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**BOARD OF HEALTH Meeting**  
**Agenda for July 27, 2023 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 from June 22, 2023\*
2. Presentation - 2022 Actuarial Valuation Report, Marne Daggett, MERS Lead Regional Mgr
3. Public Comment
4. Health Officer's Report – pg 36
5. Medical Director's Report – pg 38
6. Departmental Reports – pg 41
  - a. Environmental Health
  - b. Area Agency on Aging
  - c. Health Education & Promotion
  - d. Personal Health & Disease Prevention
7. Financial Reports – pg 66
  - a. Approve Payments\*
  - b. Review Financials\*
8. Committee Reports
  - a. Finance Committee – Approval of the July 17, 2023 Finance Committee meeting.
  - b. Program, Policies, and Appeals – Approval of the July 19, 2023 PPA Committee meeting.
9. New Business
  - a. EH appeal\* - pg77
  - b. Vaccine Storage Unit\* - pg 93
  - c. Hillsdale Elevator\* - pg 109
  - d. County Appropriations\* - pg 143
  - e. AAA Appropriations\* - pg 165
10. Public Comment
11. Adjournment - Next meeting: August 24, 2023

**Public Comment:**

For the purpose of public participation during public hearings or during the public comment portion of a meeting, every speaker prior to the beginning of the meeting is requested but not required to provide the Board with his or her name, address and subject to be discussed. Speakers are requested to provide comments that are civil and respectful. Each speaker will be allowed to speak for no more than three (3) minutes at each public comment opportunity.

Upcoming Education Opportunities Offered After BOH Meeting:

- August – Essential Local Public Health Services
- November – Community Need Based Services

Upcoming Meeting Dates:

- August 16, 2023 @ 8:30 AM – PPA Committee (Matthew, Leininger, Baker)
- August 21, 2023 @ 11:00 AM – Finance Committee (Hoffmaster, Houtz, & Lanius)
- August 24, 2023 @ 9:00 AM – Full Board Meeting
- September 18, 2023 @ 11:00 AM – Finance Committee (Hoffmaster, Houtz, & Lanius)
- September 20, 2023 @ 8:30 AM – PPA Committee (Matthew, Leininger, Baker)
- September 28, 2023 @ 9:00 AM – Full Board Meeting
- October 16, 2023 @ 11:00 AM – Finance Committee (Hoffmaster, Houtz, & Lanius)
- October 18, 2023 @ 8:30 AM – PPA Committee (Matthew, Leininger, Baker)
- November 9, 2023 @ 9:00 AM – Full Board Meeting
- November 15, 2023 @ 8:30 AM – PPA Committee (Matthew, Leininger, Baker)
- November 20, 2023 @ 11:00 AM – Finance Committee (Hoffmaster, Houtz, & Lanius)
- December 14, 2023 @ 9:00 AM – Full Board Meeting
- January 15, 2024 @ 11:00 AM - Finance Committee (Hoffmaster, Houtz, & Lanius)
- January 17, 2024 @ 8:30 AM – PPA Committee (Matthew, Leininger, Baker)
- January 25, 2024 @ 9:00 AM – Full Board Meeting

## June 22, 2023 – Board of Health Meeting Minutes

The Branch-Hillsdale-St. Joseph Community Health Agency Board of Health meeting was called to order by Chair, Brent Leininger at 9:00 AM with the Pledge of Allegiance to the Flag of the United States. Roll call was completed as follows: Tom Matthew, Jon Houtz, Brent Leininger, Rusty Baker, and Steve Lanius. The following members were absent: Jared Hoffmaster.

Also present from BHSJ: Rebecca Burns, Karen Luparello, Kali Nichols, Laura Sutter, Paul Andriacchi, Alex Bergmooser, and Theresa Fisher.

Mr. Houtz moved to approve the agenda with support from Mr. Baker. The motion passed unopposed.

Mr. Baker moved to approve the minutes from the May 25, 2023 meeting with support from Mr. Houtz. The motion passed unopposed.

Public Comment: No public comments were given.

Rebecca Burns, Health Officer, reviewed her monthly report. Items included: Public Health Accreditation in Michigan, Strategic Plan Activities, Website Redesign Committee, EH Software Implementation, Community Health Needs Assessment (CHNA)/Community Health Improvement Plan (CHIP), Hillsdale Hospital Proposal, Agency Staff Meetings, Public Health Concerns, Opioid Settlement Funds, Medicaid Redeterminations, Coldwater Office, Hillsdale Office, Three Rivers Office, and Sturgis Office.

Dr. Luparello reviewed the Medical Director's monthly report. This month's educational report was titled, "June is Alzheimer's and Brain Awareness Month".

### Departmental Reports:

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

### Financial Reports/Expenditures

- Mr. Baker moved to approve the expenditures for May as reported with support from Mr. Matthew. The motion passed unopposed.
- Mr. Houtz moved to place the financials for May on file with support from Mr. Matthew. The motion passed unopposed.

Committee Reports:

- Finance Committee – Mr. Houtz moved to approve the minutes from the June 19, 2023 Board of Health Finance Committee meeting with support from Mr. Lanius. The motion passed unopposed.
- Program, Policy, & Appeals Committee – Mr. Matthew moved to approve the minutes for the June 21, 2023 Program, Policy, & Appeals Committee meeting with support from Mr. Baker. The motion passed unopposed.

New Business:

- Mr. Baker moved to approve the appointment of Sandra Leslie to the AAA Region IIIc Advisory Committee, with support from Mr. Matthew. The motion passed unopposed.
- Mr. Houtz moved to approve the FY23 Budget Amendment #2 as presented, with support from Mr. Lanius. The motion passed unopposed.
- Mr. Houtz moved to approve the FY24 Original Budget as presented, with support from Mr. Lanius. The motion passed unopposed.
- Mr. Houtz moved to approve the amendment to the Sturgis Office Lease as presented, with support from Mr. Baker. The motion passed unopposed.
- Information was shared with the board regarding the Cycle 8 Michigan Local Public Health Accreditation Report but no action was taken.
- Information was shared with the board regarding the Community Health Needs Assessment and Community Health Improvement Plan but no action was taken.
- Information was shared with the board regarding the 2022 MERS Annual Actuarial Valuation Report but no action was taken.

Public Comment: No public comments were given.

With no further business, Mr. Houtz moved to adjourn the meeting with support from Mr. Matthew. The motion passed unopposed and the meeting was adjourned at 10:26 AM.

Respectfully Submitted by:

  
Theresa Fisher,  
Administrative Services Director  
Secretary to the Board of Health

## 2022 Actuarial Valuation Report Presentation

Presented by:

Ms. Marne Daggett  
MERS Lead Regional Manager



# Municipal Employees' Retirement System of Michigan

Annual Actuarial Valuation Report

December 31, 2022 - Branch-Hillsdale-St Joseph Comm Hlth Agcy (1202)





Spring 2023

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, 2022. 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, 2022,
- Establish contribution requirements for the fiscal year beginning January 1, 2024,
- 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, 2022. 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, the MERS Retirement Board sets certain assumptions for funding and GASB purposes. These assumptions are reviewed regularly through a comprehensive study, most recently in the Fall of 2021. The MERS Retirement Board adopted a Dedicated Gains Policy at the February 17, 2022 Board meeting. The Dedicated Gains Policy automatically reduces the assumed rate of investment return in conjunction with recognizing excess investment gains to mitigate the impact on employer contributions the first year. The policy was effective with the December 31, 2021 annual actuarial valuation.

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:

<https://www.mersofmich.com/Portals/0/Assets/Resources/AAV-Appendix/MERS-2022AnnualActuarialValuation-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, 2022. At this time, no future assumptions have been adjusted as a result of COVID-19. 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.

Rebecca L. Stouffer, Mark Buis, Kurt Dosson, and Shana M. Neeson 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.



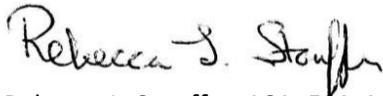
The Retirement Board of the Municipal Employees' Retirement System of Michigan confirms that the System provides for payment of the required employer contribution as described in Section 20m of Act No. 314 of 1965 (MCL 38.1140m).

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

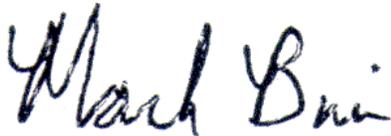
This report was prepared at the request of the MERS Retirement Board and may be provided only in its entirety by the municipality to other interested parties (MERS customarily provides the full report on request to associated third parties such as the auditor for the municipality). GRS is not responsible 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).

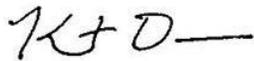
Sincerely,  
Gabriel, Roeder, Smith & Company



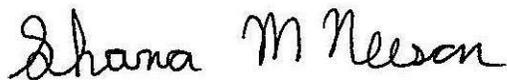
Rebecca L. Stouffer, ASA, FCA, MAAA



Mark Buis, FSA, FCA, EA, MAAA



Kurt Dosson, ASA, FCA, MAAA



Shana M. Neeson, ASA, FCA, 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 the funded 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.

	12/31/2022	12/31/2021
Funded Ratio*	94%	93%

\* 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 with the December 31, 2021 valuation, the MERS Retirement Board adopted a Dedicated Gains Policy which allows for recognition of asset gains in excess of a set threshold in combination with lowering the assumed rate of investment return. Effective with the 2020 and 2019 valuations respectively, the MERS Retirement Board adopted updated demographic and economic assumptions. The combined impact of the prior 2020 and 2019 demographic and economic assumption changes may be phased in. This valuation reflects the last year of phase-in. The combined impact of the past economic and demographic changes will be fully reflected in the 2023 annual actuarial valuation.

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:	12/31/2022	12/31/2022	12/31/2021	12/31/2021	12/31/2022	12/31/2022	12/31/2021	12/31/2021
Fiscal Year Beginning:	January 1, 2024	January 1, 2024	January 1, 2023	January 1, 2023	January 1, 2024	January 1, 2024	January 1, 2023	January 1, 2023
Division								
01 - Gnrl	-	-	-	-	\$ 42,484	\$ 45,735	\$ 36,810	\$ 43,312
Total Municipality - Estimated Monthly Contribution					\$ 42,484	\$ 45,735	\$ 36,810	\$ 43,312
Total Municipality - Estimated Annual Contribution					\$ 509,808	\$ 548,820	\$ 441,720	\$ 519,744

Employee contribution rates:

Valuation Date:	Employee Contribution Rate	
	12/31/2022	12/31/2021
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 “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 one or more Surplus divisions would not immediately lower future contributions, however the assets from the Surplus division(s) 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. With the implemented Dedicated Gains policy, market gains and losses will continue to be smoothed over five years; however, since excess returns are used to lower the investment assumption, there will be fewer gains to smooth in down markets. Having additional funds in Surplus divisions will assist plans with navigating any market volatility.**



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 2024 for the entire employer would be \$48,727, instead of \$45,735.

### 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 **7.00%** 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 and Method Change in 2022

Effective February 17, 2022, the MERS Retirement Board adopted a dedicated gains policy that automatically lowers the assumed rate of investment return by using excess asset gains to mitigate large increases in required contributions to the Plan. Full details of this dedicated gains policy are available in the Actuarial Policy found on the MERS [website](#). Some goals of the dedicated gains policy are to:

- Provide a systematic approach to lower the assumed rate of investment return between experience studies, and
- Use excess gains to cover both the increase in normal cost and any increase in UAL payment the first contribution year after application (i.e., minimize the first-year impact (i.e., increase) in employer contributions).

The dedicated gains policy was implemented with the December 31, 2021 annual actuarial valuation and was reflected in the computed employer contribution amounts beginning in fiscal year 2023.



Investment performance measured for the one-year period ending December 31, 2022 did not result in excess gains for use in lowering the assumed rate of investment return. As a result, this assumption remains at 7.00%.

Furthermore, there were no other assumption or method changes in 2022.

## Protecting MI Pension Grant Program

On July 1, 2022, Michigan lawmakers passed the state budget for the 2022-23 fiscal year. As a part of the budget, \$750 million was earmarked for underfunded municipal pension plans in counties, cities, townships, villages and road commissions across the state. Known as the **Protecting MI Pension Grant Program**, the legislation is designed to support municipal plans that are under 60% funded.

As of the valuation date the amount of funds and list of grant recipients is not yet known. Any funds received by municipalities will be considered in a future 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. After initial application of asset smoothing, remaining excess market gains are used to buy down the assumed rate of investment return and increase the level of valuation assets, to the extent allowed by the dedicated gains policy. 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 2022 was 3.51%, while the actual market rate of return was (10.61%).** 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, 2022, the actuarial value of assets is 116% of market value due to asset smoothing. This means that there are deferred investment losses, which will put upward pressure on contributions in the short term.

If the December 31, 2022 valuation results were based on market value instead of actuarial value:

- The funded percent of your entire municipality would be 81% (instead of 94%); and
- Your total employer contribution requirement for the fiscal year starting January 1, 2024 would be \$801,444 (instead of \$548,820).

## 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 generally 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 projected 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, 2022 valuation and are for the municipality in total, not by division. These results do not reflect a phase-in of the impact of the actuarial assumptions updated in the 2020 and 2019 valuations. There is no phase-in of dedicated gains.

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.

12/31/2022 Valuation Results	Lower Future Annual Returns	Lower Future Annual Returns	Valuation Assumptions
Investment Return Assumption	5.00%	6.00%	7.00%
Accrued Liability	\$ 24,224,622	\$ 21,605,312	\$ 19,416,144
Valuation Assets <sup>1</sup>	\$ 18,275,951	\$ 18,275,951	\$ 18,275,951
Unfunded Accrued Liability	\$ 5,948,671	\$ 3,329,361	\$ 1,140,193
<b>Funded Ratio</b>	75%	85%	94%
Monthly Normal Cost	\$ 15,715	\$ 11,646	\$ 8,610
Monthly Amortization Payment	\$ 76,053	\$ 55,825	\$ 37,125
<b>Total Employer Contribution<sup>2</sup></b>	\$ 91,768	\$ 67,471	\$ 45,735

<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 account for the past investment experience that will continue to affect the actuarial rate of return in the short term.

The 7.00% scenario provides an estimate of computed employer contributions based on current actuarial assumptions, and a projected 7.00% 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 6.00% and 5.00% 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. Extra contributions 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 within the plan is discretionary. Certain employers have special funding arrangements that may differ from the Actuarial Policy.

The Funded Percentage graph shows projections of funded status under the 7.00% 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 within the plan 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.

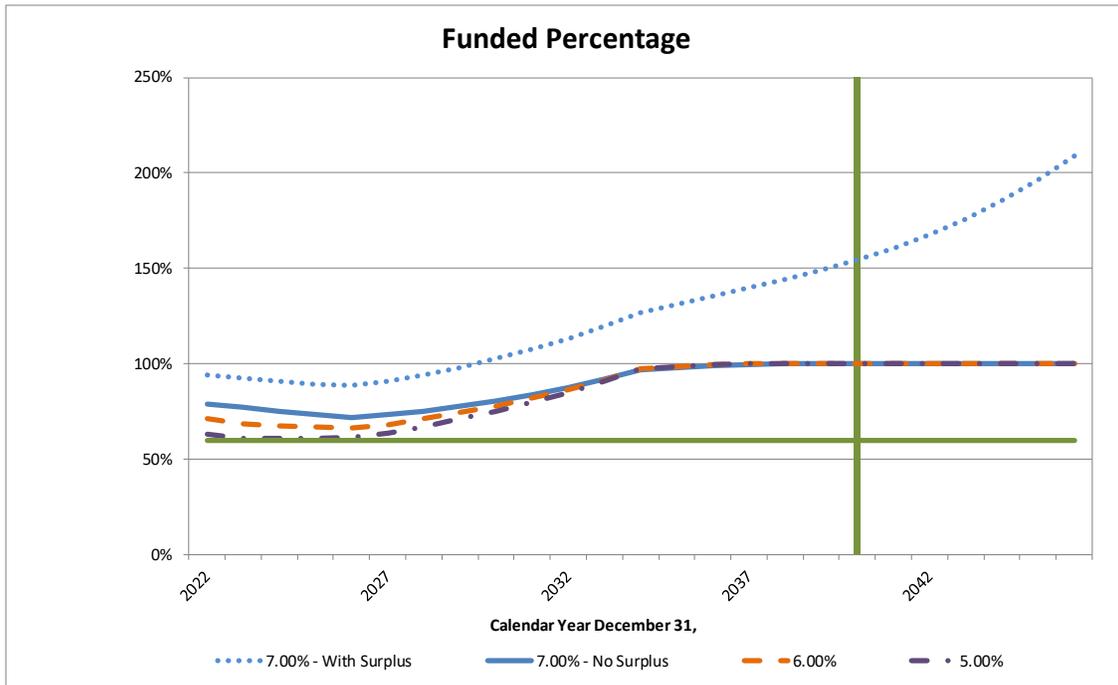
Valuation Year Ending 12/31	Fiscal Year Beginning 1/1	Actuarial Accrued Liability	Valuation Assets <sup>2</sup>	Funded Percentage	Estimated Annual Employer Contribution <sup>3</sup>
<b>7.00%<sup>1</sup> - NO PHASE-IN</b>					
2022	2024	\$ 19,416,144	\$ 15,350,651	79%	\$ 548,820
2023	2025	\$ 19,700,000	\$ 15,200,000	77%	\$ 629,000
2024	2026	\$ 19,900,000	\$ 14,900,000	75%	\$ 714,000
2025	2027	\$ 20,100,000	\$ 14,700,000	73%	\$ 800,000
2026	2028	\$ 20,100,000	\$ 14,500,000	72%	\$ 888,000
2027	2029	\$ 20,200,000	\$ 14,800,000	73%	\$ 916,000
<b>6.00%<sup>1</sup> - NO PHASE-IN</b>					
2022	2024	\$ 21,605,312	\$ 15,350,651	71%	\$ 809,652
2023	2025	\$ 21,900,000	\$ 15,000,000	69%	\$ 894,000
2024	2026	\$ 22,100,000	\$ 14,900,000	68%	\$ 975,000
2025	2027	\$ 22,200,000	\$ 14,800,000	67%	\$ 1,060,000
2026	2028	\$ 22,200,000	\$ 14,800,000	66%	\$ 1,150,000
2027	2029	\$ 22,200,000	\$ 15,100,000	68%	\$ 1,190,000
<b>5.00%<sup>1</sup> - NO PHASE-IN</b>					
2022	2024	\$ 24,224,622	\$ 15,350,651	63%	\$ 1,101,216
2023	2025	\$ 24,500,000	\$ 14,900,000	61%	\$ 1,190,000
2024	2026	\$ 24,600,000	\$ 15,000,000	61%	\$ 1,270,000
2025	2027	\$ 24,700,000	\$ 15,000,000	61%	\$ 1,350,000
2026	2028	\$ 24,700,000	\$ 15,100,000	61%	\$ 1,440,000
2027	2029	\$ 24,600,000	\$ 15,700,000	64%	\$ 1,490,000

<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.

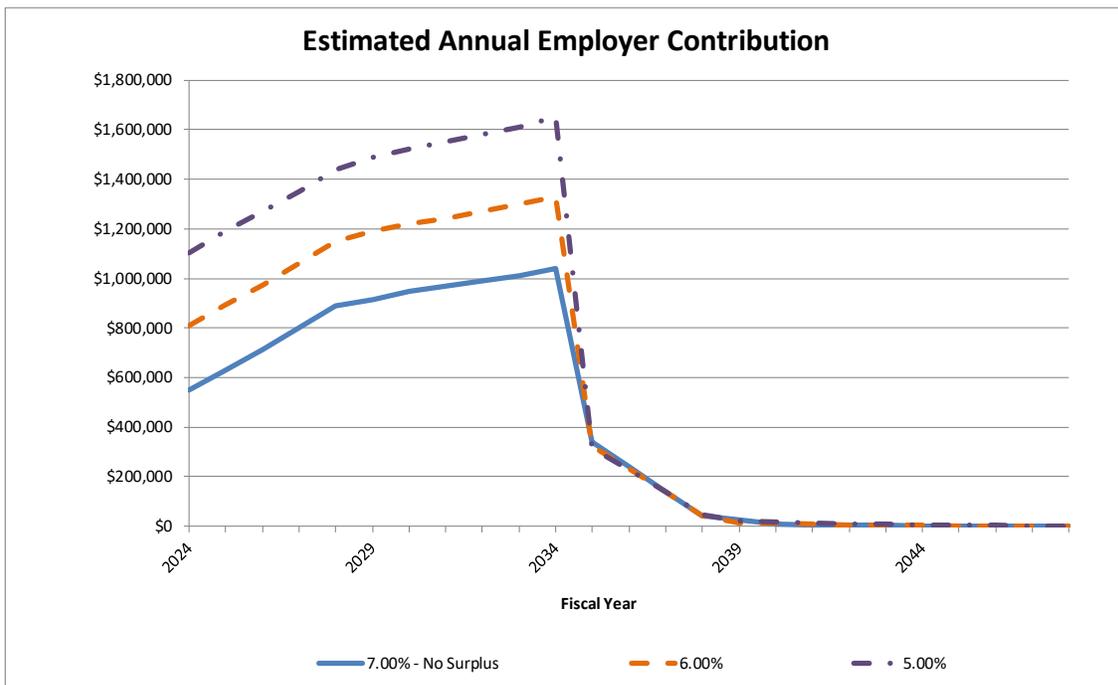
<sup>3</sup> All projected contributions are shown with no phase-in.





**Notes:**

All projected funded percentages are shown with no phase-in.  
 Assumes assets from the Surplus division(s) will not be used to lower employer contributions during the projection period.  
 The green indicator lines have been added at 60% funded and 18 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 division(s).



## Table 1: Employer Contribution Details for the Fiscal Year Beginning January 1, 2024

Division	Total Normal Cost	Employee Contribution Rate	Employer Contributions <sup>1</sup>			Computed Employer Contribution With Phase-In	Blended ER Rate No Phase-In <sup>5</sup>	Blended ER Rate With Phase-In <sup>5</sup>	Employee Contribution Conversion Factor <sup>2</sup>
			Employer Normal Cost <sup>6</sup>	Payment of the Unfunded Accrued Liability <sup>4</sup>	Computed Employer Contribution No Phase-In				
<b>Percentage of Payroll</b>									
01 - Gnrl	13.41%	3.00%	-	-	-	-			
<b>Estimated Monthly Contribution<sup>3</sup></b>									
01 - Gnrl			\$ 8,610	\$ 37,125	\$ 45,735	\$ 42,484			
<b>Total Municipality</b>			<b>\$ 8,610</b>	<b>\$ 37,125</b>	<b>\$ 45,735</b>	<b>\$ 42,484</b>			
<b>Estimated Annual Contribution<sup>3</sup></b>			<b>\$ 103,320</b>	<b>\$ 445,500</b>	<b>\$ 548,820</b>	<b>\$ 509,808</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 not to 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

	2022 Valuation	2021 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	2022 Valuation		2021 Valuation		2022 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	21	\$ 1,127,922	25	\$ 1,366,616	55.2	19.5	21.0
Vested Former Employees	21	225,142	21	219,829	51.6	12.2	13.1
Retirees and Beneficiaries	75	1,133,860	71	1,050,879	72.3		
Pending Refunds	16		18				
<b>Total Municipality</b>							
<b>Active Employees</b>	<b>21</b>	<b>\$ 1,127,922</b>	<b>25</b>	<b>\$ 1,366,616</b>	<b>55.2</b>	<b>19.5</b>	<b>21.0</b>
<b>Vested Former Employees</b>	<b>21</b>	<b>225,142</b>	<b>21</b>	<b>219,829</b>	<b>51.6</b>	<b>12.2</b>	<b>13.1</b>
<b>Retirees and Beneficiaries</b>	<b>75</b>	<b>1,133,860</b>	<b>71</b>	<b>1,050,879</b>	<b>72.3</b>		
<b>Pending Refunds</b>	<b><u>16</u></b>		<b><u>18</u></b>				
<b>Total Participants</b>	<b>133</b>		<b>135</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	2022 Valuation		2021 Valuation	
	Employer and Retiree <sup>1</sup>	Employee <sup>2</sup>	Employer and Retiree <sup>1</sup>	Employee <sup>2</sup>
01 - Gnrl	\$ 12,354,248	\$ 905,763	\$ 14,361,223	\$ 958,633
S1 - Surplus Unassociated	2,526,897	0	2,570,706	0
<b>Municipality Total<sup>3</sup></b>	<b>\$ 14,881,145</b>	<b>\$ 905,763</b>	<b>\$ 16,931,929</b>	<b>\$ 958,633</b>
<b>Combined Assets<sup>3</sup></b>	<b>\$15,786,908</b>		<b>\$17,890,563</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, 2022 valuation assets (actuarial value of assets) are equal to 1.157665 times the reported market value of assets (compared to 0.998523 as of December 31, 2021). 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, 2024.

### 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						
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
2021	419,196	856,576	44,476	2,569,385	(1,023,634)	(19,860)	0	17,864,138
2022	592,188	218,996	36,767	639,569	(1,066,392)	(9,315)	0	18,275,951

**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.

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, 2022**

Division	Actuarial Accrued Liability					Valuation Assets	Percent Funded	Unfunded (Overfunded) Accrued Liabilities
	Active Employees	Vested Former Employees	Retirees and Beneficiaries	Pending Refunds	Total			
01 - Gnrl	\$ 5,240,432	\$ 2,183,388	\$ 11,968,946	\$ 23,378	\$ 19,416,144	\$ 15,350,651	79.1%	\$ 4,065,493
S1 - Surplus Unassociated	0	0	0	0	0	2,925,300		(2,925,300)
<b>Total</b>	<b>\$ 5,240,432</b>	<b>\$ 2,183,388</b>	<b>\$ 11,968,946</b>	<b>\$ 23,378</b>	<b>\$ 19,416,144</b>	<b>\$ 18,275,951</b>	<b>94.1%</b>	<b>\$ 1,140,193</b>

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

The December 31, 2022 valuation assets (actuarial value of assets) are equal to 1.157665 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 December 31	Actuarial Accrued Liability	Valuation Assets	Percent Funded	Unfunded (Overfunded) Accrued Liabilities
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
2021	19,207,905	17,864,138	93%	1,343,767
2022	19,416,144	18,275,951	94%	1,140,193

Notes: Actuarial assumptions were revised for the 2008, 2009, 2010, 2011, 2012, 2015, 2019, 2020 and 2021 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 December 31	Actuarial Accrued Liability	Valuation Assets	Percent Funded	Unfunded (Overfunded) Accrued Liabilities
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
2021	19,207,905	15,297,229	80%	3,910,676
2022	19,416,144	15,350,651	79%	4,065,493

Notes: Actuarial assumptions were revised for the 2012, 2015, 2019, 2020 and 2021 actuarial valuations.

The percent funded does not reflect valuation assets from Surplus divisions, if any.

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

Valuation Date December 31	Active Employees		Computed Employer Contribution <sup>1</sup>	Employee Contribution Rate <sup>2</sup>
	Number	Annual Payroll		
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%
2021	25	1,366,616	\$ 43,312	3.00%
2022	21	1,127,922	\$ 45,735	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 reflect the employer contribution requirement without phase-in. If applicable, the current phase-in contribution is shown in Table 1.

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 December 31	Actuarial Accrued Liability	Valuation Assets	Percent Funded	Unfunded (Overfunded) Accrued Liabilities
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)
2021	0	2,566,909		(2,566,909)
2022	0	2,925,300		(2,925,300)

Notes: Actuarial assumptions were revised for the 2012, 2015, 2019, 2020 and 2021 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 1/1/2024		
				Outstanding UAL Balance <sup>3</sup>	Remaining Amortization Period <sup>2</sup>	Annual Amortization Payment
Initial	12/31/2015	\$ 1,722,846	21	\$ 1,640,655	11	\$ 185,280
(Gain)/Loss	12/31/2016	35,723	19	34,153	11	3,852
(Gain)/Loss	12/31/2017	138,446	17	132,452	11	14,964
(Gain)/Loss	12/31/2018	137,878	15	132,804	11	15,000
(Gain)/Loss	12/31/2019	391,419	14	381,287	11	43,056
Assumption	12/31/2019	530,789	14	508,106	11	57,384
Experience	12/31/2020	1,339,721	13	1,339,130	11	151,224
Experience	12/31/2021	(580,117)	12	(596,513)	11	(67,368)
Experience	12/31/2022	348,501	11	372,896	11	42,108
<b>Total</b>				<b>\$ 3,944,970</b>		<b>\$ 445,500</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, 2022 (see Table 6) is projected to the beginning of the fiscal year for which the contributions are being calculated. This allows the 2022 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:		12/31/2022
Measurement Date of the Total Pension Liability (TPL):		12/31/2022
At 12/31/2022, the following employees were covered by the benefit terms:		
Inactive employees or beneficiaries currently receiving benefits:		75
Inactive employees entitled to but not yet receiving benefits (including refunds):		37
Active employees:		<u>21</u>
		133
Total Pension Liability as of 12/31/2021 measurement date:	\$	18,708,586
Total Pension Liability as of 12/31/2022 measurement date:	\$	18,925,572
Service Cost for the year ending on the 12/31/2022 measurement date:	\$	144,261
Change in the Total Pension Liability due to:		
- Benefit changes <sup>1</sup> :	\$	0
- Differences between expected and actual experience <sup>2</sup> :	\$	(174,176)
- Changes in assumptions <sup>2</sup> :	\$	0
Average expected remaining service lives of all employees (active and inactive):		1

<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):	\$	1,127,922
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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 <u>(6.25%)</u>	Current Discount Rate <u>(7.25%)</u>	1% Increase <u>(8.25%)</u>
Change in Net Pension Liability as of 12/31/2022:	\$ 2,095,866	\$ 0	\$ (1,770,326)

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:	12/31/2022
Measurement Date of the Total Pension Liability (TPL):	12/31/2023

At 12/31/2022, the following employees were covered by the benefit terms:

Inactive employees or beneficiaries currently receiving benefits:	75
Inactive employees entitled to but not yet receiving benefits (including refunds):	37
Active employees:	<u>21</u>
	133

Total Pension Liability as of 12/31/2022 measurement date:	\$ 19,090,095
Total Pension Liability as of 12/31/2023 measurement date:	\$ 19,206,568
Service Cost for the year ending on the 12/31/2023 measurement date:	\$ 138,415
Change in the Total Pension Liability due to:	
- Benefit changes <sup>1</sup> :	\$ 0
- Differences between expected and actual experience <sup>2</sup> :	\$ (176,451)
- Changes in assumptions <sup>2</sup> :	\$ 0

Average expected remaining service lives of all employees (active and inactive):	1
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<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):	\$ 1,127,922
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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 <u>(6.25%)</u>	Current Discount Rate <u>(7.25%)</u>	1% Increase <u>(8.25%)</u>
Change in Net Pension Liability as of 12/31/2023:	\$ 2,081,488	\$ 0	\$ (1,761,691)

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

1/1/2021	Contract Employees - Included
1/1/2021	Seasonal Employees - Included
1/1/2021	Service Credit Qualification - 75 hours
1/1/2021	Custom Wages
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 (No Max)
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 (No Max)
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) (No Max)
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) (No Max)
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>12/31/2022</u>	<u>12/31/2021</u>	<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	14.0	13.1	9.7	9.2	7.1
2. Ratio of actuarial accrued liability to payroll	17.2	14.1	11.3	11.3	9.1
3. Ratio of actives to retirees and beneficiaries	0.3	0.4	0.4	0.5	0.7
4. Ratio of market value of assets to benefit payments	14.7	17.1	16.1	14.5	13.9
5. Ratio of net cash flow to market value of assets (boy)	-1.3%	1.8%	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, 2022</b>	
11	Indicate number of active members	21
12	Indicate number of inactive members (excluding pending refunds)	21
13	Indicate number of retirees and beneficiaries	75
<b>14</b>	<b>Investment Performance for Calendar Year Ending December 31, 2022<sup>1</sup></b>	
15	Enter actual rate of return - prior 1-year period	(10.37)%
16	Enter actual rate of return - prior 5-year period	4.95%
17	Enter actual rate of return - prior 10-year period	6.79%
<b>18</b>	<b>Actuarial Assumptions</b>	
19	Actuarial assumed rate of investment return <sup>2</sup>	7.00%
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>	11
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	\$17,053,508
25	Enter retirement pension system's actuarial accrued liabilities using uniform assumptions <sup>5</sup>	\$19,720,754
27	Actuarially Determined Contribution (ADC) using uniform assumptions, Fiscal Year Ending December 31, 2023	\$666,360

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), “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 6.85%.



# PUBLIC COMMENT

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**Health Officer's Report to the Board of Health for July 27, 2023**  
**Prepared by: Rebecca A. Burns, M.P.H., R.S.**

**Agency Updates**

**Email Service Upgrade:** On July 17<sup>th</sup> the Agency went live with a new email service provider. The transition went well with only a few challenges. Because of the upgrade I took the time to check that Board of Health meetings were in my calendar and thought I should also take a minute to remind all of you that we do not have a meeting in October and that the November and December meetings are scheduled for the 2<sup>nd</sup> Thursday. If you want to verify the schedule in your calendar, you can find the meeting schedule posted on our website; scroll to the bottom and it is under Board of Health Resources. You can also follow this link:

[https://bhsj.org/uploads/resource/attachment/31/2023\\_Board\\_of\\_Health\\_Meeting\\_Schedule\\_Updated\\_04\\_Apr\\_2023.pdf](https://bhsj.org/uploads/resource/attachment/31/2023_Board_of_Health_Meeting_Schedule_Updated_04_Apr_2023.pdf)

**Vacation:** I will be out of the office July 20<sup>th</sup> through July 26<sup>th</sup>, returning for the Board of Health meeting on July 27<sup>th</sup>. Although I will be not too far away and in a city with usually good cell service, the event I'm attending in Oshkosh, WI can result in poor cell service due to the large number of attendees. Please reach out to Theresa with any needs or concerns.

**Essential Local Public Health Services:** The Governor and legislature passed the "Make it in Michigan" budget the end of June. This budget does include a \$25 million increase for all local health departments in Michigan which was advocated by MALPH (Michigan Association for Local Public Health). I have been advised that the increase in funds along with existing funding for ELPHS will be distributed based on the ELPHS funding formula that was updated in 2017. This leaves us a bit uncertain regarding what we will receive at BHSJCHA as all of the ELPHS funding will be reformulated. Although I anticipate we will receive an increase, I have no idea what that might be. The increase in ELPHS funding is intended to bring the state closer in line with the 50/50 cost sharing requirement in the Public Health Code, PA 368 of 1978 as amended. In your packet for the Board of Health meeting is information regarding our current funding, inflation cost, funding history and much more. I am hopeful for another increase in local appropriations for FY24 as we remain significantly behind on funding that we received in the early 2000's.

**Strategic Plan Activities:** We continue to work on the objectives in the strategic plan and will provide updates to you approximately every 6 months. One part of the workplan is an annual employee satisfaction survey which is currently live and all employees have been requested to respond. We will share the results at the 6 month check-in.

