to gaining support from each County Board of Commissioners is the same as it has been since our agency's designation in fiscal year 1997. Because Area Agency on Aging 3C (AAA) is an autonomous department within the Branch-Hillsdale-St. Joseph Community Health Agency, the Board of Health serves as the AAA Policy Board. The Board is comprised of two County Commissioners from each county in the public health district.

The DRAFT FY2022 Area Implementation Plan was formally sent to each County Board of Commissioners on June 15, 2021 for review and consideration of passing a Resolution of Support for the Plan's submission. Requests to formally present the FY22 AIP at Branch County's June 17th Working Meeting and St. Joseph County's July 14th Executive Committee Meeting were made. Region IIIC will share formal Resolutions of Support once they are received.

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**Public Hearings**

| Date       | Location | Time     | Barrier Free? | No. of Attendees |
|------------|----------|----------|---------------|------------------|
| 06/15/2021 | Via Zoom | 10:30 AM | Yes           | 6                |

The Branch-St. Joseph Area Agency on Aging (IIC) held its Public Hearing via virtual platform (Zoom) on Tuesday, June 15, 2021 at 10:30am. The Notice was sent via email to all community partners, Board of Health members, and Advisory Committee members on May 27, 2021. For three months preceding the Public Hearing, input and discussion occurred at Board of Health meetings, Advisory Committee meetings and among our local community partners to gain feedback about funding priorities and service needs across the two-county planning and service area. The FY2022 AIP draft was also placed on the AAA IIC website for download at: [www.bhsj.org/aaa](http://www.bhsj.org/aaa). The AAA IIC Advisory Committee unanimously supported the FY2022 AIP draft at their June 15, 2021 meeting.

At the Hearing, an overview of the budget, program development objectives and continuing efforts to support individuals in greatest need, with emphasis on the COVID 19 pandemic, was presented. AAA IIC staff also provided information related to the planning process itself as well as our intent to gain Resolutions of Support from each County Board of Commissioners.

There was no formal testimony given at the Public Hearing. Compliments were offered related to the process, thorough highlights and content of the Plan.

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|                                     |
|-------------------------------------|
| <b>Regional Service Definitions</b> |
|-------------------------------------|

|                                |
|--------------------------------|
| <b>Service Name/Definition</b> |
|--------------------------------|

|   |
|---|
| Rationale (Explain why activities cannot be funded under an existing service definition.) |
|---|

| Service Category | Fund Source     |                        |                 | Unit of Service |
|------------------|-----------------|------------------------|-----------------|-----------------|
| Access           | Title III PartB | Title III PartD        | Title III PartE |                 |
| In-Home          | Title VII       | State Alternative Care | State Access    |                 |
| Community        | State In-home   | State Respite          |                 |                 |
|                  | Other _____     |                        |                 |                 |

**Minimum Standards**

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**Access Services**

**Care Management**

|                          |             |                        |             |
|--------------------------|-------------|------------------------|-------------|
| <u>Starting Date</u>     | 10/01/2021  | <u>Ending Date</u>     | 09/30/2022  |
| Total of Federal Dollars | \$50,000.00 | Total of State Dollars | \$92,686.00 |

Geographic area to be served

Branch and St. Joseph Counties

**Specify the planned goals and activities that will be undertaken to provide the service.**

**Goal #1: Implement more flexible service options in order to provide a more self-directed care model.**

**Activities:**

- ~ Care Consultants will further refine and improve the intake process to assure targeting of appropriate participants to each level of care outlined in the "Access and Service Coordination Continuum"
- ~ Seek additional service providers (purchase of service vendors) to serve CLP participants in Region IIIC
- ~ Communicate continued need for additional flexibility and additional staff from existing service providers to be able to accommodate participants' person-centered support plan.

**Expected Outcomes:**

- ~ Increase number of Purchase of Service vendors to serve CLP participants
- ~ Better identify the needs of individuals through a more comprehensive intake process
- ~ Better meet the needs of participants with additional categories/levels of care available

**Goal #2: Continue staff education and skill building including staff collaboration to better serve victims of elder abuse, neglect and exploitation**

**Activities:**

- ~ Care Consultants will continue to screen/assess participants/victims for current or past abuse, neglect and/or exploitation
- ~ Care Consultants will seek training and education sessions relevant to the prevention of abuse, neglect and/or exploitation

**Expected Outcomes:**

- ~ Care Consultants will have an increased capacity to build stronger person-centered support plans by including resources and knowledge about abuse, neglect and exploitation
- ~ Care Consultants will continue to build their skill set to provide supports/services and arrange services through attending available state & locally available training events

**Goal #3: Minimize wait times for individuals seeking access/care management services**

**Activities:**

- ~ Implement a new tiered approach to Access Services (Care Management funded)
- ~ Care Consultants will complete a thorough intake and referral making process
- ~ Care Consultants will continue to monitor the Waiting List for access services weekly

**Expected Outcomes:**

- ~ Individuals and caregivers will be referred to alternate resources or be able to obtain services through direct service providers in a more timely manner
- ~ Care Consultants will be able to better identify needed services as a result of implementing the tiered

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approach

|  |               |      |                    |      |
|--|---------------|------|--------------------|------|
| Number of client pre-screenings:                                 | Current Year: | 65   | Planned Next Year: | 65   |
| Number of initial client assessments:                            | Current Year: | 50   | Planned Next Year: | 50   |
| Number of initial client care plans:                             | Current Year: | 50   | Planned Next Year: | 50   |
| Total number of clients (carry over plus new):                   | Current Year: | 115  | Planned Next Year: | 115  |
| Staff to client ratio (Active and maintenance per Full time care | Current Year: | 1:38 | Planned Next Year: | 1:38 |

**Information and Assistance**

|                          |             |                        |            |
|--------------------------|-------------|------------------------|------------|
| <u>Starting Date</u>     | 10/01/2021  | <u>Ending Date</u>     | 09/30/2022 |
| Total of Federal Dollars | \$20,980.00 | Total of State Dollars |            |

Geographic area to be served

Branch and St. Joseph Counties

**Specify the planned goals and activities that will be undertaken to provide the service.**

**Goal #1: Provision of comprehensive, unbiased information & assistance/referral**

Activities:

- ~ Continue to provide referrals according to AASA & national AIRS standards
- ~ Continue to update files and maintain data entry into the State of Michigan Aging Information System - ADRCIS database
- ~ Seek MIBridges training and become established as a "community partner/referral partner" to address any inquiries being forwarded via the MDHHS/MIBridges platform.
- ~ Staff shall complete surveys with (10% as per I&A standard) callers each quarter to assure high quality information & assistance services

Expected Outcomes:

- ~ Staff will continue to provide the highest quality information & assistance/referral services to any person with an inquiry. Individuals will experience timely, accurate information to their questions and requests.

**Goal #2: Continue ongoing outreach and education activities among local and regional aging/disability network partners and among general community audiences as well.**

Activities:

- ~ Staff shall continue participation in community-based taskforces, workgroups, committee-type partnership meetings to uphold information sharing and resource collaboration.
- ~ Staff shall continue to share recent and relevant information/resources to all community and aging network partners
- ~ Staff shall continue to attend and participate in outreach events and seasonal community -based activities throughout the planning and service area.

Expected Outcome:

- ~ Local and regional aging/disability network partners will continue to seek and receive accurate information from AAA 3C.
- ~ AAA3C will continue to see an increase in information & assistance/referral calls

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**Goal #3: Continue to maintain accurate data and submit accurate data/program reporting related to AASA Standards and reporting requirements, for inclusion in the statewide resource database and NAPIS reporting tool.**

Activities:

- ~ Staff shall continue to develop and monitor the ADRCIS resource database, implementing corrections/additions/deletions as necessary.
- ~ Staff shall continue to seek updated information through contact with programs, service agencies, and organizations for inclusion in the database.
- ~ Staff shall continue to complete accurate data entry into the database according to AASA standards, including new NAPIS questions being implemented in FY2022.

Expected Outcome:

All requested and required data and reports will be submitted accurately and timely.

**Goal #4: Continue to use and promote a person-centered approach**

Activities:

- ~ Staff shall continue to use the person-centered approach in all interactions with callers, families, caregivers, participants and community partners.
- ~ Staff shall continue to be able to explain the person-centered philosophy, providing education where opportunities arise.

Expected Outcomes:

- ~ People contacting and interacting with the Area Agency on Aging 3C will indicate they have been listened to and responded to with the information/supports they were seeking and according to their preferences.
- ~ Community partners will have an increased awareness of PCT and its practice within their organizations.

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**Direct Service Request**

**Friendly reassurance**

Total of Federal Dollars      \$2,500.00                      Total of State Dollars

Geographic Area Served      Branch and St. Joseph Counties

**Planned goals, objectives, and activities that will be undertaken to provide the service in the appropriate text box for each service category.**

Goal: Provide and promote Friendly Reassurance as a service offered by the AAA3C to local aging network partners and other community partners to address social isolation among older adults in our communities.

Objective: Decrease social isolation among older adults.

Activities: Adhere to AASA Operating Standards for Friendly Reassurance by offering weekly (or as requested by the individual) telephonic check-ins to address emotional and physical well being, talk about current events, and other topics as raised by the participant. Work with individuals on ways to stay engaged in the community and with others.

**Section 307(a)(8) of the Older Americans Act provides that services will not be provided directly by an Area Agency on Aging unless, in the judgment of the State agency, it is necessary due to one or more of the three provisions described below. Please select the basis for the direct service provision request (more than one may be selected).**

**(A) Provision of such services by the Area Agency is necessary to assure an adequate supply of such services.**

**(B) Such services are directly related to the Area Agency's administrative functions.**

**(C) Such services can be provided more economically and with comparable quality by the Area Agency.**

The direct service provision request is intended to respond to the need to reduce social isolation in PSA 3C. Adequacy of Friendly Reassurance has been challenging due to staffing at provider agencies, therefore AAA3C plans to continue to provide the service moving forward as it compliments our Information & Assistance service. We've also wanted to support people where they feel comfortable versus having to make referrals to other agencies (a more streamlined process for the person).

**Provide a detailed justification for the direct service provision request. The justification should address pertinent factors that may include: a cost analysis; needs assessment; a description of the area agency's efforts to secure services from an available provider of such services; or a description of the area agency's efforts to develop additional capacity among existing providers of such services. If the service is considered part of administrative activity, describe the rationale and authority for such a determination.**

The COVID-19 pandemic has propelled our agency into providing additional services and supports through both community partner/agencies and added to our provision of service. Since FY20, under AASA waiver, we provided Friendly Reassurance to those seeking the service via web-based requests and through contracts with local partner agencies. We would like to continue this into FY22 as we know the issue of social isolation will remain evident in our communities. We do have provider agencies who will keep receiving grant funds to

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provide Friendly  
Reassurance.

**Describe the discussion, if any, at the public hearings related to this request. Include the date of the hearing(s).**

N/A

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**Regional Direct Service Request**

Total of Federal Dollars

Total of State Dollars

Geographic Area Served

**Planned goals and activities that will be undertaken to provide the service in the appropriate text box for each service category.**

**Section 307(a)(8) of the Older Americans Act provides that services will not be provided directly by an Area Agency on Aging unless, in the judgment of the State agency, it is necessary due to one or more of the three provisions described below. Please select the basis for the direct service provision request (more than one may be selected).**

- (A) Provision of such services by the Area Agency is necessary to assure an adequate supply of such services.**
- (B) Such services are directly related to the Area Agency's administrative functions.**
- (C) Such services can be provided more economically and with comparable quality by the Area Agency.**

**Provide a detailed justification for the direct service provision request. The justification should address pertinent factors that may include: a cost analysis; needs assessment; a description of the area agency's efforts to secure services from an available provider of such services; or a description of the area agency's efforts to develop additional capacity among existing providers of such services. If the service is considered part of administrative activity, describe the rationale and authority for such a determination.**

**Describe the discussion, if any, at the public hearings related to this request. Include the date of the hearing(s).**

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**Approved MYP Program Development Objectives**

**Area Agency on Aging Goal**

**A. Work with community partners to develop an adult day program in Branch County.**

Objectives

1. Work to develop a viable community partner to develop an adult day program for individuals and families in Branch County.

Timeline: 10/01/2019 to 09/30/2020

Progress

Unfortunately, there has been no progress in development of an adult day provider for Branch County... The St. Joseph County "Thurston Cares" program does serve Branch County residents, so it does support families on the west side of the county. Those further west in Branch County tend to think the drive to Sturgis is too long from Coldwater, Union City and Quincy areas for example.

**B. Work with key leaders and community partners in Branch County to explore an aging-friendly community assessment and seek designation as a Community for A Lifetime.**

Objectives

1. In FY2020, the AAA Coordinator will network and make connections with Branch County Board of Health/County Commissioners as well as the County Administrator to present the Communities for A Lifetime program. We will contact AASA staff lead for the CFL Program to participate and/or make presentation to the interested parties to allow for open dialogue, questions and answers.

Timeline: 10/01/2019 to 09/30/2020

Progress

In FY2021 there was no progress in PSA 3C to make connections in Branch County to explore Communities for A Lifetime designation.

**C. Provide advocacy, information, and training to support the rights of older/vulnerable adults to live free from abuse, neglect and/or exploitation.**

Objectives

1. Increase the awareness of vulnerable adult abuse, neglect and exploitation throughout the PSA via participation in local partnerships, coalitions/taskforces, and community groups.

