



SeniorResources 
Area Agency on Aging
Serving Muskegon, Oceana and Ottawa Counties

ANNUAL REPORT 2022

Our Mission

To provide a comprehensive and coordinated system of services designed to promote the independence and dignity of older persons and their families in Muskegon, Oceana and Ottawa counties—a mission compelling us to focus on older persons in greatest need and to advocate for all.

Fiscal Year 2022 - October 1, 2021 - September 30, 2022



Pam Curtis, CEO

CEO Report

“It matters not how long we live but how.”

– Philip James Bailey

Every May is Older Americans Month. Each year, the Administration for Community Living announces a theme for the celebratory month. In 2022, it was **Age My Way**, described as “an opportunity for all of us to explore the many ways older adults can remain in and be involved with their communities.”

I really do love that theme, as it is what we at Senior Resources wish for all older adults – to recognize the many ways older people stay involved and remain in the living setting of their choice.

During this past fiscal year, we continued to adapt to the multiple changes brought on by the 2020 pandemic. We were pleased and relieved to see our participants in person again. Many of our participants and Supports Coordinators had never met in person as assessments were conducted telephonically and virtually during the height of the pandemic. While conducting visits, supports coordinators develop relationships with participants and their families, determine in-home service needs, and address and provide interventions related to safety issues, caregiving, and social isolation. To better illustrate the importance, I share this from a staff member at Evergreen Commons, one of our valued partners:

I think the biggest impact I've seen in the last 6 months is resuming in-person visits. There is just no substitute for meeting a participant face to face in their home. The building of trust that happens when you meet someone in their own space, listening to their story and offering to walk alongside them. And the information that just can't be relayed through a phone call - the overflowing trash can, peeling paint and dripping faucets that they no longer see because there are so many other things to worry about. So much more can be observed - their skin pallor and condition, their gait and mobility, the list goes on. Our program is so valuable and needed because of these things. – Suzanne Visser, Evergreen Commons

Throughout this annual report you will see so many more examples of the good work done through and within our agency – allowing older adults to age their way, in their own homes, on their own terms, with a little – and sometimes a lot of – help.

Some of our staff, along with AgeWell Services and LifeCircles PACE, tackled the topic of ageism with a collective book read from April-June. This Chair Rocks: A Manifesto against Ageism, by Ashton Applewhite, gave us new insights and great discussions about the prevalence of ageism. Our country has tackled many “isms,” but ageism is still prevalent, and acceptable by many. We ended with a Zoom session with the author. A few takeaways: ageism can impact people at any age (‘you’re too young to know that’ is also ageist). Think about how we use the words ‘old’ and ‘young’ – break the habit of using ‘old’ as a negative term. Unlearning is hard; a lifetime of internalized bias is hard to combat. You can learn more at thischairrocks.com, watch her TedTalk, and visit oldschool.info, an anti-ageism clearinghouse. Ashton Applewhite is absolutely aging her way.

Another highlight for our agency: being named one of West Michigan’s Best and Brightest Companies to Work for in 2022! This honor involved a staff survey and an assessment by an independent research firm of multiple data points such as compensation, benefits, wellbeing solutions, employee enrichment, engagement, retention, education, recognition, work-life blend, and more. This comprehensive process took quite a bit of time, but it was a great opportunity to assess what we were doing well and gain some ideas through the questions we addressed. We plan to continue this process in the future.

The theme for Older Americans Month 2023 will change, but as area agencies on aging and Senior Resources turn 50 over the next year, I assure you that **Age My Way** will continue to be our commitment to older adults. Person-centered. Dignity and independence. Helping people remain in their own homes. These are our values and commitments every day of every year.