**Personnel Policy Committee:** The Personnel Policy Committee has updated policies and procedures in the Personnel Policies and we plan to bring those proposed changes to the Program, Policy & Appeals Committee next month for Board of Health consideration.

**Board of Health Education After the August Meeting:** The next Board of Health education is scheduled for August 24<sup>th</sup> directly after the adjournment of the Board of Health meeting on that day.

Please make plans to stay for the education offering. I invite suggestions from BOH members on the topic; please respond by August 1<sup>st</sup> so we have time to prepare.

**EH Software Implementation:** Training has started for staff on this new software. The go live for the product is toward the end of August. We set a very aggressive timeline with the vendor during the busiest time of the year but the staff are performing well.

**Hillsdale Hospital Proposal:** We continue to work with the hospital on a mutually agreeable agreement to rent our mobile clinic van.

**Public Health Concerns:** The wildfires in Canada continue to impact air quality in Michigan and other states. We have added information to our website that allow residents to sign-up for alerts from the EPA through a system called Enviroflash and MI Air Quality information at AirNow.gov.

The Three Rivers Wastewater Treatment Plant experienced a failure of the force main near the wastewater plant which resulted in a discharge of untreated wastewater into the St. Joseph River. The discharge of an estimated 500,000 gallons was identified on Friday, July 7<sup>th</sup> in the evening and stopped on Saturday morning. Our Agency was notified on Monday morning and put out a notice to the public advising no contact with the river. We were able to lift the advisory on July 18<sup>th</sup> when water tests showed coliform levels at expected levels. Our Agency will be following up with the wastewater plant superintendent and EGLE on emergency plans for events such as this that will occur in the future.

**Opioid Settlement Funds:** Our Agency staff submitted a proposal to the Hillsdale County committee reviewing requests for settlement funds. It was generally positively received with some suggestions from a consultant used by the committee. No final decision has been made on our request.

**Medicaid Redeterminations:** We continue to message on the redetermination of Medicaid and have trained staff at the health department that can assist people with questions. Individuals not responding to the request for information sent to them by MDHHS will have their Medicaid case closed and will be without insurance which is very concerning to all of us who work with these low-income individuals and families.

**Coldwater Office:** Removal of overgrown bushes is completed, and the maintenance crew will be removing rocks and seeding up to the building where these bushes were.

**Hillsdale Office:** The parking lots have been completed. Provided to the Finance Committee and moved to the full Board for approval at the meeting is the upgrade to the elevator. New regulation in Michigan requires that additional safety equipment be installed on the elevator.

**Three Rivers Office:** The contractor has started the project and is currently working on the west gable end. I expect they will be moving on to the east gable end by July 21<sup>st</sup>.

**Sturgis:** The addition of space project in Sturgis is moving along. Flooring and ceiling need to be installed as well as final electric, the intake counter and restroom facilities. We hope to occupy the new enlarged space by end of August.

## **MEDICAL DIRECTOR'S REPORT**

**JULY 2023**

1. Watching numbers of communicable diseases.
2. Director and Administrator meetings, in person and zoom.
3. Meetings via zoom and teleconference with several associations.
4. Reviewing policies and procedures.
5. Classes – Communications in Health Care (elective) ended last week

Practicum (project on sexually transmitted infections)

6. TB and latent TB patient visits.

## HEPATITIS C

### Information for the CDC website

Hepatitis means inflammation of the liver. Heavy alcohol use, toxins, some medications, and certain medical conditions can all cause hepatitis. However, hepatitis is often caused by a virus. The most common hepatitis viruses are hepatitis A virus, hepatitis B virus, and hepatitis C virus.

#### **What is the difference between hepatitis A, hepatitis B, and hepatitis C?**

[Hepatitis A](#), [hepatitis B](#), and [hepatitis C](#) are liver infections caused by three different viruses. Although each can cause similar symptoms, they are spread in different ways and can affect the liver differently.

- **Acute hepatitis C** occurs within the first 6 months after someone is exposed to the hepatitis C virus. Hepatitis C can be a short-term illness, but for most people, acute infection leads to chronic infection.
- **Chronic hepatitis C** can be a lifelong infection if left untreated. Chronic hepatitis C can cause serious health problems, including liver damage, cirrhosis (scarring of the liver), liver cancer, and even death

Hepatitis C is spread through contact with blood from an infected person.

Today, most people become infected with the hepatitis C virus by sharing needles or other equipment used to prepare and inject drugs.

People with chronic hepatitis C can often have no symptoms and don't feel sick.

When symptoms appear, they often are a sign of advanced liver disease.

The best way to prevent hepatitis C is by avoiding behaviors that can spread the disease, especially injecting drugs. Getting tested for hepatitis C is important, because treatments can cure most people with hepatitis C in 8 to 12 weeks.

#### **How common is acute hepatitis C in the United States?**

In 2016, an estimated 2.4 million people were living with hepatitis C in the United States.

#### **Transmission / Exposure**

- ▶ **Sharing drug-injection equipment.**
- ▶ **Birth.**
- ▶ **Health care exposures.**

- ▶ **Sex with an infected person.**
- ▶ **Unregulated tattoos or body piercings.**
- ▶ **Sharing personal items.**
- ▶ **Blood transfusions and organ transplants.**

## **Testing**

Who should get tested for hepatitis C?

- Are 18 years of age and older (get tested at least once in your lifetime)
- Are pregnant (get tested during each pregnancy)
- Currently inject drugs (get tested regularly)
- Have ever injected drugs, even if it was just once or many years ago
- Have HIV
- Have abnormal liver tests or liver disease
- Are on hemodialysis
- Received donated blood or organs before July 1992
- Received clotting factor concentrates before 1987
- Have been exposed to blood from a person who has hepatitis C
- Were born to a mother with hepatitis

**Branch-Hillsdale-St. Joseph Community Health Agency**  
**Environmental Public Health Services**  
**Report for the July 27, 2023 Board of Health Meeting**  
**Prepared by Paul Andriacchi R.E.H.S, Director of Environmental Health**

### **Food Service Sanitation**

We've had two new people join the food inspection staff as they are progressing in their training process. Emily Motes is new to the food inspection staff, she moved over from her position in the Type II Program after Carrie Southern retired in May. Emily is close to completing her required training inspections and is doing a great job. A more recent addition is Olivia Jacobs who was hired for our 50/50 position in Hillsdale. Olivia has been very busy training in both the food program and the field programs and is enjoying her new position with the agency.

We had two new food service facilities open in June, The Parlor Ice Cream and Coffee and Kick'n Kountry. The Parlor Ice Cream and Coffee is located north of Sturgis off M-66 and Kick'n Kountry is a bar/restaurant located in Coldwater. I would encourage you to support these new businesses in our counties.

### **Other Programs**

The City of Three Rivers had a major sewer line break on Friday, July 7. An excavator accidentally severed the line which resulted in over 500,000 gallons of raw sewage being leaked into the St. Joseph River. Our agency was not notified of this incident from the city until Monday, July 10. The city is required by law to send us notification within 24 hours but this obviously did not happen. Once we were notified of the situation the agency issued a "no contact order" for the section of the St. Joseph River effected by the release. We have since been working very closely with the Three Rivers Wastewater Treatment Plant to ensure the leak was repaired, no more sewage was being leaked into the river and water testing was being done to allow us to determine when the "no contact" order could be lifted. On July 18, water test results were received that allowed us to safely remove the "no contact order". We have taken steps to set up a meeting with the wastewater department at the city along with a representative from EGLE to discuss the failures that occurred during this event. Our goal is to ensure that our agency is contacted in the timely manner required by the State so that we in turn can get the message out to the citizens of our county to keep them safe.

I reported last month that additional sampling was conducted around the Lucas Landfill in Hillsdale. At that time reported that the residential wells were tested for 1,4 dioxane and PFAS and the 1,4 dioxane results all came back negative. We recently received the PFAS results and those all tested negative for PFAS chemicals as well. The wells in this area have been added to our annual long-term monitoring list so we will be continue to conduct sampling at this site moving forward.

## EH Service Statistics Report

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

ENVIRONMENTAL HEALTH SERVICE REPORT 2022/2023

	JUNE				YTD 2022/2023				YTD 2021/2022			
	BR	HD	SJ	TOTAL	BR	HD	SJ	TOTAL	BR	HD	SJ	TOTAL
<b>WELL/SEWAGE SYSTEM EVAL.</b>	-	1	-	1	5	3	1	9	-	2	11	13
<b>CHANGE OF USE EVALUATIONS - FIELD</b>	4	7	3	14	23	45	38	106	11	33	26	70
<b>CHANGE OF USE EVALUATIONS - OFFICE</b>	7	1	16	24	48	12	82	142	26	32	75	133
<b>ON-SITE SEWAGE DISPOSAL</b>												
PERMITS NEW CONSTRUCTION	5	7	8	20	42	42	64	148	41	46	65	152
REPAIR/REPLACEMENT	8	7	6	21	45	49	66	160	48	56	76	180
VACANT LAND EVALUATION	1	-	3	4	7	8	10	25	4	13	19	36
PERMITS DENIED	-	-	-	-	-	-	-	-	3	-	-	3
TOTAL	14	14	17	45	94	99	140	333	84	115	160	371
<b>SEWAGE PERMITS INSPECTED</b>	13	13	11	37	68	95	101	262	58	77	99	228
<b>WELL PERMITS ISSUED</b>	12	11	22	45	108	82	150	340	85	96	198	379
<b>WELL PERMITS INSPECTED</b>	3	5	8	16	90	72	128	290	101	90	163	354
<b>FOOD SERVICE INSPECTION</b>												
PERMANENT	31	19	14	64	188	165	258	611	177	191	221	589
NEW OWNER / NEW ESTABLISHMENT	2	1	3	6	7	10	14	31	4	9	10	23
FOLLOW-UP INSPECTION	2	2	-	4	12	5	12	29	12	4	9	25
TEMPORARY	5	8	17	30	13	17	34	64	6	25	38	69
MOBILE,STFU	3	5	19	27	20	26	45	91	16	11	34	61
PLAN REVIEW APPLICATIONS	-	2	-	2	8	8	10	26	9	5	17	31
FOOD RELATED COMPLAINTS	1	1	-	2	8	12	7	27	8	9	3	20
FOODBORNE ILLNESS INVESTIGATED	-	-	-	-	-	-	-	-	2	1	-	3
<b>FOOD CLASSES</b>												
MANAGEMENT CERTIFICATION CLASS	-	-	12	12	n/a	n/a	n/a	81	n/a	n/a	n/a	-
<b>CAMPGROUND INSPECTION</b>	7	-	10	17	7	-	10	17	16	4	2	22
<b>NON-COMM WATER SUPPLY INSP.</b>	3	-	5	8	18	9	17	44	9	15	8	32
<b>SWIMMING POOL INSPECTION</b>	-	5	4	9	9	14	7	30	14	14	6	34
<b>PROPOSED SUBDIVISION REVIEW</b>	-	-	-	-	-	-	-	-	1	-	-	1
<b>SEPTIC TANK CLEANER</b>	-	-	-	-	7	1	2	10	1	3	-	4
<b>DHS LICENSED FACILITY INSP.</b>	-	2	-	2	7	19	13	39	7	24	23	54
<b>COMPLAINT INVESTIGATIONS</b>	2	1	1	4	34	11	7	52	15	25	12	52
<b>LONG TERM MONITORING</b>	-	-	-	-	-	-	14	14	-	-	1	1
<b>BODY ART FACILITY INSPECTIONS</b>	-	-	-	-	2	5	2	9	5	3	-	9

# Inspection Type Count

For Date Range: 6/1/2023 - 6/30/2023 and Program: Food Service

<b>Inspection Type</b>	<b>Count</b>
Complaint	2
Consult	2
Enforcement	1
Follow-Up	4
Pre-opening/New	6
Progress Note	5
Routine	64
STFU/Mobile	27
Temporary	30
Total number of inspections	141

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Start Date 6/1/2023



End Date 6/30/2023



View Report

Program Food Service

Navigation controls: Home, Back, Page 1 of 1, Forward, Refresh, Previous, 100% zoom, Save, Print, Close

# Inspection Type Count by County

For Date Range: 6/1/2023 - 6/30/2023 and Program: Food Service

County	Inspection Type	Count
Branch	Complaint	1
	Enforcement	1
	Follow-Up	2
	Pre-opening/New	2
	Progress Note	1
	Routine	31
	STFU/Mobile	3
	Temporary	5
Hillsdale	Complaint	1
	Consult	1
	Follow-Up	2
	Pre-opening/New	1
	Progress Note	2
	Routine	19
	STFU/Mobile	5
St. Joseph	Temporary	8
	Consult	1
	Pre-opening/New	3
	Progress Note	2
	Routine	14
	STFU/Mobile	19
	Temporary	17
	Total number of inspections	141

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# Establishment Inspection Report

For Date Range: 6/1/2023 - 6/30/2023 and Program: Food Service

Name	Location	Date	Inspection Type	# P	# Pf	# P/Pf Fixed During Inspection	# Core
Abundant Life Assembly	Cement City	6/14/2023	Routine	0	0	0	0
ADDISON GUN CLUB	SOMERSET TWP	6/29/2023	Routine	0	1	0	0
ADVENTURE ZONE, INC	COLDWATER	6/21/2023	Routine	0	1	0	0
Ambassadors for Christ Church		6/15/2023	Temporary	0	0	0	0
AMERICAN LEGION POST 454	Colon	6/17/2023	Temporary	0	0	0	0
Amy & Mike's Kitchen	Litchfield	6/9/2023	STFU/Mobile	0	0	0	0
Anderson Foods Hot Dogs	Standish	6/16/2023	STFU/Mobile	0	0	0	0
Anderson Foods Popcorn	Standish	6/16/2023	STFU/Mobile	0	0	0	0
Anserson Foods Lemonade	Standish	6/16/2023	STFU/Mobile	0	0	0	0
APPLEBEE'S # 8393	COLDWATER	6/28/2023	Routine	1	0	1	0
Applebee's #8399	Three Rivers	6/7/2023	Routine	0	0	0	1
Arby's # 5968	Three Rivers	6/14/2023	Pre-opening/New	0	1	0	0
ARBY'S #7394	HILLSDALE	6/27/2023	Routine	0	0	0	0
Artic Shaved Ice	Coldwater	6/23/2023	Temporary	0	0	0	0
Baptist State Convention of Michigan - Bambi Lake Retreat	Roscommon	6/7/2023	Temporary	0	0	0	0
BEACH CONCESSIONS #88	Hillsdale	6/22/2023	STFU/Mobile	0	0	0	0
Betzer Community Church	Pittsford	6/24/2023	Temporary	0	0	0	0
Bird Lake Christian Academy	OSSEO	6/19/2023	Routine	0	0	0	1
Branch County Coalition Against Domestic Violence - Duck Race	Coldwater	6/2/2023	Temporary	0	0	0	0
Bronson Nutrition	Bronson	6/7/2023	Routine	0	0	0	0
Buck Yeah STFU	Three Rivers	6/19/2023	STFU/Mobile	0	0	0	0
BUNDY HILL DINER LLC	Jerome	6/8/2023	Routine	0	0	0	0
BURR OAK GRANGE #1350	Burr Oak	6/29/2023	Progress Note	0	0	0	0
Burr Oak United Methodist Kitchen	Burr Oak	6/29/2023	Progress Note	0	0	0	0
CHINA 1	COLDWATER	6/20/2023	Routine	0	1	1	4
Clemens Food Group LLC	COLDWATER	6/9/2023	Pre-opening/New	0	0	0	0
COLDWATER BROADWAY GRILLE	COLDWATER	6/6/2023	Follow-Up	2	6	1	8

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Name	Location	Date	Inspection Type	# P	# Pf	# P/Pf Fixed During Inspection	# Core
COLDWATER BROADWAY GRILLE	COLDWATER	6/27/2023	Follow-Up	0	0	0	0
COLDWATER HAMPTON INN/FOOD	COLDWATER	6/21/2023	Routine	0	0	0	1
COLDWATER LAKE ASSOCIATION	COLDWATER	6/29/2023	Routine	0	0	0	0
COLDWATER UNITED METHODIST CHURCH	COLDWATER	6/19/2023	Routine	0	1	1	1
COMMERCIAL SPORTS BAR	COLDWATER	6/20/2023	Routine	1	2	1	0
COMMERCIAL SPORTS BAR	COLDWATER	6/29/2023	Routine	1	2	1	0
Dips on the Vine	Middlebury	6/23/2023	Temporary	0	0	0	0
Di's Diner	Vicksburg	6/9/2023	STFU/Mobile	0	0	0	0
Dougies	Howe	6/22/2023	STFU/Mobile	0	0	0	0
EL CERRITO	HILLSDALE	6/6/2023	Routine	0	0	0	1
EL CERRITO MEXICAN RESTAURANT	COLDWATER	6/15/2023	Routine	1	0	0	3
EL CERRITO MEXICAN RESTAURANT	COLDWATER	6/21/2023	Complaint	1	0	0	0
El Sabor de Mi Pueblo	Sturgis	6/5/2023	STFU/Mobile	0	0	0	0
Farmhouse Kitchen and Ale	Camden	6/22/2023	Complaint	0	1	0	0
Farrand Hall Event Center	Colon	6/2/2023	Pre-opening/New	0	0	0	0
FIRST BAPTIST CHURCH	COLDWATER	6/19/2023	Routine	0	0	0	2
Five Lakes Coffee	Sturgis	6/21/2023	Routine	0	1	0	0
FIVE STAR PIZZA	BRONSON	6/30/2023	Routine	1	0	1	0
Flying Club of Branch County	Coldwater	6/4/2023	Temporary	0	0	0	0
FRATERNAL ORDER OF EAGLES #1907	COLDWATER	6/27/2023	Routine	0	0	0	2
FREDDIE'S FREEZE INC	SOMERSET CENTER	6/27/2023	Routine	0	0	0	0
Gambler's Golf & Grill	Litchfield	6/9/2023	Routine	2	0	1	1
GREAT LAKES HEALTH & FITNESS	COLDWATER	6/20/2023	Routine	0	0	0	0
Hillsdale Dairy Queen	Hillsdale	6/2/2023	Routine	1	0	1	0
HILLSDALE FREE METHODIST CHURCH	HILLSDALE	6/6/2023	Routine	1	0	1	0
Holiday Inn Express & Suites / Food	COLDWATER	6/21/2023	Routine	0	0	0	0
Homestead Cinnamon Rolls	Colon	6/15/2023	STFU/Mobile	0	0	0	0
Hot Diggity Dogs	Centreville	6/9/2023	STFU/Mobile	0	0	0	0
IYOPAWA ISLAND GOLF COURSE	OVID TWP	6/22/2023	Routine	0	0	0	1

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Name	Location	Date	Inspection Type	# P	# Pf	# P/Pf Fixed During Inspection	# Core
J Dawgz and Catering	Coldwater	6/29/2023	STFU/Mobile	0	0	0	0
Jackie's Concessions Elephant Ears	Standish	6/16/2023	STFU/Mobile	0	0	0	0
Jackie's Concessions French Fries	Standish	6/16/2023	STFU/Mobile	0	0	0	0
Jay'z BBQ	STURGIS	6/28/2023	STFU/Mobile	0	0	0	0
JEANNIE'S DINER	COLDWATER	6/12/2023	Routine	1	1	2	0
JERRY PRICE FISKE - FRENCH FRIES - HILLSDALE		6/16/2023	Temporary	0	0	0	0
JERRY PRICE FISKE - LEMONADE - HILLSDALE		6/16/2023	Temporary	0	0	0	0
Jilly Beans	Hillsdale	6/25/2023	Temporary	0	0	0	0
Jimmy John's #3994	Three Rivers	6/7/2023	Routine	0	1	1	0
Keim' s Elephant Ears	Osceola	6/17/2023	Temporary	0	0	0	0
Keim' s Elephant Ears	Osceola	6/17/2023	Temporary	0	0	0	0
Keim's Hamburgers	Osceola	6/17/2023	Temporary	0	0	0	0
Kendra Washburn	Bronson	6/17/2023	Temporary	0	0	0	0
Kick'n Kountry	Coldwater	6/13/2023	Pre-opening/New	0	1	1	2
Kimball Camp YMCA Nature Center	Reading	6/1/2023	Routine	0	0	0	1
KLINGER LAKE COUNTRY CLUB (Food)	Sturgis	6/5/2023	Routine	0	0	0	0
KNIGHTS OF COLUMBUS (K of C)	STURGIS	6/23/2023	Temporary	0	0	0	0
Kuhbander Concessions LLC	Constantine	6/12/2023	STFU/Mobile	0	0	0	0
Kuhbander Concessions LLC	Constantine	6/15/2023	STFU/Mobile	0	0	0	0
LIL PEPPI'S PIZZA	SOMERSET CENTER	6/27/2023	Progress Note	0	0	0	0
LIL PEPPI'S PIZZA	SOMERSET CENTER	6/29/2023	Routine	0	0	0	0
LITCHFIELD-JONESVILLE LANES INC	Jonesville	6/2/2023	Routine	1	1	1	1
Los Tequilas	Coldwater	6/14/2023	Routine	0	1	0	0
Los Tequilas	Coldwater	6/16/2023	Enforcement	1	0	0	2
Majoor's Concessions	Comstock Park	6/16/2023	STFU/Mobile	0	0	0	0
MANCINO'S OF COLDWATER	COLDWATER	6/5/2023	Routine	0	0	0	1
McKibbin Media Group	Hillsdale	6/16/2023	Temporary	0	0	0	0
Mema Kitchen - STFU	Three Rivers	6/9/2023	Consult	0	0	0	0
MIDWAY LANES LLC	COLDWATER	6/29/2023	Progress Note	0	0	0	0

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Name	Location	Date	Inspection Type	# P	# Pf	# P/Pf Fixed During Inspection	# Core
MOOSE LODGE #677	COLDWATER	6/28/2023	Routine	0	0	0	1
NJBC	Three Rivers	6/15/2023	Temporary	0	0	0	0
Ohana Kalea Shave Ice LLC	Howe	6/9/2023	STFU/Mobile	0	0	0	0
Perkins Auction Service	Allen	6/23/2023	Temporary	0	0	0	0
PREMIERE THEATRE/UNITED ENTERTAINMENT	Hillsdale	6/23/2023	Routine	0	0	0	0
Prop Blast Cafe	COLDWATER	6/13/2023	Routine	1	1	0	1
QUINCY DAIRY QUEEN	QUINCY	6/29/2023	Routine	0	0	0	0
QUINCY GOLF COURSE	QUINCY	6/28/2023	Routine	0	0	0	0
QUINCY UNITED METHODIST CHURCH	QUINCY	6/14/2023	Routine	0	0	0	0
Remedy Church	Reading	6/5/2023	Temporary	0	0	0	0
Rollin' Smoke BBQ	Marcellus	6/15/2023	Temporary	0	0	0	0
Salem Church	Osseo	6/16/2023	Pre-opening/New	0	0	0	0
Smitty's Pizza & Subs, LLC	Bronson	6/30/2023	Routine	0	2	1	1
Smokin Ain't EZ BBQ	Three Rivers	6/24/2023	Temporary	0	0	0	0
Snowkist Concessions	Cheboygan	6/16/2023	STFU/Mobile	0	0	0	0
SOMERSET CONGREGATIONAL CHURCH	SOMERSET	6/16/2023	Routine	0	0	0	0
SOUTH LANES	Three Rivers	6/21/2023	Routine	0	2	0	1
Spangler's Family Restaurant	Jonesville	6/8/2023	Routine	2	2	4	0
Spangler's Family Restaurant	Jonesville	6/19/2023	Follow-Up	0	0	0	0
Spangler's Stockyard Restaurant	Hillsdale	6/24/2023	Routine	0	0	0	1
Spence Softball Complex	Sturgis	6/21/2023	Routine	0	0	0	1
St. Clare Catholic Church	Sturgis	6/10/2023	Temporary	0	0	0	0
ST. JOE VALLEY GOLF CLUB, INC.	Sturgis	6/22/2023	Routine	0	1	1	1
St. Joseph County Commision on Aging	Three Rivers	6/1/2023	Routine	0	1	1	0
St. Pauls Lutheran Church Sonshine Preschool Daycare	Coldwater	6/7/2023	Routine	0	0	0	0
STREET DOGS	Hillsdale	6/1/2023	STFU/Mobile	0	0	0	0
Street Tacos	Kendallville	6/23/2023	Temporary	0	0	0	0
Sturgis Area Chamber of Commerce	Sturgis	6/21/2023	Temporary	0	0	0	0
Sturgis Eastside Kiwanis Club	Sturgis	6/22/2023	Temporary	0	0	0	0
Sturgis Kiwanis Club	Sturgis	6/22/2023	Temporary	0	0	0	0

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Name	Location	Date	Inspection Type	# P	# Pf	# P/Pf Fixed During Inspection	# Core
SUBWAY #1951	COLDWATER	6/5/2023	Routine	1	0	0	3
Taco Trailer	Standish	6/16/2023	STFU/Mobile	0	0	0	0
The Chill Bean	CENTERVILLE	6/22/2023	Routine	0	0	0	0
The Dawn Theater	Hillsdale	6/7/2023	Routine	0	0	0	0
The Goodie Shop	COLDWATER	6/12/2023	Routine	0	0	0	3
THE GREAT WALL	HILLSDALE	6/28/2023	Consult	0	0	0	0
THE GREAT WALL	HILLSDALE	6/28/2023	Progress Note	0	0	0	0
The Hope Cafe	Coldwater	6/7/2023	Routine	0	0	0	0
The House of Brisket	Kendallville	6/23/2023	STFU/Mobile	0	0	0	0
THE LOCAL EATERY	Hillsdale	6/13/2023	Follow-Up	0	0	0	0
The Oriental (2)	Constantine	6/15/2023	STFU/Mobile	0	0	0	0
The Oriental (2)	Constantine	6/16/2023	Routine	0	0	0	0
The Parlor Ice Cream & Coffee		6/26/2023	Pre-opening/New	0	0	0	1
THREE RIVERS 6	Three Rivers	6/27/2023	Routine	0	0	0	0
Three Rivers Fire Department	Three Rivers	6/16/2023	Temporary	0	0	0	0
Three Rivers Lions	Three Rivers	6/15/2023	Temporary	0	0	0	0
TKO BBQ	Jonesville	6/25/2023	STFU/Mobile	0	0	0	0
Tokyo Three Rivers Inc.	THREE RIVERS	6/21/2023	Routine	0	0	0	1
Two Bandits Brewing Co.	Coldwater	6/28/2023	Routine	1	1	1	1
Wagner's Good Dips	Berrien Springs	6/15/2023	STFU/Mobile	0	0	0	0
Wendy's #4574	Three Rivers	6/27/2023	Routine	0	0	0	0
White Pigeon Action Club	White Pigeon	6/16/2023	Temporary	0	0	0	0
Wieners and Tacos on the Fly II	Hillsdale	6/14/2023	STFU/Mobile	0	0	0	0
Willow's Bar & Grill	Coldwater	6/8/2023	Routine	1	0	1	2
Wright Street Park Concession Stand	Jonesville	6/1/2023	Routine	0	0	0	0
YMCA CAMP EBERHART (Food)	Three Rivers	6/30/2023	Routine	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.



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**Enclosure:**

1. Services to Victims of Elder Abuse – 3<sup>rd</sup> quarter report
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**Updates:**

1. Services to Victims of Elder Abuse Program Updates:
  - Victim Specialists continue to take many referrals and work with key community partners in both counties. County IDT meetings remain well attended with great conversation. At the end of June (year-to-date) we reported serving 42 people. As of the date this report was written (19 days into July), we've served 12 more individuals! We recently connected with Branch County's Emergency Manager, 911/Central Dispatch Director and two managers – what a beneficial meeting! It's great to be back out meeting community partners!  
I'll share updates at the meeting regarding the Elder Justice Summit (7/20/23) that our victim specialists and I attended. It's planned to be a state-wide convening of elder justice advocates and professionals to share best practices and updates on new initiatives.
2. FY2024 Annual Implementation Plan (AIP) was presented to the Branch County Board of Commissioners at their working meeting on 7/13 and to St. Joseph County Board of Commissioners at their regular meeting on 7/18. We appreciate your kind comments! The Plan will be presented (and hopefully approved without special conditions) at the September Michigan Commission on Services to the Aging meeting in Lansing.
3. Other highlights:
  - Our team is planning for multiple upcoming outreach events! Branch County Fair, St. Joseph County Fair and the St. Joseph County Project Connect/Veterans Stand Down. We hope you'll come and visit us!
  - We hosted our ACLS Field Representative, Ashley Ellsworth, for our Annual AAA Assessment on July 18<sup>th</sup>. Our Care Consultants met to with her regarding the Community Living Program and performed a case review. We then met to discuss staff training, diversity/equity/inclusion initiatives, HR/employee reviews and operational checks & balances. I'm pleased to report, all is well! We will share the formal feedback report once it's received.
  - Provider Assessments continue... We will be finishing up Branch COA's assessment soon, and then assessing a Purchase of Service Vendor for their compliance with Bureau Operating Standards. Our goals is to have a summary of the visits (including any findings or recommendations) prepared for the August BOH meeting.



## Services to Victims of Elder Abuse Grant FY22-23 3rd Quarter Report (St. Joseph County)

04/01/23 to 06/30/23

\*Types of Victimization & Services Provided are based on number of occurrences

\*Demographic Info is new clients only; all other categories include continuing clients

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Demographics - New Clients	Total	Previous Qtr. Totals	YTD
Black/African-American	0	0	0
Hispanic/Latino	0	0	0
Caucasian/Non-Latino	4	8	12
Female	2	5	7
Male	2	3	5
Vulnerable: Age 18-59	1	0	1
Elderly: Age 60 and Older	3	8	11
<b><u>New Clients Total</u></b>	<b>4</b>	<b>8</b>	<b>12</b>
<b><u>Continuing Clients</u></b>	<b>1</b>	<b>7</b>	<b>8</b>
<b><u>Total Clients Served</u></b>	<b>5</b>	<b>15</b>	<b>20</b>

Types of Victimization	Total	Previous Qtr. Totals	YTD
Arson	0	0	0
Bullying (Verbal, Cyber or Physical)	3	3	6
Domestic or Family Violence	3	7	10
Elder Abuse or Neglect	3	9	12
Identity Theft/Fraud/Financial Crime	2	8	10
Physical Assault	1	2	3
Robbery/Burglary	0	2	2
Sexual Assault	0	0	0
Survivors of Homicide	0	0	0
Multiple Victimizations	3	9	12

Special Classification	Total	Previous Qtr. Totals	YTD
Deaf/Hard of Hearing	1	2	3
Disability	4	13	17
Homeless	1	7	8
LGBTQ	0	0	0
Veteran	1	1	2

Direct Services	Total	Previous Qtr. Totals	YTD
Crime Victims Compensation	0	0	0
Information about Criminal Justice	22	22	44
Referral to Other Services	24	38	62
Referral to Other Victim Services	0	6	6
Victim Notification	2	12	14

**Services to Victims of Elder Abuse Grant  
FY22-23 3rd Quarter Report (St. Joseph County)  
Continued**

<b>Personal Advocacy</b>	<b>Total</b>	<b>Previous Qtr. Totals</b>	<b>YTD</b>
Child/Dependent Assistance	0	0	0
Emergency Medical Care	0	0	0
Individual Advocacy	1	19	20
Intervention with Person or Institutions	30	23	53
Law Enforcement Interview	1	5	6
Transportation	5	10	15

<b>Emotional Support or Safety Services</b>	<b>Total</b>	<b>Previous Qtr. Totals</b>	<b>YTD</b>
Crisis Intervention	9	17	26
Emergency Financial Assistance	0	4	4

<b>Shelter/Housing Services</b>	<b>Total</b>	<b>Previous Qtr. Totals</b>	<b>YTD</b>
Relocation Assistance	12	20	32
Transitional Housing	0	3	3

<b>Criminal Justice Assistance</b>	<b>Total</b>	<b>Previous Qtr. Totals</b>	<b>YTD</b>
Criminal Advocacy	2	2	4
Law Enforcement Interview	1	5	6
Notification of Criminal Justice Event	2	9	11
Other Emergency Assistance	0	0	0
Personal Protective Order	0	2	2
Prosecution Interview	0	0	0
Restitution Assistance	0	8	8
Victim Impact Statement	0	0	0



## Services to Victims of Elder Abuse Grant FY22-23 3rd Quarter Report (Branch County)

04/01/23 - 06/30/23

\*Types of Victimization & Services Provided are based on number of occurrences

\*Demographic Info is new clients only; all other categories include continuing clients

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Demographics - New Clients	Total	Previous Qtr. Totals	YTD
Black/African-American	0	0	0
Hispanic/Latino	0	0	0
Caucasian/Non-Latino	5	2	7
Female	3	4	7
Male	2	3	5
Vulnerable: Age 18-59	0	0	0
Elderly: Age 60 and Older	5	7	12
<b><u>New Clients Total</u></b>	<b>5</b>	<b>7</b>	<b>12</b>
<b><u>Continuing Clients</u></b>	<b>4</b>	<b>6</b>	<b>10</b>
<b><u>Total Clients Served</u></b>	<b>9</b>	<b>13</b>	<b>22</b>

Types of Victimization	Total	Previous Qtr. Totals	YTD
Arson	0	0	0
Bullying (Verbal, Cyber or Physical)	2	6	8
Domestic or Family Violence	2	4	6
Elder Abuse or Neglect	2	7	9
Identity Theft/Fraud/Financial Crime	3	11	14
Physical Assault	2	1	3
Robbery/Burglary	1	0	1
Sexual Assault	0	0	0
Survivors of Homicide	0	0	0
Multiple Victimizations	3	2	5

Special Classification	Total	Previous Qtr. Totals	YTD
Deaf/Hard of Hearing	5	4	9
Disability	7	5	12
Homeless	0	0	0
LGBTQ	0	0	0
Veteran	2	1	3

Direct Services	Total	Previous Qtr. Totals	YTD
Crime Victims Compensation	0	0	0
Information about Criminal Justice	20	17	37
Referral to Other Services	11	13	24
Referral to Other Victim Services	0	4	4
Victim Notification	3	0	3

**Services to Victims of Elder Abuse Grant  
FY22-23 3rd Quarter Report (Branch County)  
Continued**

<b>Personal Advocacy</b>	<b>Total</b>	<b>Previous Qtr. Totals</b>	<b>YTD</b>
Child/Dependent Assistance	0	0	0
Emergency Medical Care	0	1	1
Individual Advocacy	3	1	4
Intervention with Person or Institutions	14	11	25
Law Enforcement Interview	0	0	0
Transportation	1	3	4

<b>Emotional Support or Safety Services</b>	<b>Total</b>	<b>Previous Qtr. Totals</b>	<b>YTD</b>
Crisis Intervention	6	5	11
Emergency Financial Assistance	2	0	2

<b>Shelter/Housing Services</b>	<b>Total</b>	<b>Previous Qtr. Totals</b>	<b>YTD</b>
Relocation Assistance	3	1	4
Transitional Housing	0	0	0

<b>Criminal Justice Assistance</b>	<b>Total</b>	<b>Previous Qtr. Totals</b>	<b>YTD</b>
Criminal Advocacy	1	0	1
Law Enforcement Interview	0	0	0
Notification of Criminal Justice Event	3	5	8
Other Emergency Assistance	0	0	0
Personal Protective Order	1	0	1
Prosecution Interview	0	0	0
Restitution Assistance	0	2	2
Victim Impact Statement	1	0	1



## Services to Victims of Elder Abuse Grant FY22-23 3rd Quarter Report (Both Counties)

04/01/23 - 06/30/23

\*Types of Victimization & Services Provided are based on number of occurrences

\*Demographic Info is new clients only; all other categories include continuing clients

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Demographics - New Clients	Total	Previous Qtr. Totals	YTD
Black/African-American	0	0	0
Hispanic/Latino	0	0	0
Caucasian/Non-Latino	9	10	19
Female	5	9	14
Male	4	6	10
Vulnerable: Age 18-59	1	0	1
Elderly: Age 60 and Older	8	15	23
<b><u>New Clients Total</u></b>	<b>9</b>	<b>15</b>	<b>24</b>
<b><u>Continuing Clients</u></b>	<b>5</b>	<b>13</b>	<b>18</b>
<b><u>Total Clients Served</u></b>	<b>14</b>	<b>28</b>	<b>42</b>

Types of Victimization	Total	Previous Qtr. Totals	YTD
Arson	0	0	0
Bullying (Verbal, Cyber or Physical)	5	9	14
Domestic or Family Violence	5	11	16
Elder Abuse or Neglect	5	16	21
Identity Theft/Fraud/Financial Crime	5	19	24
Physical Assault	3	3	6
Robbery/Burglary	1	2	3
Sexual Assault	0	0	0
Survivors of Homicide	0	0	0
Multiple Victimizations	6	11	17

Special Classification	Total	Previous Qtr. Totals	YTD
Deaf/Hard of Hearing	6	6	12
Disability	11	18	29
Homeless	1	7	8
LGBTQ	0	0	0
Veteran	3	2	5

Direct Services	Total	Previous Qtr. Totals	YTD
Crime Victims Compensation	0	0	0
Information about Criminal Justice	42	39	81
Referral to Other Services	35	51	86
Referral to Other Victim Services	0	10	10
Victim Notification	5	12	17

**Services to Victims of Elder Abuse Grant  
FY22-23 3rd Quarter Report (Both Counties)  
Continued**

<b>Personal Advocacy</b>	<b>Total</b>	<b>Previous Qtr. Totals</b>	<b>YTD</b>
Child/Dependent Assistance	0	0	0
Emergency Medical Care	0	1	1
Individual Advocacy	4	20	24
Intervention with Person or Institutions	44	34	78
Law Enforcement Interview	1	5	6
Transportation	6	13	19

<b>Emotional Support or Safety Services</b>	<b>Total</b>	<b>Previous Qtr. Totals</b>	<b>YTD</b>
Crisis Intervention	15	22	37
Emergency Financial Assistance	2	4	6

<b>Shelter/Housing Services</b>	<b>Total</b>	<b>Previous Qtr. Totals</b>	<b>YTD</b>
Relocation Assistance	15	21	36
Transitional Housing	0	3	3

<b>Criminal Justice Assistance</b>	<b>Total</b>	<b>Previous Qtr. Totals</b>	<b>YTD</b>
Criminal Advocacy	3	2	5
Law Enforcement Interview	1	8	9
Notification of Criminal Justice Event	5	11	16
Other Emergency Assistance	0	0	0
Personal Protective Order	1	2	3
Prosecution Interview	0	0	0
Restitution Assistance	0	10	10
Victim Impact Statement	1	0	1

***Included in This Month's Report:***

1. *Health Education & Promotion Department Update*
2. *2023 Medicinal Marijuana Operations & Oversight Grant (MMOOG) Update*
3. *MCRH – “Embedding a Community Health Worker Program within the Local Public Health Department” Grant Update*
4. *Community Events Update*
5. *June Social Media Data*
6. *June CHW Client Data*

**1. Health Education & Promotion Department Update:**

The month of June went by quickly for the Health Education & Promotion team, as we worked around staff members utilizing some much needed vacation time, welcoming a new team member, and preparing for the very busy upcoming months. Our Health Educators, Isabella Stycos and Josh Englehart have been utilizing creative techniques through our social media pages and agency website to re-engage and reconnect with our community members. One of the ways in which they are doing this is continuing the video series “We Are Public Health” that Josh began several months ago. These video snippets are interviews with agency staff members wherein a specific health topic (pertinent to current issues or the time of year), or an overall department’s focus and mission is discussed with the HEP team and then posted to our website and social media pages; the idea behind this is to give the public a deeper view of the roles we all play here at the health department. As was alluded to earlier, we continue to monitor, update, and post relevant messaging through our social media platforms. Our Facebook/Instagram posts for the month of June included, but were not limited to, topics such as: Safety month, Alzheimer’s month, Oral health month, pool safety awareness, excessive heat safety, Sickle Cell awareness day, Mosquito awareness week, and HIV testing Day.