Timeline: 10/01/2019 to 09/30/2020

Progress

In FY2021, and throughout FY2022, Region IIIC AAA staff will continue to support and implement our elder abuse prevention, awareness and outreach to address abuse neglect and exploitation. We will further support Victim Specialist staff, who are funded by the Division of Victim Services "Services to Victims of Elder Abuse" program

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funding to work directly with victims of abuse, neglect and/or exploitation. Since 2018 we've served over 150 victims, provided hundreds of hours of training to professionals and community groups and continue to support each county's coalition/Interdisciplinary Team efforts.

**D. Improve the accessibility of services to Michigan's communities and people of color, immigrants and LGBTQ+ individuals**

Objectives

1. Assure AAA staff and local aging network providers are trained in diversity, equity and inclusion topics. This will include training topics on how to recognize and address unconscious bias.  
Timeline: 10/01/2020 to 09/30/2021

Progress

During FY2021, Region IIIC has not made significant progress with formalized training for our staff and community partners/providers. We've raised the discussion at Advisory and Board meetings and its been received well. We anticipate more active recruitment of speakers/trainers and involvement in regional trainings in FY2022 including AASA's sponsored DEI training for the network.

2. Ensure that AAA3C staff and providers use outreach methods which are culturally sensitive and welcoming to all individuals. This targeted outreach includes sensitivity for individuals from other cultures, backgrounds, and whom use other language(s) than English.  
Timeline: 10/01/2020 to 09/30/2021

Progress

During our provider assessments (held virtually in FY2021) we've addressed the topic of more welcoming & accommodating outreach materials and methods among all of our annual contract providers. We are also working collaboratively with the Community Health Agency to make revisions and additions of language on our webpage regarding non-discrimination practices and our approach of serving all who seek services from us. We will continue this work throughout FY2022 as it remains a high priority!

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**2022 Program Development Objectives**

**Area Agency on Aging Goal**

**A.**

State Goal Match:

Narrative

Objectives

1.

Timeline: to

Activities

Expected Outcome

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**SUPPLEMENTAL DOCUMENT A**  
**Board of Directors Membership**

|                            | Asian/Pacific<br>Islander | African<br>American | Native<br>American/<br>Alaskan | Hispanic<br>Origin | Persons<br>with<br>Disabilities | Female | Total<br>Membership |
|----------------------------|---------------------------|---------------------|--------------------------------|--------------------|---------------------------------|--------|---------------------|
| Membership<br>Demographics | 1                         | 0                   | 0                              | 0                  | 1                               | 1      | 6                   |
| Aged 60 and Over           | 1                         | 0                   | 0                              | 0                  | 1                               | 1      | 4                   |

| Board Member Name | Geographic Area   | Affiliation         | Membership Status |
|-------------------|-------------------|---------------------|-------------------|
| Brent Leininger   | Hillsdale County  | County Commissioner | Elected Official  |
| Mark E. Wiley     | Hillsdale County  | County Commissioner | Elected Official  |
| Jared Hoffmaster  | St. Joseph County | County Commissioner | Elected Official  |
| Kathy Pangle      | St. Joseph County | County Commissioner | Elected Official  |
| Tom Matthew       | Branch County     | County Commissioner | Elected Official  |
| Jon Houtz         | Branch County     | County Commissioner | Elected Official  |

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**SUPPLEMENTAL DOCUMENT B**  
**Advisory Board Membership**

|                            | Asian/<br>Pacific<br>Islander | African<br>American | Native<br>American/A<br>laskan | Hispanic<br>Origin | Persons<br>with<br>Disabilities | Female | Total<br>Membership |
|----------------------------|-------------------------------|---------------------|--------------------------------|--------------------|---------------------------------|--------|---------------------|
| Membership<br>Demographics | 0                             | 2                   | 0                              | 0                  | 1                               | 8      | 11                  |
| Aged 60 and Over           | 0                             | 2                   | 0                              | 0                  | 1                               | 4      | 7                   |

| Board Member Name | Geographic Area           | Affiliation                               |
|-------------------|---------------------------|---|
| Charles Asher     | Branch County             | Service Provider                          |
| Pamela Riley      | St. Joseph County         | Service Provider                          |
| Dennis Breske     | Branch County             | Community Advocate                        |
| Steve Todd        | St. Joseph County         | Community Advocate                        |
| Alisha Carr       | Branch County             | Service Provider                          |
| Sandra Leslie     | St. Joseph County         | MDHHS - Adult Services                    |
| Kristi Gatke      | Branch County             | MDHHS - Supervisor                        |
| Benita Armstrong  | St. Joseph County         | MDHHS - Supervisor                        |
| Kathy Pangle      | St. Joseph County         | Policy Board liaison, County Commissioner |
| Kelly Jonker      | Branch & St. Joseph Count | Service Provider & Advocate               |
| Amy Duff          | Branch County             | Service Provider                          |

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**SUPPLEMENTAL DOCUMENT D**

**Agreement for Receipt of Supplemental Cash-In-Lieu of Commodity Payments for the Nutrition Program for the Elderly**

The above identified agency, (hereinafter referred to as the GRANTEE), under contract with the Aging and Adult Services Agency (AASA), affirms that its contractor(s) have secured local funding for additional meals for senior citizens which is not included in the current fiscal year (see above) application and contract as approved by the GRANTEE.

**Estimated number of meals these funds will be used to produce is:**

**165,000**

These meals are administered by the contractor(s) as part of the Nutrition Program for the Elderly, and the meals served are in compliance with all State and Federal requirements applicable to Title III, Part C of the Older Americans Act of 1965, as amended.

Therefore, the GRANTEE agrees to report monthly on a separate AASA Financial Status Report the number of meals served utilizing the local funds, and in consideration of these meals will receive separate reimbursement at the authorized per meal level cash-in-lieu of United States Department of Agriculture commodities, to the extent that these funds are available to AASA.

The GRANTEE also affirms that the cash-in-lieu reimbursement will be used exclusively to purchase domestic agricultural products, and will provide separate accounting for receipt of these funds.

STATE OF MICHIGAN  
Michigan Department of Health & Human Services  
**AGING AND ADULT SERVICES AGENCY**

FY2020-2022 Multi Year Plan

FY 2022 Annual Implementation Plan

Branch-St. Joseph Area Agency on Aging

FY 2022

**SUPPLEMENTAL DOCUMENT F**  
**Request to Transfer Funds**

|   |  |                                  |
|---|--|----------------------------------|
| <b>1</b>  | The Area Agency on Aging requests approval to transfer funds <b>from Title III-B Supportive Services</b> to Title III-C Nutrition Services. The Agency assures that this action will not result in a reduction in support for in-home services and senior center staffing. Rationale for this request is below.  | Amount of Transfer<br><br>0      |
|   |  |                                  |
| <b>2</b>  | The Area Agency on Aging requests approval to transfer funds <b>from Title III-C1 Congregate Nutrition Services</b> to Title III-B Supportive Services for in-home services. The rationale as to why congregate participation cannot be increased is described below.  | Amount of Transfer<br><br>50,000 |
| <p>As in years past, in-home and other supportive services such as care management are in greater demand in PSA 3C than that of Congregate Meals. This request of transferred funds allows us to better fulfill needs in the planning and service area.</p> <p>As such, the \$50,000 transfer out of Title III-C-1 shall be allocated as follows:<br/>C1 to 3B --- \$35,000<br/>C1 to C2 --- \$15,000</p> |  |                                  |
| <b>3</b>  | The Area Agency on Aging requests approval to transfer funds <b>from Title III-C1 Congregate Nutrition</b> to Title III-B Supportive Services for participant transportation to and from meal sites to possibly increase participation in the Congregate Nutrition Program. Rationale for this request is below. | Amount of Transfer<br><br>0      |
|   |  |                                  |

**FY 2022 AREA PLAN GRANT BUDGET**

Rev. 3/2/21

Agency: Branch-St. Joseph AAA

Budget Period: 10/01/21 to 09/30/22

PSA: 3C

Date: 06/09/21

Rev. No.: original Page 1of 3

| SERVICES SUMMARY                   |                     |                    |                  |
|------------------------------------|---------------------|--------------------|------------------|
| FUND SOURCE                        | SUPPORTIVE SERVICES | NUTRITION SERVICES | TOTAL            |
| 1. Federal Title III-B Services    | 151,780             |                    | 151,780          |
| 2. Fed. Title III-C1 (Congregate)  |                     | 104,075            | 104,075          |
| 3. State Congregate Nutrition      |                     | 2,676              | 2,676            |
| 4. Federal Title III-C2 (HDM)      |                     | 97,422             | 97,422           |
| 5. State Home Delivered Meals      |                     | 133,495            | 133,495          |
| 8. Fed. Title III-D (Prev. Health) | 8,795               |                    | 8,795            |
| 9. Federal Title III-E (NFCSP)     | 55,543              |                    | 55,543           |
| 10. Federal Title VII-A            | -                   |                    | -                |
| 10. Federal Title VII-EAP          | -                   |                    | -                |
| 11. State Access                   | 7,989               |                    | 7,989            |
| 12. State In-Home                  | 142,429             |                    | 142,429          |
| 13. State Alternative Care         | 31,400              |                    | 31,400           |
| 14. State Care Management          | 80,228              |                    | 80,228           |
| 15. St. ANS                        | 12,458              |                    | 12,458           |
| 16. St. Nursing Home Ombuds (NHO)  | -                   |                    | -                |
| 17. Local Match                    |                     |                    |                  |
| a. Cash                            | 284,454             | 55,231             | 339,685          |
| b. In-Kind                         | 20,250              | 41,900             | 62,150           |
| 18. State Respite Care (Escheat)   | 36,311              |                    | 36,311           |
| 19. MATF                           | 33,416              |                    | 33,416           |
| 19. St. CG Support                 | 4,122               |                    | 4,122            |
| 20. TCM/Medicaid & MSO             | 50,000              |                    | 50,000           |
| 21. NSIP                           |                     | 102,662            | 102,662          |
| 22. Program Income                 | 88,050              | 173,000            | 261,050          |
| <b>TOTAL:</b>                      | <b>1,007,225</b>    | <b>710,461</b>     | <b>1,717,686</b> |

| ADMINISTRATION                |                |               |               |                |
|-------------------------------|----------------|---------------|---------------|----------------|
| Revenues                      |                | Local Cash    | Local In-Kind | Total          |
| Federal Administration        | 46,402         | 32,504        | 20,250        | 99,156         |
| State Administration          | 8,019          |               |               | 8,019          |
| MATF Administration           | 3,300          | -             | -             | 3,300          |
| St. CG Support Administration | 408            | -             | -             | 408            |
| Other Admin                   | 96,800         |               |               | 96,800         |
| <b>Total AIP Admin:</b>       | <b>154,929</b> | <b>32,504</b> | <b>20,250</b> | <b>207,683</b> |

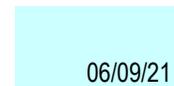
| Expenditures         |      |                |
|----------------------|------|----------------|
|                      | FTEs |                |
| 1. Salaries/Wages    | 4.65 | 165,600        |
| 2. Fringe Benefits   |      | 31,583         |
| 3. Office Operations |      | 10,500         |
| <b>Total:</b>        |      | <b>207,683</b> |

| Cash Match Detail |               | In-Kind Match Detail |               |
|-------------------|---------------|----------------------|---------------|
| Source            | Amount        | Source               | Amount        |
| Branch County     | 15,515        | Local Appropriation  | 20,250        |
| St. Joseph County | 16,989        |                      |               |
|                   |               |                      |               |
|                   |               |                      |               |
|                   |               |                      |               |
|                   |               |                      |               |
|                   |               |                      |               |
|                   |               |                      |               |
|                   |               |                      |               |
| <b>Total:</b>     | <b>32,504</b> | <b>Total:</b>        | <b>20,250</b> |

I certify that I am authorized to sign on behalf of the Area Agency on Aging. This budget represents necessary costs for implementation of the Area Plan. Adequate documentation and records will be maintained to support required program expenditures.