Pam Curtis

Pam Curtis, CEO



AREA PLAN AND PROGRAM DEVELOPMENT

- Increased the availability of adult day services throughout the region with an emphasis on reducing social isolation through the use of supplemental funding.
- Held 11 public input sessions throughout the region, disseminated an electronic survey, and conducted a survey in Senior Perspectives to obtain information for the Multi Year Area Plan.
- Gained approval from the Michigan Commission on Services to the Aging for the FY23 Annual Implementation Plan and the FY23-25 Multi Year Area Plan.

+33%
Loaned Items

ACCESS TO SUPPORTS AND SERVICES

8,508 medical loan closet items given to community members. Estimated value \$137,102.

7,800 Loan Closet donations received. Estimated value of \$124,184.

Enrolled 838 people in an Access Program.

Veterans Directed Care resumed home visits, received nine referrals with seven participants enrolling for a total of 17 current participants.

Opened
38
Cases

LONG TERM CARE OMBUDSMAN

Resumed quarterly in person visits and completed 22 in-person visits to long term care facilities.

Resumed attendance at resident council meetings to reacquaint residents with ombudsman services.

Began participation in the Elder Death Review Team.

Fielded 27 information and assistance calls.

190
In-Person
Contacts

OPTIONS COUNSELING

15,626 calls or contacts made or received.

Resumed walk-in and in home counseling options for callers.

Family/friend was top identified referral source.

+147%
Trualta
Users

CAREGIVER SUPPORT

Resumed and began in-person caregiver support groups by two full-time Caregiver Support Specialists throughout the region: Oceana, Northern Muskegon County, Muskegon, Coopersville, Jenison, Northern Ottawa County, and Holland (provided through contract with Evergreen Day Center).

74 registered users to seniorresources.trualta.com. Trualta is a free online resource for caregivers.

“Aging is not ‘lost youth’ but a new stage of opportunity and strength.”

— Betty Friedan

FY22 Review

+54%
Beneficiaries
Served

MEDICARE/MEDICAID ASSISTANCE PROGRAM (MMAP)

3,152 beneficiaries served by region's 35 trained MMAP counselors on a one-to-one basis. 37.7% estimated to be low-income. 54.8% returned contacts.

\$1,244,521 savings* received by beneficiaries through MMAP counselor assisted plan changes.

75,161 consumers reached by MMAP through speaking engagements, newspaper articles or ads and outreach events.

MMAP counselors provided 1,883 hours of service.

Assisted with: 69 Part D Plans, 280 Medicare Advantage Plans, 35 Low Income Subsidy Applications, and 33 Medicare Savings Program Applications.

**Larger increase due in-part to WellCare no longer providing services in Muskegon County*

+73%
Patients
Enrolled

PRIMARY CARE AT HOME

232 patients enrolled in program.

1,053 home visits.

\$297,499 in program revenue.

1,431 hours of patient contact and care management.

Established Dr. Mike Borgeld as new Medical Director.

On-boarded Jennifer Wheeler NP to medical team.

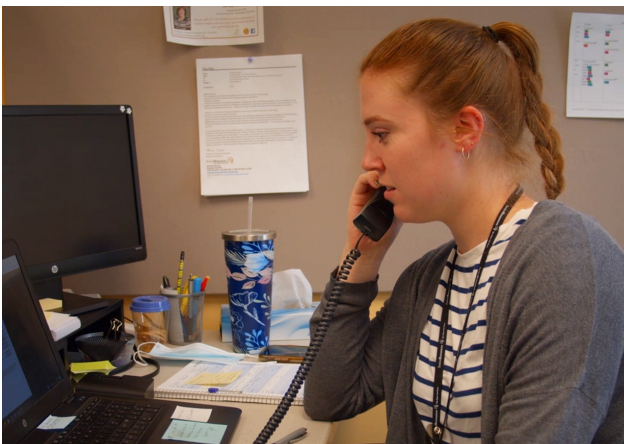
De-prescribed controlled substances.

244 hours of behavioral health counseling services provided to patients in the home.

Patient hospital utilization averaged 3% per month.

An average of 6% of patients visited an emergency department each month.