Furthermore, the department has also been working to update print materials such as agency brochures, educational materials, Immunization guideline brochures, the Community Health Worker brochures, and the WIC income guidelines fliers. This is an ongoing project, but we have made some significant progress and will continue to work with the other departments to ensure we are providing the most up-to-date information to the community members that we serve. Furthermore, the Agency’s CHNA/CHIP was officially completed with presentations at the various county community organizations taking place on June 13<sup>th</sup> (SJ HSC), June 20<sup>th</sup> (HD HSN) and June 21<sup>st</sup> (BCCN).

**2. 2023 Medicinal Marijuana Operations & Oversight Grant (MMOOG)**

At the last BOH meeting, I mentioned that the department had a lot of exciting stuff underway for this grant, and that those projects are moving along as planned; that is still where this grant remains as we await some of the final components of the project to come together and look to spend the existing funds and close the grant out by the end of August. As I’ve mentioned before, this year we chose to use the funds to purchase more large-scale advertisement opportunities to get the message out to the public. The first objective of this campaign was to renew our contract for a 2<sup>nd</sup> year with the Branch Area Transit Authority (BATA) for the design that is currently on one of their public transportation buses; under this same objective, we have also decided to create a 2<sup>nd</sup>, similar design, that will be going on a 2<sup>nd</sup> bus later this summer for a 1-year period. Both aspects of this objective are complete on our end and all that is left to do is wait for the design to be printed and installed on the BATA bus, which we hope to see completed within the next couple of weeks.

The second objective was to work with EffecTV, a sub-contractor company of Comcast, to create and distribute a “Lock It Up” television commercial. This ad will be shown on live TV through MVPDs (Multichannel Video Programming Distributors) such as Xfinity, Dish Network and DirecTV, as well as vMPVDs (Virtual Multichannel

Video Programming Distributors), which are live streaming services such as FuboTV, Sling, YouTubeTV, AppleTV, and Fox+. The commercial will also air directly through Internet-enabled “smart” devices such as gaming systems, Roku Televisions, FireTV consoles, and many more. This objective has been completed and the ads began running on July 3<sup>rd</sup> within Branch and Hillsdale counties. Due to the success and public reach of these commercials, we have decided to utilize the remaining funds available for St. Joseph County and we will be showing this same commercial within those zip codes during the month of August.

The third objective, which was to secure a billboard in Hillsdale County that will be displaying the “Lock It Up” message, has also been completed. The design will be up for an 8-week period, which began on June 20th. The HEP team is very excited to be able to utilize this medium again, as last year we were unable to secure any open billboards during the project period. Lastly, after reviewing our budget, we decided to add a 4<sup>th</sup> objective by making a purchase of the lockable medication bags as we have done in the past in either lock box or bag form. We were able to purchase 190 of these medication bags and it is our preliminary idea to work with the county’s substance abuse task forces in getting these bags distributed to the public, while also distributing them on our own at the numerous summer community events that will be coming up in the next few months.

### **3. The Michigan Center for Rural Health (MCRH) – Embedding a Community Health Worker Program within the Local Public Health Department Grant:**

During the month of June, our CHW Rachael Wall was busy as she welcomed 3 new clients and continued to work with her existing clients, as well. Rachael has been working hard to expand her resources and to build trust with the public by attending many of the community events that have already taken place, and the many fairs, carnivals, etc. that will be taking place within our 3 counties over the remainder of the Summer months. Furthermore, it was announced at the end of April that the funds provided by this grant will be extended through May of 2024, which will allow us to continue with the program until at least that time with the hopes of securing further funding before that window closes.

Lastly, I wanted to share a “Success Story” that Rachael provided me after helping a client. These successes are important because the work of a CHW can be difficult and frustrating, but it is stories like the following that make these programs so beneficial, and rewarding, for both our staff and the community members that they serve:

*Rachael recently took the case of a young homeless man. She found out that he had only recently turned 18 years old and that he should be a High School Senior in St. Joseph County this upcoming Fall. The young man had no housing due to a deteriorating relationship with his father that led to him being kicked out once he had turned 18; and, unfortunately, no other family or friend’s house was a safe option for the 18 year old. Rachael worked tirelessly and spent over a month looking for housing for the young man and tapped into all the different community resources that she had available. Finally, she was given the name of a family by another community partner and after many, many phone calls and personal meet-and-greets, they agreed to take the young man in for the Summer and for the entirety of his Senior year. Rachael also got the client enrolled in the “YOU” program through MI Works, which would help him to get his driver’s license soon. The client is in a safe and loving home where the family can work with him, help him with school, and help him prepare for his final year of high school and the struggles that lie beyond it.*

**4. Community Events:** We have participated, or will be participating in the following events:

Date	Event
6/1	Three Rivers Community Resource Roundtable
6/2	Branch County ISD Health Family Fun Day
6/16	Three Rivers Water Festival
6/17	Three Rivers Water Festival
6/20	Hillsdale County Safety Fair
6/21	Branch Co. Community Network (BCCN): CHNA/CHIP Presentation
6/28	Branch County SATF: Underage Drinking Presentation
7/10-7/13	Car Seat Technician Training
7/21	Bronson Polish Festival

**5. Social Media Data: June**

Social Media Data (As of July 1st, 2023)						
	# of Followers (Facebook & Instagram)	Instagram Reach (Amount a post is viewed, commented on, shared, etc.)	Facebook Reach (Amount a post is viewed, commented on, shared, etc.)	Number & Topic of Facebook Live Events	Agency Mentions in Local Media (radio stations, local newspaper/digital articles, etc.)	Other Activities (# and Topic)
June	4092	41 <i>(Down 18% from May)</i>	15,278 <i>(Up 17.3% from May)</i>	0	11	None
TOTAL TO DATE (Since 10/1/2022)	18 NEW followers since last report	190	167,577	7	87	5

**6. Community Health Worker (CHW) Client Data: June**

Community Health Worker (CHW) Client Data - June 2023								
	# New	# Total to Date	*** "Interactions" = Supplied Resources or referred an individual to an outside agency, but not an active client (Interactions are counted under the "Referral Source" numbers, as well). **Interactions "# Total to Date" Began Reporting Numbers in January 2023.					
<b>*** Interactions</b>	7	34**						
<b>Clients</b>	3	35						
	Internal (Clinic) Referral & Agency Website	External Referral (Partner Organization)	AAA	MDHHS	Internal (Clinic) Referral & Agency Website (Total to Date)	External Referral, i.e.: Partner Organization (Total to Date)	AAA (Total to Date)	MDHHS (Total to Date)
<b>Referral Source</b>	1	1	0	1	18	10	5	2
	Branch	St. Joseph	Hillsdale	Branch (Total to Date)	St. Joseph (Total to Date)	Hillsdale (Total to Date)		
<b>Clients by County</b>	0	2	1	8	22	5		
	In-Person (Office)	Phone	Email	In-Person (Home Visit)	In-Person: Office (Total to Date)	Phone (Total to Date)	Email (Total to Date)	In-Person: Home Visit (Total to Date)
<b>Communications (sum of all communications w/each client)</b>	8	51	2	8	51	263	11	15
	Open	Closed (Completed)	Closed (Unable to Complete)	Other (Specify)	Open, (Total # of Clients to Date)	Closed/Completed (Total to Date)	Closed: Unable to Complete (Total to Date)	Other: Specify (Total to Date)
<b>Case Status</b>	17	2	2	0	35	9	9	0
	Behavioral Health	Health Insurance	Housing	Immunization Information	Employment Issues	Family Planning & Pregnancy	At-Home Medical & Health Needs	Adult Education
<b>Services Provided</b>	3	6	4	1	1	0	3	0
<b>Service Provided (Total to Date)</b>	14	45	24	7	14	7	16	7
	Transportation	Food Assistance	Child Developmental /Education Issues & Screening	Childcare Services	Clothing Needs	Domestic Concerns	Other (Specify)	
<b>Services Provided Cont.</b>	0	1	0	2	0	0	7 (Non-Specific Resource)	
<b>Service Provided (Total to Date)</b>	10	24	7	10	9	9	29	

## **Personal Health and Disease Prevention: July 27, 2023**

### **Communicable Disease:**

- Respiratory virus activity is low (covid, flu, RSV)
- Arboviruses are starting to be detected in mosquitos in Michigan but not yet reported in animals or humans.
  - Eastern Equine Encephalitis virus detected in two mosquito pools (Bay and Barry).
  - Jamestown Canyon Virus detected in three mosquito pools (Bay and Saginaw).
- Bats, skunks, and a [kitten](#) have tested positive for rabies.
- The agency has received our new respiratory fit testing equipment. A training was completed with our EPC and clinic supervisory staff on properly using the equipment and performing an accurate test.

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

June 27<sup>th</sup> was National HIV testing day. We were able to post on social media and prepare a press release to encourage testing. We did see an increase in testing in the month of June with a total of 15 performed.

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

The WIC program has approved some new physical presence waiver options. The options can be used after August 10<sup>th</sup> and will allow for certain appointments to be virtual under special circumstances. The client must have a hardship that prevents them from accessing or continuing WIC services. This is considered an exception to standard operations and should occur rarely. The WIC program will host a webinar on July 27<sup>th</sup> to explain these new options in more detail with staff.

We were able to receive an in-kind donation for oral health items from Delta Dental that will nicely compliment our Varnish program. The agency will receive a supply of toothpaste, youth and adult toothbrushes, along with some oral health educational brochures for client distribution.

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

CSHCS team continues to work on sensory rooms for the offices. They have also been working closely with the family center to provide training and support for bereavement to parents and caregivers who have lost a child.

We have posted for an available part-time technician position in our hearing and vision program.

Our annual client survey has been running from July 19<sup>th</sup>-24<sup>th</sup>. A QR code has been posted in all of our lobby areas for clients to evaluate our clinical services and provide suggestions/feedback.

We will analyze the data and evaluate for quality improvement needs.

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

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

**June-23**

Confirmed & Probable Case Totals

	2022-2023				FYTD 2022-2023				2021-2022 FYTD			
	BR	HD	SJ	Total	BR	HD	SJ	Total	BR	HD	SJ	Total
Animal Bite/Rabies potential exposure	-	6	-	6	13	28	-	41	14	49	-	63
Blastomycosis	-	-	-	-	-	-	-	-	-	-	-	-
Brucellosis	-	-	-	-	-	-	-	-	-	-	-	-
Campylobacter	3	2	-	5	11	9	2	22	11	9	4	24
Chicken Pox	-	-	-	-	1	1	1	3	-	-	-	-
Chlamydia	7	13	10	30	95	69	242	406	83	74	124	281
Coccidioidomycosis	-	-	-	-	-	-	-	-	-	-	1	1
CRE Carbapenem Resistant Enterobac.	-	-	-	-	1	-	1	2	1	-	-	1
Cryptosporidiosis	-	-	-	-	2	2	3	7	3	-	1	4
Giardiasis	-	-	-	-	-	1	3	4	-	3	4	7
Gonorrhea	3	2	1	6	19	34	30	83	26	26	71	123
H. Influenzae Disease - Inv.	-	-	-	-	1	-	-	1	3	1	-	4
Hepatitis B - Acute	1	-	-	1	1	-	2	3	4	-	-	4
Hepatitis B - Chronic	-	-	-	-	2	-	-	2	3	-	1	4
Hepatitis C - Acute	-	-	1	1	16	2	17	35	2	1	-	3
Hepatitis C - Chronic	-	-	4	4	9	16	18	43	15	1	5	21
Hepatitis C Unknown	-	-	-	-	-	-	-	-	-	-	-	-
Histoplasmosis	-	-	-	-	2	-	-	2	1	-	1	2
HIV/AIDS	-	-	-	-	-	-	-	-	2	-	2	4
Influenza	6	-	3	9	401	243	292	936	116	151	123	390
Kawasaki	-	-	-	-	-	-	-	-	-	-	-	-
Legionellosis	-	-	-	-	-	-	1	1	-	1	-	1
Listeriosis	-	-	-	-	-	-	1	1	-	-	-	-
Lyme Disease	-	-	1	1	1	1	4	6	-	2	1	3
Measles	-	-	-	-	-	-	-	-	-	1	-	1
Menengitis - Aseptic	1	-	-	1	2	-	-	2	-	2	1	3
Menengitis - Bacterial	-	-	-	-	1	-	-	1	1	-	-	1
Meningococcal Disease	-	-	-	-	-	-	-	-	-	-	-	-
Mumps	-	-	-	-	-	-	-	-	-	-	-	-
Mycobacterium - Other	-	-	-	-	1	-	16	17	3	7	2	12
Norovirus	1	-	-	1	1	1	-	2	1	2	2	5
Novel Coronavirus	8	11	8	27	955	171	184	1,310	5,668	5,353	6,557	17,578
Pertussis	-	-	-	-	-	2	8	10	-	8	-	8
Salmonellosis	-	-	-	-	3	16	2	21	2	2	3	7
Scabies	-	-	-	-	2	-	-	2	-	-	-	-
Shiga Toxin-prod. (STEC)	-	1	-	1	1	1	8	10	1	1	1	3
Shigellosis	-	-	-	-	-	1	-	1	-	-	-	-
Shingles	-	-	-	-	-	2	-	2	1	-	-	1
Staphylococcus Aureus Infect.	-	-	-	-	-	-	-	-	-	-	-	-
Strep Invasive Gp A	3	-	-	3	11	3	16	30	-	2	-	2
Strep Pneumonia Inv Ds.	-	-	-	-	4	3	8	15	2	7	2	11
Syphilis - Primary	-	-	-	-	-	1	-	1	1	-	-	1
Syphilis - Secondary	-	-	-	-	1	1	2	4	-	1	2	3
Syphilis To Be Determined	-	1	-	1	-	1	1	2	2	1	1	4

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

	Jun-23					YTD 2022-2023					YTD 2021-2022				
	BR	HD	ST	TR	Total	BR	HD	ST	TR	Total	BR	HD	ST	TR	Total
<b>CHILD IMMUNIZATIONS</b>															
# Vaccines Given CHA	78	92	63	52	285	1,015	1,181	213	655	3,064	1,020	1,256	-	830	3,106
All VFC Doses Given	651	292	-	598	1,541	6,561	3,376	-	6,328	16,265	6,287	3,558	-	6,218	16,063
Waivers	9	11	7	3	30	87	105	15	51	258	71	115	22	65	273
<b>ADULT IMMUNIZATIONS</b>															
# Vaccines Given	29	15	-	13	57	1,019	535	14	354	1,922	3,738	1,724	-	1,468	6,930
All AVP Doses Given	15	3	-	2	20	124	125	-	198	447	86	317	-	142	545
<b>COMMUNICABLE DISEASE</b>															
TB Tests Done	6	2	-	-	8	65	61	-	8	134	56	89	-	14	159
STD treatments	-	4	-	5	9	2	8	2	50	62	19	23	2	81	125
HIV Testing	1	1	-	13	15	1	8	1	40	50	2	1	2	30	35
<b>ENROLLMENTS</b>															
Medicaid & Michild	1	1	-	-	2	10	5	1	12	28	11	3	-	3	17
<b>REFERRAL SERVICE</b>															
MCDC Referrals	7	5	18	9	39	74	96	191	319	680	50	-	144	239	433
MIHP referrals	-	-	7	20	27	33	19	128	164	344	311	23	123	164	621
<b>Hearing Screens</b>															
Pre-school	-	-	-	35	35	302	517	-	741	1,560	246	336	64	443	1,089
School Age	14	-	-	1	15	1,094	1,058	-	1,680	3,832	895	850	489	2,038	4,272
<b>Vision Screens</b>															
Pre-school	-	-	-	36	36	335	574	-	619	1,528	302	387	-	515	1,204
School Age	19	-	-	1	20	2,805	2,187	-	4,481	9,473	2,959	1,863	-	3,970	8,792
<b>Children's Special Health Care Services</b>															
Diagnostics	1	1	-	-	2	35	5	-	1	41	33	11	-	4	48
Assessments-Renewal	8	13	-	24	45	145	175	-	220	540	137	166	-	176	479
Assessments-New	3	12	-	11	26	27	45	-	55	127	41	44	-	55	140

State Participation/Enrollment Ratio [2]:

Jan-23	Feb-23	Mar-23	Apr-23	May-23	Curr Year P/E Ratio (last 12 months)
95.1%	94.9%	94.9%	95.6%	95.1%	94.8%

Months	Enrollment [3]	Initial Participation [4]	Closeout Participation [5]	% Change in Participation [6]	Participation/Enrollment Ratio[2]
Oct / 2021	4,026	3,485	3,545		86.56%
Nov / 2021	3,978	3,319	3,413	-3.72%	83.43%
Dec / 2021	3,904	3,293	3,346	-1.96%	84.35%
Jan / 2022	3,931	3,407	3,470	3.71%	86.67%
Feb / 2022	3,932	3,405	3,487	0.49%	86.60%
Mar / 2022	4,020	3,585	3,616	3.70%	89.18%
Apr / 2022	3,974	3,583	3,643	0.75%	90.16%
May / 2022	4,024	3,628	3,674	0.85%	90.16%
Jun / 2022	4,082	3,760	3,802	3.48%	92.11%
Jul / 2022	4,073	3,702	3,782	-0.53%	90.89%
Aug / 2022	4,129	3,783	3,841	1.56%	91.62%
Sep / 2022	4,140	3,849	3,871	0.78%	92.97%
Oct / 2022	4,125	3,844	3,866	-0.13%	93.19%
Nov / 2022	4,149	3,836	3,892	0.67%	92.46%
Dec / 2022	4,161	3,819	3,874	-0.46%	91.78%
Jan / 2023	4,266	3,984	4,027	3.95%	93.39%
Feb / 2023	4,283	3,938	4,005	-0.55%	91.94%
Mar / 2023	4,325	4,010	4,034	0.72%	92.72%
Apr / 2023	4,267	3,924	3,987	-1.17%	91.96%
May / 2023	4,248	3,941	3,987	0.00%	92.77%
Jun / 2023	4,244	3,921	(est[7]) 4,046		92.39%
Jul / 2023	0	0	(est[7]) 4,028		
Aug / 2023	0	0	0		
Sep / 2023	0	0	0		

Total (Year to date)	38,068	35,217	31,672		
Curr Year Avg	4,230	3,913	3,959	901.53%	90.42%
Months with Count	9	9	8	8	9
Average to Base % [8]		94.0%	95.15%		
Last yrs Base % [9]		82.9%	84.22%		
Last yrs Average	4,018	3,567	3,624		88.77%

Estimated average participation for current year to date:

Actual average monthly participation current year to date [10]:

3,975
3,959

**Funding Allocation Information**

Total Funding Allocation:	\$908,156
Assigned Funding Participation Count [11]:	
Current Yr Base:	4,161
Previous Yr Base:	4,303

- [1] **Caseload:** The term used to refer to the number of clients being served in a given time. This is comprised of both enrollment and participation.
- [2] **Participation/Enrollment Ratio:** The number of clients participating divided by the number enrolled.
- [3] **Enrollment:** Number of clients certified to receive benefits in the given month. Final counts available for the month that just ended.
- [4] **Initial Participation:** Number of clients receiving benefits at the beginning of the month. Comparison between this and the closeout participation is indicative of the number of participants added over the course of the month. This can be used to inform staff of participation numbers at the start of the month and enable them to proactively improve participation before it is finalized.
- [5] **Closeout Participation:** Final number of clients who received benefits for the given month. Finalized approx. 5 weeks after the month ends.
- [6] **% Change in Participation:** The % difference in closeout participation when compared to the previous month.
- [7] **est:** It is the estimated participation for the given month. This is available prior to the closeout participation being available. It is a calculated value based on prior months' participation. **NOTE: Last two non 0 values are "Estimates"**
- [8] **Average to Base %:** Compares the current year average participation to the current year base.
- [9] **Last yrs Base %:** Compares last year's average participation to the last year base.
- [10] **Actual Avg. Part. For current year to date:** It is an average that includes the participation counts for all months in the current year where participation has been finalized.
- [11] **Assigned Funding Participant Count:** The value used in the calculation to determine the funding allocated to the local agency for the fiscal year. For additional details, refer to your agency's annual funding allocation letter.

**Branch-Hillsdale-St Joseph Community Health Agency**

Check/Voucher Register - Check Register for BOH

00103 - Cash - Accounts Payable

From 6/1/2023 Through 6/30/2023

<u>Payee</u>	<u>Check Amount</u>	<u>Check Number</u>	<u>Effective Date</u>
4Imprint	4,168.51	54002	6/2/2023
Abila	4,055.21	23-06-30 A.01	6/30/2023
Accident Fund	3,188.75	23-06-16 P.01	6/16/2023
ACD.NET	1,908.36	54018	6/16/2023
Action Quick Print Plus	225.00	23-06-16 A.01	6/16/2023
ADAMS OUTDOOR	150.00	54003	6/2/2023
ADAMS OUTDOOR	900.00	54034	6/30/2023
Aflac District Office	559.97	54016	6/9/2023
Aflac District Office	514.67	54032	6/23/2023
Alerus Retirement Solutions	1,981.00	23-06-09 R.01	6/9/2023
Alerus Retirement Solutions	1,981.00	23-06-23 R.01	6/23/2023
Amanda Methner	265.00	54035	6/30/2023
Amazon Capital Services, Inc	3,752.19	23-06-02 A.01	6/2/2023
Amazon Capital Services, Inc	579.50	23-06-16 A.02	6/16/2023
Amazon Capital Services, Inc	4,251.39	23-06-30 A.02	6/30/2023
Armstrong Nutrition Management	4,147.24	23-06-16 A.03	6/16/2023
Beacon Properties Administration	1,805.93	54036	6/30/2023
Beacon Properties Administration	3,645.00	54037	6/30/2023
Bish's RV	123.92	54019	6/16/2023
Blue Cross Blue Shield	56,989.29	23-06-16 P.02	6/16/2023
Branch County Commission	24,204.37	23-06-16 A.04	6/16/2023
Branch County Complex	282.00	23-06-02 A.02	6/2/2023
Branch County Complex	5,694.28	23-06-30 A.03	6/30/2023
Branch County Fair	160.00	54020	6/16/2023
Bronson Wellness Center	95.00	54038	6/30/2023
Card Services Center	3,519.48	23-06-30 P.02	6/30/2023
CDW GOVERNMENT INC.	748.02	23-06-02 A.03	6/2/2023
CDW GOVERNMENT INC.	22,735.83	23-06-30 A.04	6/30/2023
Center for Information Mgmnt	1,350.00	23-06-16 A.05	6/16/2023
Century Bank - Hillsdale Maintenance	2,000.00	23-06-30 A.05	6/30/2023
Century Bank - Three Rivers Maintenance	2,000.00	23-06-30 A.06	6/30/2023
Century Basic	920.60	23-06-09 R.02	6/9/2023
Century Basic	920.60	23-06-23 R.02	6/23/2023
Century EFPTS	31,773.93	23-06-09 R.03	6/9/2023
Century EFPTS	123.64	23-06-23 DI.01	6/23/2023
Century EFPTS	114.76	23-06-23 L.01	6/23/2023
Century EFPTS	23,661.38	23-06-23 R.03	6/23/2023
Century Mastercard	97.59	23-06-02 P.01	6/2/2023
Century MERS	50,572.24	23-06-16 A.06	6/16/2023
Century State/Michigan State Treasury	4,987.82	23-06-09 R.04	6/9/2023
Century State/Michigan State Treasury	30.92	23-06-23 L.02	6/23/2023
Century State/Michigan State Treasury	4,078.68	23-06-23 R.04	6/23/2023
Cereal City Baseball LLC	2,866.50	54004	6/2/2023
Cintas Corporation Loc 351	159.05	23-06-16 P.03	6/16/2023
City Of Coldwater	40.00	23-06-02 A.04	6/2/2023
City Of Coldwater	80.00	23-06-16 A.07	6/16/2023
City of Jonesville	160.00	23-06-16 A.08	6/16/2023
City Of Three Rivers	270.00	23-06-30 A.07	6/30/2023
Clean Earth Environmental Contracting Services	756.00	54039	6/30/2023
Clia Laboratory Program	180.00	54005	6/2/2023
ConnectAmerica	149.50	23-06-16 A.09	6/16/2023

**Branch-Hillsdale-St Joseph Community Health Agency**

Check/Voucher Register - Check Register for BOH

00103 - Cash - Accounts Payable

From 6/1/2023 Through 6/30/2023

<u>Payee</u>	<u>Check Amount</u>	<u>Check Number</u>	<u>Effective Date</u>
Control Solutions Inc.	250.00	23-06-02 A.05	6/2/2023
Crossroads Home Care Inc.	424.80	23-06-16 A.10	6/16/2023
Dan Wood Co.	2,908.00	23-06-16 A.11	6/16/2023
Dan Wood Co.	2,181.00	23-06-30 A.08	6/30/2023
DL Gallivan Office Solutions	542.41	54006	6/2/2023
DL Gallivan Office Solutions	666.21	54040	6/30/2023
Dr. Karen M. Luparello	4,273.13	23-06-02 A.06	6/2/2023
Dr. Karen M. Luparello	4,219.42	23-06-30 A.09	6/30/2023
Dr. Karen M. Luparello	4,240.04	23-06-30 A.10	6/30/2023
e3 Diagnostics	1,792.00	54007	6/2/2023
Eric Schultz	110.00	54021	6/16/2023
FedEx	12.69	23-06-16 P.04	6/16/2023
Frontier	299.11	23-06-02 P.02	6/2/2023
Frontier	298.89	23-06-30 P.03	6/30/2023
Gateway Village Apartments	261.87	54022	6/16/2023
GDI Services Inc.	4,398.00	23-06-30 A.11	6/30/2023
Glaxo-Smithkline Financial Inc.	2,797.48	23-06-16 A.12	6/16/2023
Griffiths Mechanical Contracting, Inc.	189.95	23-06-16 A.13	6/16/2023
GT INDEPENDENCE	1,798.72	23-06-16 A.14	6/16/2023
Health Equity	590.56	23-06-09 PR.01	6/9/2023
Health Equity	590.56	23-06-23 PR.01	6/23/2023
Helping Angels Home Care LLC	459.36	23-06-16 A.15	6/16/2023
Hillsdale Board Of Public Utilities	2,028.35	23-06-02 P.03	6/2/2023
Hillsdale Board Of Public Utilities	1,879.30	23-06-30 P.04	6/30/2023
Hillsdale County Agricultural Society	295.00	54023	6/16/2023
Hillsdale County Treasurer	424.95	23-06-02 A.07	6/2/2023
Hillsdale County Treasurer	701.95	23-06-16 A.16	6/16/2023
HomeJoy of Kalamzoo	5,628.39	23-06-16 A.17	6/16/2023
Hospital Network Healthcare Services	61.43	23-06-30 A.12	6/30/2023
Indiana MI Power Company	601.65	23-06-16 P.05	6/16/2023
JACKSON PUBLISHING CO.	1,725.00	54008	6/2/2023
JAMES COOK	102.77	23-06-02 A.08	6/2/2023
Jessica A Adams	2,250.00	23-06-02 A.09	6/2/2023
Jessica A Adams	1,977.50	23-06-16 A.18	6/16/2023
Jessica A Adams	2,145.00	23-06-30 A.13	6/30/2023
Jim Lanburt	200.00	54041	6/30/2023
Legal Services Of S.Central MI	780.00	23-06-16 A.19	6/16/2023
Lindsay Mortensen	396.79	54009	6/2/2023
Macquarie Equipment Capital Inc.	1,266.75	23-06-02 A.10	6/2/2023
Macquarie Equipment Capital Inc.	1,266.75	23-06-30 A.14	6/30/2023
Maplecrest, LLC	646.00	23-06-30 A.15	6/30/2023
Matasha Goosby	2,250.00	23-06-02 A.11	6/2/2023
Matasha Goosby	2,075.00	23-06-16 A.20	6/16/2023
Matasha Goosby	2,250.00	23-06-30 A.16	6/30/2023
McKesson Medical-Surgical Gov. Solutions LLC	451.51	23-06-02 P.04	6/2/2023
McKesson Medical-Surgical Gov. Solutions LLC	339.36	23-06-16 P.06	6/16/2023
McKesson Medical-Surgical Gov. Solutions LLC	137.44	23-06-30 P.05	6/30/2023
Medical Care Alert	403.95	23-06-16 A.21	6/16/2023
Merck Sharp & Dohme LLC	4,898.40	54024	6/16/2023
MERS 5% EMPLOYEES	6,252.97	23-06-16 A.22	6/16/2023