  
Signature

  
Health Officer  
Title

  
06/09/21  
Date

FY 2022 AREA AGENCY GRANT FUNDS - SUPPORT SERVICES DETAIL

Agency: Branch-St. Joseph AAA  
 PSA: 3C

Budget Period: 10/01/21 to 09/30/22  
 Date: 06/09/21 Rev. No.: original

Rev. 3/2/21  
 page 2 of 3

Operating Standards For AAA's

| Op Std | SERVICE CATEGORY                           | Title III-B | Title III-D | Title III - E | Title VII A<br>OMB | Title VII EAP | State Access | State In-Home | St. Alt. Care | State Care Mgmt | State NHO | ST. ANS | St. Respite (Escheat) | MATF   | St. CG Suppl | TOW-Medicaid<br>MSO Fund | Program Income | Cash Match | In-Kind Match | TOTAL     |
|--------|--|-------------|-------------|---------------|--------------------|---------------|--------------|---------------|---------------|-----------------|-----------|---------|-----------------------|--------|--------------|--------------------------|----------------|------------|---------------|-----------|
| A      | <b>Access Services</b>                     |             |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            |               |           |
| A-1    | Care Management                            | 21,000      |             | 29,000        |                    |               |              |               |               | 80,228          |           | 12,458  |                       |        |              | 50,000                   |                | 32,504     | 8,000         | 233,190   |
| A-2    | Case Coord/supp                            |             |             | 6,000         |                    |               | 7,989        |               |               |                 |           |         |                       |        |              |                          |                | 30,000     |               | 43,989    |
| A-3    | Disaster Advocacy & Outreach Program       |             |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            |               | -         |
| A-4    | Information & Assis                        | 20,980      |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            | 3,000         | 23,980    |
| A-5    | Outreach                                   |             |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            |               | -         |
| A-6    | Transportation                             | 29,750      |             | 6,300         |                    |               |              |               |               |                 |           |         |                       | 8,000  |              |                          | 22,000         | 28,000     |               | 94,050    |
| A-7    | Options Counseling                         |             |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            |               | -         |
| B      | <b>In-Home</b>                             |             |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            |               |           |
| B-1    | Chore                                      | 5,200       |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          | 500            | 2,650      |               | 8,350     |
| B-2    | Home Care Assis                            | 15,000      |             |               |                    |               |              | 112,429       | 31,400        |                 |           |         |                       |        |              |                          | 38,550         | 103,500    |               | 300,879   |
| B-3    | Home Injury Cntrl                          |             |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            |               | -         |
| B-4    | Homemaking                                 |             |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            |               | -         |
| B-6    | Home Health Aide                           |             |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            |               | -         |
| B-7    | Medication Mgt                             |             |             |               |                    |               |              | 9,000         |               |                 |           |         |                       |        |              |                          |                |            |               | 9,000     |
| B-8    | Personal Care                              |             |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            |               | -         |
| B-9    | Assistive Device&Tech                      |             |             |               |                    |               |              | 8,000         |               |                 |           |         |                       |        |              |                          |                |            |               | 8,000     |
| B-10   | Respite Care                               |             |             |               |                    |               |              | 13,000        |               |                 |           |         | 13,500                | 5,416  |              |                          | 5,200          | 18,550     |               | 55,666    |
| B-11   | Friendly Reassure                          | 7,100       |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                | 600        | 1,500         | 9,200     |
| C-10   | Legal Assistance                           | 10,250      |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          | 500            | 1,400      |               | 12,150    |
| C      | <b>Community Services</b>                  |             |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            |               |           |
| C-1    | Adult Day Services                         |             |             |               |                    |               |              |               |               |                 |           |         | 22,811                | 20,000 | 4,122        |                          | 20,000         | 31,250     |               | 98,183    |
| C-2    | Dementia ADC                               |             |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            |               | -         |
| C-6    | Disease Prevent/Health Promtion            |             | 8,795       |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          | 250            | 2,500      |               | 11,545    |
| C-7    | Health Screening                           |             |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            |               | -         |
| C-8    | Assist to Hearing Impaired & Deaf Cmty     |             |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            |               | -         |
| C-9    | Home Repair                                | 6,000       |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          | 500            | 3,500      |               | 10,000    |
| C-11   | LTC Ombudsman                              | 2,000       |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                | 18,000     |               | 20,000    |
| C-12   | Sr Ctr Operations                          |             |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            |               | -         |
| C-13   | Sr Ctr Staffing                            |             |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            |               | -         |
| C-14   | Vision Services                            |             |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            |               | -         |
| C-15   | Prevnt of Elder Abuse,Neglect,Exploitation |             |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            |               | -         |
| C-16   | Counseling Services                        | 2,500       |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          | 100            | 1,500      |               | 4,100     |
| C-17   | Creat.Conf.CG@ CCC                         |             |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            |               | -         |
| C-18   | Caregiver Supplmt Services                 |             |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            |               | -         |
| C-19   | Kinship Support Services                   |             |             | 3,500         |                    |               |              |               |               |                 |           |         |                       |        |              |                          | 250            | 2,500      |               | 6,250     |
| C-20   | Caregiver E,S,T                            |             |             | 10,743        |                    |               |              |               |               |                 |           |         |                       |        |              |                          | 200            | 8,000      |               | 18,943    |
| *C-8   | Program Develop                            | 23,000      |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            | 6,000         | 29,000    |
|        | <b>Region Specific</b>                     |             |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            |               |           |
|        | Community Living Program Services          | 3,500       |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            | 1,100         | 4,600     |
|        | Gap Filling                                | 5,500       |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            | 650           | 6,150     |
|        | c.   |             |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            |               | -         |
|        | d.   |             |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            |               | -         |
|        | 7. CLP/ADRC Services                       |             |             |               |                    |               |              |               |               |                 |           |         |                       |        |              |                          |                |            |               | -         |
| Sp Co  | 8. MATF Adm                                |             |             |               |                    |               |              |               |               |                 |           |         |                       | 3,300  |              |                          |                |            |               | 3,300     |
| Sp Co  | 9. St CG Sup Adm                           |             |             |               |                    |               |              |               |               |                 |           |         |                       |        | 408          |                          |                |            |               | 408       |
|        | <b>SUPPRT SERV TOTAL</b>                   | 151,780     | 8,795       | 55,543        | -                  | -             | 7,989        | 142,429       | 31,400        | 80,228          | -         | 12,458  | 36,311                | 36,716 | 4,530        | 50,000                   | 88,050         | 284,454    | 20,250        | 1,010,933 |

**FY 2022 NUTRITION / OMBUDSMAN / RESPITE / KINSHIP - PROGRAM BUDGET DETAIL**

Rev. 3/2/21

Agency: Branch-St. Joseph AAA Budget Period: 10/01/21 to 9/30/22  
 PSA: 3C Date: 06/09/21 Rev. Number original

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**FY 2022 AREA PLAN GRANT BUDGET - TITLE III-C NUTRITION SERVICES DETAIL**

| Op Std | SERVICE CATEGORY                | Title III C-1  | Title III C-2 | State Congregate | State HDM      | NSIP Title III-E | Program Income | Cash Match    | In-Kind Match | TOTAL          |
|--------|---------------------------------|----------------|---------------|------------------|----------------|------------------|----------------|---------------|---------------|----------------|
|        | <b>Nutrition Services</b>       |                |               |                  |                |                  |                |               |               |                |
| C-3    | Congregate Meals                | 103,125        |               | 2,676            |                |                  | 48,000         | 15,000        | 6,500         | 175,301        |
| B-5    | Home Delivered Meals            |                | 97,422        |                  | 133,495        | 102,662          | 125,000        | 40,231        | 35,400        | 534,210        |
| C-4    | Nutrition Counseling            |                |               |                  |                |                  |                |               |               | -              |
| C-5    | Nutrition Education             |                |               |                  |                |                  |                |               |               | -              |
|        | AAA RD/Nutritionist*            | 950            |               |                  |                |                  |                |               |               | 950            |
|        | <b>Nutrition Services Total</b> | <b>104,075</b> | <b>97,422</b> | <b>2,676</b>     | <b>133,495</b> | <b>102,662</b>   | <b>173,000</b> | <b>55,231</b> | <b>41,900</b> | <b>710,461</b> |

\*Registered Dietitian, Nutritionist or individual with comparable certification, as approved by AASA.

**FY 2022 AREA PLAN GRANT BUDGET-TITLE VII LTC OMBUDSMAN DETAIL**

| Op Std | SERVICE CATEGORY               | Title III-B  | Title VII-A | Title VII-EAP | State NHO | MSO Fund | Program Income | Cash Match    | In-Kind Match | TOTAL         |
|--------|--------------------------------|--------------|-------------|---------------|-----------|----------|----------------|---------------|---------------|---------------|
|        | <b>LTC Ombudsman Ser</b>       |              |             |               |           |          |                |               |               |               |
| C-11   | LTC Ombudsman                  | 2,000        | -           | -             | -         | -        | -              | 18,000        | -             | 20,000        |
| C-15   | Elder Abuse Prevention         | -            |             | -             |           |          | -              | -             | -             | -             |
|        | Region Specific                | -            | -           | -             |           |          | -              | -             | -             | -             |
|        | <b>LTC Ombudsman Ser Total</b> | <b>2,000</b> | <b>-</b>    | <b>-</b>      | <b>-</b>  | <b>-</b> | <b>-</b>       | <b>18,000</b> | <b>-</b>      | <b>20,000</b> |

**FY 2022 AREA PLAN GRANT BUDGET- RESPITE SERVICE DETAIL**

| Op Std | SERVICES PROVIDED AS A FORM OF RESPITE CARE | Title III-B | Title III-E | State Alt Care | State Escheats | State In-Home | Merit Award Trust Fund | Program Income | Cash/In-Kind Match | TOTAL    |
|--------|---|-------------|-------------|----------------|----------------|---------------|------------------------|----------------|--------------------|----------|
| B-1    | Chore                                       |             |             |                |                |               |                        |                |                    | -        |
| B-4    | Homemaking                                  |             |             |                |                |               |                        |                |                    | -        |
| B-2    | Home Care Assistance                        |             |             |                |                |               |                        |                |                    | -        |
| B-6    | Home Health Aide                            |             |             |                |                |               |                        |                |                    | -        |
| B-10   | Meal Preparation/HDM                        |             |             |                |                |               |                        |                |                    | -        |
| B-8    | Personal Care                               |             |             |                |                |               |                        |                |                    | -        |
|        | <b>Respite Service Total</b>                | <b>-</b>    | <b>-</b>    | <b>-</b>       | <b>-</b>       | <b>-</b>      | <b>-</b>               | <b>-</b>       | <b>-</b>           | <b>-</b> |

**FY 2022 AREA PLAN GRANT BUDGET-TITLE E- KINSHIP SERVICES DETAIL**

| Op Std | SERVICE CATEGORY                 | Title III-B | Title III-E  |  |  |  | Program Income | Cash Match   | In-Kind Match | TOTAL        |
|--------|----------------------------------|-------------|--------------|--|--|--|----------------|--------------|---------------|--------------|
|        | <b>Kinship Ser. Amounts Only</b> |             |              |  |  |  |                |              |               |              |
| C-18   | Caregiver Sup. Services          | -           |              |  |  |  | -              |              | -             | -            |
| C-19   | Kinship Support Services         | -           | 3,500        |  |  |  | 250            | 2,500        | -             | 6,250        |
| C-20   | Caregiver E,S,T                  | -           | -            |  |  |  | -              | -            | -             | -            |
|        | <b>Kinship Services Total</b>    | <b>-</b>    | <b>3,500</b> |  |  |  | <b>250</b>     | <b>2,500</b> | <b>-</b>      | <b>6,250</b> |

| Planned Services Summary Page for FY 2022 |                |                      | PSA: 3C             |             |           |
|---|----------------|----------------------|---------------------|-------------|-----------|
| Service                                   | Budgeted Funds | Percent of the Total | Method of Provision |             |           |
|   |                |                      | Purchased           | Contract    | Direct    |
| <b>ACCESS SERVICES</b>                    |                |                      |                     |             |           |
| Care Management                           | \$ 233,190     | 13.55%               | x                   |             | x         |
| Case Coordination & Support               | \$ 43,989      | 2.56%                |                     | x           |           |
| Disaster Advocacy & Outreach Program      | \$ -           | 0.00%                |                     |             |           |
| Information & Assistance                  | \$ 23,980      | 1.39%                |                     |             | x         |
| Outreach                                  | \$ -           | 0.00%                |                     |             |           |
| Transportation                            | \$ 94,050      | 5.46%                |                     | x           |           |
| Option Counseling                         | \$ -           | 0.00%                |                     |             |           |
| <b>IN-HOME SERVICES</b>                   |                |                      |                     |             |           |
| Chore                                     | \$ 8,350       | 0.49%                |                     | x           |           |
| Home Care Assistance                      | \$ 300,879     | 17.48%               |                     | x           |           |
| Home Injury Control                       | \$ -           | 0.00%                |                     |             |           |
| Homemaking                                | \$ -           | 0.00%                | x                   |             |           |
| Home Delivered Meals                      | \$ 534,210     | 31.03%               |                     | x           |           |
| Home Health Aide                          | \$ -           | 0.00%                |                     |             |           |
| Medication Management                     | \$ 9,000       | 0.52%                | x                   |             |           |
| Personal Care                             | \$ -           | 0.00%                | x                   |             |           |
| Personal Emergency Response System        | \$ 8,000       | 0.46%                | x                   |             |           |
| Respite Care                              | \$ 55,666      | 3.23%                | x                   | x           |           |
| Friendly Reassurance                      | \$ 9,200       | 0.53%                |                     | x           | x         |
| <b>COMMUNITY SERVICES</b>                 |                |                      |                     |             |           |
| Adult Day Services                        | \$ 98,183      | 5.70%                |                     | x           |           |
| Dementia Adult Day Care                   | \$ -           | 0.00%                |                     |             |           |
| Congregate Meals                          | \$ 175,301     | 10.18%               |                     | x           |           |
| Nutrition Counseling                      | \$ -           | 0.00%                |                     |             |           |
| Nutrition Education                       | \$ -           | 0.00%                |                     |             |           |
| Disease Prevention/Health Promotion       | \$ 11,545      | 0.67%                |                     | x           |           |
| Health Screening                          | \$ -           | 0.00%                |                     |             |           |
| Assistance to the Hearing Impaired & Deaf | \$ -           | 0.00%                |                     |             |           |
| Home Repair                               | \$ 10,000      | 0.58%                |                     | x           |           |
| Legal Assistance                          | \$ 12,150      | 0.71%                |                     | x           |           |
| Long Term Care Ombudsman/Advocacy         | \$ 20,000      | 1.16%                |                     | x           |           |
| Senior Center Operations                  | \$ -           | 0.00%                |                     |             |           |
| Senior Center Staffing                    | \$ -           | 0.00%                |                     |             |           |
| Vision Services                           | \$ -           | 0.00%                |                     |             |           |
| Programs for Prevention of Elder Abuse,   | \$ -           | 0.00%                |                     |             |           |
| Counseling Services                       | \$ 4,100       | 0.24%                |                     | x           |           |
| Creating Confident Caregivers® (CCC)      | \$ -           | 0.00%                |                     |             |           |
| Caregiver Supplemental Services           | \$ -           | 0.00%                |                     |             |           |
| Kinship Support Services                  | \$ 6,250       | 0.36%                |                     | x           |           |
| Caregiver Education, Support, & Training  | \$ 18,943      | 1.10%                |                     | x           |           |
| AAA RD/Nutritionist                       | \$ 950         | 0.06%                |                     | x           |           |
| <b>PROGRAM DEVELOPMENT</b>                | \$ 29,000      | 1.68%                |                     |             | x         |
| <b>REGION-SPECIFIC</b>                    |                |                      |                     |             |           |
| Community Living Program Services         | \$ 4,600       | 0.27%                | x                   |             |           |
| Gap Filling                               | \$ 6,150       | 0.36%                | x                   |             |           |
| c.  | \$ -           | 0.00%                |                     |             |           |
| d.  | \$ -           | 0.00%                |                     |             |           |
| <b>CLP/ADRC SERVICES</b>                  | \$ -           | 0.00%                |                     |             |           |
| <b>SUBTOTAL SERVICES</b>                  |                |                      |                     |             |           |
|   | \$ 1,717,686   |                      |                     |             |           |
| <b>MATF &amp; ST CG ADMINISTRATION</b>    |                |                      |                     |             |           |
|   | \$ 3,708       | 0.22%                |                     |             | x         |
| <b>TOTAL PERCENT</b>                      |                |                      | 8.75%               | 83.08%      | 8.17%     |
| <b>TOTAL FUNDING</b>                      |                | \$ 1,721,394         | \$150,590           | \$1,430,144 | \$140,660 |