Presented program information for USAging national conference and Business Institute.



Options Counselor, Dana Fields



Primary Care at Home patient with Nurse Practitioner, Koren Gebben



+6%
Participants

MI CHOICE WAIVER

1,322 participants received MI Choice Waiver services.

Ranked fourth of 20 MI Choice agents in the state, including first in encounter data and first in timely reporting.

Worked collaboratively with our provider network to combat the direct care worker shortage.

Collaborated with Hackley Community Care for virtual counseling sessions for participants.

Created procedures and instructions for supports coordinators to resume in-person visits.

Certified 32 employees in adult/child/infant CPR/AED.

Facilitated several advance care planning participant meetings to support their preferences and promote quality of life.

Waiver Performance Improvement Initiatives

Reduce Prevalence of Participant Falls to < 23%.

10/1/21 Baseline = 27.05% 3/31/22=28.2% 9/30/22=23.4% FY 22=25.8%

Increase Senior Resources MI Choice Waiver participants who have completed written Advance Directives on file and distributed appropriately to necessary entities by 10%.

10/1/21 Baseline %=39% 9/30/22 = 41%

The leadership and quality team will strive to implement strategies and interventions to satisfy the requirements. Both initiatives and goals will continue for FY 2023.

+9.6%
Assistance to
Individuals

UNMET NEEDS FUND

The fund assists vulnerable adults age 60 and older who fall short for government-supported assistance and whose limited income prevents purchasing needed personal items or home repairs. When needed, the fund is used to purchase bulk supplies for the medical loan closet. The fund comes from interest income, memorial gifts, and private contributions, and is usually funding of last resort.

91 individuals received assistance with dental services, lift chairs, medical equipment and supplies, linens, mattresses, air conditioners, vacuum cleaners, humidifiers. A total of \$47,845 spent for unmet needs.

197
People/Families
Assisted

HOUSING COORDINATION

68 people placed and secured in Assisted Living communities.

12 people placed and secured in Independent living apartments.

Pursued Assisted Living for those who required more help with daily living care than provided in their own home. Assisted others to secure safe, affordable housing that would allow them to remain in the community, living as independently as possible. Housing challenges remain due to limited affordable living communities and caregiver shortage that affect the older adult population and the Assisted Living homes.

FY22 Review

+20%
Circulation

COMMUNICATIONS / MARKETING

Senior Perspectives newspaper circulation is currently 18,000. Won 16 North American Mature Publishers Association awards, reduced paper waste, and saw continuous ad sales growth.

Doubled Dementia Friends participants to 49.

Began twice-monthly video series for Muskegon County Senior Millage.

Developed and executed integrated marketing strategy for agency brand and vaccine grant.

19
New
Employees

HUMAN RESOURCES

Onboarded 19 new employees, and offboarded 30 former employees (most due to transfer of a program to outside the organization).

Created a benefit survey for staff, in conjunction with the Employers Association.

Conducted survey and secured recognition of “Best and the Brightest Companies to Work For” status.

WHAT IS YOUR WHY? WHY DO YOU DO THIS WORK?

As part of our strategic planning last fall, we asked Senior Resources staff members that all important question. Here are a few of their responses presented anonymously:

I enjoy the fact that I can make a difference and help people remain in their own home and live the quality of life that they want.

Everybody needs an advocate, somebody that is on their side. Quite frequently I believe that I am the only one that is on my clients' side, no matter what.

Get up each day and make an impact in at least one person's life.

To provide health care to under served populations, thereby improving the health of individuals and the community.

I come to work at Senior Resources everyday because I am a part of the best team and I make differences in the lives of our participants and their families.