**Branch-Hillsdale-St Joseph Community Health Agency**

Check/Voucher Register - Check Register for BOH

00103 - Cash - Accounts Payable

From 6/1/2023 Through 6/30/2023

<u>Payee</u>	<u>Check Amount</u>	<u>Check Number</u>	<u>Effective Date</u>
Michigan Medicine	395.00	54010	6/2/2023
Michigan Public Health Institute	3,258.98	23-06-16 A.23	6/16/2023
Michigan State Disbursement Unit	190.11	54017	6/9/2023
Michigan State Disbursement Unit	190.11	54033	6/23/2023
Mistel de Varona	1,350.00	54011	6/2/2023
Mistel de Varona	675.00	54025	6/16/2023
Mistel de Varona	675.00	54042	6/30/2023
Monica Jordan	220.00	54026	6/16/2023
Nationwide	920.00	23-06-09 R.05	6/9/2023
Nationwide	820.00	23-06-23 R.05	6/23/2023
PFIZER INC	2,197.06	54043	6/30/2023
Pitney Bowes Inc.	273.87	23-06-02 P.05	6/2/2023
Principal Life Insurance Company	1,833.25	23-06-02 P.06	6/2/2023
Principal Life Insurance Company	1,751.59	23-06-30 P.06	6/30/2023
Proassurance Casualty Company	965.00	54027	6/16/2023
Prompt Care Express PC	142.00	54028	6/16/2023
R. Johnson Builders, inc	29,315.00	54031	6/16/2023
Radio Communications, INC	142.50	54012	6/2/2023
RDK's Asphalt & Sealcoating LLC	5,550.00	23-06-30 A.17	6/30/2023
RDK's Asphalt & Sealcoating LLC	42,000.00	23.06.23 SP.01	6/30/2023
Reserve Account	3,000.00	23-06-16 A.24	6/16/2023
Richard Clark	2,225.00	23-06-30 A.18	6/30/2023
Riley Pumpkin Farm	865.00	23-06-30 A.19	6/30/2023
RJB Heating & Cooling	3,250.00	54044	6/30/2023
ROSE PEST SOLUTIONS	80.00	23-06-16 A.25	6/16/2023
Sanofi Pasteur Inc.	663.78	23-06-02 P.07	6/2/2023
Sanofi Pasteur Inc.	2,189.32	23-06-30 P.07	6/30/2023
Semco Energy	66.06	23-06-02 P.08	6/2/2023
Semco Energy	50.78	23-06-30 P.08	6/30/2023
ServerSupply	44.55	54045	6/30/2023
Shaffmasters U-Stor-n-Lock	150.00	23-06-30 A.20	6/30/2023
Shred It	90.00	23-06-02 P.09	6/2/2023
Shred It	90.00	23-06-30 P.09	6/30/2023
Social Data LLC	9,000.00	23-06-16 A.26	6/16/2023
Solara Medical Supplies	1,924.50	54046	6/30/2023
St Joseph County COA	11,083.68	23-06-16 A.27	6/16/2023
St Joseph County Transit Authority	1,637.91	23-06-16 A.28	6/16/2023
St. Joseph Community Co-op	1,905.68	23-06-16 A.29	6/16/2023
Staples	160.25	23-06-02 P.10	6/2/2023
Staples	17.07	23-06-16 P.07	6/16/2023
State of Mich EGLE	17.00	54013	6/2/2023
State of Mich EGLE	136.00	54047	6/30/2023
State Of Michigan	3,074.00	54029	6/16/2023
Stephanie Hough	23.30	54048	6/30/2023
Stratus Video, LLC	2,057.01	54014	6/2/2023
Stratus Video, LLC	2,009.73	54049	6/30/2023
Thurston Woods Village	1,081.51	54030	6/16/2023
TMK Worldwide, LLC	142.00	23-06-02 A.12	6/2/2023
TMK Worldwide, LLC	142.00	23-06-30 A.21	6/30/2023
Verizon	999.52	23-06-16 P.08	6/16/2023
VRI INC.	189.00	23-06-16 A.30	6/16/2023
Wal-Mart Community	67.10	23-06-02 P.11	6/2/2023
Xmission	431.78	54015	6/2/2023

**Branch-Hillsdale-St Joseph Community Health Agency**

Check/Voucher Register - Check Register for BOH

00103 - Cash - Accounts Payable

From 6/1/2023 Through 6/30/2023

<u>Payee</u>	<u>Check Amount</u>	<u>Check Number</u>	<u>Effective Date</u>
Xmission	434.22	54050	6/30/2023
Zoho Corporation	<u>4,800.00</u>	54051	6/30/2023
Report Total	503,626.75		

Branch-Hillsdale-St Joseph Community Health Agency  
 Balance Sheet  
 As of 6/30/2023

Assets

Cash on Hand	9,822.76
Cash with County Treasurer	4,151,340.99
Community Foundation Grant	309,955.94
Cash HD Building Maintenance	2,450.00
Cash TR Building Maintenance	62,685.00
Accounts Receivable	54,886.85
Due from Hillsdale County	60,613.50
Due from State	(387,569.88)
Due from Other Funding Sources	146,647.37
Prepaid Expenses	132,075.84
Biologic Inventory	<u>95,738.22</u>
<b>Total Assets</b>	<b><u>4,638,646.59</u></b>

Liabilities

Accounts Payable	170,846.23
Payroll Liabilites	147,401.74
Capital Improvements	25,000.00
Deferred Revenue	498,757.69
Biologics	<u>95,738.22</u>
<b>Total Liabilities</b>	<b><u>937,743.88</u></b>

Net Assets

Operation Fund Balance	632,176.08
Restricted Fund Balance	354,263.10
Designated Fund Balance	<u>2,714,463.53</u>
<b>Total Net Assets</b>	<b><u>3,700,902.71</u></b>

<b>Total Liabilities and Net Assets</b>	<b><u>4,638,646.59</u></b>
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**Prior Year Fund Balance Comparison at 6/30/2022:**

Operation Fund Balance	711,368.16
Restricted Fund Balance	396,617.86
Designated Fund Balance	<u>2,379,445.80</u>
<b>Total Fund Balance \$</b>	<b><u>3,487,431.82</u></b>

BHSJ Community Health Agency  
 Schedule of Cash Receipts and Disbursements  
 January 31, 2023 thru  
 June 30, 2023

Plus: Cash Receipts	\$	721,777.83
Less: Cash Disbursements For Payroll/AP	\$	(601,733.04)
<b>1/31/2023 Cash Balance</b>		<b>\$ 4,304,627.83</b>
<hr/>		
Plus: Cash Receipts	\$	242,699.30
Less: Cash Disbursements For Payroll/AP	\$	(516,761.72)
<b>2/28/2023 Cash Balance</b>		<b>\$ 4,030,565.41</b>
<hr/>		
Plus: Cash Receipts	\$	466,507.25
Less: Cash Disbursements For Payroll/AP	\$	(686,310.45)
<b>3/31/2023 Cash Balance</b>		<b>\$ 3,810,762.21</b>
<hr/>		
Plus: Cash Receipts	\$	867,660.47
Less: Cash Disbursements For Payroll/AP	\$	(537,992.62)
<b>4/30/2023 Cash Balance</b>		<b>\$ 4,140,430.06</b>
<hr/>		
Plus: Cash Receipts	\$	530,201.24
Less: Cash Disbursements For Payroll/AP	\$	(565,168.11)
<b>5/31/2023 Cash Balance</b>		<b>\$ 4,105,463.19</b>
<hr/>		
Plus: Cash Receipts	\$	932,252.30
Less: Cash Disbursements For Payroll/AP	\$	(583,492.08)
<b>6/30/2023 Cash Balance</b>		<b>\$ 4,454,223.41</b>

## BRANCH HILLSDALE ST JOSEPH COMMUNITY HEALTH AGENCY

### Expense by Program - 6/30/2023

Program	Program Title	Month	Year to Date	Amend #1	Expended	
*	724	PFAS - Westside Landfill	3,653.61	4,281.80	2,687.00	159.35%
*	325	CSHCS	16,538.48	179,409.74	190,729.00	94.06%
**	032	Emergency Preparedness	13,664.58	120,616.28	132,323.00	91.15%
*	024	MERS Pension Underfunded Liability	22,590.00	40,252.75	44,590.00	90.27%
*	010	Agency Support	9,056.47	93,617.55	112,002.00	83.58%
*	021	Dental Clinic - Three Rivers	5,450.93	34,610.93	43,740.00	79.12%
*	605	General EH Services	(15,843.23)	9,488.31	12,162.00	78.01%
**	326	Vision (ELPHS)	4,318.00	75,514.22	99,725.00	75.72%
	008	Salary & Fringe Payoff	4,460.60	71,074.21	95,000.00	74.81%
	185	Dental Outreach	1,544.61	12,453.45	16,880.00	73.77%
	345	Lead Testing	3,711.07	19,678.34	26,718.00	73.65%
	716	EGLE Campgrounds	12,249.45	13,224.00	18,359.00	72.03%
	714	Onsite Sewage Disposal	31,810.33	272,460.18	378,287.00	72.02%
	721	Drinking Water Supply	31,810.33	272,460.18	378,287.00	72.02%
	109	WIC	105,557.70	789,518.38	1,100,203.00	71.76%
	201	CSF Carseats	2,170.57	16,221.06	22,793.00	71.16%
	338	Immunization Vaccine Handling	22,315.73	205,928.68	289,805.00	71.05%
	331	STD	8,705.97	90,527.68	128,424.00	70.49%
	327	Hearing (ELPHS)	4,406.44	67,915.13	96,768.00	70.18%
	012	Area Agency on Aging	114,477.84	1,064,564.62	1,549,433.00	67.59%
	341	Infectious Disease	18,839.54	187,553.90	278,111.00	67.43%
	255	Community Health Direction	15,382.62	74,047.28	110,000.00	67.31%
	107	Medicaid Outreach	433.16	7,492.59	11,188.00	66.96%
	704	Food Service	42,881.39	358,915.95	540,396.00	66.41%
	332	HIV Prevention	1,360.10	17,743.57	27,136.00	65.38%
	108	WIC Breastfeeding	13,395.99	86,414.05	133,633.00	64.66%
	115	MCH Enabling Women	1,589.52	30,290.15	46,940.00	64.52%
	200	ELPHS Marketing	7,786.24	52,172.79	85,730.00	60.85%
	719	EGLE Body Art	2,749.39	3,378.03	5,570.00	60.65%
	014	VOCA	17,846.26	124,362.20	205,743.00	60.44%
	138	Immunization IAP	53,071.51	503,753.46	872,405.00	57.74%
	023	Capital Expenditures	76,865.00	125,015.00	227,630.00	54.92%
	717	EGLE Swimming	6,506.82	7,640.00	14,627.00	52.23%
	745	Type II Water	11,301.34	103,446.71	202,886.00	50.98%
	352	ELCCT Contact Tracing, testing doord,	29,134.46	283,611.03	606,578.00	46.75%
	029	Dental Clinic - Hillsdale	885.82	6,431.73	14,000.00	45.94%
	101	Workforce Development	3,941.40	25,912.54	56,666.00	45.72%

329	MCH Enabling Children	2,368.03	20,787.72	48,158.00	43.16%
718	EGLT Septage	157.05	2,614.00	6,328.00	41.31%
035	Vector Borne Disease Surveillance	9,272.83	13,797.12	33,421.00	41.28%
363	363 CVDIMS Covid Immz Supplemental	3,824.82	70,925.02	214,940.00	32.99%
371	CSHCS Vaccine Initiative	330.91	4,263.57	14,328.00	29.75%
112	CSHCS Medicaid Outreach	5,575.86	29,639.30	112,602.00	26.32%
207	MCRH Community Health Workers	7,481.86	75,902.94	291,889.00	26.00%
723	PFAS Response - White Pigeon	1,561.31	1,713.37	8,078.00	21.21%
355	COVID-19 PH Workforce Supplemental	13,514.83	66,262.90	331,742.00	19.97%
230	Medical Marijuana HD	1,768.53	2,236.44	11,672.00	19.16%
097	CSHCS Donations BR HD	2,519.50	4,938.93	27,765.00	17.78%
405	Grant Writing	17.14	397.08	2,615.00	15.18%
715	EGLT LT Monitoring	1.88	523.06	3,482.00	15.02%
275	Medical Marijuana SJ	786.02	1,147.53	7,756.00	14.79%
096	CSHCS Donations SJ	661.79	4,710.24	32,412.00	14.53%
212	Medical Marijuana BR	1,605.59	2,199.91	20,457.00	10.75%
374	EOACV Expanding Older Adult Access to	740.26	3,722.88	60,651.00	6.13%
378	Monkeypox Virus Response	129.90	898.17	15,333.00	5.85%
722	PFAS Response	0.00	0.00	1,415.00	0.00%
<b>Total Expense</b>		<b><u>758,938.15</u></b>	<b><u>5,758,678.65</u></b>	<b><u>9,423,198.00</u></b>	<b><u>61.11%</u></b>

The Agency is currently 13.89% under budget.

\*9/12 Months = 75.00%

\*\*9/9 Months = 100.00%

### Programs Over Budget as of 6/30/2023

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**RU 724:** Increase in PFAS filters, amendment was sent to State by EH.  
**159.35%**

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**RU 325:** Budget for RU 325 is fully expended and therefore expenses can be charged to RU 112. When looking at these two budgets together as one the program is under by budget at 68.92%.  
**94.06%**

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**RU 032:** 9-Month Program - fully expended  
**91.15%**

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**RU 010:** The current revenue for this program is over budget (at 83.58%), causing expenses to also show over budget. This will fall in line with budget as the year progresses.  
**83.58%**

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**RU 021:** Over budget due to rent increase. The increase is being covered by additional revenue from MCDC.  
**79.12%**

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**RU 605:** Over budget due to new software purchase expended in current quarter. This should come back in line as the year progresses.  
**78.01%**

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**RU 326:** 9-Month Program - within budget  
**75.72%**

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## July 17, 2023 – Board of Health Finance Committee Meeting Minutes

The Branch-Hillsdale-St. Joseph Community Health Agency Board of Health, Finance Committee meeting was called to order by Jared Hoffmaster at 11:00 AM. Roll call was completed as follows: Jared Hoffmaster, Jon Houtz and Steve Lanius.

Also present from BHSJ: Rebecca Burns, Theresa Fisher and Laura Sutter

Mr. Houtz moved to approve the agenda with support from Mr. Lanius. The motion passed unopposed.

Public Comment: No public comments were given.

### New Business:

- Mr. Houtz moved to recommend that the full Board approve the purchase of a new vaccine storage unit PHCBI for a total of \$7,7983, with support from Mr. Lanius. The motion passed unopposed.
- Mr. Houtz moved to recommend that the full Board approve the bid to upgrade the Hillsdale building elevator from Schindler Elevator Corporation for a total of \$26,734, with support from Mr. Lanius. The motion passed unopposed.
- Mr. Houtz moved to recommend that the full Board approve the request for an increase of \$0.15 per capita for calendar year 2024, for a total of \$5.45 per capita. The motion received support from Mr. Lanius. The motion passed unopposed.
- Mr. Houtz moved to recommend that the full Board approve the request for an increase from St. Joseph County for AAA appropriations from \$16,989 to \$20,387 (20%) to correct the funding imbalance and restore the 58/42 split that is based on population. The motion received support from Mr. Lanius. The motion passed unopposed.

Public Comment: No public comments were given.

With no further business, the meeting was adjourned at 11:44 AM.

Respectfully Submitted by:



Theresa Fisher,  
Administrative Services Director  
Secretary to the Board of Health

## July 19, 2023 – Board of Health Program, Policy, & Appeals Committee Meeting Minutes

The Branch-Hillsdale-St. Joseph Community Health Agency Board of Health, Program, Policy, & Appeals Committee meeting was called to order by Committee-Chair, Tom Matthew, at 8:30 AM with the Pledge of Allegiance to the Flag of the United States led by Commissioner Baker. Roll call was completed as follows: Tom Matthew, Rusty Baker, and Brent Leininger.

Also present from BHSJ: Rebecca Burns, Theresa Fisher, Paul Andriacchi, and Cody Johnson.

Mr. Leininger moved to approve the agenda with support from Mr. Baker. The motion passed unopposed.

Public Comment: No public comments were given.

New Business:

- Mr. Leininger moved to recommend that the full Board deny the EH Appeal from Mr. and Mrs. Ross for the property located at 837 Dragon Shores Dr., Coldwater with support from Mr. Baker. A roll call vote was taken and the motion passed 3-0 (Matthew, Yes; Leininger, Yes; Baker, yes).

Public Comment: Public Comments were given by 2 individuals.

With no further business, Mr. Leininger moved to adjourn the meeting with support from Mr. Baker. The motion passed unopposed and the meeting was adjourned at 8:58 AM.

Respectfully Submitted by:

  
Theresa Fisher,  
Administrative Services Director  
Secretary to the Board of Health

## Environmental Health Appeals

**Procedure:** Appeals received as outlined in the Environmental Health Code will be first reviewed and heard by the Program, Policy and Appeals Committee (PPAC) of the Board of Health. The PPAC then provides a recommendation for full board action at the next regularly scheduled Board of Health meeting.

**Environmental Health Code for Branch, Hillsdale, St. Joseph Counties, Michigan:** The Environmental Health Code (EHC) for Branch, Hillsdale, and St. Joseph Counties is a legal regulation supported by the three county government commissions that received final approval from the Board of Health. The version currently in effect was adopted by the Board of Health on December 20, 1990 and became effective April 1, 1991.

**Authority:** The EHC identifies in Article 1, Section 102. Authority. "...adopted under authority conferred upon local health departments by Section 2441(1) of the Michigan Public Health Code, P.A. 368 of 1978 as amended." This section states:

*Sec. [2441.](#)*

*A local health department may adopt regulations necessary or appropriate to implement or carry out the duties or functions vested by law in the local health department. The regulations shall be approved or disapproved by the local governing entity. The regulations shall become effective 45 days after approval by the local health department's governing entity or at a time specified by the local health department's governing entity. The regulations shall be at least as stringent as the standard established by state law applicable to the same or similar subject matter. Regulations of a local health department supersede inconsistent or conflicting local ordinances. .*

*History: 1978, Act 368, Eff. Sept. 30, 1978 ;-- Am. 1986, Act 76, Imd. Eff. Apr. 7, 1986 ;-- Am. [2010, Act 72, Imd. Eff. May 13, 2010](#)  
Popular Name: Act 368*

**Purpose:** The EHC identifies in Article 1, Section 104. Purpose. "...adopted for the purpose of protecting public health and safety and the quality of the environment as it affects human health, and to prevent the occurrence of public health nuisances."

**Appeals Board:** The EHC identifies in Article 1, Section 119. Appeals Board. "Appeals from the rulings of the Health Officer are provided for reasonable and equitable interpretations of the provisions of these regulations. The Branch-Hillsdale-St. Joseph district Board of Health, Board of Appeals shall hear any appeal presented in accordance with rules of procedure established by the Board. The Board shall furnish the appellant with a written report of its findings and decision."

**Hearing of Appeals:** The EHC identifies in Article 1, Section 120. Hearing of Appeals. “Appeals shall be submitted in writing, addressed to the chairman of the Branch-Hillsdale-St. Joseph District Board of health in care of the Health Officer. Hearing of an appeal shall be granted at the next scheduled or regular meeting the District Board of Health or at the discretion of the chairman thereof at a special meeting called for the purpose: provided, that no hearing shall be scheduled within less than ten (10) days of receipt of written request. *The Board may grant individual variances from the requirements of these regulations when said Board has adequately determined that all of the following conditions exists:*

- 1) *That no substantial health or nuisance is likely to occur therefrom.*
- 2) *That strict compliance with the code requirements would result in unnecessary or unreasonable hardship.*
- 3) *That no state statute or other applicable laws would be violated by such variance.*
- 4) *That the proposed variance would provide essentially equivalent protection in the public interest.”*

**Criteria for Permit Denial:** The EHC identifies in Article 6, Section 600.9.1. Criteria for Permit Denial. “The Health Officer may decline to issue a sewage disposal facility permit for any of the following reasons or causes:

- a) ...
- b) Failure of the proposed sewage disposal facility design to conform to the requirements of Article VII of these Regulations.
- c) Failure of the proposed installation site for the sewage disposal facility to conform to the requirements of Article VII of these regulations.....”

**Site Acceptance Criteria :** The EHC identifies in Article 7, Section 700.3. Site Acceptance Criteria. “An acceptable site for a sewage disposal facility shall possess soils which are of sufficient quantity and permeability to absorb all sewage effluent to be discharged upon such site, and to insure its confinement beneath the ground surfaces at all times. The following minimum criteria shall also be determined to exist by the Health Officer as the basis for any site approval:

- f) Sufficient suitable area shall be available and reserved to provide for a minimum of one replacement system without utilization or disruption of the initial installation.”

**Contractual requirements between DEQ and the BHSJCHA to administer the on-site wastewater program.**

MPR 1: The local health department shall have a wastewater treatment regulation capable of protecting the public health legally adopted under enabling state legislation. The regulation shall authorize an enforcement process that is utilized and includes the capability to deny permits, issue orders for corrections of failed systems, and/or other remedies for construction without a permit or for violating an order.

**References:** Sections 2433 through 2446 of the Public Health Code, 1978 PA 368, as amended; Part 31, Water Resources Protection, of the Natural Resources and Environmental Protection Act, 1994 PA 451, as amended; and Part 22, administrative rules.

#### **DEQ On-Site Wastewater Program Staff Advice.**

- In a 2009 response to a request for input from DEQ on an appeal of a denial of a sewage permit, the Agency was advised that the request, “should be denied until sewer becomes available or additional land with suitable soils is obtained that can support an onsite sewage system that complies with your department’s Sanitary Code.”

Spencer & Sharon Ross

3318 102<sup>nd</sup> Ave.

Gobles, MI 49055

Chairman

Board of Health

c/o Health Officer

570 Marshall Rd.

Coldwater, MI 49036

Dear Chairman:

RE: Request for Appeal - 837 Dragon Shores Rd., Coldwater, MI

We are submitting a request for appeal because our application for septic was denied(saying there is less than the required two feet of natural permeable soil above the seasonal high-water table).

We are appealing because we purchased the property on May 16, 2023 from William and Jennifer Kroncke, who told us the property was buildable and that their intention had been to build on it until a house across the channel came up for sale, which they purchased. William knew we were considering the property to use as a retirement/vacation home.

Now we have been informed by the Health Department that the site is not suitable for the installation of a standard sewage disposal system.

Upon speaking with Cody Johnson, Health Dept., we were told that we had enough property to install a mound septic system. It will cost quite a bit more than a standard septic system.

If the mound system is not approved by the board, we would like an above-ground holding tank to be considered. These are known to be used for cottage homes in Michigan.. We plan on using this property strictly as a retirement/vacation home.

If there are any other reasonable septic systems the Health Department can suggest we would like the opportunity to review them.

Thank You,



Spencer Ross

Sharon Ross

### Ross Appeal

Our agency received a request for a well and septic permit for the property at 837 Dragon Shore Dr., Coldwater, MI on May 25, 2023 from Spencer and Sharon Ross. An evaluation of the soil conditions on this site was performed by Cody Johnson on June 15, 2023. The soil evaluation revealed that there was only 14” of native soil before the seasonal high-water table was reached. Our Environmental Health Code requires a minimum of 24” of natural permeable soil above the seasonal high-water table to be acceptable for any sewage disposal facility. Our agency does have a policy that will allow a sewage disposal system to be constructed with these limited soil condition if there is at least one acre of property. Unfortunately for the Ross’ their property is only .42 acres, therefore the reason for the denial of the permit.

The soil evaluation not only determined a very high seasonal water table but also fill dirt and muck beginning at 10” below the ground surface. These types of soils are very poor and unacceptable for sewage treatment. In a situation where an acre of property is available, we would require a minimum of 3’ of clean sand to be place above the surface of the ground and construct the drainfield on top of the sand. Because this proposal is also a new build, our code requires an equal sized area be made available for a replacement system in the future. The required mound for this property would be a 5’ finished mound (3’ of sand above original grade, 1’ of stone and pipe and a minimum of 1’ of final cover). Additionally, the mound must be gradually tapered back to original grade to prevent erosion. Due to the limitations of the lot size and soil conditions, it is the opinion of this agency that the .42 acres is not adequate to accommodate the building proposal.

It should be noted that a request was also made in the appeal for the consideration of a holding tank. Holding tanks are only considered in situation where there is an existing home that has no other options for sewage disposal. This option should not be considered for any **proposed** building site.

# Branch-Hillsdale-St. Joseph Community Health Agency

www.bhsj.org

570 Marshall Road  
Coldwater, MI 49036  
(517) 279-9561 ext. 106

20 Care Drive  
Hillsdale, MI 49242  
(517) 437-7395 ext. 311

1110 Hill Street  
Three Rivers, MI 49093  
(269) 273-2161 ext. 233

Office Use Only	
Date Received	05/25/2023
"C" Receipt #	11754
Received by	IW
Amount Received	\$450.00
Township Code	KH
Section Number	8
Record Search by	IW

**APPLICATION FOR:**

- Sewage Permit (\$235)
- Well Permit (\$215)
- Site (vacant land) Evaluation (\$150)

**Make checks payable to: "Community Health Agency" (Drivers license number must be on all personal checks) (Signature below and payment of fees indicate that the applicant has or will provide all necessary information accurately. No refund will be available after staff has provided field assistance. There is a \$25.00 handling fee charged if no field service has been provided.)**

**Address/Location** 837 Dragon Shores Dr, Coldwater, MI 49036

**Subdivision** Prairie River Shores **Lot #** 6 **Property Tax ID #** 12-150-PT5-000-006-00

**Owners' Name:** Spencer & Sharon Racc **Phone:** 269-355-1664

**Owners' Current Address:** 3318 102nd Ave **City:** Cobles **State:** MI **Zip:** 49025

**Contractor or Contact Person** N/A **Phone:** \_\_\_\_\_

**Address** \_\_\_\_\_ **City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip** \_\_\_\_\_

**Send Permit to:**  **Owner**  **Contractor or Contact Person**

**Email Address:** ~~SEN~~ ~~SEN~~ SAM@ZANCOhotmail.com

**Existing**      **Proposed**

- # of bedrooms      \_\_\_\_\_      3
- # of bathrooms      \_\_\_\_\_      2
- # of occupants      \_\_\_\_\_      2
- Water softener?     Y  N     Y  N
- Garbage disposal?  Y  N     Y  N
- Fuel oil tank?       Y  N     Y  N

Previous Health Dept. Site Evaluation  Yes  No

**THE FOLLOWING ANSWERS MAY HELP US LOCATE EXISTING PERMITS ALREADY ON FILE**

Check here if there is  WELL  SEPTIC system on site.

When was home built? \_\_\_\_\_

Name of original owner? \_\_\_\_\_

Name(s) of previous owners? \_\_\_\_\_

Property size \_\_\_\_\_

**TOWNSHIP ZONING PERMIT#** \_\_\_\_\_

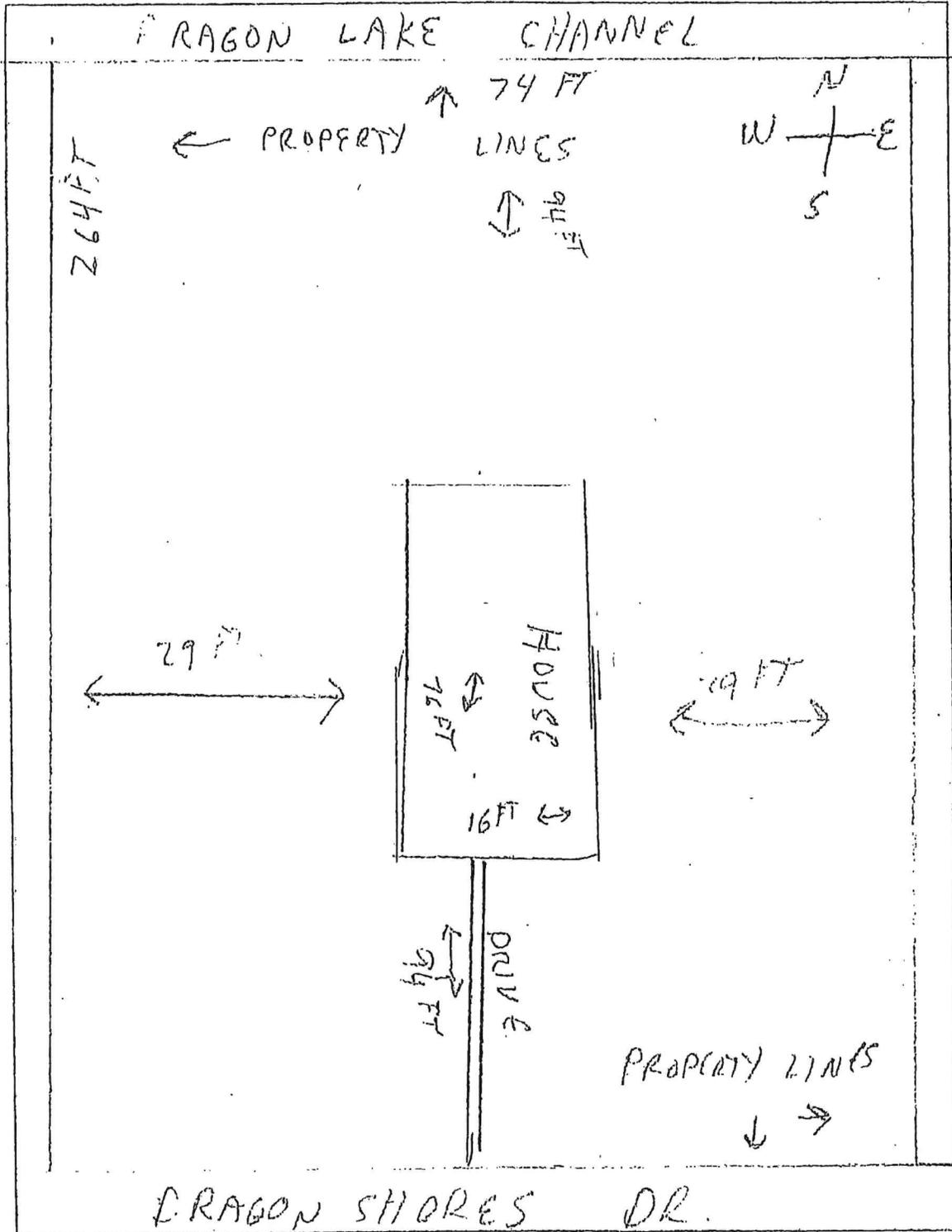
**APPLICANT MUST INCLUDE SKETCH OF:**

1. site boundaries and property dimensions
2. locations of all buildings and driveways
3. locations of existing well and/or sewage system
4. prominent landmarks on or near the site (surface water, fences, large trees, buildings, neighboring houses, etc.)
5. wells, sewage systems, and fuel tanks on adjacent lots
6. indication of the direction (north arrow)

**I, the owner or the owner's representative, agree to allow the representative of the Community Health Agency access to the described parcel to perform necessary tests and observations. The applicant certifies that the information contained in this application is complete and accurate to the best of their knowledge.**

**Signature** [Signature]

**Date** May 22, 2023



NOTE: Branch County 9-1-1 will provide address applicant with a double-sided reflective green sign with address number to be posted after construction has been completed. This sign is very important to emergency response vehicles when responding to 9-1-1 calls.

**THIS IS NOT A PERMIT**

Township KH

Application receipt 11754

Section 8

**BRANCH-HILLSDALE-ST. JOSEPH COMMUNITY HEALTH AGENCY  
UNDEVELOPED LOT EVALUATION REPORT**

PERSON REQUESTING TEST Spencer & Sharon Ross  
Circle one: owner realtor agent prospective buyer

ADDRESS 3318 102nd AVE, Gobles, MI 49055 PHONE 269-355-1664

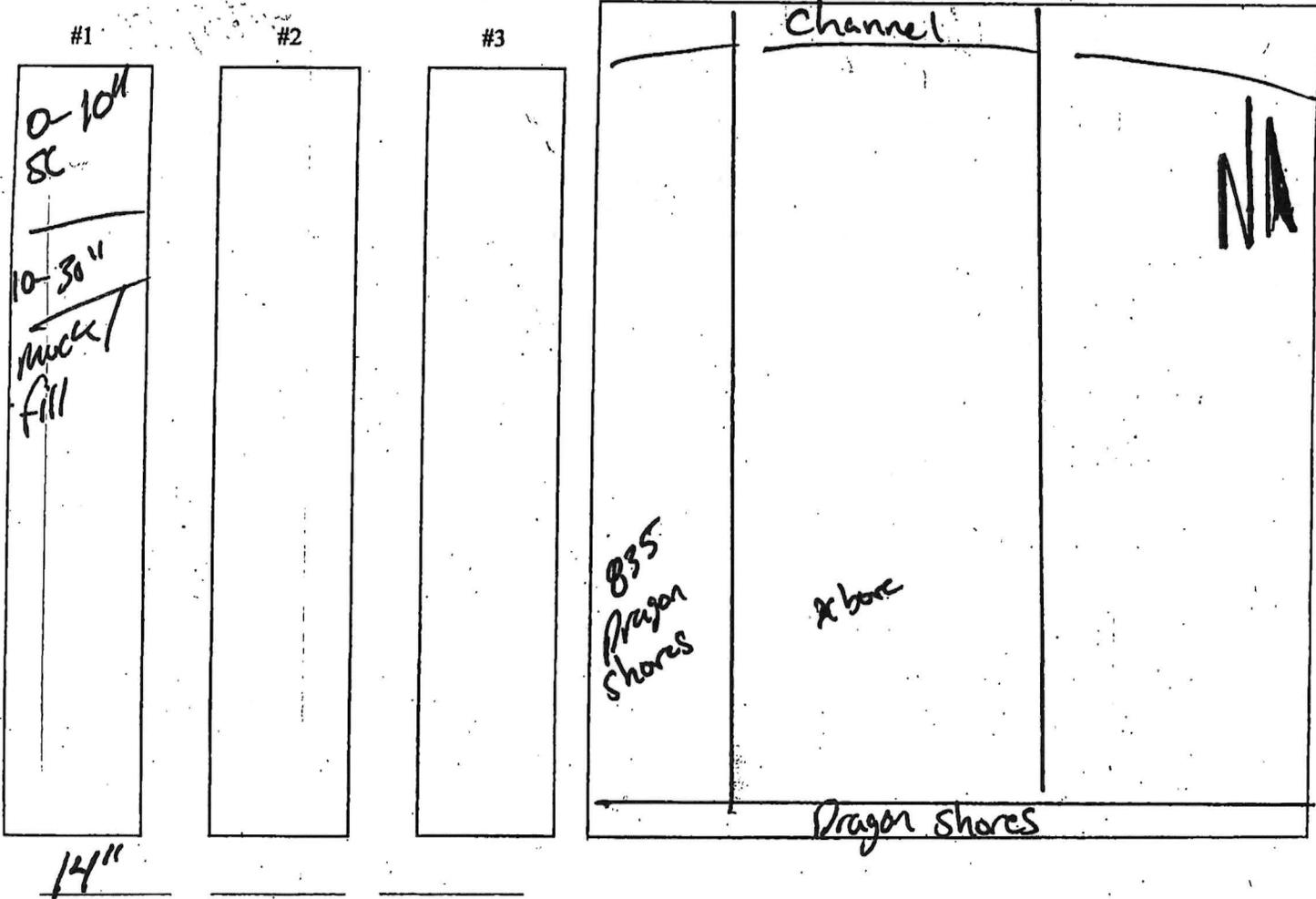
PROPOSED USE: 1 or 2 family home  Other

LOT LOCATION: (address, subdivision & lot number, property ID number, and/or directions from road intersection)  
837 dragon shores 12-150-075-000-000-00

PROPERTY OWNER Same

**Soil Profile(s)**

**Property Layout**



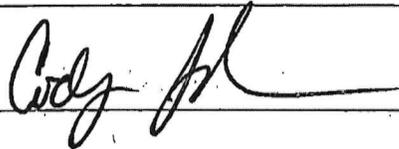
**RESULTS:**

- Site suitable for standard system in accordance with permit.
- Site suitable for special system as specified on permit
- Site suitable with variance agreement. See Item I below.
- Site not suitable.

**REMARKS:**

Please see letter

EVALUATION MADE BY:



DATE:

6/15/23

I. VARIANCE - The District Environmental Health Code allows for a variance from the standards where, in the opinion of the Health Officer, conditions of design, occupancy, and isolation are such that potential health hazards can be adequately controlled or minimized. On sites where highly impermeable soils exist and/or the seasonal high water table is less than 24 inches beneath the ground surface, variances are limited by state laws only to specially designed "alternative" sewage disposal systems to serve a single family dwelling. The minimum property size for alternative sewage disposal systems is one (1) acre. Such a variance requires an affidavit signed by the owner and filed with the deed to the property, specifying the conditions required by the Health Officer to assure that potential hazards will be minimized.