Note: Rounding variances may occur between the Budgeted Funds column total and the Total Funding under the Method of Provision columns due to percentages in the formula. Rounding variances of + or (-) \$1 are not considered material.

FY 2022 BUDGET REVIEW SPREADSHEET

Rev. 3/2/21

| Agency:                                  | Branch-St. Joseph of AAA Regions |              |                   | Fiscal Year:  | FY 2022   |
|--|----------------------------------|--------------|-------------------|---|-----------|
| Date of SGA:                             | 2/24/2021                        | SGA No.      |                   | Date Reviewed by AASA:  |           |
| Date of Budget:                          | 06/09/21                         | Revision No. | original          | Initials of Field Rep Approving:  |           |
| SGA CATEGORY                             | SGA AWARD                        | C/O AMOUNT   | TOTAL             | AAA COMMENTS  |           |
| Title III Administration                 | \$ 46,402                        |              | \$ 46,402         |   |           |
| State Administration                     | \$ 8,019                         |              | \$ 8,019          | Transfer request (appendix f)   |           |
| Title III-B Services                     | \$ 151,780                       |              | \$ 151,780        | From (-) Title IIIC1 (\$60,000)   |           |
| Title III-C-1 Services                   | \$ 104,075                       |              | \$ 104,075        | To Title IIIC2 +\$25,000  |           |
| Title III-C-2 Services                   | \$ 97,422                        |              | \$ 97,422         | To Title IIIB +\$35,000   |           |
| Federal Title III-D (Prev. Health)       | \$ 8,795                         |              | \$ 8,795          |   |           |
| Title III-E Services (NFCSP)             | \$ 55,543                        |              | \$ 55,543         |   |           |
| Title VII/A Services (LTC Ombuds)        |                                  |              | \$ -              |   |           |
| Title VII/EAP Services                   |                                  |              | \$ -              |   |           |
| St. Access                               | \$ 7,989                         |              | \$ 7,989          |   |           |
| St. In Home                              | \$ 142,429                       |              | \$ 142,429        |   |           |
| St. Congregate Meals                     | \$ 2,676                         |              | \$ 2,676          |   |           |
| St. Home Delivered Meals                 | \$ 133,495                       |              | \$ 133,495        |   |           |
| St. Alternative Care                     | \$ 31,400                        |              | \$ 31,400         |   |           |
| St. Aging Network Srv. (St. ANS)         | \$ 12,458                        |              | \$ 12,458         |   |           |
| St. Respite Care (Escheats)              | \$ 36,311                        |              | \$ 36,311         |   |           |
| Merit Award Trust Fund (MATF)            | \$ 36,716                        |              | \$ 36,716         |   |           |
| St. Caregiver Support (St. CG Sup.)      | \$ 4,530                         |              | \$ 4,530          |   |           |
| St. Nursing Home Ombuds (NHO)            |                                  |              | \$ -              |   |           |
| MSO Fund-LTC Ombudsman                   |                                  |              | \$ -              |   |           |
| St. Care Mgt.                            | \$ 80,228                        |              | \$ 80,228         |   |           |
| NSIP                                     | \$ 102,662                       |              | \$ 102,662        |   |           |
|  |                                  |              | \$ -              |   |           |
| <b>SGA TOTALS:</b>                       | \$ 1,062,930                     | \$ -         | \$ 1,062,930      |   |           |
| <b>Administrative Match Requirements</b> |                                  |              |                   |   |           |
| <b>ADMINISTRATION</b>                    | <b>BUDGET</b>                    | <b>SGA</b>   | <b>DIFFERENCE</b> |   |           |
| Federal Administration                   | \$ 46,402                        | \$ 46,402    | \$ -              | Minimum federal administration match amount   | \$15,467  |
| State Administration                     | \$ 8,019                         | \$ 8,019     | \$ -              | Administration match expended (State Adm. + Local Match)                                  | \$60,773  |
|  |                                  |              |                   | Is the federal administration matched at a minimum 25%?                                   | Yes       |
|  |                                  |              |                   | Does federal administration budget equal SGA?   | Yes       |
| <b>Sub-Total:</b>                        | \$ 54,421                        | \$ 54,421    | \$ -              | Does state administration budget equal SGA?   | Yes       |
| MATF                                     | \$ 3,300                         |              |                   |   |           |
| ST CG Supp                               | \$ 408                           |              |                   |   |           |
| <b>Local Administrative Match</b>        |                                  |              |                   | Merit Award Trust Admin. & St. Caregiver Support Admin must be expended at or below 9% of |           |
| Local Cash Match                         | \$ 32,504                        |              |                   | Total Merit Award Trust Fund & St. Caregiver Support Admin. Funds budgeted:               | 8%        |
| Local In-Kind Match                      | \$ 20,250                        |              |                   | Is Merit Award Trust Fund & St CG Support Admin. budgeted at 9% or less?                  | Yes       |
| <b>Sub-Total:</b>                        | \$ 52,754                        |              |                   | Amount of MATF Funds budgeted on Adult Day Care   | \$ 20,000 |
| Other Admin                              | \$ 96,800                        |              |                   | Is at least 50% of MATF budgeted on Adult Day Care services?                              | Yes       |
| <b>Total Administration:</b>             | \$ 207,683                       | \$ 207,683   | \$ -              | <b>Title III-E Kinship Services Program Requirements</b>                                  |           |
| <b>SERVICES:</b>                         | <b>BUDGET</b>                    | <b>SGA</b>   | <b>% BUDGETED</b> |   |           |
| Federal Title III-B Services             | \$ 151,780                       | \$ 151,780   | 100.0000%         | Are kinship services budgeted at > 5% of the AAA's Title III-E funding?                   | Yes       |
| Fed. Title III C-1 (Congregate)          | \$ 104,075                       | \$ 104,075   | 100.0000%         |   |           |
| State Congregate Nutrition               | \$ 2,676                         | \$ 2,676     | 100.0000%         | [note: see TL #369 & TL#2007-141]   |           |
| Federal C-2 (HDM)                        | \$ 97,422                        | \$ 97,422    | 100.0000%         | For Agencies required to budget a minimum of \$25,000 of Title III-E requirement met?     | N/A       |
| State Home Delivered Meals               | \$ 133,495                       | \$ 133,495   | 100.0000%         | <b>Title III-B Long Term Care Ombudsman Maintenance of Effort Requirements</b>            |           |
| Federal Title III-D (Prev. Health)       | \$ 8,795                         | \$ 8,795     | 100.0000%         | Amount required from Transmittal Letter #2020-431. (see cell L 42)                        | #N/A      |
| Federal Title III-E (NFCSP)              | \$ 55,543                        | \$ 55,543    | 100.0000%         | Budgeted amount Title III-B for LTC Ombudsman.  | \$2,000   |
| St. Access                               | \$ 7,989                         | \$ 7,989     | 100.0000%         | Is required maintenance of effort met?  | #N/A      |
| St. In Home                              | \$ 142,429                       | \$ 142,429   | 100.0000%         |   |           |
| St. Alternative Care                     | \$ 31,400                        | \$ 31,400    | 100.0000%         | <b>Service Match Requirements</b>   |           |
| St. Care Mgt.                            | \$ 80,228                        | \$ 80,228    | 100.0000%         | Minimum service match amount required   | \$92,490  |
| State Nursing Home Ombs (NHO)            | \$ -                             | \$ -         | #DIV/0!           | Service matched budgeted: (Local Cash + In-Kind)  | \$401,835 |
| St ANS                                   | \$ 12,458                        | \$ 12,458    | 100.0000%         | Is the service allotment matched at a minimum 10%?  | Yes       |
| <b>Sub-Total:</b>                        | \$ 828,290                       | \$ 828,290   | 100.0000%         |   |           |
| <b>Local Service Match</b>               |                                  |              |                   | <b>Miscellaneous Budget Requirements / Constraints</b>                                    |           |
| Local Cash Match                         | \$ 339,685                       |              |                   | Amounts budgeted for OAA / AASA Priority Services:  |           |
| Local In-Kind Match                      | \$ 62,150                        |              |                   | Access:   | \$71,730  |
|  |                                  |              |                   | In-Home:  | \$27,300  |
|  |                                  |              |                   | Legal:  | \$10,250  |
| <b>Sub-Total:</b>                        | \$ 401,835                       |              |                   | Total Budgeted for Priority Services:   | \$109,280 |
| Title VII/A Services (LTC Ombuds)        | \$ -                             | \$ -         | #DIV/0!           | Are Access Services budgeted at minimum 10% of Original ACL Title III-B                   | Yes       |
| Title VII/EAP Services                   | \$ -                             | \$ -         | #DIV/0!           | Are In Home Services budgeted at minimum 10% of Original ACL Title III-B                  | Yes       |
| NSIP                                     | \$ 102,662                       | \$ 102,662   | 100.0000%         | Are Legal Services budgeted at minimum 6.5% of Original ACL Title III-B                   | Yes       |
| St. Respite Care (Escheats)              | \$ 36,311                        | \$ 36,311    | 100.0000%         | (Actual % of Legal)   | 6.75%     |
| MATF                                     | \$ 33,416                        | \$ 33,416    | 100.0000%         |   |           |
| St. CG Support                           | \$ 4,122                         | \$ 4,122     | 100.0000%         | Title III-B award w/o carryover or Transfers in current SGA                               | \$151,780 |
| MSO Fund-LTC Ombudsman                   | \$ -                             | \$ -         | #DIV/0!           | Amount budgeted for Program Development:  | \$23,000  |
| TCM-Medicaid / CM                        | \$ 50,000                        |              |                   | % of Title III-B Program Development (must be 20% or less):                               | 15.0%     |
| Program Income                           | \$ 261,050                       |              |                   | Is Program Development budgeted at 20% or less?   | Yes       |
|  |                                  |              |                   | Title III-D allotment with carryover:   | \$8,795   |
| <b>Total Services:</b>                   | \$ 1,717,686                     |              |                   | Amount budgeted for EBDP Activities, per TL#2012-244:                                     | \$8,795   |
| <b>Grand Total: Ser.+ Admin.</b>         | \$ 1,925,369                     |              |                   | Is 100% of Title III-D budgeted on APPROVED EBDP?   | Yes       |

**PRIORITY SERVICE SECTION**

| Access Services        | III-B Budget Amount |
|------------------------|---------------------|
| a. Care Management     | \$21,000            |
| b. Case Coord/supp     |                     |
| c. Disaster Advocacy   | \$0                 |
| d. Information & Assis | \$20,980            |
| e. Outreach            | \$0                 |
| f. Transportation      | \$29,750            |
| g. Options Counseling  | \$0                 |
| <b>Access Total:</b>   | <b>\$71,730</b>     |

(AAA Regional Access Service)

| In Home Services               | III-B Budget Amount |
|--------------------------------|---------------------|
| a. Chore                       | \$5,200             |
| b. Home Care Assis             | \$15,000            |
| c. Home Injury Cntrl           |                     |
| d. Homemaking                  |                     |
| e. Home Health Aide            | \$0                 |
| f. Medication Mgt              |                     |
| g. Personal Care               |                     |
| h. Assistive Device&Tech       | \$0                 |
| i. Respite Care                | \$0                 |
| j. Friendly Reassure           | \$7,100             |
| <b>In Home Services Total:</b> | <b>\$27,300</b>     |