Senior Resources team at staff retreat

Grant Funded Services



As one of 16 Michigan Area Agencies on Aging, we are awarded Older Americans Act (OAA) and Older Michiganians Act (OMA) funds and then grant those funds to organizations serving Muskegon, Oceana, and Ottawa counties. The following organizations received grant funding in FY22:

- AgeWell Services
- Alzheimer's Association - Greater Michigan Chapter
- Community Access Line of Lakeshore
- Evergreen Commons
- Four Pointes
- Golden Sands Golf Course
- Hackley Community Care Center
- Lakeside Rehabilitation
- Legal Aid of Western Michigan
- Oceana County Council on Aging
- Ottawa Food
- The Little Red House

In FY22, Senior Resources also received funding through the Bureau of Aging, Community Living, and Supports made available by the American Rescue Plan Act and administered a mini-grant program. A total of \$108,988 was awarded to the following organizations:

- AgeWell Services
- Community Access Line of Lakeshore
- Evergreen Commons
- Four Pointes
- Golden Sands Golf Course
- Oceana County Council on Aging
- The Little Red House

Service Category:	Impact	Participants Served
Adult Day Services Provides participants with care and activities in a safe environment while providing relief for caregivers	2,857 hours	30
Caregiver Support & Training Identifies, prevents, and provides support and training to family caregivers	431 sessions/hrs	202
Case Coordination Assess, develop and monitor an individual plan of service and arrange and evaluate these services	2,843 hours	303
Congregate Meals Healthy, nutritious meals served in a group setting to adults 60+	65,038 meals	1,124
Elder Abuse Prevention Public education and outreach to help prevent abuse, neglect, and exploitation	395 hours	710*
Friendly Reassurance Regular phone calls to homebound older adults providing wellness checks and socialization	2,350 contacts	59
Health Promotion Training and education to assist seniors in avoiding illness and improving their health	424 sessions	502*
Home Delivered Meals Low-cost, nutritious meals delivered to people who are challenged to prepare their own meals	174,869 meals	1,511
Information and Assistance Connects individuals to service providers that address their needs	3,945 hours	7,889
Kinship Care Support for relatives who step up to raise children or grandchildren	134 sessions/hrs	27
Legal Services Protects legal rights through education, advocacy, counseling, and legal assistance	702 hours	356
Transportation Access services, reduce isolation, and promote independent living through assisted/public transportation	12,420 rides	520
TOTAL PARTICIPANTS SERVED		13,233*

*Participant count may be duplicated numbers. Muskegon County Senior Millage grants are not included.

In-Home Care Coordination by the Numbers

Our provider network is the foundation of our organization allowing us to deliver support to the older adults and those living with disabilities in our region. We thank them and appreciate their partnership. A nationwide shortage of direct care workers providing hands-on care continues. We will continue to advocate for improvements at the local, state, and national levels.