II. APPEALS - Appeals from the rulings of the Health Officer are provided for in the District Environmental Health Code. The Board of Health serves as the Board of Appeals. A Request for Appeal must be in writing and addressed to: Chairman, Board of Health, c/o Health Officer, 570 Marshall Road, Coldwater, MI 49036.

Upon receipt of the written appeal, a site inspection may be made by members of the Board of Health in company with environmental health staff and the appellant. If a soil scientist or consultant from the Michigan Department of Environmental Quality has not already reviewed the site, such review may be requested.

In compliance with Article 120 of the Environmental Health Code for Branch, Hillsdale and St. Joseph Counties, Michigan, the hearing of an appeal shall be granted at the next scheduled or regular meeting of the Board of Health or at the discretion of the chairman thereof at a special meeting called for that purpose. No hearing shall be scheduled within less than ten (10) days of receipt of the written request. The Board may grant individual variances from the requirements of these regulations when said board has adequately determined that all of the following conditions exist; 1) that no substantial health problem or nuisance is likely to occur therefrom; 2) that strict compliance with the code requirements would result in an unnecessary or unreasonable hardship; 3) that no state statute or other applicable laws would be violated by such variance; and 4) that the proposed variance would provide essentially equivalent protection in the public interest.

The screenshot shows a web browser window with the URL `explorer.eagleview.com/index.php`. The main content is an aerial map from EagleView titled "CONNECTEXPLORER". A parcel is highlighted with a black border. The map shows several parcels with addresses: 831 DRAGON SHORES DR, 835 DRAGON SHORES DR, and 830 DRAGON SHORES DR. The road is labeled "Dragon Lake Shores Road".

On the right side, there is an "Identify" panel. It includes a "Choose an identify tool" section with options: Point, Box, Line, Polygon, and Select. Below that, it shows "Buffer: 0 Feet" and "Layers: All Layers (5)".

The "Results by layer" section shows "Branch County Parcels 2023 (1)". A dropdown menu is open for "Parcel Number: 150-P75-000-006-00". The details for this parcel are:

- Parcel Number: 150-P75-000-006-00
- Property Street Address: DRAGON SHORES DR
- Owner Name: KRONCKE, WILLIAM & JENNIFER M
- Owner Address: 219 PRAIRIE RIVER
- Owner City: COLDWATER
- Owner State: MI
- Owner ZIP: 49036
- Acreage: 0.42
- Municipality: Kinderhook Township
- Town: 8S
- Area: 16394 Square Feet
- Perimeter: 663.1 Feet

At the bottom of the browser, there is a taskbar showing the date "03/24/2018", a file explorer with files like "dragon 2.pdf", "Dragon 1.pdf", "save (56).pdf", and "save (57).pdf", and a system tray with weather "69°F Sunny" and time "8:32 AM 7/11/2023".



6/15/2023

Spencer and Sharon Ross  
3318 102<sup>ND</sup> AVE  
Gobles, MI 49055

**837 Dragon Shores Dr., Coldwater, MI (12-150-P75-000-006-00)**

Mr. Ross:

This agency received a well and septic application for the above address and during the site visit, a soil auger boring was made and it was determined that the soils on the site are not suitable for the installation of a standard sewage disposal facility. The Environmental Health Code for Branch, Hillsdale and St. Joseph Counties Michigan (Section 700.3) states that the following minimum criteria shall be determined to exist by the Health Officer as the basis for any site approval:

- a. On-site soils shall have a permeability rate of not more than 45 minutes per inch
- b. At least 2 feet of natural permeable soil above the seasonal high-water table.
- c. A disposal system shall not be installed at an elevation below the flood plain of 100 years, nor otherwise located in an area subjected to seasonal flooding or ponding of surface water.
- d. A disposal system shall not be located where any factor would prohibit use of said system.
- e. A disposal system shall not be installed where the minimum required isolation distances specified in this regulation cannot be maintained.
- f. Sufficient suitable area shall be available and reserved to provide for a minimum of one replacement system without utilization or disruption of the initial installation.

There is less than the required two feet of natural permeable soil above the seasonal high-water table.

Since the minimum acceptance criteria cannot be satisfied on this property, the permit application is denied by the Health Officer to prevent the creation of conditions which may

endanger public health. Due to the failure of the proposed installation site to conform with the requirements of the Section 700.3(f), the Health Officer has declined to issue a sewage disposal facility permit for this location as allowed in the EH Code Section 600.9.1(c). Appeals from the rulings of the Health Officer are provided for reasonable and equitable interpretations of the provisions of the EH Code. Appeals shall be submitted in writing, addressed to the chairman of the Branch-Hillsdale-St. Joseph District Board of Health in care of the Health Officer.

If you decide to go through the appeals process or have any questions feel free to call me at 517-279-9561 Ext:108

Sincerely,

A handwritten signature in black ink, appearing to read "Cody Johnson", with a long horizontal flourish extending to the right.

Cody Johnson  
Sanitarian

**THIS IS NOT A PERMIT**

Township Hinderhook

Application receipt 185671

Section 8

**BRANCH-HILLSDALE-ST. JOSEPH COMMUNITY HEALTH AGENCY  
UNDEVELOPED LOT EVALUATION REPORT**

PERSON REQUESTING TEST Bill + Jennifer Kronke

Circle one: owner realtor agent prospective buyer

ADDRESS 219 Prairie River Dr., Gw

PHONE 517-227-9066

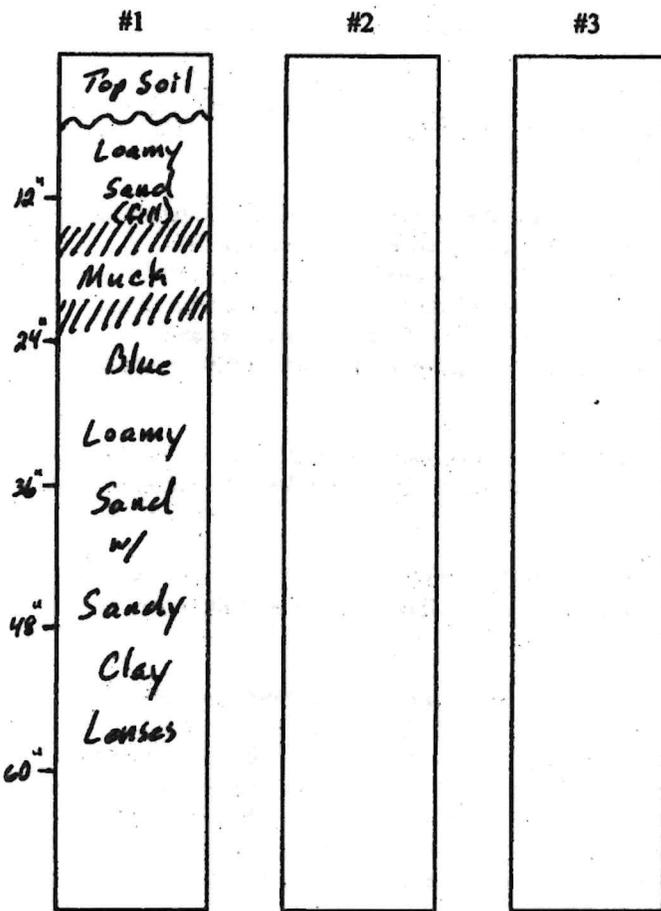
PROPOSED USE: 1 or 2 family home  Other \_\_\_\_\_

LOT LOCATION: (address, subdivision & lot number, property ID number, and/or directions from road intersection)

Prairie River Shores Sub. Lot #6

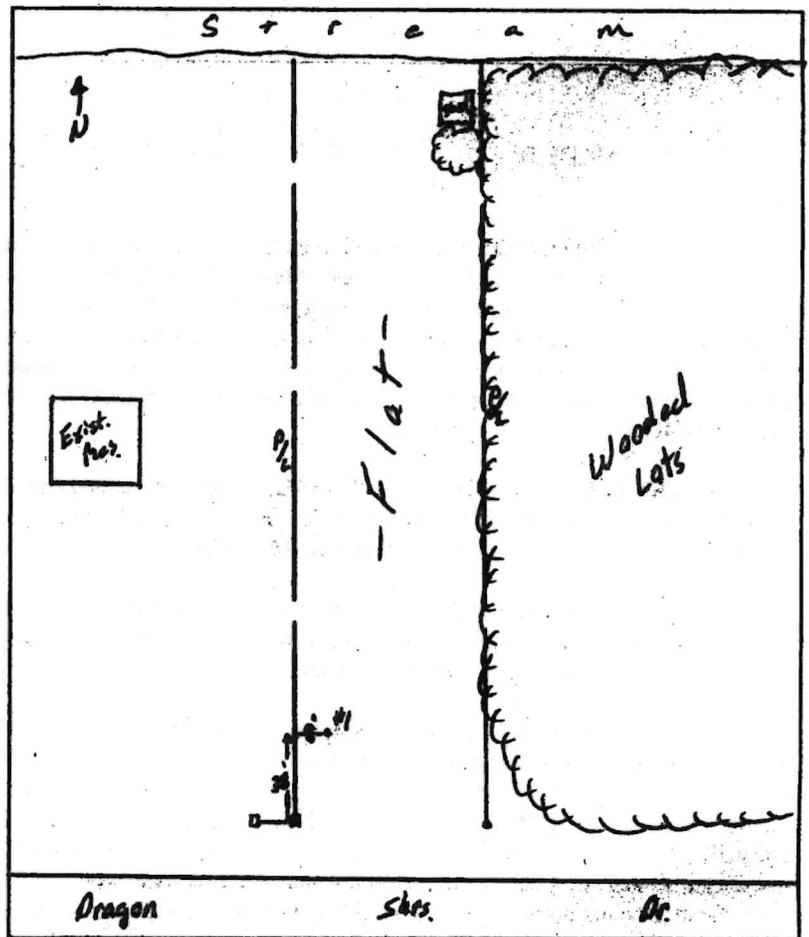
PROPERTY OWNER \_\_\_\_\_

**Soil Profile(s)**



12-14"

**Property Layout**



SEASONAL HIGH WATER TABLE

(SEE REVERSE SIDE FOR RESULTS) Page 1 of 2

**RESULTS:**

- Site suitable for standard system in accordance with permit.
- Site suitable for special system as specified on permit
- Site suitable with variance agreement. See Item I below.
- Site not suitable.

**REMARKS:**

*Soils and water table do not meet the minimum (24") criteria for on-site septic suitability. At this time, additional lots (adjacent) would have to be obtained to amass 1 acre of ground to utilize a 1 Acre Variance.*

EVALUATION MADE BY: *Anthony D. Headley* DATE: 6-26-15

I. VARIANCE - The District Environmental Health Code allows for a variance from the standards where, in the opinion of the Health Officer, conditions of design, occupancy, and isolation are such that potential health hazards can be adequately controlled or minimized. On sites where highly impermeable soils exist and/or the seasonal high water table is less than 24 inches beneath the ground surface, variances are limited by state laws only to specially designed "alternative" sewage disposal systems to serve a single family dwelling. The minimum property size for alternative sewage disposal systems is one (1) acre. Such a variance requires an affidavit signed by the owner and filed with the deed to the property, specifying the conditions required by the Health Officer to assure that potential hazards will be minimized.

II. APPEALS - Appeals from the rulings of the Health Officer are provided for in the District Environmental Health Code. The Board of Health serves as the Board of Appeals. A Request for Appeal must be in writing and addressed to: Chairman, Board of Health, c/o Health Officer, 570 Marshall Road, Coldwater, MI 49036.

Upon receipt of the written appeal, a site inspection may be made by members of the Board of Health in company with environmental health staff and the appellant. If a soil scientist or consultant from the Michigan Department of Environmental Quality has not already reviewed the site, such review may be requested.

In compliance with Article 120 of the Environmental Health Code for Branch, Hillsdale and St. Joseph Counties, Michigan, the hearing of an appeal shall be granted at the next scheduled or regular meeting of the Board of Health or at the discretion of the chairman thereof at a special meeting called for that purpose. No hearing shall be scheduled within less than ten (10) days of receipt of the written request. The Board may grant individual variances from the requirements of these regulations when said board has adequately determined that all of the following conditions exist; 1) that no substantial health problem or nuisance is likely to occur therefrom; 2) that strict compliance with the code requirements would result in an unnecessary or unreasonable hardship; 3) that no state statute or other applicable laws would be violated by such variance; and 4) that the proposed variance would provide essentially equivalent protection in the public interest.

**POLICIES AND GUIDELINES FOR INSTALLATION OF ALTERNATIVE SEWAGE DISPOSAL FACILITIES ON SITES THAT DO NOT MEET THE MINIMUM REQUIREMENTS OF THE ENVIRONMENTAL HEALTH CODE FOR SOIL PERMEABILITY OR SEASONAL HIGH WATER TABLE.**

This policy and guideline for Alternative Sewage Disposal Facilities are prepared under the authority of the following Sections of the “Environmental Health Code for Branch, Hillsdale and St. Joseph Counties Michigan” which state:

**117 - POWER TO ESTABLISH POLICY AND GUIDELINES**

- (1) The Health Officer is hereby granted the authority to establish policies and guidelines, not in conflict with the purpose and intent of these Regulations, for the purpose of carrying out the responsibilities herein delegated to the Health Officer by Law.
- (2) All such policies and guidelines shall be in writing and shall be kept in a policy file available for public inspection upon request. The policies and guidelines are subject to review and approval of the Branch- Hillsdale St. Joseph District Board of Health.

**710 - Alternative Sewage Disposal Facilities**

**710.1 - Authorization of Guidelines**

The Health Officer shall be empowered to prepare guidelines concerning the application, location design, construction, usage, and maintenance of specific categories of alternative sewage disposal facilities, devices, or process. Such guidelines shall be reviewed and approved by The Board of Health.

**710.2 - General Provisions**

Alternative sewage disposal facilities, devices or processes may be approved by the Health Officer. An alternative sewage disposal facility, or process shall not be approved unless the Health Officer has determined that the use of such a facility, device, or process will not create a nuisance, result in a hazard to public health or safety, or endanger the natural environment. The usage of alternative sewage disposal facilities, devices or processes shall be subject to restrictions or limitations imposed by statutes, ordinances, or rules other than those contained in these Regulations, and to policies and guidelines adopted pursuant to authority of Section 700 of these Regulations.

**APPLICATION**

These policies and guidelines apply only to proposed new construction, on greater than 1 acre sites, of single family homes to be served by an on-site sewage system, where the soil permeability exceeds 45 minutes per inch and /or the seasonal high water table is less than 24 inches beneath the ground surface.

**ELEVATED FILTER BED REQUIREMENTS AND SPECIFICATIONS**

**SITE REQUIREMENTS**

Sufficient area to allow installation of an initial absorption area and replacement absorption area of equal size meeting the minimum size and isolation requirements for both the absorption area, septic tank and sewer lines as follows

ISOLATION REQUIREMENTS

	SEPTIC TANK & DOSING TANK	ABSORPTION AREA
Property Lines	25 ft.	25 ft. from toe of berm
Private Wells	50 ft.	50 ft from toe of berm
Pressure Water Lines	10 ft	10 ft
Suction Water Lines	50 ft	50 ft
Public/Semi Public Wells	As mandated in applicable state laws	
Building Foundation	10 ft	25 ft. from toe of berm
Surface Waters	100 ft	100 ft from toe of berm
Drainage Ways	5 ft	50 ft from toe of berm
Wet Areas	50 ft	50 ft from toe of berm
100 Year Flood Plain	10 ft	50 ft from toe of berm
Swimming Pools	10 ft	25 ft from toe of berm
Seasonal High Water Table and/or Impermeable Soil Surface.	**	minimum of four (4) feet beneath bottom of stone bed

\*\* The septic tank and dosing chamber shall be sealed water tight on all seams, around inlet, outlet and access risers and lids.

NOTE: the force main from the dosing tank to the septic tank shall be isolated a minimum of 50 ft from wells and surface waters.

SYSTEM SIZE -	1- 2 bedrooms	3-4 bedrooms	> 4 bedrooms
Septic Tank	1500 gal	1500 gal	add 200 gal per bdrm
Absorption area	1000 sq ft	1500 sq ft	add 250 sq ft/ bdrm
Dosing Chamber	500 gal	500 gal	500 gal

FILL MATERIAL UNDER ABSORPTION BED - Clean coarse sand to provide a minimum of 4 feet above the impermeable soil layer and /or seasonal high water table. Coarse sand fill to be extended a minimum of 3 feet around the outside perimeter of the stone bed. eg. If the stone bed needs to be 20 feet by 50 feet then the coarse sand fill area will be 26 ft by 56 ft.

FILL MATERIAL FOR BERM AROUND BED - permeable fill material with a slope of 1 : 4 extended from edge of coarse sand bed from top elevation of stone bed. Eg. If sand bed area 26 feet by 56 feet and vertical distance to top of bed at five feet then the berm would extend 20 feet around the perimeter of the sand bed. The total area taken up by the mound would be 96 feet by 66 feet.

FINAL COVER MATERIAL - no less than 1 foot nor more than 3 feet of suitable top soil over the entire mound. It is essential to seed with grass as soon as possible.

## OTHER DESIGN CONSIDERATIONS

The absorption area must be installed only during dry weather conditions. The entire initial and replacement fill area must be marked off and protected from any vehicular traffic during construction.

An approved filter device shall be installed on the outlet end of the septic tank.

The absorption area should be laid out so the distribution lines are run horizontal to the natural grade. Long narrow beds are preferred. Discharge of the septic tank effluent into the distribution lines through a center header is preferable.

Inspection ports, one in the middle of the bed, and one adjacent to the berm on the down gradient side of the site, and capped and accessible at grade level are required.

The access cover over the dosing chamber shall be accessible at ground surface and not buried.

A deed addendum form must be completed and filed prior to issuance of the construction permit.



Life Science Innovator Since 1966

Quotation # DAIQ32586

Date: 05/31/23

Expiration Date: 7/30/2023

Quote To:

BHSJ-CHA

Heidi Hazel

Phone: (517) 933-3009

Email: hazelh@bhsj.org

Local Sales Rep:

Brian Langenderfer

847-550-3036

brian.langenderfer@daiscientific.com

MAKE ORDER OUT TO:

PHC Corporation of North America (PHCNA)

1300 Michael Dr. Suite A

Wood Dale, IL 60191

Phone: 800-858-8442

biocustomerservice@us.phchd.com

E&I Contract Number CNR01422

We are pleased to quote the following:

	Part Number	Description	Qty	Unit Price	Ext. Price
	<b>PHCbi MPR-1412-PA</b>				
	Laboratory Refrigerator		1	\$7,798.00	\$7,798.00
	<ul style="list-style-type: none"> <li>*Environmentally friendly HFO (Hydrofluro-Olefins) refrigerant</li> <li>* Total Capacity 48.4 cu. ft.</li> <li>* Precise microprocessor controlled temp. range from +2C to +23C</li> <li>* Key lock function for the controls to prevent accidental/tampering</li> <li>* Lockable double doors with double paned window</li> <li>* Forced air circulation refrigeration system</li> <li>* Digital LED display and input with keypad controls</li> <li>* Audible/Visual Alarms for high/low temp. and door ajar</li> <li>* Remote alarm contacts</li> <li>* One 40W fluorescent light</li> <li>* Two access ports</li> <li>* (4) Casters</li> <li>* Eight wire shelves (plastic coated)</li> <li>* Power requirements: 115V/60Hz/NEMA 5-15P</li> <li>* Inner Dimension: 52"W x 28"D x 59.1"H</li> </ul>				

1300 Michael Dr. Suite A, Wood Dale, IL 60191  
Phone: 800-858-8442  
Email: biocustomerservice@us.phchd.com

Page 1

	Part Number	Description	Qty	Unit Price	Ext. Price
		* Outer Dimension: 56.7"W x 36.2"D x 76.8"H * Warranty: Three (3) years parts and labor			
		<b>Freight to Dock</b>	1	\$0.00	\$0.00
		<b>White Glove Inside Delivery Provided by Corrigan Movers</b>	1	\$0.00	\$0.00
	<b>Terms</b>	<b>Net 30</b>	<b>FOB:</b>	<b>Dest PP</b>	

If purchase will be exempt from state tax at the ship to address please include a copy of the state exempt certificate with purchase order. PLEASE NOTE: Freight charges, lift gate charges, "In-Room" charges, installation, or tax are not included in this quotation unless noted above.

---

<b>Total</b>	<b>\$7,798.00</b>
--------------	-------------------



# QUOTATION

Creation Date: 6/14/2023 10:32:42 AM

Toll Free: 800.743.5637  
 EMAIL or FAX orders to:  
[orders@helmerinc.com](mailto:orders@helmerinc.com)  
 317-773-9082

**Quote #:**  
**QUO-203121-J3K4D2**  
 Rev: 0

PLEASE REFER TO THIS QUOTE NUMBER ON ALL CORRESPONDENCES AND ORDERS

YOUR REPRESENTATIVE:  
 Nicholas Reusser  
 1-317-764-5216 Ext: 3817  
 nreusser@helmerinc.com

**Requestor:** Heidi Hazel  
 hazelh@bhsj.org  
 15179333009

**Facility ID:** MI203

**Branch-Hillsdale St Joseph Community**  
**570 Marshall Rd**  
**Coldwater MI 49036**

**Ship to:**

<b>CONTRACT</b>	Health Clinic	
<b>Terms:</b> N30 Days	<b>FOB:</b> Origin	<b>Shipping Charge:</b> Prepaid and Add
<b>Effective Date</b>	2023-06-14	
<b>Expiration Date</b>	2023-07-18	

Ln No	Part#	Model	Description / Details	QTY	Price Each	Total /Extended
1	5113245-1	HLR245-GX	HLR245-GX Horizon Series™ Laboratory Refrigerator, 44.9 cu ft (1271 Liters)	1	\$7,497.72	\$7,497.72
2	890011-3	TrueBlue Service Agreement	TrueBlue Service Agreement	1	\$491.63	\$491.63
3	890050-2		TrueBlue Delivery and Set Up	1	\$1,327.71	\$1,327.71

Sub Total: \$9,317.06

Shipping Method: -

We accept Visa, Mastercard and American Express

**Total Amount:**

All prices are in USD

**\$9,317.06**

**Notes:**

# QUOTATION

Creation Date: 6/14/2023 10:32:42 AM

Toll Free: 800.743.5637  
EMAIL or FAX orders to:  
[orders@helmerinc.com](mailto:orders@helmerinc.com)  
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**Quote #:**  
**QUO-203121-J3K4D2**  
Rev: 0

PLEASE REFER TO THIS QUOTE NUMBER ON ALL CORRESPONDENCES AND ORDERS

YOUR REPRESENTATIVE:  
Nicholas Reusser  
1-317-764-5216 Ext: 3817  
nreusser@helmerinc.com

This quotation is subject to Helmer Scientific's standard terms and conditions, please visit <https://www.helmerinc.com/terms/general>.

SHIPPING: Standard cost is dock-to-dock delivery. Inside delivery (white glove) and lift gate is an additional cost and will be quoted upon request.

**ORDERING INSTRUCTIONS:**

Purchase Orders: Email to [orders@helmerinc.com](mailto:orders@helmerinc.com) or Fax to (317) 773-9082. Please include the Helmer Quote Number on your PO.

Credit Card Orders: Please contact Customer Service at: (800) 743-5637 (8-5 EST M-F) to provide information securely over the phone.

*Helmer may request new customers and established customers complete our credit application to create or update current credit files. This requirement will be contingent on order amount and prior history with Helmer.*

Domestic Warranties	i.Series and PRO			Horizon Series		
	Compressor	Parts	Labor	Compressor	Parts	Labor
Refrigerators	7 yrs.	2 yrs.	1 yr.	5 yrs.	2 yrs.	1 yr.
-30° Freezers	5 yrs.	2 yrs.	1 yr.	3 yrs.	2 yrs.	1 yr.
Ultra Low Freezers	5 yrs.	2 yrs.	2 yrs.			
Platelet Incubators	5 yrs.	2 yrs.	1 yr.			
Platelet Agitators	2 yrs. Parts, 1 yr. Labor					
Plasma Thawers	2 yrs. Parts, 1 yr Labor					
Cell Washers	2 yrs. Parts, 1 yr. Labor					
Centrifuges	5 yrs. Power Train, 2 yrs. Parts, 1 yr. Labor					

# QUOTATION

Creation Date: 6/14/2023 10:32:42 AM

Toll Free: 800.743.5637  
EMAIL or FAX orders to:  
[orders@helmerinc.com](mailto:orders@helmerinc.com)  
317-773-9082

Quote #:  
**QUO-203121-J3K4D2**  
Rev: 0

PLEASE REFER TO THIS QUOTE NUMBER ON ALL CORRESPONDENCES AND ORDERS

YOUR REPRESENTATIVE:  
Nicholas Reusser  
1-317-764-5216 Ext: 3817  
nreusser@helmerinc.com

## Configured As:

**Line No:** 1  
**Model:** HLR245-GX  
**Item Number:** 5113245-1  
**Description:** HLR245-GX Horizon Series™ Laboratory Refrigerator, 44.9 cu ft (1271 Liters)

Part Number	Description	Qty	Price Each
5113245-1	HLR245-GX Horizon Series™ Laboratory Refrigerator, 44.9 cu ft (1271 Liters)	1	7,497.72
4010175-1	Power Option: 115V 60Hz (for Horizon Series™ Refrigerators, GX Models, 45 cu ft)	1	0.00
4110006-1	Power Cord Option: 115V 60Hz NEMA 5-15	1	0.00
4020045-1	Exterior Option: Powder Coat (for Refrigerators, GX models, 45 cu ft)	1	0.00
4030046-1	Interior Option: Powder Coat, White (for Refrigerators, GX models, 45 cu ft)	1	0.00
4040025-1	Light Option: Basic (for Refrigerators with Powder Coat Interior, GX models, 45 56 cu ft)	1	0.00
4050071-1	Chart Recorder Option: None (for Horizon Series™ Blood Bank Refrigerators, GX models, 45 56 cu)	1	0.00
4060070-1	Lock Option: Standard Key (for Horizon Series™ Refrigerators, GX models, 45 56 cu ft)	1	0.00
4080050-1	Handle Option: Standard (for Refrigerators, GX models, 20/25/45/56 cu ft)	1	0.00
4080050-1	Handle Option: Standard (for Refrigerators, GX models, 20/25/45/56 cu ft)	1	0.00
4070203-1	Door Option: Right Hinge, Glass (for iHorizon Series™ Refrigerators, GX models, 20/25/45/56 cu ft)	1	0.00
4070221-1	Door Option: Left Hinge, Glass (for Horizon Series™ Refrigerators, GX models, 20/25/45/56 cu ft and i.Series® Refrigerators, GX models, 45 56 cu ft)	1	0.00

# QUOTATION

Creation Date: 6/14/2023 10:32:42 AM

Toll Free: 800.743.5637  
EMAIL or FAX orders to:  
[orders@helmerinc.com](mailto:orders@helmerinc.com)  
317-773-9082

**Quote #:**  
**QUO-203121-J3K4D2**  
Rev: 0

PLEASE REFER TO THIS QUOTE NUMBER ON ALL CORRESPONDENCES AND ORDERS

YOUR REPRESENTATIVE:  
Nicholas Reusser  
1-317-764-5216 Ext: 3817  
nreusser@helmerinc.com

4090096-1	Storage Option: Shelf, Ventilated, Factory Installed (for Refrigerators, GX models, 20 45 cu ft)	1	0.00
4090096-1	Storage Option: Shelf, Ventilated, Factory Installed (for Refrigerators, GX models, 20 45 cu ft)	1	0.00
4090096-1	Storage Option: Shelf, Ventilated, Factory Installed (for Refrigerators, GX models, 20 45 cu ft)	1	0.00
4090096-1	Storage Option: Shelf, Ventilated, Factory Installed (for Refrigerators, GX models, 20 45 cu ft)	1	0.00
4090095-1	Storage Option: None (for Refrigerators, GX models, 20 45 cu ft)	1	0.00
4090095-1	Storage Option: None (for Refrigerators, GX models, 20 45 cu ft)	1	0.00
4090095-1	Storage Option: None (for Refrigerators, GX models, 20 45 cu ft)	1	0.00
4090095-1	Storage Option: None (for Refrigerators, GX models, 20 45 cu ft)	1	0.00
4090096-1	Storage Option: Shelf, Ventilated, Factory Installed (for Refrigerators, GX models, 20 45 cu ft)	1	0.00
4090096-1	Storage Option: Shelf, Ventilated, Factory Installed (for Refrigerators, GX models, 20 45 cu ft)	1	0.00
4090096-1	Storage Option: Shelf, Ventilated, Factory Installed (for Refrigerators, GX models, 20 45 cu ft)	1	0.00
4090096-1	Storage Option: Shelf, Ventilated, Factory Installed (for Refrigerators, GX models, 20 45 cu ft)	1	0.00
4090095-1	Storage Option: None (for Refrigerators, GX models, 20 45 cu ft)	1	0.00
4090095-1	Storage Option: None (for Refrigerators, GX models, 20 45 cu ft)	1	0.00
4090095-1	Storage Option: None (for Refrigerators, GX models, 20 45 cu ft)	1	0.00
4090095-1	Storage Option: None (for Refrigerators, GX models, 20 45 cu ft)	1	0.00
4120013-1	Monitoring Option: Bottle with Glycerin, Factory Installed (for Horizon Series™ Refrigerators, GX models, 45/56 cu ft)	1	0.00
4900098-1	Special Option: Access Port, Left Wall (for Blood Bank Refrigerators, GX models, 13/20/25/45/56 cu ft)	1	0.00

**Total Price: \$7,497.72**

# QUOTATION

Creation Date: 6/14/2023 10:32:42 AM

Toll Free: 800.743.5637  
EMAIL or FAX orders to:  
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**Quote #:**  
**QUO-203121-J3K4D2**  
Rev: 0

PLEASE REFER TO THIS QUOTE NUMBER ON ALL CORRESPONDENCES AND ORDERS

YOUR REPRESENTATIVE:  
Nicholas Reusser  
1-317-764-5216 Ext: 3817  
nreusser@helmerinc.com

## Configured As:

**Line No:** 2  
**Model:** TrueBlue Service Agreement  
**Item Number:** 890011-3  
**Description:** TrueBlue Service Agreement

<i>Part Number</i>	<i>Description</i>	<i>Qty</i>	<i>Price Each</i>
890011-3	TrueBlue Service Agreement	1	0.00
8120111	Ref/Frz, 2yr, New Product	1	491.63

**Total Price: \$491.63**

Heidi Hazel  
Clinic Supervisor & Immunization Coordinator

Community Health Center of Branch City  
570 Marshall Rd.  
Coldwater, MI49036  
Phone: (517) 279-9561 ext.105  
hazelh@bhsj.org

June 16, 2023  
Page 1 of 9

Subject: Quote # 922399-1

Dear Heidi Hazel

Thank you for your recent inquiry. Thermo Fisher Scientific is pleased to provide you with the attached quotation.

To ensure accurate and timely processing of your order, please provide the following information on your purchase order:

- Purchase order addressed to Thermo Fisher Scientific (Asheville) LLC, as shown below
- Complete billing address
- Complete shipping address
- Purchase order number
- Reference quote number
- Item number of the product(s) being ordered
- Description of item(s) being ordered
- Quantity for each item
- Price for each item
- Shipping and payment terms should match quotation

Thermo Fisher Scientific provides a complete portfolio of laboratory equipment and professional services including: Product Installation, Validation Services, Preventative Maintenance Agreements, and Extended Warranty Plans. Should you require additional information about any of our products or services, please contact your local Sales Representative.

Competitive finance options are available with fast and simple documentation. Please contact Thermo Fisher Financial Services at (800) 986-9731 Ext. 7 for more information.

We appreciate your interest in Thermo Fisher Scientific and look forward to serving you in the future.

Sincerely,

THERMO FISHER SCIENTIFIC

Tom Kuhn

Bid Representative

**Order From Address :** orderprocessing.led.asheville@thermofisher.com

Thermo Fisher Scientific (Asheville) LLC

Building 2B - Suite 400

28 Schenck Parkway

Asheville, NC 28803

Phone: (866) 984-3766

www.thermoscientific.com

Fax: (888) 618-2676

TO ENSURE PRICING AND TERMS REFERENCE QUOTATION

**Acceptance and delivery of your order is subject to the terms and conditions on the face of and attached to this quote, which shall constitute the exclusive contract between us for your order.**

Building 2B - Suite 400  
28 Schenck Parkway  
Asheville, NC 28803

Quote #:922399  
Rev #:1

Phone: (866) 984-3766 Fax: (888) 618-2676  
orderprocessing.led.asheville@thermofisher.com

Issued date:06/16/2023  
Expiration date:09/14/2023

<b>Submit To:</b> Heidi Hazel Clinic Supervisor & Immunization Coordinator Community Health Center of Branch City 570 Marshall Rd. Coldwater, MI 49036 Phone: (517) 279-9561 ext.105 hazelh@bhsj.org	<b>Customer Information:</b> Heidi Hazel Clinic Supervisor & Immunization Coordinator Community Health Center of Branch City 570 Marshall Rd. Coldwater, Michigan49036 Phone: (517) 279-9561 ext.105 hazelh@bhsj.org	<b>Ship To :</b> Heidi Hazel Clinic Supervisor & Immunization Coordinator Community Health Center of Branch City 570 Marshall Rd. Coldwater, MI 49036 Phone: (517) 279-9561 ext.105 hazelh@bhsj.org
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<b>Sales Rep Information:</b> Camille Contre <b>Phone:</b> 828-774-7262 <b>Fax:</b> 888-618-2676 <b>Email:</b> camille.contre@thermofisher.com	<b>Prepared By:</b> Tom Kuhn <b>Phone:</b> (740) 374-1867 <b>Fax:</b> 877-723-6624 <b>Email:</b> tom.kuhn@thermofisher.com
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<b>Special Delivery Options</b>			
<b>Lift Gate:</b>	False	<b>Ship Complete:</b>	False
<b>Inside Delivery:</b>	False	<b>Dock to Dock:</b>	False
<b>Delivery Instructions:</b>			

<b>We Deliver to the Following Terms and Conditions</b>			
• <b>Our Payment Terms:</b>	Net 30	• <b>Terms of Delivery:</b>	FOB Factory, Frt Prepay & Add
• <b>Currency:</b>	US Dollar	• <b>Taxes are extra where applicable.</b>	
		• <b>Product Return Eligibility:</b>	Within 30 Days
This order is subject to the terms and conditions attached to this quote. Certain products may not be returned. Please refer to the attached terms and conditions of sale for more information, and visit <a href="http://www.thermofisher.com/productpolicy">www.thermofisher.com/productpolicy</a> for full details of our return policy.			