(AAA Regional In-Home Service)  
(AAA Regional In-Home Service)

| Kinship Services                           | III-E Budget Amount |
|--|---------------------|
| 1. Caregiver Supplmt - Kinship Amount Only |                     |
| 2. Kinship Support                         | \$3,500             |
| 3. Caregiver E,S,T - Kinship Amount Only   | \$0                 |
|  | \$0                 |
| <b>Kinship Services Total:</b>             | <b>\$3,500</b>      |

(Other Title III-E Kinship Service)  
(Other Title III-E Kinship Service)

| Title III-B Transfers reflected in SGA | Title III-B Award |
|--|-------------------|
| Title III-B award w/o carryover in SGA | \$151,780         |
| a. Amt. Transferred into Title III-B   |                   |
| b. Amt. Transferred out of Title III-B |                   |
| <b>AoA Title III-B Award Total:</b>    | <b>\$151,780</b>  |

(Use ONLY If SGA Reflects Transfers)

(Always Enter Positive Number)  
(Always Enter Positive Number)

**NOTE: AoA Title III Part B award for the current FY means total award from AoA without carryover or transfers.**

**FY 2022 Annual Implementation Plan  
Direct Service Budget Detail #1**

AAA: Branch-St. Joseph AAA

FISCAL YEAR: FY 2022

SERVICE: Care Management

| LINE ITEM                    | Federal OAA<br>Title III Funds | Other Fed Funds<br>(non-Title III) | State<br>Funds | Program<br>Income | Match         |              | Other<br>Resources | Total<br>Budgeted |
|------------------------------|--------------------------------|------------------------------------|----------------|-------------------|---------------|--------------|--------------------|-------------------|
|                              |                                |                                    |                |                   | Cash          | In-Kind      |                    |                   |
| Wages/Salaries               | 24,500                         |                                    | 58,000         |                   | 16,500        | 3,500        | 14,000             | 116,500           |
| Fringe Benefits              | 4,500                          |                                    | 4,686          |                   | 4,004         | 1,500        | 2,000              | 16,690            |
| Travel                       | 1,000                          |                                    |                |                   |               | 1,000        |                    | 2,000             |
| Training                     | 1,000                          |                                    |                |                   |               | 500          |                    | 1,500             |
| Supplies                     | 800                            |                                    |                |                   |               |              |                    | 800               |
| Occupancy                    | 1,000                          |                                    |                |                   |               | 1,000        |                    | 2,000             |
| Communications               | 1,000                          |                                    |                |                   |               | 500          |                    | 1,500             |
| Equipment                    |                                |                                    |                |                   |               |              |                    | 0                 |
| Other:                       |                                |                                    |                |                   |               |              |                    | 0                 |
| Service Costs                |                                |                                    |                |                   |               |              |                    | 0                 |
| Purchased Services (CM only) | 16,200                         |                                    | 30,000         |                   | 12,000        |              | 34,000             | 92,200            |
|                              |                                |                                    |                |                   |               |              |                    | 0                 |
| <b>Totals</b>                | <b>50,000</b>                  | <b>0</b>                           | <b>92,686</b>  | <b>0</b>          | <b>32,504</b> | <b>8,000</b> | <b>50,000</b>      | <b>233,190</b>    |

SERVICE AREA: Branch & St. Joseph Counties

(List by County/City if service area is not entire PSA)

Does the Direct Service Budget reflect any changes to the one approved as part of the agency's FY AIP?  Yes  No

If yes, please describe:

**SCHEDULE OF MATCH & OTHER RESOURCES #1**

FY 2022

| SOURCE OF FUNDS                   | MATCH         |              | OTHER RESOURCES |          | Explanation for Other Expenses: |
|-----------------------------------|---------------|--------------|-----------------|----------|---------------------------------|
|                                   | VALUE         |              | VALUE           |          |                                 |
|                                   | Cash          | In-Kind      | Cash            | In-Kind  |                                 |
| County Appropriation              | 32,504        |              |                 |          |                                 |
| Medicaid Targeted Case Management |               |              | 50,000          |          |                                 |
| Local Appropriation               |               | 8,000        |                 |          |                                 |
|                                   |               |              |                 |          |                                 |
| <b>Totals</b>                     | <b>32,504</b> | <b>8,000</b> | <b>50,000</b>   | <b>0</b> |                                 |

Difference      0      0      0      0

OK                      OK                      OK

**FY 2022 Annual Implementation Plan  
Direct Service Budget Detail #2**

AAA: Branch-St. Joseph AAA

FISCAL YEAR: FY 2022

SERVICE: Information & Assistance

| LINE ITEM                    | Federal OAA<br>Title III Funds | Other Fed Funds<br>(non-Title III) | State<br>Funds | Program<br>Income | Match    |              | Other<br>Resources | Total<br>Budgeted |
|------------------------------|--------------------------------|------------------------------------|----------------|-------------------|----------|--------------|--------------------|-------------------|
|                              |                                |                                    |                |                   | Cash     | In-Kind      |                    |                   |
| Wages/Salaries               | 18,500                         |                                    |                |                   |          | 3,000        |                    | 21,500            |
| Fringe Benefits              | 2,480                          |                                    |                |                   |          |              |                    | 2,480             |
| Travel                       |                                |                                    |                |                   |          |              |                    | 0                 |
| Training                     |                                |                                    |                |                   |          |              |                    | 0                 |
| Supplies                     |                                |                                    |                |                   |          |              |                    | 0                 |
| Occupancy                    |                                |                                    |                |                   |          |              |                    | 0                 |
| Communications               |                                |                                    |                |                   |          |              |                    | 0                 |
| Equipment                    |                                |                                    |                |                   |          |              |                    | 0                 |
| Other:                       |                                |                                    |                |                   |          |              |                    | 0                 |
| Service Costs                |                                |                                    |                |                   |          |              |                    | 0                 |
| Purchased Services (CM only) |                                |                                    |                |                   |          |              |                    | 0                 |
|                              |                                |                                    |                |                   |          |              |                    | 0                 |
| <b>Totals</b>                | <b>20,980</b>                  | <b>0</b>                           | <b>0</b>       | <b>0</b>          | <b>0</b> | <b>3,000</b> | <b>0</b>           | <b>23,980</b>     |

SERVICE AREA: Branch & St. Joseph Counties

(List by County/City if service area is not entire PSA) \_\_\_\_\_

Does the Direct Service Budget reflect any changes to the one approved as part of the agency's FY AIP?  Yes  No

If yes, please describe: \_\_\_\_\_

Explanation for Other Expenses: \_\_\_\_\_

**SCHEDULE OF MATCH & OTHER RESOURCES #2** FY 2022

| SOURCE OF FUNDS     | MATCH    |              | OTHER RESOURCES |          | Explanation for Other Expenses: |
|---------------------|----------|--------------|-----------------|----------|---------------------------------|
|                     | VALUE    |              | VALUE           |          |                                 |
|                     | Cash     | In-Kind      | Cash            | In-Kind  |                                 |
| Local Appropriation |          | 3,000        |                 |          |                                 |
|                     |          |              |                 |          |                                 |
|                     |          |              |                 |          |                                 |
|                     |          |              |                 |          |                                 |
| <b>Totals</b>       | <b>0</b> | <b>3,000</b> | <b>0</b>        | <b>0</b> |                                 |

Difference      0      0      0      0

OK                      OK                      OK

**FY 2022 Annual Implementation Plan  
Direct Service Budget Detail #3**

AAA: Branch-St. Joseph AAA

FISCAL YEAR: FY 2022

SERVICE: Gap Filling Services

| LINE ITEM                    | Federal OAA<br>Title III Funds | Other Fed Funds<br>(non-Title III) | State<br>Funds | Program<br>Income | Match    |            | Other<br>Resources | Total<br>Budgeted |
|------------------------------|--------------------------------|------------------------------------|----------------|-------------------|----------|------------|--------------------|-------------------|
|                              |                                |                                    |                |                   | Cash     | In-Kind    |                    |                   |
| Wages/Salaries               |                                |                                    |                |                   |          | 650        |                    | 650               |
| Fringe Benefits              |                                |                                    |                |                   |          |            |                    | 0                 |
| Travel                       |                                |                                    |                |                   |          |            |                    | 0                 |
| Training                     |                                |                                    |                |                   |          |            |                    | 0                 |
| Supplies                     | 2,500                          |                                    |                |                   |          |            |                    | 2,500             |
| Occupancy                    |                                |                                    |                |                   |          |            |                    | 0                 |
| Communications               |                                |                                    |                |                   |          |            |                    | 0                 |
| Equipment                    |                                |                                    |                |                   |          |            |                    | 0                 |
| Other:                       |                                |                                    |                |                   |          |            |                    | 0                 |
| Service Costs                |                                |                                    |                |                   |          |            |                    | 0                 |
| Purchased Services (CM only) |                                |                                    |                |                   |          |            |                    | 0                 |
|                              |                                |                                    |                |                   |          |            |                    | 0                 |
| <b>Totals</b>                | <b>2,500</b>                   | <b>0</b>                           | <b>0</b>       | <b>0</b>          | <b>0</b> | <b>650</b> | <b>0</b>           | <b>3,150</b>      |

SERVICE AREA: Branch & St. Joseph Counties

(List by County/City if service area is not entire PSA)

Does the Direct Service Budget reflect any changes to the one approved as part of the agency's FY AIP?  Yes  No

If yes, please describe:

**SCHEDULE OF MATCH & OTHER RESOURCES #3**

**FY 2022**

| SOURCE OF FUNDS     | MATCH    |            | OTHER RESOURCES |          | Explanation for Other Expenses: |
|---------------------|----------|------------|-----------------|----------|---------------------------------|
|                     | VALUE    |            | VALUE           |          |                                 |
|                     | Cash     | In-Kind    | Cash            | In-Kind  |                                 |
| Local Appropriation |          | 650        |                 |          |                                 |
|                     |          |            |                 |          |                                 |
|                     |          |            |                 |          |                                 |
| <b>Totals</b>       | <b>0</b> | <b>650</b> | <b>0</b>        | <b>0</b> |                                 |

Difference

OK

0

OK

0

OK

0



**Enclosure:**

1. AASA correspondence: Aging & Adult Services Agency Assessment of the AAA (IIIIC) to be held on July 20, 2021 at 10:00am
  2. FY2022 Annual Implementation Plan \*
- 

**Updates:**

1. Services to Victims of Elder Abuse Program Updates
  - Feedback from the Division of Victim Services regarding the March Contract Review has not been received yet...
  - Our presentation at the Area Agencies on Aging Association of Michigan's Annual Conference was a success! 45 people attended our session to learn about our SVEA program, Region 2's Safe Haven program, and about statewide multi-disciplinary teams. Attendees shared rave reviews!
2. We continue to search for candidates to fill our open full-time positions including: Nurse Care Consultant, Program Specialist, Elder Abuse Victim Specialist, and Social Work Care Consultant.
3. We are steps closer to being able to present budget amendments to you... All providers seeking budget amendments and/or adjustments have submitted their requests for consideration. Amendments are proposed to the Board of Health in summary format and have taken into consideration the following factors:
  - Federal and state laws – sets prioritization requirements for all programs, establishes funding allowability/restrictions, sets service/admin match requirements, etc.
  - AASA guidance & Statement of Grant Award documents
  - Local planning documents – establishing the region's funded services and prioritization of funding
  - Service delivery experience (for example: an agency planned to offer 12 education sessions but, due to restrictions on gathering, they've not offered classes and request a shift in funding to another allowable service; an agency planned on providing 5,000 hours of home care assistance but has exceeded that goal and they are now requesting additional funds if available)

We have also received FY2020 AASA "Close Out Letters" which indicate any funding categories that may have balances (carry forward). We have received \$24,873 in "regular" funding and zero balances (\$0) in the CARES/FFCRA relief funds. We spent every dollar of the COVID relief funds (\$332,924 total) by awarding funds to our providers & addressing unique community needs that arose during the pandemic.

4. Annual provider monitoring visits are complete. I'm still working on feedback letters to each provider. A summary of these virtual assessments will be shared with the Board.



STATE OF MICHIGAN  
DEPARTMENT OF HEALTH AND HUMAN SERVICES  
LANSING

GRETCHEN WHITMER  
GOVERNOR

ELIZABETH HERTEL  
DIRECTOR

AGING & ADULT SERVICES AGENCY

June 18, 2021

Rebecca A. Burns, Health Officer  
Branch-St. Joseph Area Agency on Aging (3C)  
c/o Branch-Hillsdale-St. Joseph Comm. Health Agency  
570 N. Marshall Rd.  
Coldwater, MI 49036

Dear Ms. Burns:

The Michigan Department of Health and Human Services, Aging & Adult Services Agency (AASA) has the responsibility to assess the performance of agencies that are awarded funds under the Older Americans Act and from the Michigan legislature. This letter is to inform you of our intent to conduct a virtual review of information submitted to this office by Branch-St. Joseph Area Agency on Aging (AAA) 3C, in the AAA Assessment Guide.

The assessment is scheduled for **10:00 a.m., on July 20, 2021**. The intent of the assessment will be to determine if ongoing management and organizations procedures are established, in use, and in compliance with statewide operating standards. Please have appropriate staff available. Sample documentation will be examined. In addition, a review of past assessment recommendations, if any, will be made.