Senior Resources' Nurses and Social Workers Provided:		Impact
Care Management Services		156 participants
An assessment of a person's living situation for those who do not financially qualify for the MI Choice Waiver program		
Case Coordination Services		350 participants
Assess, develop and monitor an individual plan of service and arrange and evaluate these services		
MI Choice Waiver Services		1,322 participants
For those who meet a nursing home level of care but choose to remain in their own homes or community-based setting of their choice, provides a wide variety of home and community-based services managed by nurses and social workers: Paid by Medicaid.		
Nursing Home Transition Services		169 participants
Assistance for residents living in a skilled nursing care facility who wish to return to community-based living.		
Veterans Services		23 participants
Additional programs and services to allow veterans to live at home rather than in a nursing home		
Senior Millage Services		148 participants
Programs funded through the Muskegon County Senior Millage; including community living supports, homemaker services, medication management, personal care, emergency response systems and respite care		
Caregiver Support Services		77 participants
Additional programs and services to allow veterans to live at home rather than in a nursing home		
Purchased In-Home Services		
Adult Day Care		12,302.75 hours
Provides participants with care and activities in a safe environment while providing relief for caregivers		
Home Delivered Meals		53,934 meals served
Nutritious meals delivered to people who, through assessment, are challenged to prepare their own meals		
Homemaker		6,995.75 hours
Maintains a healthy living through tasks like laundry, meal preparation, light housekeeping, and shopping		
Personal Care/Homecare		441,451 hours
Help with bathing, dressing, toileting, eating, transferring, and more		
Respite Care (in & out of home)		5,906 hours
Provides companionship, supervision and/or help with activities of daily living in absence of caregiver		
Nursing, Counseling/Training & Med Mgmt		27,404 hours
Help with setting up and monitoring medications		
Transportation		12,155 trips / 33,303 miles
Help access services, reduce isolation, and promote independent living through assisted or public transportation		22 bus passes
Chore Services		2,370 hours
Tasks to increase safety and independence, like snow removal and yard maintenance for those who can't perform or pay		
Medical Supplies & Equipment (Per Piece / Supply Provided)		90,991
Equipment and supplies needed to help keep older adults safely in their homes		
Emergency Response Systems (Monthly Monitoring)		784 participants
Electronic devices that monitor participant safety and give access to crisis intervention and monthly monitoring		
Home Repair/ Modification/ Environmental Aid (Per Service / Supply Provided)		44
Assessment of a residence and environment to identify barriers, with a plan to make needed repairs/modifications		
Community Support Services - Residential Care		65,858 days
Help participants accomplish tasks they could not normally do, beyond support provided by the residential setting		
Fiscal Intermediary Services		46 participants
A person or organization that pays bills on behalf of a participant		

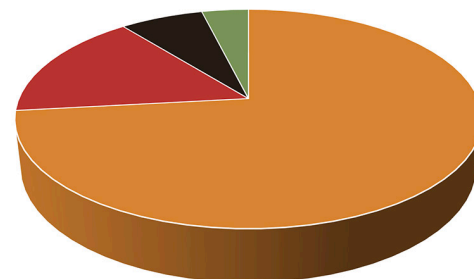
FY22 Financial Overview



Summary Statement of Activities

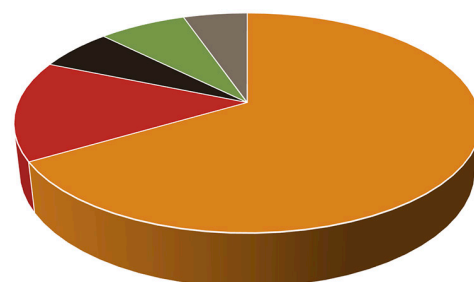
Revenue

MI Choice Waiver Program	\$ 23,933,381	73.2%
Aging Programs	\$ 5,232,507	16%
Muskegon County Senior Millage	\$ 2,248,238	6.9%
Other Revenue, Net	\$ 1,262,072	3.9%
Total Revenue & Support	\$ 32,676,198	100.0%



Expense

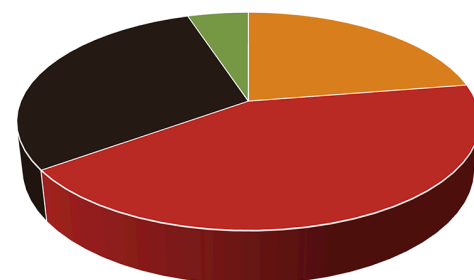
MI Choice Waiver Program	\$ 22,095,048	66.4%
Aging Programs	\$ 4,898,659	14.8%
Muskegon County Senior Millage	\$ 2,050,438	6.2%
Other Programs and Services	\$ 2,405,521	7.2%
Total Program Expense	\$ 31,449,666	94.7%
Administrative, Management, and non-Service Expense	\$ 1,757,310	5.3%
Total Expense	\$ 33,206,976	100.0%