Line	Description	Install Type	Qty	List Price	Net Price	Total Price
1.0	TSX5005PA THERMO SCIENTIFIC HC PHARMACY REFRIGERATOR configured as 95005H3A0ZAPJR0B with options below		1	\$18,129.00	\$10,902.78	\$10,902.78

Building 2B - Suite 400

28 Schenck Parkway

Asheville, NC 28803

Phone: (866) 984-3766 Fax: (888) 618-2676

orderprocessing.led.asheville@thermofisher.com

Quote #:922399

Rev #:1

Issued date:06/16/2023

Expiration date:09/14/2023

1.1	Model No. TSX5005PA Thermo Scientific HC Pharmacy Refrigerator +2C to +8C Total Capacity (Cu. Ft/Liters): 51.1 (1447) Exterior Dimensions: 77.5"H x 36.2"F-B x 56.5"W (1969mm x 907mm x 1435mm) Voltage: A - 115V 60Hz Doors: Double Warranty: H-24 mo. P & L	1	\$18,129.00	\$10,902.78	\$10,902.78
1.2	Catalog No. 6916-2 - Certificate of Calibration	1	\$0.00	\$0.00	\$0.00
<b>2.0</b>	<b>N206</b>  Environmental Disposal Includes removal and environmental disposal of old unit and inside delivery of one new replacement unit. Inside delivery of additional new units subject to additional charges. NOTE: If the disposal unit is not decontaminated and ready for pick up, arrangements will need to be made to return. Re-delivery is subject to a \$550.00 re-delivery fee. ** "Bio-hazard Certificate for Disposal" form must be completed and returned with your purchase order. **  Serial number, TBD Model PHCbi MPR 1412-PA	1	<b>\$1,049.00</b>	<b>\$1,049.00</b>	<b>\$1,049.00</b>
<b>3.0</b>	<b>FRQ</b>  Estimated Freight Charges  Dock to dock to zip code 49036	1	<b>\$515.00</b>	<b>\$515.00</b>	<b>\$515.00</b>
				<b>List Price Subtotal</b>	<b>\$19,693.00</b>
				<b>Grand Total</b>	<b>\$12,466.78</b>

Building 2B - Suite 400

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Asheville, NC 28803

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Quote #:922399

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**Optional Items**

Line	Description	Install Type	Qty	List Price	Net Price	Total Price
4.0	<b>EWBRF05</b>		1	<b>\$709.00</b>	<b>\$709.00</b>	<b>\$709.00</b>
Extend the factory warranty of Thermo Scientific Refrigerators/Freezers. Plan Includes <ul style="list-style-type: none"> <li>• Unlimited engineer labor, travel and factory-certified replacement parts required for corrective maintenance.</li> <li>• Priority unlimited access to our OEM-trained Technical support experts who can diagnose, investigate, and remotely resolve issues or schedule on-site visits using the latest digital remote support tools.</li> <li>• Access to our on-line service knowledgebase</li> <li>• Instrument Software/ Firmware updates4 included as needed to support a corrective maintenance visit</li> </ul>						

Thank you for considering products manufactured by Thermo Fisher Scientific (Asheville) LLC. This quote is issued and intended for sales and shipments within the U.S. For equipment ultimately destined for outside of the U.S., please contact the International Department at inquiries.led.1care@thermofisher.com.

Orders can be emailed or faxed to Thermo Fisher Scientific at the address above.

**Competitive Finance Options** are available with fast and simple documentation. Please contact Thermo Fisher Financial Services at (800) 986-9731 Ext. 9 or e-mail Choyce LaRue at choyce.larue@thermofisher.com for more information.

Available delivery services:

- **Bronze Delivery** – From manufacturing location to your receiving dock.
- **Inside/Gold Delivery** – Equipment delivered to the final location, uncrating, removal of debris, assembly/stacking as required, and set in place. Pricing is valid under the following assumption: the delivery contact is available at the time of delivery, delivery personnel have clear and unrestricted physical access to the inside delivery location and all necessary loading and lifting equipment including dock plates and freight elevators are available if required.
- **Lift Gate** – Requires truck with ability to lower equipment to the ground. For Delivery to a location without a receiving dock.
- **Ship Complete** – All items on order are shipped together on one delivery. No Partial Shipments.
- **Dock to Dock** – From Manufacturing location to your Receiving Dock
- **Depot White Glove Delivery** – equipment received at Thermo Fisher Scientific depot, uncrated, tested and then delivery scheduled to customers location with assembly/stacking as required. Unit to be set in place and customer instructions provided.

## TERMS AND CONDITIONS OF SALE

These Terms and Conditions of Sale apply to purchases from one or more of the following Thermo Fisher Scientific Inc. affiliates, including Capital Vial, Inc., Chase Scientific Glass, Inc.; EP Scientific Products LLC, Fiberlite Centrifuge LLC, Molecular BioProducts, Inc., Nalge Nunc International Corporation, Thermo Fisher Scientific (Asheville) LLC or Thermo Orion Inc. (each, a "Seller"). Unless otherwise expressly agreed in writing, all sales are subject to the following Terms and Conditions.

1. **GENERAL.** The Seller hereby offers for sale to the buyer ("Buyer") the products listed on the face hereof (the "Products") on the express condition that Buyer agrees to accept and be bound by the terms and conditions set forth herein. Any provisions contained in any document issued by Buyer are expressly rejected and if the terms and conditions in this Agreement differ from the terms of Buyer's offer, this document shall be construed as a counter offer and shall not be effective as an acceptance of Buyer's document. Buyer's receipt of Products or Seller's commencement of the services provided hereunder will constitute Buyer's acceptance of this Agreement. This is the complete and exclusive statement of the contract between Seller and Buyer with respect to Buyer's purchase of the Products. No waiver, consent, modification, amendment or change of the terms contained herein shall be binding unless in writing and signed by Seller and Buyer. Seller's failure to object to terms contained in any subsequent communication from Buyer will not be a waiver or modification of the terms set forth herein. All orders are subject to acceptance in writing by an authorized representative of Seller.

2. **PRICE.** All prices published by Seller or quoted by Seller's representatives may be changed at any time without notice. All prices quoted by Seller or Seller's representatives are valid for thirty (30) days, unless otherwise stated in writing. All prices for the Products will be as specified by Seller or, if no price has been specified or quoted, will be Seller's price in effect at the time of shipment. All prices are subject to adjustment on account of specifications, quantities, raw materials, cost of production, shipment arrangements or other terms or conditions which are not part of Seller's original price quotation.

3. **TAXES AND OTHER CHARGES.** Prices for the Products exclude all sales, value added and other taxes and duties imposed with respect to the sale, delivery, or use of any Products covered hereby, all of which taxes and duties must be paid by Buyer. If Buyer claims any exemption, Buyer must provide a valid, signed certificate or letter of exemption for each respective jurisdiction.

4. **TERMS OF PAYMENT.** Seller may invoice Buyer upon shipment for the price and all other charges payable by Buyer in accordance with the terms on the face hereof. If no payment terms are stated on the face hereof, payment shall be net thirty (30) days from the date of invoice. If Buyer fails to pay any amounts when due, Buyer shall pay Seller interest thereon at a periodic rate of one and one-half percent (1.5%) per month (or, if lower, the highest rate permitted by law), together with all costs and expenses (Including without limitation reasonable attorneys' fees and disbursements and court costs) incurred by Seller in collecting such overdue amounts or otherwise enforcing Seller's rights hereunder. Seller reserves the right to require from Buyer full or partial payment in advance, or other security that is satisfactory to Seller, at any time that Seller believes in good faith that Buyer's financial condition does not justify the terms of payment specified. All payments shall be made in U.S. Dollars.

5. **DELIVERY; CANCELLATION OR CHANGES BY BUYER; ACCEPTANCE & RETURNS.** Unless otherwise specified on the face of Seller's quote, the Products will be shipped to the destination specified by Buyer, FCA (Incoterms 2020) Seller's shipping point. Seller will have the right, at its election, to make partial shipments of the Products and to invoice each shipment separately. Seller reserves the right to stop delivery of Products in transit and to withhold shipments in whole or in part if Buyer fails to make any payment to Seller when due or otherwise fails to perform its obligations hereunder. All shipping dates are approximate only, and Seller will not be liable for any loss or damage resulting from any delay in delivery or failure to deliver which is due to any cause beyond Seller's reasonable control. In the event of a delay due to any cause beyond Seller's reasonable control, Seller reserves the right to terminate the order or to reschedule the shipment within a reasonable period of time; Buyer will not be entitled to refuse delivery or otherwise be relieved of any obligations as the result of such delay. Products as to which delivery is delayed due to any cause within Buyer's control may be placed in storage by Seller at Buyer's risk and expense and for Buyer's account. Orders in process may be canceled only with Seller's written consent and upon

payment of Seller's cancellation charges. Orders in process may not be changed except with Seller's written consent and upon agreement by the parties as to an appropriate adjustment in the purchase price therefor. Credit will not be allowed for Products returned without the prior written consent of Seller. All orders of specialized, private labeled, customized and non-stock products are subject to a cancellation charge of up to 100% of the purchase price. For additional terms regarding Product acceptance and returns, please visit Seller's Product Acceptance and Return Policy page at [www.thermofisher.com/productpolicy](http://www.thermofisher.com/productpolicy), the terms of which are incorporated herein by reference, and which may be amended from time to time.

6. **TITLE AND RISK OF LOSS.** Notwithstanding the trade terms indicated above and subject to Seller's right to stop delivery of Products in transit, title to & risk of loss to the Products will pass to Buyer upon delivery of possession of the Products by Seller to the carrier; provided, however, that title to any software incorporated within or forming a part of the Products shall at all times remain with Seller or the licensor(s) thereof, as the case may be.

7. **WARRANTY.** Seller warrants that the Products will operate or perform substantially in conformance with Seller's published specifications and be free from defects in material and workmanship, when subjected to normal, proper and intended usage by properly trained personnel, for the period of time set forth in the product documentation, published specifications or package inserts. If a period of time is not specified in Seller's product documentation, published specifications or package inserts, the warranty period shall be one (1) year from the date of shipment to Buyer for equipment and ninety (90) days for all other products (the "Warranty Period"). During the Warranty Period, Seller agrees in its sole discretion, to repair or replace Products and/or provide additional parts or services as reasonably necessary to cause the Products to perform in substantial conformance with said published specifications; provided that Buyer shall (a) promptly notify Seller in writing upon the discovery of any defect, which notice shall include the product model and serial number (if applicable) and details of the warranty claim; and (b) after Seller's review, Seller will provide Buyer with service data and/or a Return Material Authorization ("RMA"), which may include biohazard decontamination procedures and other product-specific handling instructions, then, if applicable, Buyer may return the defective Products to Seller with all costs prepaid by Buyer. Seller further reserves the right in its sole discretion to extend any Warranty Period if at the time that the Warranty Period would otherwise expire there are ongoing concerns regarding a Product's conformance to the warranty stated herein. Replacement parts may be new or refurbished, at the election of Seller. All replaced parts shall become the property of Seller. Shipment to Buyer of repaired or replacement Products shall be made in accordance with the Delivery provisions of the Seller's Terms and Conditions of Sale. If Seller elects to repair defective medical device instruments, Seller may, in its sole discretion, provide a replacement loaner instrument to Buyer as necessary for use while the instruments are being repaired.

Notwithstanding the foregoing, Products supplied by Seller that are obtained by Seller from an original manufacturer or third party supplier are not warranted by Seller, but Seller agrees to assign to Buyer any warranty rights in such Product that Seller may have from the original manufacturer or third party supplier, to the extent such assignment is allowed by such original manufacturer or third party supplier.

In no event shall Seller have any obligation to make repairs, replacements or corrections required, in whole or in part, as the result of (i) normal wear and tear, (ii) accident, disaster or event of force majeure, (iii) misuse, fault or negligence of or by Buyer, (iv) use of the Products in a manner for which they were not designed, (v) causes external to the Products such as, but not limited to, power failure or electrical power surges, (vi) improper storage and handling of the Products or (vii) use of the Products in combination with equipment or software not supplied by Seller. If Seller determines that Products for which Buyer has requested warranty services are not covered by the warranty hereunder, Buyer shall pay or reimburse Seller for all costs of investigating and responding to such request at Seller's then prevailing time and materials rates. If Seller provides repair services or replacement parts that are not covered by this warranty, Buyer shall pay Seller therefor at Seller's then prevailing time and materials rates. ANY INSTALLATION, MAINTENANCE, REPAIR, SERVICE, RELOCATION OR ALTERATION TO OR OF, OR OTHER TAMPERING WITH, THE PRODUCTS PERFORMED BY ANY PERSON OR ENTITY OTHER THAN SELLER WITHOUT SELLER'S PRIOR WRITTEN APPROVAL, OR ANY USE OF REPLACEMENT PARTS NOT SUPPLIED BY SELLER, SHALL IMMEDIATELY VOID AND CANCEL ALL WARRANTIES WITH RESPECT TO THE AFFECTED PRODUCTS.

THE OBLIGATIONS CREATED BY THIS WARRANTY TO REPAIR OR REPLACE A DEFECTIVE PRODUCT SHALL BE THE SOLE REMEDY OF BUYER IN THE EVENT OF A DEFECTIVE PRODUCT. EXCEPT AS PROVIDED HEREIN, SELLER DISCLAIMS ALL OTHER WARRANTIES, WHETHER EXPRESS OR IMPLIED, ORAL OR WRITTEN, WITH RESPECT TO THE PRODUCTS, INCLUDING WITHOUT LIMITATION ALL IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR ANY PARTICULAR PURPOSE. SELLER DOES NOT WARRANT THAT THE PRODUCTS ARE ERROR-FREE OR WILL ACCOMPLISH ANY PARTICULAR RESULT.

## 8. INDEMNIFICATION.

8.1 By Seller. Seller agrees to indemnify, defend and save Buyer, its officer, directors, and employees from and against any and all damages, liabilities, actions, causes of action, suits, claims, demands, losses, costs and expenses (including without limitation reasonable attorney's fees) ("Indemnified Items") for (i) injury to or death of persons or damage to property to the extent caused by the negligence or willful misconduct of Seller, its employees, agents or representatives or contractors in connection with the performance of services at Buyer's premises under this Agreement and (ii) claims that a Product infringes any valid United States patent, copyright or trade secret; provided, however, Seller shall have no liability under this Section to the extent any such Indemnified Items are caused by either (i) the negligence or willful misconduct of Buyer, its employees, agents or representatives or contractors, (ii) by any third party, (iii) use of a Product in combination with equipment or software not supplied by Seller where the Product would not itself be infringing, (iv) compliance with Buyer's designs, specifications or instructions, (v) use of the Product in an application or environment for which it was not designed or (vi) modifications of the Product by anyone other than Seller without Seller's prior written approval. Buyer shall provide Seller prompt written notice of any third party claim covered by Seller's indemnification obligations hereunder. Seller shall have the right to assume exclusive control of the defense of such claim or, at the option of the Seller, to settle the same. Buyer agrees to cooperate reasonably with Seller in connection with the performance by Seller of its obligations in this Section.

Notwithstanding the above, Seller's infringement related indemnification obligations shall be extinguished and relieved if Seller, at its discretion and at its own expense (a) procures for Buyer the right, at no additional expense to Buyer, to continue using the Product; (b) replaces or modifies the Product so that it becomes non-infringing, provided the modification or replacement does not adversely affect the specifications of the Product; or (c) in the event (a) and (b) are not practical, refund to Buyer the amortized amounts paid by Buyer with respect thereto, based on a five (5) year amortization schedule. THE FOREGOING INDEMNIFICATION PROVISION STATES SELLER'S ENTIRE LIABILITY TO BUYER FOR THE CLAIMS DESCRIBED HEREIN.

8.2 By Buyer. Buyer shall indemnify, defend with competent and experienced counsel and hold harmless Seller, its parent, subsidiaries, affiliates and divisions, and their respective officers, directors, shareholders and employees, from and against any and all damages, liabilities, actions, causes of action, suits, claims, demands, losses, costs and expenses (including without limitation reasonable attorneys' fees and disbursements and court costs) to the extent arising from or in connection with (i) the negligence or willful misconduct of Buyer, its agents, employees, representatives or contractors; (ii) use of a Product in combination with equipment or software not supplied by Seller where the Product itself would not be infringing; (iii) Seller's compliance with designs, specifications or instructions supplied to Seller by Buyer; (iv) use of a Product in an application or environment for which it was not designed; or (v) modifications of a Product by anyone other than Seller without Seller's prior written approval.

9. SOFTWARE. With respect to any software products incorporated in or forming a part of the Products hereunder, Seller and Buyer intend and agree that such software products are being licensed and not sold, and that the words "purchase", "sell" or similar or derivative words are understood and agreed to mean "license", and that the word "Buyer" or similar or derivative words are understood and agreed to mean "licensee". Notwithstanding anything to the contrary contained herein, Seller or its licensor, as the case may be, retains all rights and interest in software products provided hereunder. Seller hereby grants to Buyer a royalty-free, non-exclusive, nontransferable license, without power to sublicense, to use software provided hereunder solely for Buyer's own internal business purposes on the hardware products provided hereunder and to use the related documentation solely for Buyer's own internal business purposes. This license terminates when Buyer's lawful possession of the hardware products provided hereunder ceases, unless earlier terminated as provided herein. Buyer agrees to hold in confidence and not to sell, transfer, license,

loan or otherwise make available in any form to third parties the software products and related documentation provided hereunder. Buyer may not disassemble, decompile or reverse engineer, copy, modify, enhance or otherwise change or supplement the software products provided hereunder without Seller's prior written consent. Seller will be entitled to terminate this license if Buyer fails to comply with any term or condition herein. Buyer agrees, upon termination of this license, immediately to return to Seller all software products and related documentation provided hereunder and all copies and portions thereof. Certain of the software products provided by Seller may be owned by one or more third parties and licensed to Seller. Thus, Seller and Buyer agree that such third parties retain ownership of and title to such software products. The warranty and indemnification provisions set forth herein shall not apply to software products owned by third parties and provided hereunder.

10. LIMITATION OF LIABILITY. NOTWITHSTANDING ANYTHING TO THE CONTRARY CONTAINED HEREIN, THE LIABILITY OF SELLER UNDER THESE TERMS AND CONDITIONS (WHETHER BY REASON OF BREACH OF CONTRACT, TORT, INDEMNIFICATION, OR OTHERWISE, BUT EXCLUDING LIABILITY OF SELLER FOR BREACH OF WARRANTY (THE SOLE REMEDY FOR WHICH SHALL BE AS PROVIDED UNDER SECTION 7 ABOVE)) SHALL NOT EXCEED AN AMOUNT EQUAL TO THE LESSER OF (A) THE TOTAL PURCHASE PRICE THERETOFORE PAID BY BUYER TO SELLER WITH RESPECT TO THE PRODUCT(S) GIVING RISE TO SUCH LIABILITY OR (B) ONE MILLION DOLLARS (\$1,000,000). NOTWITHSTANDING ANYTHING TO THE CONTRARY CONTAINED HEREIN, IN NO EVENT SHALL SELLER BE LIABLE FOR ANY INDIRECT, SPECIAL, CONSEQUENTIAL OR INCIDENTAL DAMAGES (INCLUDING WITHOUT LIMITATION DAMAGES FOR LOSS OF USE OF FACILITIES OR EQUIPMENT, LOSS OF REVENUE, LOSS OF DATA, LOSS OF PROFITS OR LOSS OF GOODWILL), REGARDLESS OF WHETHER SELLER (a) HAS BEEN INFORMED OF THE POSSIBILITY OF SUCH DAMAGES OR (b) IS NEGLIGENT.

11. EXPORT RESTRICTIONS Buyer acknowledges that each Product and any related software and technology, including technical information supplied by Seller or contained in documents (collectively "Items"), is subject to export controls of the U.S. government. The export controls may include, but are not limited to, those of the Export Administration Regulations of the U.S. Department of Commerce (the "EAR"), which may restrict or require licenses for the export of Items from the United States and their re-export from other countries. Buyer shall comply with the EAR and all other applicable laws, regulations, laws, treaties, and agreements relating to the export, re-export, and import of any Item. Buyer shall not, without first obtaining the required license to do so from the appropriate U.S. government agency; (i) export or re-export any Item, or (ii) export, re-export, distribute or supply any Item to any restricted or embargoed country or to a person or entity whose privilege to participate in exports has been denied or restricted by the U.S. government. Buyer shall, if requested by Seller, provide information on the end user and end use of any Item exported by the Buyer or to be exported by the Buyer. Buyer shall cooperate fully with Seller in any official or unofficial audit or inspection related to applicable export or import control laws or regulations, and shall indemnify and hold Seller harmless from, or in connection with, any violation of this Section by Buyer or its employees, consultants, or agents.

12. MEDICARE/MEDICAID REPORTING REQUIREMENTS: If Buyer is a recipient of Medicare/Medicaid funds, Buyer acknowledges that it has been informed of and agrees to fully and accurately account for, and report on its applicable cost report, the total value of any discount, rebate or other compensation paid hereunder in a way that complies with all applicable federal, state and local laws and regulations which establish "Safe Harbor" for discounts. Buyer shall make written request to Seller in the event Buyer requires additional information from Seller in order to meet its reporting requirements. Buyer acknowledges that agreement to such reporting requirement was a condition precedent to Seller's agreement to provide Products and that Seller would not have entered into this Agreement had Buyer not agreed to comply with such obligations.

13. MISCELLANEOUS. (a) Buyer may not delegate any duties nor assign any rights or claims hereunder without Seller's prior written consent, and any such attempted delegation or assignment shall be void. (b) The rights and obligations of the parties hereunder shall be governed by and construed in accordance with the laws of the State of Seller's manufacturing location, without reference to its choice of law provisions. Each party hereby irrevocably consents to the exclusive jurisdiction of the state and federal courts located in the county and state of Seller's manufacturing location, in any action arising out of or relating to this Agreement. (c) Both parties waive any right they may have under applicable law or otherwise to a right to a trial by jury. Any action arising under this Agreement must be brought within one (1) year from the date that the cause of action arose. (d) The application to this Agreement of the U.N. Convention on Contracts for the International Sale of Goods is hereby expressly excluded.

(e) In the event that any one or more provisions contained herein shall be held by a court of competent jurisdiction to be invalid, illegal or unenforceable in any respect, the validity, legality and enforceability of the remaining provisions contained herein shall remain in full force and effect, unless the revision materially changes the bargain. (f) Seller's failure to enforce, or Seller's waiver of a breach of, any provision contained herein shall not constitute a waiver of any other breach or of such provision. (g) Unless otherwise expressly stated on the Product or in the documentation accompanying the Product, the Product is intended for research only and is not to be used for any other purpose, including without limitation, unauthorized commercial uses, *in vitro* diagnostic uses, *ex vivo* or *in vivo* therapeutic uses, or any type of consumption by or application to humans or animals. (h) Buyer agrees that all pricing, discounts and technical information that Seller provides to Buyer are the confidential and proprietary information of Seller. Buyer agrees to (1) keep such information confidential and not disclose such information to any third party, and (2) use such information solely for Buyer's internal purposes and in connection with the Products supplied hereunder. Nothing herein shall restrict the use of information available to the general public. (i) Any notice or communication required or permitted hereunder shall be in writing and shall be deemed received when personally delivered or three (3) business days after being sent by certified mail, postage prepaid, to a party at the address specified herein or at such other address as either party may from time to time designate to the other. (j) Seller may, in its sole discretion, provide (1) applicable Product training to Buyer or its employees, or (2) samples of Products to Buyer for distribution to patients of Buyer. Buyer agrees that any such samples shall be distributed to patients for patient use or, if not so distributed, returned to Seller. Buyer shall not use such samples to provide care to patient and shall not bill patients or third party payers for the provision of such samples.

**From:** "Kevin Kalita" <[kevin.kalita@schindler.com](mailto:kevin.kalita@schindler.com)>  
**To:** "Diana Rogers" <[rogersd@bhsj.org](mailto:rogersd@bhsj.org)>, "Diana Rogers" <[Fitzmauricer@bhsj.org](mailto:Fitzmauricer@bhsj.org)>  
**Sent:** Wednesday, June 7, 2023 10:11:17 AM  
**Subject:** Elevator (20 Care Dr) = New code mandated upgrade

Good morning,

The State of Michigan elevator division recently adopted a new revision of elevator code (letter attached) that mandates "door lock monitoring" be installed on all elevators. Grandfathering in does not apply here so all elevators must have this equipped before 6/27/2024 or local state inspectors will start writing correction orders with continuing fines. To begin, elevators installed in 2002 and newer have this function built into their controllers that we can simply re-program with new software, etc. however your elevator was installed in 1995 so that option is not available. In your case, we must install a separate door lock monitoring controller that then ties into your existing elevator controller to monitor every floor's door locks.

This is all being fast tracked across the United States because a riding passenger was killed in NYC 8 years ago when it could have been fully prevented if this device had been installed on that elevator. Now, 10 states, including Michigan have already adopted this new code with many more closely behind. Furthermore, every one of these involves custom engineering as we have to get prints marked up from our engineering group along with adapting a custom DLM controller to pair with your existing elevator.

We completely understand this is a lot of money and a fully unbudgeted cost which is why we are offering this as low as we possibly can but this is a large undertaking with a lot of work involved in each and every one. We have an entire division set aside just for these upgrades because Schindler has made their own Door Lock Monitoring device to help keep costs down. However, this upgrade will take close to a week to install with weeks of material leadtime. I personally have hundreds of these in my area alone so the sooner we can get your approval, the sooner we can get this installed. I mention this because we are going to inevitably hit a bottleneck on these where leadtimes increase & labor is not available. The State of Michigan has granted a 1-year grace period (ends 6/27/24) but that will go by quickly, especially with a 3-month material leadtime.

Please review the attached proposal, brochure & code reference and let me know what questions you have. Please remember we require 50% down payments so this could potentially be divided up into 2023 / 2024 if approved this summer/fall.

All the best,

Kevin Kalita | Sales Rep EI  
Fax 5172721240 | Mobile 616-262-9178  
[kevin.kalita@schindler.com](mailto:kevin.kalita@schindler.com)

Schindler Elevator Corporation | District Michigan  
3135 Pine Tree Rd, Suite B ,  
Lansing, MI 48911, United States

[www.schindler.com](http://www.schindler.com)

**We Elevate**



GRETCHEN WHITMER  
GOVERNOR

STATE OF MICHIGAN  
DEPARTMENT OF LICENSING AND REGULATORY AFFAIRS  
LANSING

ORLENE HAWKS  
DIRECTOR

DATE: May 2, 2023

SUBJECT: Elevator Rules Update

The Bureau of Construction Codes is pleased to announce that the new elevator rules have been approved and are available for review here: [\\*New\\* Elevator Rules 6/27](#). These rules, including the updated code and fees, will be effective June 27, 2023. Any permits applied for and/or approved prior to 6/27/2023 will be reviewed and inspected using the existing rules and fee structure.

The Bureau is currently working to update all the licensing exams to reflect changes in the newly adopted codes: ASME 17.1-2016, ASME 17.2-2017, ASME 17.3-2017, ASME 18.1-2017, ASME A90.1-2009, ASME A10.4-2016, and NFPA 70 (Michigan Electrical Code). Testing for elevator licenses will continue to be based upon the existing rules, and further information will be provided when the revised licensing exams will be implemented.

If there are any questions, please send those to [elevsafety@michigan.gov](mailto:elevsafety@michigan.gov) with a subject of "New Rules Questions" to ensure proper routing.

Sincerely,

Andrew Brisbo, Director

Bureau of Construction Codes

# Door Lock Monitoring

## Code Explanations

### Door Lock Monitoring (DLM)

Door lock monitoring has been included as a requirement in ASME 17.1 (1996) for traction elevators. ASME A17.1-2000 was designed to add this requirement to Hydro elevators as well. It can typically be found in all elevator controls built to meet code requirements based on when each individual state adopted these two codes.

#### National Code

Per ASME A17.3 (2015), all automatic passenger and freight elevators must provide a system to monitor and prevent automatic operation with faulty door contact circuits.

#### State Code

Individual States can adopt the latest ASME codes at a time of their choosing

#### AHJ Building Codes

Individual City or State AHJ's may have specific requirements for items such as Fire Service Operation (eg, NYC Fire Code vs National). Typically, the City or State codes will override the ASME code or the more stringent of the two codes prevails

### ASME A17.1 vs A17.3 Clarification

#### A17.1 – Focus is on NI, Mod and Major Alterations

- Covers the standard provisions that New Installations must conform to.
- Existing units aren't required to conform until a unit is Modernized or a Major Alteration is performed on the unit.
  - The code version required to "conform" to is the latest A17.1 version that the individual state has adopted, **not** the latest national A17.1 that exists
- Existing units are typically "grand-fathered" in

#### A17.3 – Focus is on Existing Elevators

- Covers many of the same areas as A17.1
- Retroactive requirements on existing elevators
- Differs in that it sets a minimum standard for what safety features and maintenance measures must be in place for **any** elevator, regardless of its age for the safety of the general public.
- Existing units no longer "grand-fathered" in

**SCHINDLER ELEVATOR CORPORATION**

135 East Bennett St.  
Saline, MI 48176  
Phone: 616-262-9178  
Email: kevin.kalita@schindler.com



**UPGRADE ORDER AGREEMENT**

**Date:** 6/01/2023

**Contract #:** \_\_\_\_\_ (Schindler will fill out for you)

**Building Address:** \_\_\_\_\_ (Please fill out)

\_\_\_\_\_  
\_\_\_\_\_

To Whom it May Concern:

The Michigan Bureau of Elevator Safety has adopted the ASME A17.3-2015 Elevator Safety Code for existing Elevators & Escalators effective 06/27/2023. This adoption specifies Door Lock Monitoring as a retroactive safety requirement, to be installed on all existing elevators by 6/27/2024.

Schindler Elevator Corporation solution is the installation of our Schindler Door Lock Monitoring device. Our solution complies with ASME A17.1/CSA B44 codes and is designed for quick, effective integration into all leading brands of elevators. The DLM module detects door position, monitors for faults within the door circuitry, and prevents the elevator from running if any abnormalities are detected.

Get a jump start on the code compliance due date and avoid potential installation bottlenecks by ordering your DLM upgrade early. Order fulfillment can take 12+ weeks, and we expect an increasing risk of manpower constraints as we approach the compliance deadline. Once the deadline arrives, state inspectors will be performing inspections & writing correction orders with continuing fines until this upgrade is installed.

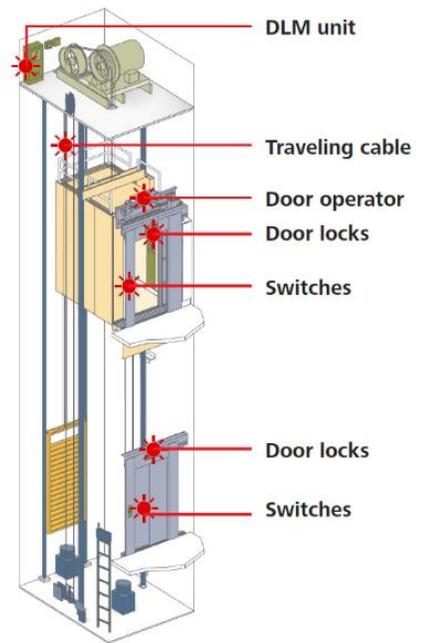
**Scope of work:**

We propose to provide all labor, material, engineering, and supervision required to perform the following scope of work during regular working hours of the elevator trade:

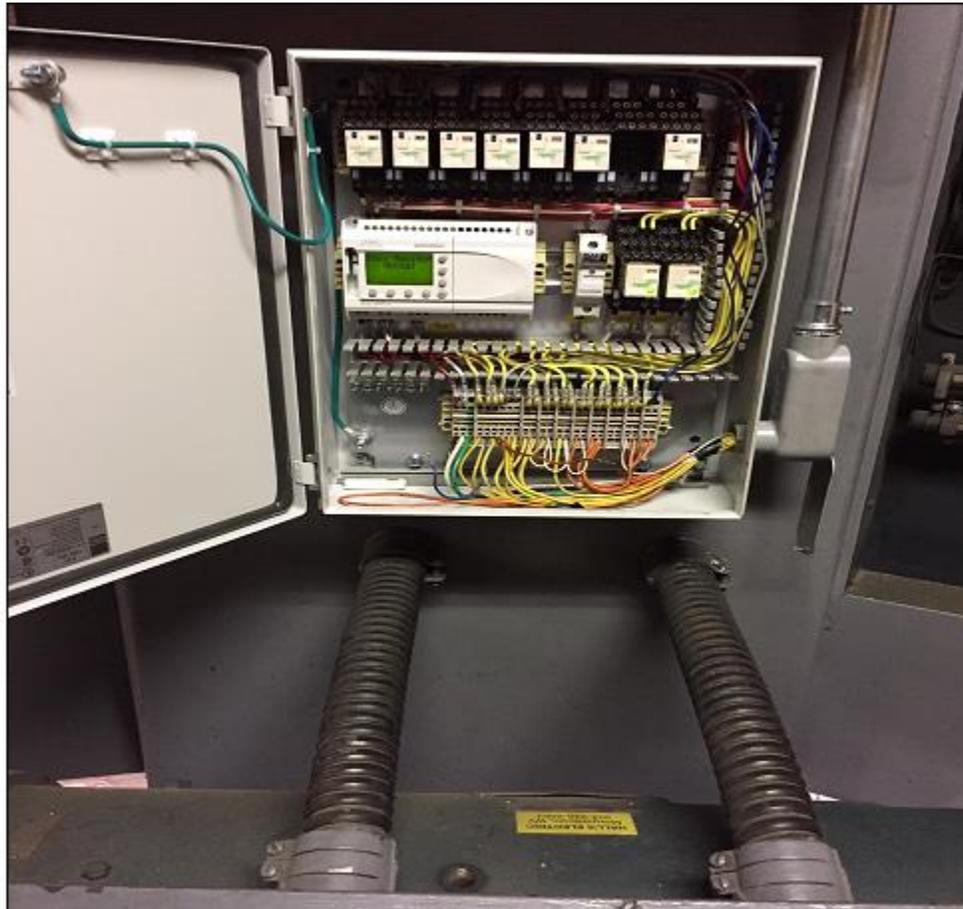
- Apply for all necessary permits from the State of Michigan
- Install the door lock monitoring controller and cross connect it with your existing controller
- Perform all necessary adjustments
- Perform final acceptance with local state inspector
- Return elevator back in service
  - o Pictures & further explanation continued on next page

Our installation will conform with ASME rule A17.3-2015 3.10.12 to Monitor and Prevent Automatic Operation of the Elevator in the event of Faulty Door Contact Circuits, requiring that the position of all mechanically coupled doors be monitored in order to:

- a.) prevent the operation of the car if the cab doors are not closed; and
- b.) prevent the power-closing of the doors if the cab doors are fully open and;
  - [i.] the car door contact is closed or bypassed; or
  - [ii.] the interlock contact which is coupled to the open car door is closed or bypassed; or
  - [iii.] both the car door contact and associated interlock contact are closed or bypassed.



- Door Lock Monitoring controller being furnish and installed:



The below price is contingent upon a final sight equipment survey to verify any abnormal site conditions that would require additional work such as remote machine rooms, bi-parting doors, etc.

**Price:** \$29,704.00, plus applicable taxes. (Quotations valid for 60 days; price based upon work during regular working hours of regular working days)

**Payment:** 50% of the price is due upon acceptance of this proposal.  
40% of the price is due as work progresses within 30 days of invoice;  
Balance due upon completion, within 30 days of invoice.