Members of the advisory council and/or policy board who wish to observe the assessment are invited to do so. Should you have any questions regarding this matter, please direct questions to your AASA Field Representative, Ashley Ellsworth, at [ellswortha2@michigan.gov](mailto:ellswortha2@michigan.gov), or Cindy Albrecht, at [albrechtc@michigan.gov](mailto:albrechtc@michigan.gov).

Sincerely,

A handwritten signature in cursive script that reads 'Cindy Masterson'.

Cindy Masterson, Director  
Operations & Aging Network Support Division

CM/ae/cll

cc: Kathy Pangle, Region 3C Board Chairperson  
Laura Sutter, AAA Director  
Steve Betterly, Manager, Technical Assistance and Quality Improvement Section  
Ashley Ellsworth, AASA Field Representative  
Cindy Albrecht, AASA Field Representative

## **Personal Health and Disease Prevention: June 24, 2021**

### **Communicable Disease:**

Covid response has reduced significantly. Our staff is diving back into the long to-do list of items that were dropped while in the midst of a pandemic. Cases and outbreaks are low so it has been great to focus our attention on other daily programs. I have enjoyed it very much! A few updates for Covid-related items...

- Variants continue to be a concern (Delta)
- Breakthrough case increase: 20 Region 1/ 50 Region 5 (March-June 8, 2021)  
Last report was 17 Region 1/ 43 Region 5
- Sending recall letters for Covid immunizations

### **Immunizations/STI/HIV:**

Our staff has been busy attending community events like Water Fest in Three Rivers and Project Connect in Hillsdale. We offered Covid vaccination at both of these events. The mobile clinic is still out and about in the community almost every day making visits. We are working on filling the Mobile Clinic Clerk position so Carol will have a permanent team member dedicated to that role.

We will now be carrying Bicillin in our offices for Syphilis treatment. We see very few cases in our jurisdiction but it will be a convenient way of quickly treating someone if needed. I'm glad we are able to have this available and accessible to the community. STDs like Chlamydia and Gonorrhea have been quite prevalent in the tri-county area. We have experienced an increase in these cases during the pandemic along with a lot of other Michigan health departments. We will resume in-person STD clinics in August.

June 27<sup>th</sup>, 2021 is National HIV Testing Day.

### **Women, Infant, and Children (WIC):**

A few of our Breastfeeding Peers plan to attend Strawberry Fest in Coldwater to meet our community and do some outreach efforts. They are very excited to get back out at these events!

The physical presence waiver that allows local agencies to provide certification appointments remotely will end in August. We are preparing to open our doors and discuss how this restart will look. Some health departments are doing hybrid models before reopening or only seeing certain people who meet specific criteria in the office first.

### **Children's Special Health Care Services (CSHCS), Lead, and Hearing & Vision:**

The have been planning for the next off site hearing clinic in Branch County with Mott's University of Michigan.

**Kali Nichols MPH  
Personal Health & Disease Prevention Director**

**Branch - Hillsdale - St. Joseph Community Health Agency  
Personal Health and Disease Prevention**

May-21

YTD 2020-21

YTD 2019-2020

|  | BR  | HD  | ST | TR  | Total | BR     | HD     | ST  | TR     | Total  | BR    | HD    | ST  | TR    | Total  |
|--|-----|-----|----|-----|-------|--------|--------|-----|--------|--------|-------|-------|-----|-------|--------|
| <b>CHILD IMMUNIZATIONS</b>                     |     |     |    |     |       |        |        |     |        |        |       |       |     |       |        |
| # Vaccines Given CHA                           | 450 | 159 | -  | 202 | 811   | 1,383  | 1,207  | 87  | 1,347  | 4,024  | 1,039 | 949   | 274 | 562   | 2,824  |
| All VFC Doses Given                            | 629 | 327 | -  | 703 | 1,659 | 6,228  | 4,175  | -   | 7,557  | 17,960 | 5,845 | 4,161 | -   | 7,095 | 17,101 |
| Waivers  | 2   | -   | -  | -   | 2     | 27     | 22     | 8   | 24     | 81     | 32    | 39    | 1   | 43    | 115    |
| <b>ADULT IMMUNIZATIONS</b>                     |     |     |    |     |       |        |        |     |        |        |       |       |     |       |        |
| # Vaccines Given                               | 756 | 476 | -  | 890 | 2,122 | 15,961 | 12,598 | 14  | 22,076 | 50,649 | 973   | 421   | 105 | 417   | 1,916  |
| All AVP Doses Given                            | 15  | 9   | -  | 10  | 34    | 117    | 72     | -   | 125    | 314    | 241   | 153   | -   | 190   | 584    |
| <b>TRAVEL VACCINATIONS</b>                     |     |     |    |     |       |        |        |     |        |        |       |       |     |       |        |
| Branch Office                                  | -   | -   | -  | -   | -     | -      | -      | -   | -      | -      | 9     | -     | -   | -     | 9      |
| <b>COMMUNICABLE DISEASE</b>                    |     |     |    |     |       |        |        |     |        |        |       |       |     |       |        |
| TB Tests Done                                  | 6   | 12  | -  | -   | 18    | 48     | 71     | -   | 4      | 123    | 55    | 65    | -   | 23    | 143    |
| New LTBI on Rx                                 | -   | -   | -  | -   | -     | 1      | -      | -   | -      | 1      | -     | -     | -   | -     | -      |
| STD treatments                                 | -   | 2   | -  | 5   | 7     | -      | 17     | 2   | 25     | 44     | 4     | 13    | 3   | 80    | 100    |
| New STD Investigations                         | 13  | 10  | -  | 29  | 52    | 114    | 119    | -   | 183    | 416    | 94    | 90    | -   | 181   | 365    |
| HIV Testing                                    | 1   | -   | -  | -   | 1     | 1      | 2      | 2   | 4      | 9      | -     | 6     | -   | 25    | 31     |
| <b>ENROLLMENTS</b>                             |     |     |    |     |       |        |        |     |        |        |       |       |     |       |        |
| Medicaid & Michild                             | 2   | -   | -  | -   | 2     | 2      | -      | -   | -      | 2      | 19    | 3     | -   | 12    | 34     |
| <b>REFERRAL SERVICE</b>                        |     |     |    |     |       |        |        |     |        |        |       |       |     |       |        |
| MCDC Referrals                                 | 7   | 31  | 6  | 4   | 48    | 63     | 228    | 60  | 86     | 437    | 115   | 284   | 8   | 81    | 488    |
| MIHP referrals                                 | 16  | 7   | 13 | 20  | 56    | 135    | 36     | 149 | 148    | 468    | 30    | 25    | 109 | 148   | 312    |
| <b>Hearing Screens</b>                         |     |     |    |     |       |        |        |     |        |        |       |       |     |       |        |
| Pre-school                                     | -   | -   | -  | -   | -     | 155    | 337    | -   | 401    | 893    | 86    | 102   | -   | 313   | 501    |
| School Age                                     | -   | -   | -  | -   | -     | 828    | 922    | -   | 1,782  | 3,532  | 1,088 | 795   | -   | 1,999 | 3,882  |
| <b>Vision Screens</b>                          |     |     |    |     |       |        |        |     |        |        |       |       |     |       |        |
| Pre-school                                     | 25  | -   | -  | 47  | 72    | 211    | 362    | -   | 493    | 1,066  | 102   | 86    | -   | 330   | 518    |
| School Age                                     | -   | -   | -  | 247 | 247   | 2,249  | 1,699  | -   | 3,193  | 7,141  | 3,151 | 2,139 | -   | 4,560 | 9,850  |
| <b>Children's Special Health Care Services</b> |     |     |    |     |       |        |        |     |        |        |       |       |     |       |        |
| Diagnostics                                    | 2   | 2   | -  | -   | 4     | 7      | 11     | -   | -      | 18     | 10    | 22    | -   | 1     | 33     |
| Assessments-Renewal                            | 24  | 27  | -  | 16  | 67    | 137    | 177    | -   | 184    | 498    | 144   | 162   | -   | 195   | 501    |
| Assessments-New                                | 6   | 4   | -  | 12  | 22    | 20     | 36     | -   | 52     | 108    | 36    | 37    | -   | 44    | 117    |

## Branch - Hillsdale - St. Joseph Community Health Agency

### Personal Health and Disease Prevention

May-21

|                                       | 2020-2021 |     |     |       | FYTD 2020-2021 |       |       |        | 2019-20 FYTD |       |       |       |
|---------------------------------------|-----------|-----|-----|-------|----------------|-------|-------|--------|--------------|-------|-------|-------|
|                                       | BR        | HD  | SJ  | Total | BR             | HD    | SJ    | Total  | BR           | HD    | SJ    | Total |
|                                       |           |     |     |       |                |       |       |        |              |       |       |       |
| Animal Bite/Rabies potential exposure | 2         | 5   | -   | 7     | 28             | 34    | -     | 62     | 21           | 32    | 1     | 54    |
| Campylobacter                         | -         | 2   | 1   | 3     | -              | 4     | 6     | 10     | 6            | 3     | 7     | 16    |
| Chicken Pox                           | -         | -   | -   | -     | -              | -     | -     | -      | -            | 1     | -     | 1     |
| Chlamydia                             | 9         | 7   | 18  | 34    | 74             | 71    | 119   | 264    | 64           | 65    | 126   | 255   |
| Coccidioidomycosis                    | -         | -   | -   | -     | -              | -     | -     | -      | -            | -     | 1     | 1     |
| Colds W/O Fever                       | 126       | 69  | 134 | 329   | 714            | 584   | 1,110 | 2,408  | 572          | 284   | 1,023 | 1,879 |
| CRE Carbapenem Resistant Enterobac.   | -         | -   | -   | -     | -              | 1     | -     | 1      | -            | 1     | 1     | 2     |
| Cryptosporidiosis                     | -         | 1   | -   | 1     | -              | 1     | 1     | 2      | 3            | 1     | -     | 4     |
| Ehrlichiosis, Anaplasma               | -         | -   | -   | -     | -              | -     | -     | -      | -            | -     | -     | -     |
| Flu Like Disease                      | 110       | 28  | 72  | 210   | 838            | 174   | 548   | 1,560  | 1,390        | 1,093 | 1,653 | 4,136 |
| GI Illness                            | 208       | 146 | 182 | 536   | 1,390          | 817   | 1,168 | 3,375  | 2,017        | 1,158 | 1,804 | 4,979 |
| Giardiasis                            | -         | -   | -   | -     | -              | -     | -     | -      | 3            | 2     | 5     | 10    |
| Gonorrhea                             | 4         | 3   | 11  | 18    | 40             | 47    | 63    | 150    | 28           | 25    | 55    | 108   |
| Guillian-Barre Syndrome               | -         | -   | -   | -     | -              | -     | -     | -      | 1            | -     | -     | 1     |
| H. Influenzae Disease - Inv.          | -         | -   | -   | -     | -              | 1     | -     | 1      | -            | 1     | 3     | 4     |
| Head Lice                             | 15        | 3   | 28  | 46    | 120            | 46    | 223   | 389    | 236          | 90    | 317   | 643   |
| Hepatitis A                           | -         | -   | -   | -     | -              | -     | -     | -      | 1            | -     | -     | 1     |
| Hepatitis B - Acute                   | -         | -   | -   | -     | -              | -     | 1     | 1      | -            | -     | 2     | 2     |
| Hepatitis B - Chronic                 | -         | -   | -   | -     | 1              | -     | 1     | 2      | -            | 1     | -     | 1     |
| Hepatitis C - Acute                   | -         | 1   | -   | 1     | 3              | 2     | 2     | 7      | 2            | -     | 4     | 6     |
| Hepatitis C - Chronic                 | 2         | -   | -   | 2     | 15             | 5     | 5     | 25     | 16           | 14    | 25    | 55    |
| Hepatitis C Unknown                   | -         | 1   | -   | 1     | -              | 1     | -     | 1      | -            | -     | -     | -     |
| Histoplasmosis                        | -         | -   | -   | -     | -              | -     | -     | -      | -            | 1     | 1     | 2     |
| HIV/AIDS                              | -         | -   | -   | -     | -              | -     | -     | -      | 2            | -     | -     | 2     |
| Impetigo                              | -         | -   | -   | -     | 10             | 3     | 4     | 17     | 7            | 3     | 18    | 28    |
| Influenza                             | -         | -   | -   | -     | -              | -     | -     | -      | 205          | 644   | 87    | 936   |
| Legionellosis                         | -         | -   | -   | -     | -              | -     | -     | -      | -            | 2     | 1     | 3     |
| Lyme Disease                          | -         | 1   | -   | 1     | -              | 1     | -     | 1      | 1            | -     | 5     | 6     |
| Menengitis - Aseptic                  | -         | -   | -   | -     | -              | -     | -     | -      | 1            | -     | -     | 1     |
| Mononucleosis                         | -         | 1   | 1   | 2     | 3              | 4     | 5     | 12     | 6            | 9     | 19    | 34    |
| Mycobacterium - Other                 | -         | -   | -   | -     | -              | 2     | 1     | 3      | -            | 3     | 3     | 6     |
| Norovirus                             | -         | -   | -   | -     | -              | 1     | 1     | 2      | -            | -     | 1     | 1     |
| Novel Coronavirus                     | 220       | 239 | 339 | 798   | 4,182          | 4,025 | 5,392 | 13,599 | 132          | 176   | 128   | 436   |
| Pertussis                             | -         | -   | -   | -     | -              | -     | -     | -      | -            | 1     | 2     | 3     |
| Pink Eye                              | 1         | 1   | 5   | 7     | 12             | 12    | 32    | 56     | 120          | 57    | 173   | 350   |
| Q Fever                               | -         | -   | -   | -     | -              | -     | -     | -      | -            | -     | 1     | 1     |
| Salmonellosis                         | 1         | -   | 1   | 2     | 5              | 1     | 2     | 8      | 3            | 4     | 2     | 9     |
| Scabies                               | -         | -   | -   | -     | 6              | -     | -     | 6      | 2            | 2     | 4     | 8     |
| Shiga Toxin-prod. (STEC)              | -         | 1   | -   | 1     | -              | 1     | -     | 1      | 2            | 4     | 2     | 8     |
| Shigellosis                           | -         | -   | -   | -     | -              | -     | -     | -      | -            | -     | 2     | 2     |
| Shingles                              | -         | -   | -   | -     | -              | -     | -     | -      | 2            | 1     | 1     | 4     |
| Staphylococcus Aureus Infect.         | -         | -   | -   | -     | -              | -     | -     | -      | -            | -     | -     | -     |
| Strep Invasive Gp A                   | -         | -   | -   | -     | -              | -     | 1     | 1      | 4            | 3     | 4     | 11    |
| Strep Pneumonia Inv Ds.               | -         | -   | 1   | 1     | 1              | 1     | 4     | 6      | 3            | 2     | 3     | 8     |
| Strep Throat                          | 29        | 13  | 27  | 69    | 154            | 102   | 184   | 440    | 312          | 288   | 424   | 1,024 |