Summary Statement of Financial Position

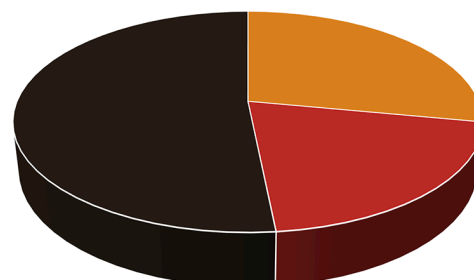
Assets

Cash	\$ 2,033,045	22.5%
Investments	\$ 3,848,102	42.6%
Grants & Other Receivables	\$ 2,700,469	29.9%
Other Assets, Net	\$ 458,386	5.1%
Total Assets	\$ 9,040,002	100.0%



Liabilities and Net Assets

Payables	\$ 2,531,468	28%
Other Liabilities	\$ 1,845,533	20.4%
Unrestricted Net Assets		
Beginning of year	\$ 5,193,779	
Change in Net Assets	\$ (530,778)	
End of year	\$ 4,663,001	51.5%
Total Liabilities & Net Assets	\$ 9,040,002	100.0%



NOTE: Financial Statement audit conducted by Plante Moran, PLLC

See the complete audited financial statements at <https://seniorresourceswmi.org/our-agency/>

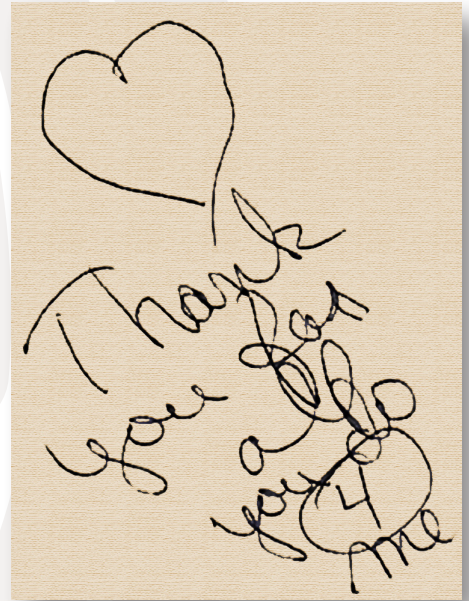
Participant Stories

Doris is almost 90, and while she can “still get up and do” she has bad knees that make it challenging for her to do some cleaning. She thanks the Case Coordination and Support program at Senior Resources – and especially her Supports Coordinator Maria – for helping her stay in her own home.

The Muskegon Heights resident has used the Case Coordination and Support program for about 10 years. Her late husband had been a participant with Senior Resources, and when he passed, she joined the program. “They are helping me with housework,” Doris said of the program. “They help with the floors, dusting, cleaning the bathtub. I can’t get on my knees to clean the bathtub or behind the toilet, but I still do what I can. I still get up and do – go to church, the store...”

“It’s a gift.”

Having Maria as her supports coordinator has been “a blessing,” Doris said. “Sometimes she just sits and talks, and I feel so much better when she leaves. Maria is a godsent young lady. I can’t describe how wonderful she is. It’s a gift.”



Charlie is an Army veteran and a participant in the MI Choice Waiver program. He also gets assistance from the Veterans Administration; the Waiver program helps fill gaps in services and provides peace of mind for his wife Mary.

Charlie receives a Personal Emergency Response System (PERS) help button, which has been used when Charlie falls. “I know he’s safe if I have to leave because of the help button,” Mary said. “He tends to not listen and does do things he’s not supposed to do.” Like picking up something from the floor. “He says he didn’t want to bother someone,” she notes with a sigh. “I tell him it’s easier to pick it up from the floor than to pick him up!”

Supports Coordinator Toni has also been an advocate for Charlie when needed during his almost six years in the Waiver program. When there was an issue covering a personal care aide through the VA, Toni went to bat and arranged help through the Waiver program. A week later the VA approved the service, but Toni ensured there wasn’t a gap in the service, Mary said.