Schindler reserves the right not to source material or schedule labor for the above quoted work until payment in full has been received.

Payable in full within 30 days of invoice. Schindler retains title to any equipment furnished hereunder until final payment is made. Late or non-payment will result in assessment of interest charged at a rate of 1 1/2% per month or the highest legal rate available, and any attorneys' fees, expenses, and costs of collection. The customer understands that this is a fixed price proposal. Supporting documentation for materials and/or labor shall not be a condition precedent for payment in full to be made to Schindler.

**Option #1:** Extend service contract by five (5) years for 10% savings of this order. (> than \$2,500 in savings)

Acceptance of Option #1 (Initial):

- This upgrade order agreement price will be adjusted by 10% as noted above, subject to all terms and conditions of the original agreement including, without limitation, the annual provision for price adjustment.

**Option #2:** Extend service contract by ten (10) years for 20% savings of this order. (> than \$5,500 in savings)

Acceptance of Option #2 (Initial):

- The contract price will be adjusted as noted above along with a Three-year extension of our current subject to all terms and conditions of the original agreement including, the annual provision for price adjustment.

**The attached terms and conditions** are incorporated herein by reference.

Acceptance by you as owner's agent or authorized representative and subsequent approval by our authorized representative will be required to validate this agreement.

Proposed:

\_\_\_\_\_

By: Kevin Kalita

For: Schindler Elevator Corporation

Title: Sales Representative

Date: \_\_\_\_\_

Accepted:

\_\_\_\_\_

By: \_\_\_\_\_

For: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Approved:

\_\_\_\_\_

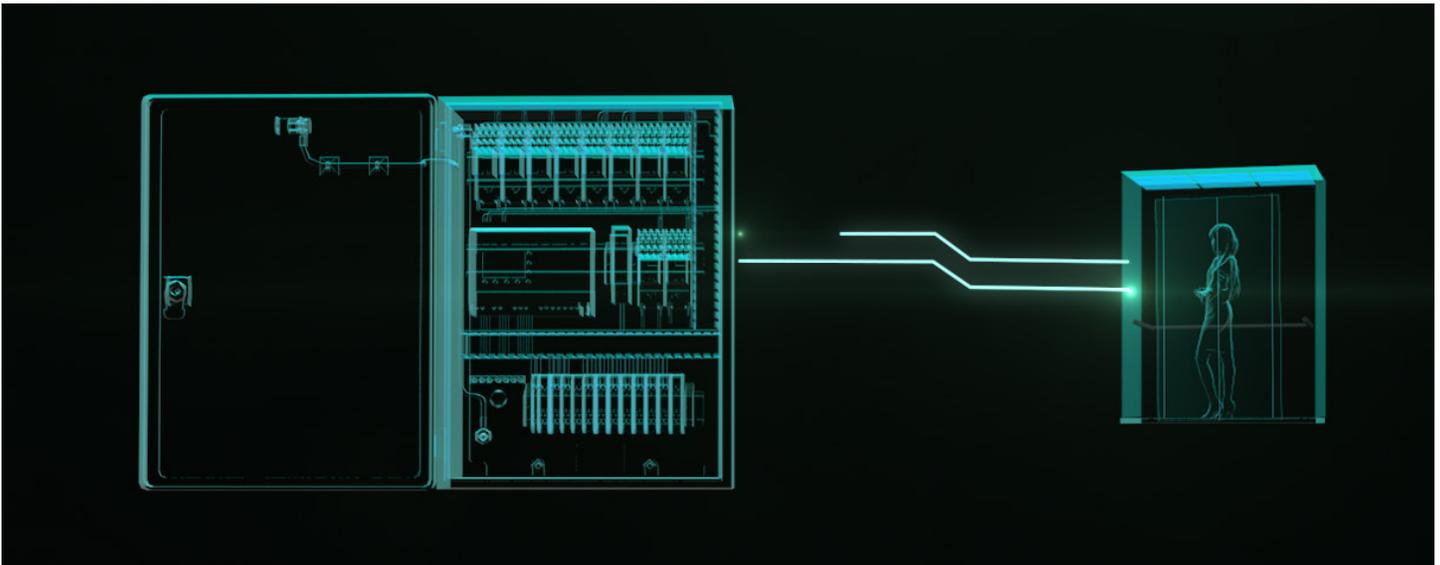
By: Walter Czekaj

Title: T.V.P.

Date: \_\_\_\_\_

## TERMS AND CONDITIONS

1. Any changes to the building to meet local or state codes are to be made by Purchaser. Any changes in the Work required due to building conditions discovered in the performance of the Work will be paid by Purchaser.
2. No work, service materials or equipment other than as specified hereunder is included or intended.
3. Purchaser retains its normal responsibilities as Owner of the equipment which is subject of this Agreement.
4. Schindler will not be liable for damages of any kind, in excess of the Price of this Agreement, nor in any event for special, indirect, consequential or liquidated damages.
5. Any cutting and patching is by others and not included in this work.
6. Neither party shall be responsible for any loss, damage, detention or delay caused by labor trouble or disputes, strikes, lockouts, fire, explosion, theft, lightning, wind storm, earthquake, floods, epidemics, pandemics, storms, riot, civil commotion, malicious mischief, embargoes, shortages of materials or workmen, unavailability of material from usual sources, government priorities or requests or demands of the National Defense Program, civil or military authority, war, insurrection, failure to act on the part of either party's suppliers or subcontractors, orders or instructions of any federal, state, or municipal government or any department or agency thereof, acts of God, or by any other cause beyond the reasonable control of either party. Dates for the performance or completion of the work shall be extended by such delay of time as may be reasonably necessary to compensate for the delay.
7. We warrant that the work will comply with the specifications and that there will be no defects in materials or workmanship for one year after completion of the work or acceptance thereof by beneficial use, whichever is earlier. Our duty under this warranty is to correct nonconformance or defect at our expense within a reasonable time after the receipt of notice. THE EXPRESS WARRANTIES CONTAINED HEREIN ARE IN LIEU OF ALL OTHER WARRANTIES, EXPRESS OR IMPLIED, INCLUDING ANY WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. Purchaser's remedies hereunder are exclusive.
8. Purchaser agrees to defend, indemnify and hold Schindler harmless from and against any claims, lawsuits, demands, judgments, damages, costs and expenses arising out of this Agreement except to the extent caused by or resulting from the sole and direct fault of Schindler.
9. For non-maintenance contract customers, Customer hereby agrees, without limitation, to defend, indemnify, release and hold harmless Schindler and its employees, affiliates, divisions, parent entities, predecessors and successors, representatives and agents from and against all claims, liabilities, losses, injuries, death, damages, fines, penalties, payments, costs, and expenses (including reasonable attorneys' fees and expenses) arising out of or relating to the Work performed by Schindler under this Agreement.  
**INSURANCE:** At a minimum, Customer shall provide to Schindler, insurance coverages as set forth within, and a certificate of insurance evidencing such coverage: Comprehensive General Liability (including Products Liability, Completed Operations, Broad Form Property damage, and Blanket Contractual Liability) in the amounts of \$2M per occurrence, \$5M aggregate. Schindler Holding, Ltd., Schindler Elevator Corporation, and Schindler Enterprises, Inc. shall be named as additional insureds on the above referenced policies, pursuant to ISO Form CG 2010 11/85, and shall appear as such on the Certificate of Insurance. Insurance shall provide a waiver of subrogation in favor of the entities named as additional insureds. Insurance shall be primary over any other valid and collectible insurance. Any deductible / retention is the responsibility of the Named Insured.
10. Any proprietary material, information, data or devices contained in the equipment or work provided hereunder, or any component or feature thereof, remains our property. This includes, but is not limited to, any tools, devices, manuals, software, modems, source/ access/ object codes, passwords. In the event Schindler's maintenance obligation is terminated, the Schindler Ahead features ("SA") (if applicable) will be deactivated and Schindler reserves the right to remove the Schindler Ahead hardware. If Schindler is no longer the maintenance provider, Customer is responsible for obtaining alternative telephone service for the elevator phones.
11. In the event of governmental changes to applicable tariffs, tax rates, including but not limited to sales tax, use tax, excise tax, privilege tax, transaction tax and similar changes, or loss of tax exempt status, Schindler reserves the rights to adjust the contract price accordingly to account for all additional cost impacts.
12. We reserve the right to modify price and schedule without penalty due to material or component shortages, increases in inflation and/or material price increases based upon the S&P Material Price Index (MPI).



# Schindler Door Lock Monitor Upgrade

## The Schindler Door Lock Monitor

The Schindler Door Lock Monitor upgrade brings safety enhancements to your elevator. It is a simple, fast, and code-compliant upgrade that can help reduce accidents and your liability exposure.

Our Door Lock Monitor complies with ASME A17.1/CSA B44 codes and is designed for quick, effective integration into all leading brands of elevators.

## How it works

Using a small programmable logic controller (PLC), the system automatically:

- Monitors for shorts across door lock and car gate switch circuits
- Detects door position
- Prevents the car from running once a fault is detected
- Detects failure modes of the Door Lock Monitor (i.e. failed input relays and signals).

When needed, troubleshooting the system is easy. The status of the door monitor is indicated on the PLC display along with any “fault codes” it has detected. These codes enable our technician to spend less time on diagnostics and more time implementing a resolution. Your elevator is returned to service faster.



The Schindler Door Lock Monitor is designed to meet the most current codes for safely monitoring elevator doors.



# Schindler – We Elevate

For more information, including the location of the Schindler office nearest you, please visit:

U.S. Headquarters. Morristown, New Jersey  
Tel. 973.397.6500  
[www.us.schindler.com](http://www.us.schindler.com)

Canada Headquarters. Toronto, Ontario  
Tel. 416.332.8280  
[www.ca.schindler.com](http://www.ca.schindler.com)

**We Elevate**



Schindler has received renewal to ISO 9001 and ISO 14001 certificates.



Schindler prints with vegetable-based ink on paper containing post-consumer waste fiber.  
© Schindler Elevator Corporation



**From:** "Kevin Kalita" <kevin.kalita@schindler.com>  
**To:** "Diana Rogers" <rogersd@bhsj.org>, "Diana Rogers" <Fitzmauricer@bhsj.org>  
**Sent:** Friday, July 14, 2023 11:20:47 AM  
**Subject:** RE: Elevator (20 Care Dr) = New code mandated upgrade

Good morning,

Good news for you just came out 2 days ago from the State of Michigan elevator division. Someone with some power must have complained about the timeline and only having a year to get these all installed because we just got notified of an extension giving all customers ~4 years. This door lock monitoring now has to be completed by 12/31/2027. I always believe in complete transparency and wanted to pass this along ASAP.

Good news #2 = My parts division ordered a million of these door lock monitoring units because of the sheer number of units in Michigan that need this and they are taking up a ton of space in our warehouse that we can't afford long term I guess. Thus, they are offering me a discount if bought this year (2023). Thus, I have attached a revised proposal that cuts 10% off the sale price that is attached if approved in 2023. It still has to be done so why not save some money now and get this taken care of. If you wait, things are only going to increase in price, timeline, etc.

The updated elevator announcement is attached with the updated proposal. Please review and let me know.

Thank you,

Kevin Kalita | Sales Rep EI  
Mobile 616-262-9178  
[kevin.kalita@schindler.com](mailto:kevin.kalita@schindler.com)  
[www.schindler.com](http://www.schindler.com)

**SCHINDLER ELEVATOR CORPORATION**

135 East Bennett St.  
Saline, MI 48176  
Phone: 616-262-9178  
Email: kevin.kalita@schindler.com



**UPGRADE ORDER AGREEMENT**

**Date:** 7/14/2023

**Contract #:** \_\_\_\_\_ (Schindler will fill out for you)

**Building Address:** \_\_\_\_\_ (Please fill out)

\_\_\_\_\_  
\_\_\_\_\_

To Whom it May Concern:

The Michigan Bureau of Elevator Safety has adopted the ASME A17.3-2015 Elevator Safety Code for existing Elevators & Escalators effective 06/27/2023. This adoption specifies Door Lock Monitoring as a retroactive safety requirement, to be installed on all existing elevators by 6/27/2024.

Schindler Elevator Corporation solution is the installation of our Schindler Door Lock Monitoring device. Our solution complies with ASME A17.1/CSA B44 codes and is designed for quick, effective integration into all leading brands of elevators. The DLM module detects door position, monitors for faults within the door circuitry, and prevents the elevator from running if any abnormalities are detected.

Get a jump start on the code compliance due date and avoid potential installation bottlenecks by ordering your DLM upgrade early. Order fulfillment can take 12+ weeks, and we expect an increasing risk of manpower constraints as we approach the compliance deadline. Once the deadline arrives, state inspectors will be performing inspections & writing correction orders with continuing fines until this upgrade is installed.

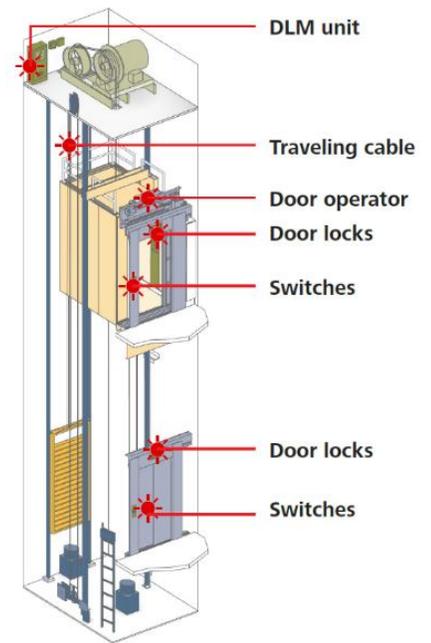
**Scope of work:**

We propose to provide all labor, material, engineering, and supervision required to perform the following scope of work during regular working hours of the elevator trade:

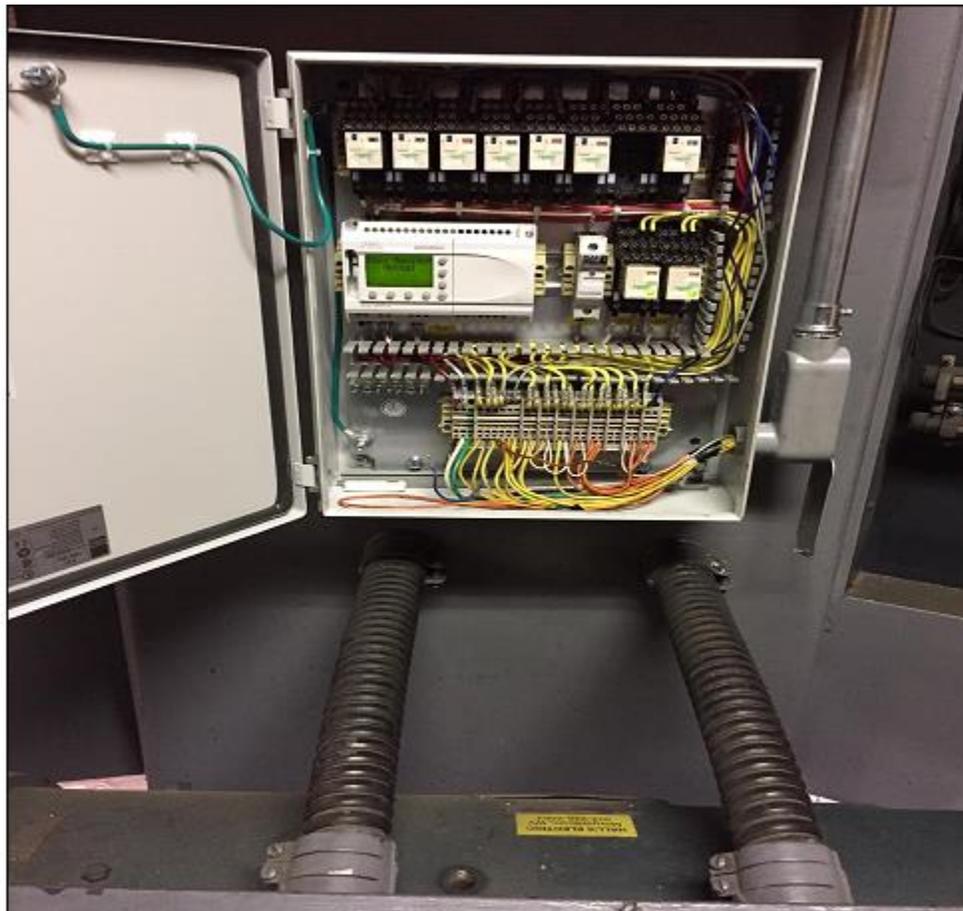
- Apply for all necessary permits from the State of Michigan
- Install the door lock monitoring controller and cross connect it with your existing controller
- Perform all necessary adjustments
- Perform final acceptance with local state inspector
- Return elevator back in service
  - o Pictures & further explanation continued on next page

Our installation will conform with ASME rule A17.3-2015 3.10.12 to Monitor and Prevent Automatic Operation of the Elevator in the event of Faulty Door Contact Circuits, requiring that the position of all mechanically coupled doors be monitored in order to:

- a.) prevent the operation of the car if the cab doors are not closed; and
- b.) prevent the power-closing of the doors if the cab doors are fully open and;
  - [i.] the car door contact is closed or bypassed; or
  - [ii.] the interlock contact which is coupled to the open car door is closed or bypassed; or
  - [iii.] both the car door contact and associated interlock contact are closed or bypassed.



- Door Lock Monitoring controller being furnish and installed:



*The below price is contingent upon a final sight equipment survey to verify any abnormal site conditions that would require additional work such as remote machine rooms, bi-parting doors, etc.*

**Price:** \$26,734.00, plus applicable taxes. (Quotations valid for 2023 approval; price based upon work during regular working hours of regular working days)

**Payment:** 50% of the price is due upon acceptance of this proposal.  
40% of the price is due as work progresses within 30 days of invoice;  
Balance due upon completion, within 30 days of invoice.

Schindler reserves the right not to source material or schedule labor for the above quoted work until payment in full has been received.

Payable in full within 30 days of invoice. Schindler retains title to any equipment furnished hereunder until final payment is made. Late or non-payment will result in assessment of interest charged at a rate of 1 1/2% per month or the highest legal rate available, and any attorneys' fees, expenses, and costs of collection. The customer understands that this is a fixed price proposal. Supporting documentation for materials and/or labor shall not be a condition precedent for payment in full to be made to Schindler.

**Option #1:** Extend service contract by five (5) years for 10% savings of this order. (> than \$2,500 in savings)

Acceptance of Option #1 (Initial):

- This upgrade order agreement price will be adjusted by 10% as noted above, subject to all terms and conditions of the original agreement including, without limitation, the annual provision for price adjustment.

**Option #2:** Extend service contract by ten (10) years for 20% savings of this order. (> than \$5,500 in savings)

Acceptance of Option #2 (Initial):

- The contract price will be adjusted as noted above along with a Three-year extension of our current subject to all terms and conditions of the original agreement including, the annual provision for price adjustment.

**The attached terms and conditions** are incorporated herein by reference.

Acceptance by you as owner's agent or authorized representative and subsequent approval by our authorized representative will be required to validate this agreement.

Proposed:

\_\_\_\_\_

By: Kevin Kalita

For: Schindler Elevator Corporation

Title: Sales Representative

Date: 7/14/2023

Accepted:

\_\_\_\_\_

By: \_\_\_\_\_

For: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Approved:

\_\_\_\_\_

By: Mike Sullivan

Title: General Manager

Date: \_\_\_\_\_

## TERMS AND CONDITIONS

1. Any changes to the building to meet local or state codes are to be made by Purchaser. Any changes in the Work required due to building conditions discovered in the performance of the Work will be paid by Purchaser.
2. No work, service materials or equipment other than as specified hereunder is included or intended.
3. Purchaser retains its normal responsibilities as Owner of the equipment which is subject of this Agreement.
4. Schindler will not be liable for damages of any kind, in excess of the Price of this Agreement, nor in any event for special, indirect, consequential or liquidated damages.
5. Any cutting and patching is by others and not included in this work.
6. Neither party shall be responsible for any loss, damage, detention or delay caused by labor trouble or disputes, strikes, lockouts, fire, explosion, theft, lightning, wind storm, earthquake, floods, epidemics, pandemics, storms, riot, civil commotion, malicious mischief, embargoes, shortages of materials or workmen, unavailability of material from usual sources, government priorities or requests or demands of the National Defense Program, civil or military authority, war, insurrection, failure to act on the part of either party's suppliers or subcontractors, orders or instructions of any federal, state, or municipal government or any department or agency thereof, acts of God, or by any other cause beyond the reasonable control of either party. Dates for the performance or completion of the work shall be extended by such delay of time as may be reasonably necessary to compensate for the delay.
7. We warrant that the work will comply with the specifications and that there will be no defects in materials or workmanship for one year after completion of the work or acceptance thereof by beneficial use, whichever is earlier. Our duty under this warranty is to correct nonconformance or defect at our expense within a reasonable time after the receipt of notice. THE EXPRESS WARRANTIES CONTAINED HEREIN ARE IN LIEU OF ALL OTHER WARRANTIES, EXPRESS OR IMPLIED, INCLUDING ANY WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. Purchaser's remedies hereunder are exclusive.
8. Purchaser agrees to defend, indemnify and hold Schindler harmless from and against any claims, lawsuits, demands, judgments, damages, costs and expenses arising out of this Agreement except to the extent caused by or resulting from the sole and direct fault of Schindler.
9. For non-maintenance contract customers, Customer hereby agrees, without limitation, to defend, indemnify, release and hold harmless Schindler and its employees, affiliates, divisions, parent entities, predecessors and successors, representatives and agents from and against all claims, liabilities, losses, injuries, death, damages, fines, penalties, payments, costs, and expenses (including reasonable attorneys' fees and expenses) arising out of or relating to the Work performed by Schindler under this Agreement.  
**INSURANCE:** At a minimum, Customer shall provide to Schindler, insurance coverages as set forth within, and a certificate of insurance evidencing such coverage: Comprehensive General Liability (including Products Liability, Completed Operations, Broad Form Property damage, and Blanket Contractual Liability) in the amounts of \$2M per occurrence, \$5M aggregate. Schindler Holding, Ltd., Schindler Elevator Corporation, and Schindler Enterprises, Inc. shall be named as additional insureds on the above referenced policies, pursuant to ISO Form CG 2010 11/85, and shall appear as such on the Certificate of Insurance. Insurance shall provide a waiver of subrogation in favor of the entities named as additional insureds. Insurance shall be primary over any other valid and collectible insurance. Any deductible / retention is the responsibility of the Named Insured.
10. Any proprietary material, information, data or devices contained in the equipment or work provided hereunder, or any component or feature thereof, remains our property. This includes, but is not limited to, any tools, devices, manuals, software, modems, source/ access/ object codes, passwords. In the event Schindler's maintenance obligation is terminated, the Schindler Ahead features ("SA") (if applicable) will be deactivated and Schindler reserves the right to remove the Schindler Ahead hardware. If Schindler is no longer the maintenance provider, Customer is responsible for obtaining alternative telephone service for the elevator phones.
11. In the event of governmental changes to applicable tariffs, tax rates, including but not limited to sales tax, use tax, excise tax, privilege tax, transaction tax and similar changes, or loss of tax exempt status, Schindler reserves the rights to adjust the contract price accordingly to account for all additional cost impacts.
12. We reserve the right to modify price and schedule without penalty due to material or component shortages, increases in inflation and/or material price increases based upon the S&P Material Price Index (MPI).



GRETCHEN WHITMER  
GOVERNOR

STATE OF MICHIGAN  
DEPARTMENT OF LICENSING AND REGULATORY AFFAIRS  
LANSING

ORLENE HAWKS  
DIRECTOR

The Bureau of Construction Codes is pleased to announce the current elevator rules became effective June 27, 2023. With the adoption of the new rules and code the Bureau would like to provide guidance on notable changes.

- Fees have been updated and a copy of the fee schedule as of 6/27/23 is included after this letter.
- Permits:
  - As of June 29, 2023, all new installation and alteration permits are required to be compliant with the newly adopted rules and codes.
  - Alteration permits will no longer be required for the following:
    - Victaulic seals and fittings.
    - Soft starts (only in a like for like replacement).
    - Flooring (only in a like for like replacement).
  - Emergency Permits:
    - There is a 2-item maximum on emergency permits.
    - Items such as card readers, door systems, and cab interiors will no longer be approved as an emergency permit and will be denied having an alteration permit requested.
    - To request an elevator to be returned to service prior to a final with an inspector the following must take place:
      - All in scope testing must be completed by a licensed elevator journey person.
      - Copies of passing in scope test forms must be emailed to the inspector and [elevsafety@michigan.gov](mailto:elevsafety@michigan.gov).
      - A final must be scheduled with the inspector.
  - Dormant elevators:
    - Permits are required when making an elevator dormant.
      - When the work for this permit is completed notify the local inspector and they will perform the inspection as their schedule allows.
        - Note: If there are rule/code violations those will be sent to the permit holder, fees will be assessed, and corrections must be addressed. Then, another final will take place.
    - When there is a request for putting a dormant elevator back into service the following is required:
      - An alteration permit.

- A dormant elevator must be brought into compliance with CURRENT code and rules, not those under which it was installed.
- ASME A17.3 – 2017: Safety Code for Existing Elevators and Escalators:
  - As authorized in the code, provisions of ASME A17.3 – 2017 will be implemented according to the schedule noted below.
  - Requests for an alternative method of compliance or hardship related to implementation may submit a variance application found [here](#).
- Updated test forms and test tags are being developed. The new test forms will be separated and grouped by like device types.
- A copy of all test forms shall be kept with the maintenance records in the Maintenance Control Program.
- A full and combined set of the newly adopted rules and existing rules will be available on the website [here](#).

If there are any questions, please send those to [elevsafety@michigan.gov](mailto:elevsafety@michigan.gov) and we will assist you.

Sincerely,

Andrew Brisbo, Director  
Bureau of Construction Codes

## Elevator Fees as of 6/27/23

INSTALLATION PERMIT FEES					
	Application Fee (Non Refundable)	Base Permit Fee	Certificate Fee	Hoistway Openings/Floors Traveled (hw/flrs)*	Total
Passenger	\$ 100.00	\$ 300.00	\$ 60.00	\$ 50.00	\$460 +hw/flrs fees
Freight	\$ 100.00	\$ 300.00	\$ 60.00	\$ 50.00	\$460 +hw/flrs fees
Inclined	\$ 100.00	\$ 300.00	\$ 60.00	\$ 50.00	\$460 +hw/flrs fees
Limited Use/Limited Application	\$ 100.00	\$ 300.00	\$ 60.00	\$ 50.00	\$460 +hw/flrs fees
Private Residence	\$ 100.00	\$ 300.00	\$ -	\$ 50.00	\$400 +hw/flrs fees
Private Residence Inclined	\$ 100.00	\$ 300.00	\$ -	\$ 50.00	\$400 +hw/flrs fees
Special Purpose Personnel	\$ 100.00	\$ 300.00	\$ 60.00	\$ 50.00	\$460 +hw/flrs fees
Dumbwaiter	\$ 100.00	\$ 300.00	\$ 60.00	\$ 50.00	\$460 +hw/flrs fees
Material Lift	\$ 100.00	\$ 300.00	\$ 60.00	\$ 50.00	\$460 +hw/flrs fees
Power Sidewalk	\$ 100.00	\$ 300.00	\$ 60.00	\$ 50.00	\$460 +hw/flrs fees
Rooftop Elevator	\$ 100.00	\$ 300.00	\$ 60.00	\$ 50.00	\$460 +hw/flrs fees
Belt Manlift	\$ 100.00	\$ 300.00	\$ 60.00	\$ 50.00	\$460 +hw/flrs fees
Special Elevating Device	\$ 100.00	\$ 300.00	\$ 60.00	\$ 50.00	\$460 +hw/flrs fees
Escalator	\$ 100.00	\$ 360.00	\$ 60.00	\$ -	\$ 520.00
Moving Walk	\$ 100.00	\$ 360.00	\$ 60.00	\$ -	\$ 520.00
Personnel Hoist	\$ 100.00	\$ 300.00	\$ 60.00	\$ 50.00	\$460 +hw/flrs fees
Private Residence Platform Lift	\$ 100.00	\$ 250.00	\$ -	\$ -	\$ 350.00
Private Residence Stairway Chairlift	\$ 100.00	\$ 250.00	\$ -	\$ -	\$ 350.00
Platform Lift	\$ 100.00	\$ 100.00	\$ 60.00	\$ -	\$ 260.00
Stairway Chairlift	\$ 100.00	\$ 100.00	\$ 60.00	\$ -	\$ 260.00
ALTERATION PERMIT FEES					
	Application Fee (Non Refundable)	Base Permit Fee	Hoistway Openings/Floors Traveled (hw/flrs)*	Additional Fee	Total
Personnel Hoist	\$ 150.00	\$75.00 (includes 1st alteration)		\$75.00 hoistway openings	\$225.00 + hw/flrs fees
All Other Units	\$ 100.00	\$75.00 (includes 1st alteration)	\$25.00	\$75.00 each additional alteration	\$175 + ea additional alteration and + hw/floors fees
Dormant Elevator	\$ 100.00			\$ 100.00	\$ 200.00
Emergency Permit	\$ 500.00				\$500 - max 2 alterations
ANNUAL FEES					
	Certificate Fee	Inspection Fee	Hoistway Openings/Floors Traveled		Total
1 year device	\$ 60.00	\$ 175.00	\$ 25.00		\$235 + hw/flrs fees

2 year device	\$ 60.00	\$ 125.00	\$ -		\$ 185.00
<b>MISCELLANEOUS</b>					
	Base Fee		Hoistway Openings/Floors Traveled		Total
Temporary Certificate of Operation	\$ 250.00				\$ 250.00
Inspection for Temporary Certificate of Operation	\$ 200.00		\$ 35.00		\$200 + hw/flrs fees
Special Services/Overtime	\$ 150.00				\$150/hr
Reinspection 1 year device	\$ 175.00				\$ 175.00
Reinspection 2 year device	\$ 125.00				\$ 125.00
Permit Failure Residential and 2 year devices	\$ 450.00				\$ 450.00
Permit Failure All other	\$ 750.00				\$ 750.00
Variance to the Board	\$ 100.00				\$ 100.00
Appeal to the Board	\$ 250.00				\$ 250.00

## ASME A17.3 – 2017 Implementation Dates

### *Effective date of 1-1-2025*

#### **2.1.2 Windows in Hoistway Enclosures**

Every hoistway-window opening ten stories or less above a thoroughfare, and every such window opening three stories or less above a roof of an adjacent building, shall be guarded on the outside by one of the following methods:

- (a) by vertical bars at least 0.625 in. (16 mm) in diameter or equivalent, spaced not more than 10 in. (254 mm) apart, permanently and securely fastened in place
- (b) by metal-sash windows having solid-section steel muntin's of not less than 0.125 in. (3.2 mm) thickness, spaced not more than 8 in. (203 mm) apart. Exterior hoistway windows shall be identified with 4 in. (102 mm) high letters marked "ELEVATOR."

#### **2.1.3 Projections in Hoistway**

Hoistway enclosures shall have substantially flush surfaces on the hoistway sides used for loading and unloading, subject to the following:

- (a) Landing sills, hoistway doors, door tracks, and hangers shall be permitted to project inside the hoistway enclosure.
- (b) Landing sills, except for elevators equipped with vertically sliding biparting counterbalanced doors or with vertically sliding counterweighted doors, which slide down to open, shall be guarded on the underside with guard plates of smooth metal of not less than 0.0598 in. (1.519 mm) in thickness extending not less than the full width of the car entrance and securely fastened in place as follows:

(1) Where a car leveling device is provided and the hoistway edge of the sill is either flush with or projects into the hoistway, the guard shall have a straight vertical face extending below the sill not less than the depth of the leveling zone plus 3 in. (76 mm). Where the sill projects inward from the hoistway enclosure, the bottom of the guard shall also be beveled at an angle of not less than 60 deg nor more than 75 deg from the horizontal or the guard shall be extended from the hoistway edge of the landing sill to the top of door hanger pocket of the next entrance below.

The guard is not required for freight elevators with sills not projecting inward from the hoistway enclosure.

(2) Where no car leveling device is provided and the sill projects inward from the general line of the hoistway, the guard shall be either beveled at an angle of not less than 60 deg nor more than 75 deg from the horizontal, or it shall be permitted to have a straight vertical face extending from the hoistway edge of the sill to the top of the door hanger pocket of the next entrance below.

### **2.3.1 Access to Pits**

- (a) Means of access for authorized personnel shall be provided to all pits.
- (b) Where a separate pit access door is provided, it shall be self-closing and provided with a spring type lock arranged to permit the door to be opened from inside the pit without a key. Such doors shall be kept locked.
- (c) Keys to unlock the pit access door shall be kept on the premises in a location readily accessible to authorized personnel, but not where they are accessible to the general public. The keys shall be permitted to be the same as those used for the machine room access door.

### **2.3.3 Stop Switch**

A stop switch conforming to the requirements of 3.10.4(e) shall be provided in the pit of every elevator.

The switch shall be located adjacent to the normal pit access.

### **2.7.3 Elevator Parking Device**

(a) Parking Devices Required. Elevators that are operated from within the car only shall have elevator parking devices installed at every landing that is equipped with an unlocking device. On elevators that are not operated from within the car only, an elevator parking device shall be provided at one landing and shall be permitted to be provided at other landings. This device shall be located at a height not greater than 6 ft 11 in. (2.11 m) above the floor. Parking devices are not required for elevators having hoistway doors that are automatically unlocked when the car is within the landing zone.

(b) General Design Requirements. Parking devices shall conform to the following requirements:

(1) They shall be mechanically or electrically operated.

(2) They shall be designed and installed so that friction or sticking or the breaking of any springs used

in the device will not permit opening or unlocking a door when the car is outside the landing zone of that floor.

(3) Springs, where used, shall be of the restrained compression type, which will prevent separation of the parts in case the spring breaks.

(c) In elevators with a parking device, means shall not be permitted to turn off the lighting inside the car

unless a means is provided to ensure that alternative lighting is always available inside the car that meets the requirements of 3.4.5(a) and (b).

### **2.7.4 Access to Hoistway**

Hoistway door unlocking devices or hoistway access switches shall be provided on elevators having hoistway doors that are unlocked when closed with car at landing, or locked but openable from the landing by means effective only when the car is in the landing zone.

Hoistway door unlocking devices shall be permitted to be provided at all landings for emergency purposes.

(a) Hoistway Door Unlocking Devices. Hoistway door unlocking devices shall conform to the following:

(1) The device shall unlock and permit the opening of the hoistway door from the access landing irrespective of the position of the car.  
(2) The device shall be designed to prevent unlocking the door with common tools.  
(3) The operating means for unlocking the door shall be available to and used only by inspectors, elevator maintenance and repair personnel, and qualified emergency personnel.  
(4) The unlocking device keyway shall be located at a height not greater than 6 ft 11 in. (2.11 m) above the floor.