**Branch-Hillsdale-St. Joseph Community Health Agency**  
**Environmental Public Health Services**  
**Report for the June 24, 2021 Board of Health Meeting**  
**Prepared by Paul Andriacchi R.E.H.S, Director of Environmental Health**

### **Food Service Sanitation**

As we are conducting our routine food service establishment inspections our staff has been encouraging the owners and managers to get their staff vaccinated for Covid 19. The current guidelines allow food workers to work without a mask if they are fully vaccinated. The owners and managers are responsible for checking with their workers to ensure they are vaccinated if they are not wearing a mask. We were informed during a recent teleconference with MIOSHA that restaurant operators can ask for proof of vaccination without risk of violating HIPPA regulations.



We have noticed a significant decline in the number of complaints related to the Covid-19 restrictions in the recent weeks. On July 1, the mask requirement is scheduled to be lifted by MDHHS, however, we are not clear if MIOSHA is going to follow suit for restrictions in the workplace.

### **Well and Septic Program**

The general field staff work related to well and septic services has risen dramatically this fiscal year. The total number of services we have provided in those two programs for the first eight months of the fiscal year has risen from 1159 (2019-2020) to 1575 (2020-2021). This translates to an increase of just under 36%. When compared to the previous fiscal year (a non-Covid year), the percent increase is even higher at 40% (1125 total services). Our sanitarians are working very hard to keep up with the pace of service requests but our turn around time is currently running about 3 weeks from the time of application. The lead time could increase in the coming weeks as our seasonal inspections (campgrounds, swimming pools, children's camps and septic haulers) all need to be completed in the next month or two as well.

### **General Programs**

The two Senate Bill (353 & 354) that proposed the waiver of all food establishment license fees has stalled out at this point. Our legislative liaison in MALEHA, reported that the legislators have been busy with budget issues and that many of them have realized the financial implications of the bills to local public health department budgets. The bills are not necessarily dead but have at the very least been put on the back burner.

## EH Service Statistics Report

### BRANCH - HILLSDALE - ST. JOSEPH COMMUNITY HEALTH AGENCY

#### ENVIRONMENTAL HEALTH SERVICE REPORT 2020/2021

|   | MAY |    |    |       | YTD 2020/2021 |     |     |       | YTD 2019/2020 |     |     |       |
|---|-----|----|----|-------|---------------|-----|-----|-------|---------------|-----|-----|-------|
|   | BR  | HD | SJ | TOTAL | BR            | HD  | SJ  | TOTAL | BR            | HD  | SJ  | TOTAL |
| <b>WELL/SEWAGE SYSTEM EVAL.</b>           | -   | -  | -  | -     | 2             | 2   | 5   | 9     | 4             | 1   | 7   | 12    |
| <b>CHANGE OF USE EVALUATIONS - FIELD</b>  | 2   | 3  | 6  | 11    | 24            | 34  | 27  | 85    | 19            | 28  | 16  | 63    |
| <b>CHANGE OF USE EVALUATIONS - OFFICE</b> | 9   | 5  | 14 | 28    | 46            | 27  | 84  | 157   | 43            | 12  | 20  | 75    |
| <b>ON-SITE SEWAGE DISPOSAL</b>            |     |    |    |       |               |     |     |       |               |     |     |       |
| PERMITS NEW CONSTRUCTION                  | 9   | 10 | 9  | 28    | 32            | 56  | 53  | 141   | 19            | 27  | 50  | 96    |
| REPAIR/REPLACEMENT                        | 13  | 10 | 16 | 39    | 60            | 40  | 107 | 207   | 36            | 29  | 62  | 127   |
| VACANT LAND EVALUATION                    | 1   | 2  | 1  | 4     | 10            | 14  | 11  | 35    | 2             | 9   | 13  | 24    |
| PERMITS DENIED                            | -   | -  | -  | -     | -             | -   | 3   | 3     | -             | -   | 1   | 1     |
| TOTAL                                     | 23  | 22 | 26 | 71    | 102           | 110 | 172 | 386   | 57            | 65  | 126 | 248   |
| <b>SEWAGE PERMITS INSPECTED</b>           | 8   | 14 | 18 | 40    | 62            | 77  | 124 | 262   | 50            | 59  | 65  | 174   |
| <b>WELL PERMITS ISSUED</b>                | 16  | 23 | 17 | 56    | 122           | 115 | 133 | 370   | 84            | 86  | 153 | 323   |
| <b>WELL PERMITS INSPECTED</b>             | 7   | 12 | 5  | 24    | 98            | 99  | 109 | 306   | 60            | 66  | 138 | 264   |
| <b>FOOD SERVICE INSPECTION</b>            |     |    |    |       |               |     |     |       |               |     |     |       |
| PERMANENT                                 | 23  | 17 | 16 | 56    | 171           | 148 | 216 | 553   | 112           | 138 | 174 | 424   |
| NEW OWNER / NEW ESTABLISHMENT             | 1   | -  | 3  | 4     | 3             | 4   | 5   | 12    | 6             | 3   | 5   | 14    |
| FOLLOW-UP INSPECTION                      | 1   | 1  | 1  | 3     | 5             | 2   | 5   | 16    | 6             | 1   | 7   | 14    |
| TEMPORARY                                 | 4   | 2  | 9  | 15    | 5             | 11  | 33  | 49    | 4             | 11  | 18  | 33    |
| MOBILE/STFU                               | 1   | 2  | 5  | 8     | 1             | 3   | 19  | 23    | -             | -   | 7   | 7     |
| PLAN REVIEW APPLICATIONS                  | 1   | -  | 2  | 3     | 5             | 3   | 6   | 14    | -             | -   | 1   | 1     |
| FOOD RELATED COMPLAINTS                   | -   | 2  | 1  | 3     | 8             | 31  | 10  | 43    | 8             | 8   | 9   | 25    |
| FOODBORNE ILLNESS INVESTIGATED            | -   | -  | 1  | 1     | -             | -   | 1   | 1     | 1             | -   | 1   | 2     |
| <b>FOOD CLASSES</b>                       |     |    |    |       |               |     |     |       |               |     |     |       |
| MANAGEMENT CERTIFICATION CLASS            | -   | -  | -  | -     | n/a           | n/a | n/a | n/a   | n/a           | n/a | n/a | -     |
| FOOD HANDLERS CLASS                       | -   | -  | -  | -     | n/a           | n/a | n/a | n/a   | n/a           | n/a | n/a | -     |
| <b>METH LAB REFERRALS</b>                 |     |    |    |       |               |     |     |       |               |     |     |       |
| METH LAB LETTERS SENT                     | -   | -  | -  | -     | -             | -   | -   | -     | -             | -   | -   | -     |
| <b>CAMPGROUND INSPECTION</b>              |     |    |    |       |               |     |     |       |               |     |     |       |
|   | -   | 3  | -  | 3     | -             | 3   | -   | 3     | -             | -   | -   | -     |
| <b>NON-COMM WATER SUPPLY INSP.</b>        |     |    |    |       |               |     |     |       |               |     |     |       |
|   | -   | 1  | 6  | -     | 4             | 7   | 11  | 15    | 8             | 12  | 14  | 34    |
| <b>SWIMMING POOL INSPECTION</b>           |     |    |    |       |               |     |     |       |               |     |     |       |
|   | 2   | 5  | 1  | 8     | 9             | 8   | 1   | 18    | 1             | 4   | -   | 5     |
| <b>PROPOSED SUBDIVISION REVIEW</b>        |     |    |    |       |               |     |     |       |               |     |     |       |
|   | -   | -  | -  | -     | -             | -   | -   | -     | -             | -   | -   | -     |
| <b>SEPTIC TANK CLEANER</b>                |     |    |    |       |               |     |     |       |               |     |     |       |
|   | 2   | -  | -  | 2     | 2             | -   | 4   | 6     | -             | -   | -   | -     |
| <b>DHS LICENSED FACILITY INSP.</b>        |     |    |    |       |               |     |     |       |               |     |     |       |
|   | -   | 2  | 2  | 4     | 3             | 21  | 18  | 42    | 6             | 29  | 16  | 51    |
| <b>COMPLAINT INVESTIGATIONS</b>           |     |    |    |       |               |     |     |       |               |     |     |       |
|   | 1   | -  | 1  | 2     | 3             | 18  | 6   | 27    | 1             | 4   | -   | 5     |
| <b>LONG TERM MONITORING</b>               |     |    |    |       |               |     |     |       |               |     |     |       |
|   | -   | -  | -  | -     | -             | -   | -   | -     | -             | -   | -   | -     |
| <b>BODY ART FACILITY INSPECTIONS</b>      |     |    |    |       |               |     |     |       |               |     |     |       |
|   | 1   | -  | -  | 1     | 4             | 3   | 4   | 9     | 2             | 3   | 2   | 8     |

# Inspection Type Count by County

For Date Range: 5/1/2021 - 5/31/2021 and Program: Food Service

| County     | Inspection Type             | Count |
|------------|-----------------------------|-------|
| Branch     | Consult                     | 2     |
|            | Follow-Up                   | 1     |
|            | Pre-opening/New             | 1     |
|            | Routine                     | 23    |
|            | STFU/Mobile                 | 1     |
|            | Temporary                   | 4     |
| Hillsdale  | Complaint                   | 2     |
|            | Follow-Up                   | 1     |
|            | Progress Note               | 1     |
|            | Routine                     | 17    |
|            | STFU/Mobile                 | 2     |
|            | Temporary                   | 2     |
| St. Joseph | Complaint                   | 1     |
|            | Follow-Up                   | 1     |
|            | Pre-opening/New             | 3     |
|            | Progress Note               | 1     |
|            | Routine                     | 16    |
|            | STFU/Mobile                 | 5     |
|            | Temporary                   | 9     |
|            | Total number of inspections | 93    |

# Inspection Type Count

For Date Range: 5/1/2021 - 5/31/2021 and Program: Food Service

| <b>Inspection Type</b>      | <b>Count</b> |
|-----------------------------|--------------|
| Complaint                   | 3            |
| Consult                     | 2            |
| Follow-Up                   | 3            |
| Pre-opening/New             | 4            |
| Progress Note               | 2            |
| Routine                     | 56           |
| STFU/Mobile                 | 8            |
| Temporary                   | 15           |
| Total number of inspections | 93           |