Toni reports that the PERS gives Charlie and Mary peace of mind in the event of an emergency; supports coordination “gives them both the assurance that if they have an increased need they only have to call and we will work it out together. It provides her someone to talk things through with on a monthly basis and assurance that if Charlie requires something more, Waiver can assist with that.”

Mary appreciates that help. “If I have questions or concerns, that office is always there,” Mary said. “It’s not always Toni. If she isn’t available, anybody else has always been helpful. If they couldn’t help at that moment, they let me know they will call back – and they DO. It’s not just a phrase.” Senior Resources is “absolutely” a resource when she needs help, Mary said. “I’m grateful for the help it gets him and the backup we have.”

“If I have questions or concerns, that office is always there.”

“Charlie is a very sweet man,” Toni noted. “In the event that he should decline and need more services in the home, such as increased Community Living Supports, the Waiver program will be able to step in and provide that for him/them.”



Team Building



2022 Purchase of Service Providers

A New Beginning
 A&J Total Care, LLC
 Advatage Ramp and Home Modification
 Aegin Place of West Michigan, LLC
 Agape Home at Blueberry Fields
 Agape Home, Inc.
 AgeWell Services of West Michigan
 AgeWell Services – Transportation Div.
 AH Jenison Subtenant LLC
 Airway Oxygen, Inc. – Muskegon
 Alliance Home Health Care Services, Inc.
 Appledorn Assisted Living Center
 Arcadia Home Health Care and Staffing
 Bedside Buddies
 Care Plus TLC
 CareLinc
 Cherry Blossom Manor, Inc.
 Christian Care Senior Care Community
 Christian Haven
 Christian Haven Home
 Comfort Keepers
 Connect America.com LLC
 Continuum Home Health Care
 Daybreak Adult Services, Inc.
 Dayspring Assisted Living and In Home
 Elders' Helpers
 Endless Compassion Services
 Evergreen Commons
 Families Manor
 Fountain View Assisted Living
 Four Pointes Center for Successful Aging
 Freedom Transit, Inc.
 Functional Homes, Inc.
 Georgetown & Cambridge Manors
 Golden Years Personal Care Home, LLC
 Good Samaritans Medical Transport
 Grand Pines Assisted Living Center
 Great Lakes Home Care
 Services-Lakeshore
 Great Lakes Home Modification, LLC
 Green Acres Standale
 GT Independence
 Guardian Medical Monitoring
 Hallstrom Castle Assisted Living
 Happier at Home

Health Care Associates
 Heart and Hands In Home Care
 Help at Home of Michigan
 Home Care Assistance of Michigan
 Homestyle Direct, LLC
 Interim Healthcare of West Michigan
 Kate's Transportation
 Kidbit Services Inc.
 King Home
 Lakeshore Assisted Living Homes
 Lakeshore Home Health Care Services
 Lakeshore Senior Care
 Leaves Personal Care
 Love I.N.C. of Muskegon County
 Martell & Company Home Care
 and Assistance
 MedScope America Corporation
 MI Life Transport
 Mom's Meals Nourishcare
 Northcrest Assisted Living Community
 Oceana County Council on Aging
 O'Malley's Pest Control, Inc.
 Pampered Auto Transportation
 Pinewood Retirement Home
 Professional Med Team
 Ready Ride Transportation
 Resource Transportation
 Resthaven Maple Woods
 Robbinswood Assisted Living Community
 Roskam, Pete
 Rural Home Care Services, Inc.
 Sanctuary at the Oaks
 SarahCare at Metro Health Village
 Seminole Shores Assisted Living Center
 Sheldon Meadows Assisted Living Center
 Spring Lake Compassionate Living
 St. John's Health Care, PC
 Stuart T. Wilson CPA, PC
 Sunset at Home
 The Hume Home of Muskegon
 The Little Red House, Inc.
 Twin Lake Assisted Living
 VRI
 Water's Edge
 West Shore Medical Personnel Service

Muskegon County Senior Millage grants are not included.

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*Filled a partial term



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