# Establishment Inspection Report

For Date Range: 5/1/2021 - 5/31/2021 and Program: Food Service

| Name  | Location     | Date      | Inspection Type | # P | # Pf | # P/Pf Fixed During Inspection | # Core |
|---|--------------|-----------|-----------------|-----|------|--------------------------------|--------|
| AMBASSADORS FOR CHRIST CHURCH                     | Three Rivers | 5/21/2021 | Routine         | 0   | 0    | 0                              | 0      |
| American Legion Post 196                          | Union City   | 5/12/2021 | Temporary       | 0   | 0    | 0                              | 0      |
| AMERICAN LEGION POST 360                          | READING      | 5/24/2021 | Routine         | 1   | 1    | 2                              | 0      |
| APPLEBEE'S # 8393                                 | COLDWATER    | 5/12/2021 | Routine         | 1   | 0    | 1                              | 3      |
| Bavarian Nut Tent                                 | Centreville  | 5/13/2021 | Progress Note   | 0   | 0    | 0                              | 0      |
| BIRD LAKE BIBLE SCHOOL                            | OSSEO        | 5/10/2021 | Routine         | 0   | 0    | 0                              | 0      |
| BRANCH AREA CAREERS CENTER                        | COLDWATER    | 5/13/2021 | Routine         | 0   | 0    | 0                              | 0      |
| Branch County Coalition Against Domestic Violence | Coldwater    | 5/28/2021 | Temporary       | 0   | 0    | 0                              | 0      |
| BURGER KING #13790                                | HILLSDALE    | 5/12/2021 | Complaint       | 0   | 0    | 0                              | 0      |
| BURGER KING #13790                                | HILLSDALE    | 5/17/2021 | Complaint       | 0   | 0    | 0                              | 0      |
| BURGER KING #13790                                | HILLSDALE    | 5/17/2021 | Routine         | 2   | 1    | 2                              | 3      |
| BURGER KING #13790                                | HILLSDALE    | 5/27/2021 | Follow-Up       | 0   | 0    | 0                              | 0      |
| CAMDEN-FRONTIER SCHOOL                            | Camden       | 5/11/2021 | Routine         | 0   | 0    | 0                              | 2      |
| Charcoal Grilling 101                             | Jones        | 5/1/2021  | Temporary       | 0   | 0    | 0                              | 0      |
| CITY OF COLDWATER-HERITAGE BALL DIAMOND           | COLDWATER    | 5/25/2021 | Routine         | 0   | 0    | 0                              | 0      |
| CLEMEN'S FOOD GROUP-AVI FOODSYSTEMS               | COLDWATER    | 5/25/2021 | Follow-Up       | 3   | 1    | 3                              | 0      |
| COLDWATER HIGH SCHOOL                             | COLDWATER    | 5/4/2021  | Routine         | 0   | 0    | 0                              | 0      |
| COLDWATER UNITED METHODIST CHURCH                 | COLDWATER    | 5/19/2021 | Routine         | 0   | 0    | 0                              | 0      |
| COLDWATER WINGS ETC                               | COLDWATER    | 5/25/2021 | Routine         | 0   | 0    | 0                              | 0      |
| Coldwater Youth Baseball/Softball                 | COLDWATER    | 5/25/2021 | Routine         | 0   | 0    | 0                              | 0      |
| COMMUNITY ACTION AGENCY (HEAD START)              | HILLSDALE    | 5/12/2021 | Routine         | 0   | 1    | 0                              | 0      |
| CONSTANTINE LITTLE LEAGUE                         | Three Rivers | 5/19/2021 | Routine         | 0   | 0    | 0                              | 0      |
| Dairy Queen                                       | Sturgis      | 5/20/2021 | Routine         | 1   | 0    | 0                              | 1      |
| DAVIS SIDEKICK CAFE                               | OSSEO        | 5/21/2021 | Progress Note   | 0   | 0    | 0                              | 0      |
| DENISE'S DINER                                    | Camden       | 5/11/2021 | Routine         | 0   | 1    | 1                              | 1      |
| DQ Grill & Chill                                  | Coldwater    | 5/12/2021 | Routine         | 0   | 0    | 0                              | 0      |

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| Name   | Location      | Date      | Inspection Type | # P | # Pf | # P/Pf Fixed During Inspection | # Core |
|--|---------------|-----------|-----------------|-----|------|--------------------------------|--------|
| DR. ROBERT W. BROWNE RECREATION CENTER       | COLDWATER     | 5/25/2021 | Routine         | 0   | 1    | 0                              | 0      |
| Eats at the Airport                          | Three Rivers  | 5/29/2021 | Temporary       | 0   | 0    | 0                              | 0      |
| EL CERRITO                                   | HILLSDALE     | 5/10/2021 | Routine         | 0   | 0    | 0                              | 1      |
| EL CERRITO MEXICAN RESTAURANT                | COLDWATER     | 5/25/2021 | Routine         | 0   | 1    | 0                              | 0      |
| El Sembrador LLC                             | Sturgis       | 5/6/2021  | Follow-Up       | 1   | 2    | 3                              | 1      |
| Elke's                                       | Constantine   | 5/26/2021 | Pre-opening/New | 0   | 0    | 0                              | 0      |
| Factoryville Bible Church                    | Athens        | 5/8/2021  | Temporary       | 0   | 0    | 0                              | 0      |
| GIRARD HEAD START BISD                       | COLDWATER     | 5/6/2021  | Routine         | 0   | 0    | 0                              | 0      |
| GIRARD UNITED METHODIST CHURCH               | COLDWATER     | 5/6/2021  | Routine         | 0   | 0    | 0                              | 0      |
| GREAT LAKES HEALTH & FITNESS                 | COLDWATER     | 5/19/2021 | Routine         | 0   | 0    | 0                              | 0      |
| Harvey House                                 | Constantine   | 5/21/2021 | Routine         | 0   | 0    | 0                              | 1      |
| Hawaiian Shaved Ice                          | Sturgis       | 5/21/2021 | Routine         | 2   | 4    | 1                              | 0      |
| HILLSDALE ACADEMY                            | HILLSDALE     | 5/14/2021 | Routine         | 0   | 0    | 0                              | 0      |
| HILLSDALE HIGH SCHOOL                        | HILLSDALE     | 5/7/2021  | Routine         | 0   | 0    | 0                              | 0      |
| HOT 'N NOW                                   | STURGIS       | 5/6/2021  | Routine         | 1   | 0    | 0                              | 0      |
| JEFFERSON ELEMENTARY SCHOOL                  | COLDWATER     | 5/4/2021  | Routine         | 0   | 0    | 0                              | 0      |
| JERRY PRICE FISKE - FRENCH FRIES - BRANCH CO | Brooksville   | 5/28/2021 | Temporary       | 0   | 0    | 0                              | 1      |
| JERRY PRICE FISKE - LEMONADE - BRANCH CO     | Brooksville   | 5/28/2021 | Temporary       | 0   | 0    | 0                              | 1      |
| Jonesville Fire Department                   | Jonesville    | 5/15/2021 | Temporary       | 0   | 0    | 0                              | 0      |
| JONESVILLE MIDDLE SCHOOL                     | JONESVILLE    | 5/4/2021  | Routine         | 0   | 0    | 0                              | 0      |
| Lakeland Elementary                          | Coldwater     | 5/13/2021 | Routine         | 0   | 0    | 0                              | 0      |
| Majoor's Concessions                         | Comstock Park | 5/7/2021  | STFU/Mobile     | 0   | 0    | 0                              | 0      |
| MaMazzoni's Italian Beef                     | Sturgis       | 5/28/2021 | STFU/Mobile     | 0   | 0    | 0                              | 0      |
| MARIA'S                                      | Sturgis       | 5/19/2021 | Routine         | 1   | 2    | 0                              | 2      |
| MARIA'S                                      | Sturgis       | 5/19/2021 | Complaint       | 0   | 1    | 0                              | 0      |
| MAX LARSEN ELEM SCHOOL                       | COLDWATER     | 5/4/2021  | Routine         | 0   | 0    | 0                              | 0      |
| MCDONALD'S-JONESVILLE                        | JONESVILLE    | 5/26/2021 | Routine         | 0   | 0    | 0                              | 1      |
| Micharepas Cafe                              | Coldwater     | 5/17/2021 | Consult         | 0   | 0    | 0                              | 0      |
| Micharepas Cafe                              | Coldwater     | 5/25/2021 | Pre-opening/New | 0   | 0    | 0                              | 1      |

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|---------------------------------------|--------------|-----------|-----------------|-----|------|--------------------------------|--------|
| Momma's Snack Shack                   | Three Rivers | 5/17/2021 | Pre-opening/New | 0   | 0    | 0                              | 0      |
| MONTGOMERY FIRE DEPARTMENT            | MONTGOMERY   | 5/29/2021 | Routine         | 0   | 0    | 0                              | 0      |
| MOOSE LODGE #677                      | COLDWATER    | 5/19/2021 | Routine         | 0   | 0    | 0                              | 0      |
| MYSTIC STAR #354/MASONIC TEMPLE       | BRONSON      | 5/18/2021 | Routine         | 0   | 0    | 0                              | 0      |
| NEW DRAGON EXPRESS                    | STURGIS      | 5/6/2021  | Routine         | 1   | 1    | 2                              | 0      |
| NEW YORK TACO                         | Hillsdale    | 5/17/2021 | Routine         | 0   | 1    | 1                              | 0      |
| Ohana Kalea Shave Ice LLC             | Howe         | 5/6/2021  | STFU/Mobile     | 0   | 0    | 0                              | 0      |
| Ol' Papp's Kettle Corn                | Coldwater    | 5/12/2021 | Routine         | 0   | 0    | 0                              | 0      |
| PANSOPHIA ACADEMY                     | COLDWATER    | 5/13/2021 | Routine         | 0   | 0    | 0                              | 0      |
| PIGHEADED BBQ                         | LEONIDAS     | 5/7/2021  | STFU/Mobile     | 0   | 0    | 0                              | 0      |
| PITTSFORD AREA SCHOOLS                | Pittsford    | 5/5/2021  | Routine         | 0   | 0    | 0                              | 0      |
| PREMIERE THEATRE/UNITED ENTERTAINMENT | Hillsdale    | 5/28/2021 | Routine         | 0   | 0    | 0                              | 0      |
| Refuge Coffee House LLC               | Quincy       | 5/19/2021 | Consult         | 0   | 0    | 0                              | 0      |
| Shafer Concessions                    | Sparta       | 5/28/2021 | STFU/Mobile     | 0   | 0    | 0                              | 0      |
| SOMERSET CONGREGATIONAL CHURCH        | SOMERSET     | 5/28/2021 | Routine         | 0   | 1    | 1                              | 0      |
| SOUTHWEST MICHIGAN SPEEDWAY           | White Pigeon | 5/12/2021 | Routine         | 0   | 0    | 0                              | 1      |
| Sozo Church of Hillsdale              | Hillsdale    | 5/20/2021 | Routine         | 0   | 0    | 0                              | 0      |
| St Joseph County United Way           | Sturgis      | 5/27/2021 | Temporary       | 0   | 0    | 0                              | 0      |
| ST. CHARLES SCHOOL                    | COLDWATER    | 5/13/2021 | Routine         | 0   | 0    | 0                              | 0      |
| ST. JOE VALLEY GOLF CLUB, INC.        | Sturgis      | 5/7/2021  | Routine         | 0   | 0    | 0                              | 1      |
| ST. JOHN'S EPISCOPAL CHURCH           | Sturgis      | 5/21/2021 | Routine         | 0   | 0    | 0                              | 0      |
| St. Joseph Co United Way @ Remax      | Centreville  | 5/12/2021 | Temporary       | 0   | 0    | 0                              | 0      |
| St. Joseph County United Way          | Centreville  | 5/7/2021  | Temporary       | 0   | 0    | 0                              | 0      |
| STINGER'S GRILL & BAR                 | BRONSON      | 5/18/2021 | Routine         | 1   | 1    | 2                              | 0      |
| STREET DOGS                           | Hillsdale    | 5/20/2021 | STFU/Mobile     | 0   | 0    | 0                              | 0      |
| SUPER 8: Food                         | Three Rivers | 5/4/2021  | Routine         | 0   | 0    | 0                              | 0      |
| Tacos Guernense's                     | Constantine  | 5/14/2021 | Temporary       | 0   | 0    | 0                              | 0      |
| Tacos Guernense's                     | Constantine  | 5/28/2021 | Temporary       | 0   | 0    | 0                              | 0      |
| Taqueria El Tejano                    | Three Rivers | 5/4/2021  | Temporary       | 0   | 0    | 0                              | 0      |

| Name                                     | Location     | Date      | Inspection Type | # P | # Pf | # P/Pf Fixed During Inspection | # Core |
|--|--------------|-----------|-----------------|-----|------|--------------------------------|--------|
| Taqueria El Tejano                       | Three Rivers | 5/21/2021 | STFU/Mobile     | 0   | 0    | 0                              | 0      |
| The Coney Cart                           | Osseo        | 5/12/2021 | STFU/Mobile     | 0   | 0    | 0                              | 0      |
| THREE RIVERS HIGH SCHOOL                 | THREE RIVERS | 5/4/2021  | Routine         | 0   | 0    | 0                              | 1      |
| Three Rivers Life Skills Center          | Three Rivers | 5/19/2021 | Routine         | 1   | 0    | 1                              | 0      |
| THREE RIVERS LITTLE LEAGUE CONSTANTINE F | Three Rivers | 5/26/2021 | Pre-opening/New | 0   | 0    | 0                              | 0      |
| THREE RIVERS MIDDLE SCHOOL               | Three Rivers | 5/4/2021  | Routine         | 0   | 0    | 0                              | 0      |
| VETERANS FOREIGN WARS                    | STURGIS      | 5/21/2021 | Routine         | 0   | 0    | 0                              | 0      |
| WILLOWS BAR & GRILL                      | COLDWATER    | 5/4/2021  | Routine         | 0   | 0    | 0                              | 0      |
| WOODBIDGE TOWNSHIP FIRE DEPT             | Hillsdale    | 5/29/2021 | Temporary       | 0   | 0    | 0                              | 0      |

**Food Inspection Codes:**

P-This indicates a priority violation which is a violation which includes a quantifiable measure to show control of hazards such as cooking, cooling, reheating and handwashing. It is in general terms a violation that can potentially lead directly to an illness.

Pf-This is a priority foundation violation which is a violation that supports a priority violation. For example, the lack of soap or towels at a handwash sink is a Pf. This supports the priority violation of not washing hands.

C-This is a core violation-This is an item the usually relates to general sanitation, operational controls and maintenance of facilities and equipment.