(b) Hoistway Access Switches. Hoistway access switches shall conform to the following:

(1) The switch shall be installed only at the access landings.

(2) The switch shall be installed adjacent to hoistway entrance at the access landing with which it is identified.

(3) The switch shall be of the continuous pressure spring return type, and shall be operated by a cylinder type lock having not less than a five pin or five disk combination with the key removable only when the switch is in the "OFF" position. The lock shall not be operable by any key that will operate locks or devices used for other purposes in the building. The key or combination shall be available to and used only by inspectors and elevator maintenance and repair personnel.

(4) The operation of the switch at either access landing shall permit, and shall be permitted to initiate and maintain, movement of the car with the hoistway door at this landing unlocked or not in the closed position, and with the car door or gate not in the closed position, subject to the following:

(-a) The operation of the switch shall not render ineffective the hoistway door interlock or electric contact any other landing.

(-b) The car cannot be operated at a speed greater

than 150 ft/min (0.76 m/s). (-c) For automatic and continuous pressure operation elevators, provided that (-1) landing operating devices of continuous pressure operation elevators, and car and landing operating devices of automatic operation elevators, are first made inoperative by means other than the access switch (-2) power operation of the hoistway door and/or car door or gate is inoperative (-d) Automatic operation by a car-leveling device is inoperative.

(-e) The top of car operating device (see 3.10.3) is inoperative.

(f) The movement of the car initiated and maintained by the upper access switch shall be limited in the

down direction to a travel not greater than the height of the car crosshead above the car platform, and limited in the up direction above the upper access landing to the distance the car apron extends below the car platform.

Where electrically operated switches, relays, or contactors are used to render inoperative the hoistway

door interlock or electric contact or the car door or gate electric contact, the control circuits shall be arranged to conform to the requirements of 3.10.9 and in addition, to render the normal car and hall operation ineffective if any such switch, relay, or contactor fails to function in the intended manner.

### **2.7.5 Restricted Opening of Hoistway Doors and/or Car Doors on Passenger Elevators**

(a) when a car is outside the unlocking zone, the hoistway doors or car doors shall be so arranged that the hoistway doors or car doors cannot be opened more than 4 in (102 mm) from inside the car.

(b) when the car is outside the unlocking zone, the car doors shall be openable from outside the car without the use of special tools.

(c) The unlocking zone shall extend from the landing floor level to a point no greater than 18 in. (457mm) above or below the landing floor level.

### **3.3.5 Protection of Platforms Against Fire**

The underside of wood platforms, the exposed surfaces of wood platform stringers, and edges of laminated platforms shall be protected against fire by one of the following methods:

(a) covering with sheet steel of at least 0.0164 in. (0.4166 mm) in thickness or with equally fire retardant material.

(b) painting with an approved fire-retardant paint, having flame spread rating of not over 50, applied in accordance with the instructions of the manufacturer.

Such ratings shall be based on the test procedure specified in ANSI/ASTM E84.

#### **3.4.4.1 Top Emergency Exits**

(a) For elevators installed in enclosed hoistways, cars shall be provided with a car top emergency exit with a cover hinged or otherwise attached to the car top so that the cover can be opened from the top of the car only and opens outward.

For multideck elevator cars, the exit cover of the lower compartment shall be openable from either compartment.

(b) For elevators installed in unenclosed hoistways

(1) top emergency exits shall not be installed in cars in an unenclosed hoistway. Existing top emergency exits shall be permanently secured closed.

(2) where an elevator is installed in a single blind hoistway, there shall be installed in the blind portion of

the hoistway an emergency door at every third floor, but not more than 36 ft (10.97 m) from sill to sill conforming to the following:

(-a) The clear opening shall be at least 28 in. (711 mm) wide and 6 ft 6 in. (1 981 mm) high.

(-b) It shall be easily accessible and free from fixed obstructions.

(-c) It shall be either of the horizontal sliding or swinging single-section type, irrespective of the type of door installed at other landings.

(-d) It shall be self-closing and self-locking and shall be marked, in letters not less than 2 in. (51 mm)

high, "DANGER, ELEVATOR HOISTWAY."

(-e) It shall be provided with an electric contact conforming to the requirements of 2.7.6.

- (-f) It shall be unlocked from the landing side only through the use of a cylinder-type lock, having not less than a five-pin or five-disk combination. The cylinder lock shall
- (-1) not be unlocked by any key or combination that will open any other lock or device used for any purpose in the building
- (-2) be so designed that the key shall be removable only in the locked position
- (-g) The key or combination shall be kept where it is available only to authorized persons.
- (3) Telephone as Alternative to Emergency Doors.

Where an elevator is installed in a single blind hoistway, and there are no landings from which to gain access through an emergency door, a means of two-way conversation conforming to 3.11.1 shall be provided, except that the means to activate the two-way conversation system shall be provided in the car.

NOTE [3.4.4.1(b)(3)]: Examples are pulp mills, grain elevators, dams, or similar locations.

### **3.5.1 Car Safeties**

The car of every elevator suspended by wire ropes shall be provided with a safety capable of stopping and sustaining the car with rated load. When the safety is operated by a governor, the safety shall be capable of stopping and sustaining the car with rated load from governor tripping speed.

### **3.5.5 Maximum Permissible Movement of Governor**

Rope to Operate the Safety Mechanism For all Type B safeties the movement of the governor rope relative to the car or the counterweight, respectively, required to operate the safety mechanism from its fully retracted position to a position where the safety jaws begin to exert pressure against the guide rails shall not exceed the following values based on rated speed:

(a) for car safeties

- (1) 200 ft/min (1.02 m/s) or less, 42 in. (1.07 m)
- (2) 201 ft/min (1.03 m/s) to 375 ft/min (1.91 m/s), 36 in. (914 mm)
- (3) over 375 ft/min (1.91 m/s), 30 in. (762 mm)

(b) for counterweight safeties, 42 in. (1.07 m) for all speeds

Drum operated car and counterweight safeties, requiring continual unwinding of the safety drum rope to fully apply the safety, shall be so designed that not less than three turns of the safety rope will remain on the drum after the overspeed test of the safety has been made with rated load in the car.

### **3.9.2 Final Terminal Stopping Devices**

Enclosed upper and lower final terminal electromechanical stopping devices shall be provided and arranged to prevent movement of the car by the normal operating devices in either direction of travel after the car has passed a terminal landing. Final terminal stopping devices shall be located as follows:

(a) Winding Drum Driving Machines. Elevators having winding drum machines shall have stopping switches on the machines and also in the hoistway operated by the movement of the car.

(b) Traction Driving Machines. Elevators having traction driving machines shall have stopping switches in the hoistway operated by the movement of the car.

### **3.10.1 Types of Operating Devices**

Manually actuated rope (i.e., shipper rope) or rod operating devices, or rope operating devices actuated by wheels, levers, or cranks shall not be used.

### **3.10.2 Car Switch Operation Elevators**

Handles of lever type operating devices of car switch operation elevators shall be so arranged that they will return to the stop position and latch there automatically when the hand of the operator is removed.

### **4.5.2 Pressure Tanks**

(a) Vacuum Relief Valves. Tanks subject to vacuum sufficient to cause collapse shall be provided with one or more vacuum relief valves with openings of sufficient size to prevent collapse of the tank.

(b) Gage Glasses. Tanks shall be provided with one or more gage glasses attached directly to the tank and equipped to shut off the liquid automatically in case of failure of the glass. The gage glass or glasses shall be so located as to indicate any level of the liquid between permissible minimum and maximum levels, and shall be equipped with a manual cock at the bottom of the lowest glass.

(c) Pressure Gage. Tanks shall be provided with a pressure gage that will indicate the pressure correctly to not less than 1 1/2 times the pressure setting of the relief valve.

The gage shall be connected to the tank or water column by pipe and fittings with a stop cock in such a manner that it cannot be shut off from the tank except by the stop cock. The stop cock shall have a "T" or lever handle set in line with the direction of flow through the valve when open.

(d) Inspector's Gage Connection. Tanks shall be provided with 0.25 in. (6.3 mm) pipe size valve connection for attaching an inspector's pressure gage while the tank is in service.

(e) Liquid Level Detector. Tanks shall be provided with a means to render the elevator inoperative if for any reason the liquid level in the tank falls below the permissible minimum.

(f) Handholes and Manholes. Tanks shall be provided with means for internal inspection.

(g) Piping and Fittings for Gages. Piping and fittings for gage glasses, relief valves, and pressure gages shall be of a material that will not be corroded by the liquid used in the tank.

## ***Effective date of 1-1-2026***

### **2.1.4 Pipes, Air Ducts, and Wiring**

2.1.4.1 Pipes. Pipes conveying gases, vapors, or liquids and not used in connection with the operation

of the elevator, which if discharged into the hoistway could be hazardous, shall not be permitted in a hoistway except as covered by (a) through (e).

(a) Steam and hot water pipes are permitted in hoistways, for the purpose of heating these areas only,

subject to the following:

(1) Heating pipes shall convey only low-pressure steam [5 psi (34 kPa) or less] or hot water [212°F (100°C) or less].

(2) All risers and return pipes shall be located outside the hoistway.

(3) Traps and shutoff valves shall be provided in accessible locations outside the hoistway. (b)

Pipes for sprinklers only are permitted in hoistways subject to the following:

(1) All risers and returns shall be located outside of the hoistway.

(2) Branch lines in hoistway shall supply sprinklers at not more than one floor level.

(c) Piping for pit and sump pumps is permitted.

(d) Existing pipes that cannot be removed or rerouted shall be securely fastened and covered to separate them from the hoistway, prevent leakage or condensate from entering the hoistway, and prevent interference with the operation of the elevator equipment.

(e) No pipes shall be installed in the hoistway unless they directly pertain to the operation of the elevator.

NOTE: The installation of sprinklers in an existing machine room or hoistway is an alteration. See ASME A17.1, requirements 8.7.2.8 and 8.7.3.8.

### **2.2.4 Ventilation**

Machine rooms shall be provided with natural or mechanical ventilation to avoid overheating of the electrical equipment and to ensure safe and normal operation of the elevator.

### **2.8.2 Reopening Device for Power Operated Car**

Doors or Gates

Where required by 2.8.1, a power operated car door or gate shall be provided with a reopening device that will function to stop and reopen the car door or gate and the adjacent hoistway door in the event that the car door or gate is obstructed while closing. If the closing kinetic energy is reduced to 2.5 ft lbf (3.39 J) or less, the reopening device shall be permitted to be rendered inoperative [see 2.8.1(a)].

For center opening doors or gates, the reopening device shall be so designed and installed that the

obstruction of either door or gate panel when closing will cause the reopening device to function.

### **3.6.1 Speed Governor Overspeed and Car Safety Mechanism Switches**

A switch shall be provided on the speed governor and operated by the overspeed action of the governor

when used with Type B and Type C car safeties of elevators having a rated speed exceeding 150 ft/min

(0.76 m/s). A switch shall be provided on the speed governor when used with a counterweight safety for

any car speed. For static control, an overspeed switch shall be provided regardless of rated speed and shall operate in both directions of travel. These switches shall, when operated, remove power

from the driving machine motor and brake before or at the time of application of the safety.

Switches used to perform the function specified shall be positively opened and remain open until manually reset. Switches operated by the car safety mechanism shall be of a type that will not reset unless the car safety mechanism has been returned to the off position.

### **3.10.4 Electrical Protective Devices**

Electrical protective devices shall be provided in accordance with the following:

(a) Slack Rope Switch. Winding drum machines shall be provided with a slack rope device equipped with a slack rope switch of the enclosed manually reset type that shall cause the electric power to be removed from the elevator driving machine motor and brake if the suspension ropes become slack.

(b) Motor Generator Running Switch. Where generator field control is used, means shall be provided

to prevent the application of power to the elevator driving machine motor and brake unless the motor generator set connections are properly switched for the running condition of the elevator. It is not required that the electrical connections between the elevator driving machine motor and the generator be opened in order to remove power from the elevator motor.

(c) Compensating Rope Sheave Switch. Compensating rope sheaves shall be provided with a compensating rope sheave switch or switches mechanically opened by the compensating rope sheave before the sheave reaches its upper or lower limit of travel to cause the electric power to be removed from the elevator driving-machine motor and brake.

(d) Broken Rope, Tape, or Chain Switches Used in Connection With Machine Room Normal Terminal Stopping Switches. Broken rope, tape, or chain switches conforming to the requirements of 3.6.1 shall be provided in connection with normal terminal stopping devices located in machine rooms of traction elevators. Such switches shall be opened by a failure of the rope, tape, or chain.

(e) Stop Switch on Top of Car. A stop switch shall be provided on the top of every elevator car, which shall

cause the electric power to be removed from the elevator driving-machine motor and brake; and

(1) be of the manually operated and closed type

(2) have red operating handles or buttons

(3) be conspicuously and permanently marked "STOP" and shall indicate the stop and run positions

- (4) be positively opened mechanically (opening shall not be solely dependent on springs)
- (f) Car-Safety Mechanism Switch. A switch shall be required where a car safety is provided.
- (g) Speed Governor Overspeed Switch. A speed governor overspeed switch shall be provided when required by 3.6.1.
- (h) Final Terminal Stopping Devices. Final terminal stopping devices shall be provided for every elevator.
- (i) Emergency Terminal Speed Limiting Device. Where reduced stroke oil buffers are provided, emergency terminal speed limiting devices are required.
- (j) Motor Generator Overspeed Protection. Means shall be provided to cause the electric power to be removed automatically from the elevator driving-machine motor and brake should a motor generator set, driven by a direct current motor, overspeed excessively.
- (k) Motor Field Sensing Means. Where direct current is supplied to an armature and shunt field of an elevator driving-machine motor, a motor field current sensing means shall be provided, which shall cause the electric power to be removed from the motor armature and brake unless current is flowing in the shunt field of the motor. A motor field current sensing means is not required for static control elevators provided with a device to detect an overspeed condition prior to, and independent of, the operation of the governor overspeed switch. This device shall cause power to be removed from the elevator driving-machine motor armature and machine brake.
- (l) Buffer Switches for Oil Buffers Used with Type C Car Safeties. Oil level and compression switches shall be provided for all oil buffers used with Type C safeties.
- (m) Hoistway-Door Interlocks or Hoistway-Door Electric Contacts. Hoistway-door interlocks or hoistway-door electric contacts shall be provided for all elevators.
- (n) Car Door or Gate Electric Contacts. Car door or gate electric contacts shall be provided for all elevators.
- (o) Normal Terminal Stopping Devices. Normal terminal stopping devices shall be provided for every elevator.
- (p) Car Side Emergency Exit Electric Contact. An electric contact shall be provided on every car side emergency exit door.
- (q) Electric Contacts for Hinged Car Platform Sills. Hinged car platform sills, where provided, shall be equipped with electric contacts.
- (r) In-Car Stop Switch. On passenger elevators equipped with nonperforated enclosures, a stop switch, either key operated or behind a locked cover, shall be permitted to be provided in the car and located in or adjacent to the car operating panel. The switch shall be clearly and permanently marked "STOP" and shall indicate the stop and run positions. The switch shall be positively opened mechanically and its opening shall not be solely dependent on springs. When opened, this switch shall cause the electric power to be removed from the elevator driving-machine motor and brake.
- (s) Emergency Stop Switch. On all freight elevators, passenger elevators with perforated enclosures, and passenger elevators with nonperforated enclosures not provided with an in-car stop switch [see (r)], an emergency stop switch shall be provided in the car and located in or adjacent to each car operating panel. When open ("STOP" position), this switch shall cause the

electric power to be removed from the elevator driving-machine motor and brake and shall conform to the following:

- (1) be of the manually operated and closed type
- (2) have red operating handles or buttons
- (3) be conspicuously and permanently marked "STOP" and shall indicate the stop and run positions
- (4) have contacts that are positively opened mechanically (opening shall not be solely dependent on springs)
- (t) Stop Switch in Pit. A stop switch conforming to the requirements of (e) shall be provided in the pit of every elevator. The switch shall be located adjacent to the normal pit access.
- (u) Buffer Switches for Gas Spring Return Oil Buffers. A buffer switch shall be provided for gas spring return oil buffers that will cause electric power to be removed from the elevator driving-machine motor and brake if the plunger is not returned.

***Effective date of 1-1-2027***

### **3.6.2 Governor Ropes**

Governor ropes shall be of iron, steel, monel metal, phosphor bronze, or stainless steel. They shall be regular-lay construction, and not less than 0.375 in. (9.5 mm) in diameter. Tiller-rope construction shall not be used. The factor of safety of governor ropes shall be not less than 5.

### **3.10.3 Top-of-Car Operating Devices**

(a) Elevators with automatic or continuous-pressure operation shall have a continuous-pressure button operating switch mounted on the top of the car for the purpose of operating the car solely from the top of the car. The device shall operate the car at a speed not exceeding 150 ft/min (0.76 m/s).

4.7.2 4.7.2 Top-of-Car Operating Devices Top-of-car operating devices shall be provided and shall conform to the requirements of 3.10.3, except for un-counterweighted elevators having a rise of not more than 15 ft (4.57 m). The bottom normal terminal stopping device shall be permitted to be made ineffective while the elevator is under the control of the top-of-car operating device.

### **2.2.2 Access to Machine Rooms and Machinery Spaces**

A permanent means of access to elevator machine rooms and machinery spaces shall be provided for authorized persons. Access doors to machine rooms and machinery spaces shall be kept closed and locked. The only means of access to a machine room shall not be through the hoistway. The lock shall be of a spring type arranged to permit the door to be opened from the inside without a key.

### 2.6.1 Doors or Gates Required

(a) Passenger Elevators. Hoistway-landing openings for passenger elevators shall be provided with entrances that guard the full width and the height of the openings. Hand latches, pull bars, doorknobs or other hand operated door fastening devices mounted on swinging type hoistway doors shall not project beyond the line of the hoistway-door sill on automatic or continuous pressure operation passenger elevators that can be operated from hall buttons or switches at the landings. Devices such as continuous rings or loop handles that can trap a hand or fingers are prohibited.

(b) Freight Elevators. Hoistway-landing openings for freight elevators shall be provided with entrances that guard the full width of the opening and guard the height to a minimum of 6 ft (1.83 m) above the landing sill. At the top landing a gate 66 in. (1.65 m) high shall be permitted to be used if there is not sufficient clearance for a 6 ft (1.83 m) high gate. When the requirements of 2.1.1 allow non-fire-resistive hoistway enclosures, a gate shall be permitted to be used. The door or gate shall be permitted to have a maximum 1 in. (25 mm) vertical opening between the landing sill and the door or gate.

(1) Openings in gates shall reject a ball 2 in. (51 mm) in diameter.

(2) A gate made in two or more sections that overlap, and that slides or telescopes shall be permitted to

be used, provided that the openings reject a ball 0.375 in. (9.5 mm) in diameter.

(3) Where openings do not meet the requirements of (b)(1) or (b)(2), they shall be protected by grilles or

screens made from stainless or galvanized steel of not less than 0.0568 in. (1.4 mm) in thickness. Such grilles or screens shall comply with the following:

(-a) Grilles or screens shall be sized to fit over the gate and completely cover all openings.

(-b) Grilles or screens shall be secured by means of nonreversible screws or other tamperproof fasteners.

(-c) All edges shall be free of burrs and beveled.

(-d) Grilles shall be installed on the hoistway side of the gate.

(c) Automatic fire doors, the functioning of which is dependent on the action of heat, shall not lock any elevator hoistway door so that it cannot be opened manually from inside the hoistway, nor shall such door lock any exit leading from any elevator hoistway door to the outside of the building.

(d) Handles or other means provided for operation of manually operated doors shall be so located that it

is not necessary to reach the back of any panel, jamb, or sash to operate them.

(e) Combination Horizontally Sliding Doors and Swinging Panel Hoistway Entrances. Hoistway entrances

consisting of a combination of horizontally sliding doors and a stationary swinging panel shall

(1) have the swinging panel permanently secured closed; or

(2) where the swing panel assembly remains in use, the latches or removable fastenings shall be accessible only from the hoistway side of the entrance. The swing panel shall be equipped with electric contacts conforming to the following:

(-a) The contacts shall be positively opened by a lever or other device attached to and operated by the

swing panel.

(-b) The contacts shall be maintained in the open position by the action of gravity or by a restrained compression spring, or by both, or by positive mechanical means.

(-c) When the contacts are opened, electric power shall be removed from the driving machine and brake.

(-d) Mercury tube switches shall not be used.

### **Effective date of 1-1-2028**

#### **3.4.2 Car Doors and Gates**

(a) Doors, Gates, and Electric Contacts. Cars shall have a car door or gate provided at each entrance equipped with a car door or gate electric contact conforming to following requirements:

(1) It shall be positively opened by a lever or other device attached to and operated by the door or gate.

(2) It shall be maintained in the open position by the action of gravity or by a restrained compression spring, or both, or by positive mechanical means.

(3) It shall not be readily accessible.

(b) Car Door Interlock. A car door interlock shall be required for

(1) car doors of elevators where the clearance between the loading side of the car platform and hoistway enclosure exceeds the maximum specified in 2.4.1

(2) car doors of elevators that face an unenclosed portion of the hoistway during the travel of the car

(c) Closed Position of Car Doors or Gates. Car doors or gates shall be considered to be in the closed position under the following conditions:

(1) for horizontally sliding doors or gates, when the clear open space between the leading edge of the

door or gate and the nearest face of the jamb does not exceed 2 in. (51mm) except where car doors are provided with a car door interlock(s), 0.375 in. (10 mm)

(2) for vertically sliding counterweighted doors or gates, when the clear open space between the leading

edge of the door or gate and the car platform sill does not exceed 2 in. (51 mm)

(3) for horizontally sliding center opening doors, or vertically sliding biparting counterbalanced doors,

when the door panels are within 2 in. (51 mm) of contact with each other, except where

horizontally sliding center opening car doors are provided with a car door interlock(s), 0.375 in. (10 mm)

(d) Collapsible Gates. Collapsible car gates shall conform to the following requirements:

(1) Collapsible car gates shall not be power opened to a distance exceeding one third of the clear gate opening, and in no case more than 10 in. (254 mm).

(2) When fully closed (extended position), gates shall reject a ball 3 in. (76 mm) in diameter for passenger elevators and 4.5 in. (114 mm) for freight elevators.

(3) Gates shall have at least every fourth vertical member guided at the top and every second vertical member guided at the bottom.

(4) Handles of manually operated collapsible gates nearest the car operating device on elevators operated from the car only shall be so located that the nearest handle is not more than 48 in. (1.22 m) from the car operating device when the gate is closed (extended position), and not more than 48 in. (1.22 m) above the car floor. Gate handles shall be provided with finger guards.

### **3.10.12 System to Monitor and Prevent Automatic Operation of the Elevator with Faulty Door Contact Circuits**

Means shall be provided to monitor the position of the power operated car doors that are mechanically coupled with the landing doors while the car is in the landing zone, in order

(a) To prevent automatic operation of the car if the car door is not closed, regardless of whether the portion of the circuits incorporating the car door contact or the interlock contact of the landing door coupled with the car door, or both, are closed or open except as permitted in 3.10.7

(b) To prevent the poser closing of the doors during automatic operation if the car door is fully open and any of the following conditions exist:

(1) The car door contact is closed, or the portion of the circuit incorporating this contact is bypassed.

(2) The interlock contact of the landing door that is coupled to the opened car door is closed, or the portion of the circuit incorporating this contact is bypassed.

(3) The car door contact and the interlock contact of the door that is coupled to the opened car door are closed, or the portions of the circuits incorporating these contacts are bypassed.

### **3.11.3 3.11.3 Firefighters' Service**

Elevators shall conform to the requirements of ASME/ ANSI A17.1–1987 Rules 211.3 through 211.8 (see

Nonmandatory Appendix C) unless at the time of installation or alteration it was required to comply with a later edition of A17.1.

All elevators that are a part of a group shall conform to identical firefighters' service operation requirements regardless of which edition of A17.1 they complied with at the time of their installation or alteration.

The Phase I and Phase II switches for all elevators in a building shall be operable by the same key.

### **4.3.3 4.3.3 Hydraulic Elevators**

Hydraulic elevators that have any portion of the cylinder buried in the ground and that do not have a double cylinder or a cylinder with a safety bulkhead shall;

(a) have the cylinder replaced with a double cylinder or a cylinder with a safety bulkhead protected from

corrosion by one or more of the following methods:

(1) monitored cathodic protection

(2) a coating to protect the cylinder from corrosion that will withstand the installation process

(3) a protective plastic casing immune to galvanic or electrolytic action, saltwater, and other known underground conditions, or

(b) be provided with a device meeting the requirements of Section 3.5 or a device arranged to operate in

the down direction at an overspeed not exceeding 125% of rated speed. The device shall mechanically act to limit the maximum car speed to the buffer striking speed, or stop the elevator car with rated load with a deceleration not to exceed 32.2 ft/sec<sup>2</sup> (9.8 m/s

2) and shall not automatically reset. Actuation of the device shall cause power to be removed from the pump motor and control valves until manually reset, or

(c) have other means acceptable to the authority having jurisdiction to protect against unintended movement of the car as a result of uncontrolled fluid loss.

## Public Health State/Local Cost Sharing

Based on the Michigan Public Health Code (P.A. 368 of 1978, as amended, 333.2475), there shall be a 50/50 cost share for the state mandated Essential Local Public Health Services.

BHSJ has routinely met the required Maintenance of Effort reporting requirement that has gone unchanged since the early 1990s; however, it is not meeting the required 50/50 cost share required by P.A. 368 of 1978. If the state updates the Maintenance of Effort number to reflect the current grant amounts, BHSJ would not be compliant as it does not receive enough local appropriations to cover the 50%.

I am requesting a \$0.15 increase to local appropriations, which will help inch the agency toward compliance; however, the proposed increase will not even raise the funding ratio by 1%. We should carefully consider all options that may address this funding imbalance and prepare a long-range plan to correct it.

### Current Funding

	ELPHS Funds	Local Appropriations
ELPHS Total FY23	\$1,061,220	\$795,657
Funding Percentage	57.15%	42.85%

### Proposed Increased Funding

	ELPHS Funds	Local Appropriations
ELPHS Total FY24	\$1,061,220	\$818,176
Funding Percentage	56.47%	43.53%

According to table 4 in, "A Review of the First Five Years" State/Local Cost Sharing in Michigan Report published in 1986 by the Michigan Department of Public Health, the counties of the district allocated 7.93% of the general fund revenue to the LHD in 1978, 8.19% in 1980, and 7.44% in 1983. Per the report, the per-capita rate was \$4.87 per person. Today that percentage of general fund revenue is only 1.79% and the per-capita rate is \$5.30 per person.

	1983	2009	2015	2022
General Fund		\$40,071,858.00	\$38,837,655.00	\$43,153,157.00
LHD Approp.		\$998,010.00	\$665,654.00	\$795,675.00
% of General Fund	7.44%	2.49%	1.71%	1.79%

The local Health Department (LHD) took devastating cuts between 2009 and 2013. These cuts equaled a 33.3% reduction in local appropriations. The LHD has never regained those losses, but has continued to operate all required program and has received the status of Accreditation with Commendations. The proposed increase of \$0.15 per person would increase the county appropriations by 2.83%, which will still leave the LHD funded at a level that is 17% lower than it received from the Counties in 2009.

**Appropriations History**

Year	Rate	Total	% Increase/Decrease
2009		\$998,010	
2010		\$938,136	-6.00%
2011		\$857,158	-8.63%
2012	5.15	\$784,395	-8.49%
2013	4.42	\$665,654	-15.14%
2014	4.42	\$665,654	0.00%
2015	4.42	\$665,654	0.00%
2016	4.57	\$688,246	3.39%
2017	4.72	\$710,836	3.28%
2018	4.87	\$733,427	3.18%
2019	5.02	\$756,017	3.08%
2020	5.02	\$756,016	0.00%
2021	5.02	\$756,017	0.00%
2022	5.15	\$773,139	2.26%
2023	5.30	\$795,657	2.91%
2024	5.45	\$818,176	2.83%

Percentage Below 2009 rate: 

-17.32%
---------

The decrease in funding along with the inflation rates leave the LHD with significantly reduced purchasing power.

**Inflation Rates**

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Ave
2023	6.4	6	5	4.9	4	3							4.9
2022	7.5	7.9	8.5	8.3	8.6	9.1	8.5	8.3	8.2	7.7	7.1	6.5	8.0
2021	1.4	1.7	2.6	4.2	5	5.4	5.4	5.3	5.4	6.2	6.8	7	4.7
2020	2.5	2.3	1.5	0.3	0.1	0.6	1	1.3	1.4	1.2	1.2	1.4	1.2
2019	1.6	1.5	1.9	2	1.8	1.6	1.8	1.7	1.7	1.8	2.1	2.3	1.8
2018	2.1	2.2	2.4	2.5	2.8	2.9	2.9	2.7	2.3	2.5	2.2	1.9	2.4
2017	2.5	2.7	2.4	2.2	1.9	1.6	1.7	1.9	2.2	2	2.2	2.1	2.1
2016	1.4	1	0.9	1.1	1	1	0.8	1.1	1.5	1.6	1.7	2.1	1.3
2015	-0.1	0	-0.1	-0.2	0	0.1	0.2	0.2	0	0.2	0.5	0.7	0.1
2014	1.6	1.1	1.5	2	2.1	2.1	2	1.7	1.7	1.7	1.3	0.8	1.6
2013	1.6	2	1.5	1.1	1.4	1.8	2	1.5	1.2	1	1.2	1.5	1.5
2012	2.9	2.9	2.7	2.3	1.7	1.7	1.4	1.7	2	2.2	1.8	1.7	2.1

Total Average Inflation since 2012: 31.7

BHSJ staff worked to gather data from other LHDs to provide comparative data on how other LHDs are funded per capita. The resulting information is shown in the table below. The data was collected by surveying the other LHDs unless indicated otherwise. Additionally, the assessed value of “total real property” from the Michigan Department of Treasury from form L-4024 has been collected to assist in understanding the tax base for each LHD. A detailed report of millage rates for each county is provided on the subsequent pages.

Health Dept	Local Approp.	2020 Population	Per Capita	Assessed Valuations Real L-4024
Lenawee	\$ 300,000	99,424	\$ 3.02	\$ 1,343,028,127
DHD2* (Alcona, Iosco, Ogemaw, Oscoda)	\$ 333,403	64,392	\$ 5.18	\$ 6,365,046,741
Branch-Hillsdale-St Joseph	\$ 795,657	150,124	\$ 5.30	\$ 8,417,499,293
Delta-Menominee*	\$ 451,498	60,310	\$ 7.49	\$ 2,762,237,409
Midland	\$ 658,282	83,481	\$ 7.89	\$ 4,174,823,491
Western UP (Baraga, Gogebic, Houghton, Keweenaw, Ontonagon)	\$ 555,000	64,907	\$ 8.55	\$ 3,309,888,033
Allegan	\$ 1,082,986	120,502	\$ 8.99	\$ 8,980,075,773
DHD4 (Alpena, Cheboygan, Montmorency, Presque Isle)	\$ 693,305	76,911	\$ 9.01	\$ 5,604,084,130
Washtenaw	\$ 3,333,289	369,390	\$ 9.02	\$ 7,666,942,585
LMAS* (Luce, Mackinac, Alger, Schoolcraft)	\$ 312,913	33,050	\$ 9.47	\$ 2,823,477,713
Muskegon	\$ 1,774,392	175,824	\$ 10.09	\$ 7,477,910,200
Northwest (Antrim, Charlevoix, Emmet, Otsego)	\$ 1,111,492	108,679	\$ 10.23	\$ 14,560,562,272
Barry/Eaton*	\$ 1,810,614	171,774	\$ 10.54	\$ 9,559,784,856
DHD 10* (Crawford, Kalkaska, Lake, Manistee, Mason, Mecosta, Missaukee, Newaygo, Oceana, Wexford)	\$ 2,973,394	262,444	\$ 11.33	\$ 17,448,379,651
Huron	\$ 383,693	31,248	\$ 12.28	\$ 3,655,686,706
Benzie-Leelanau	\$ 586,932	40,845	\$ 14.37	\$ 7,911,479,648
Kent**	\$ 9,472,113	657,974	\$ 14.40	\$ 40,271,726,477
Grand Traverse**	\$ 1,430,000	95,238	\$ 15.02	\$ 9,505,876,817

\*Information obtained from annual reports

\*\*Information collected in 2022

**Branch-Hillsdale-St.Joseph Community Health Agency  
Appropriations History**

Year	Per Capita - Based on Calendar Year	Branch	Hillsdale	St. Joseph	Total	Total Agency Budget	% to Budget	Prior Year Increase (Decrease)
2005		273,608	278,231	372,514	\$924,353	\$5,869,966	15.75%	\$ 11,411
2006		277,028	281,708	377,172	\$935,908	\$6,600,370	14.18%	\$ 11,555
2007		281,877	286,635	383,772	\$952,284	\$6,865,897	13.87%	\$ 16,376
2008		284,871	293,592	390,487	\$968,950	\$7,205,684	13.45%	\$ 16,666
2009		293,417	302,392	402,201	\$998,010	\$7,739,501	12.90%	\$ 29,060
2010		275,812	284,255	378,069	\$938,136	\$7,131,289	13.16%	\$ (59,874)
2011		248,241	268,655	340,262	\$857,158	\$7,210,148	11.89%	\$ (80,978)
2012	5.15	219,482	240,443	324,470	\$784,395	\$5,991,536	13.09%	\$ (72,763)
2013	4.42	188,371	206,360	270,923	*\$665,654	\$6,000,892	10.93%	\$ (128,741)
2014	4.42	188,371	206,360	270,923	*\$665,654	\$6,174,625	10.62%	\$ -
2015	4.42	188,371	206,360	270,923	*\$665,654	\$6,031,609	10.87%	\$ -
2016	4.57	194,764	213,364	280,118	\$688,246	\$5,926,003	11.61%	\$ 22,592
2017	4.72	201,157	220,367	289,312	\$710,836	\$6,052,032	11.75%	\$ 22,590
2018	4.87	207,550	227,371	298,506	\$733,427	\$6,081,668	12.06%	\$ 22,591
2019	5.02	213,943	234,374	307,700	\$756,017	\$7,020,445	10.77%	\$ 22,590 +
2020	5.02	213,942	234,374	307,700	\$756,016	\$7,765,083	9.74%	\$ -
2021	5.02	213,942	234,374	307,701	\$756,017	\$8,366,875	9.04%	\$ -
2022	5.15	223,711	235,592	313,836	\$773,139	\$8,309,241	9.30%	\$17,122
2023	5.30	230,227	242,454	322,977	\$795,657	\$8,372,787	9.50%	\$ 22,519
2024	5.45	236,743	249,316	332,118	\$818,176	\$8,611,127	9.50%	\$ 22,519 **

0.15  
0.15  
0.15  
0.15  
+ 0.15  
0.13  
0.15  
0.15

\* Maintenance of Effort (Minimum State Allowed set in FY92/93 is \$664,834)

\*\* If granted additional \$.15 per capita annually

+ Increase of \$22,590 must be spent on unfunded pension liability until pension plan is fully funded

**Proposed \$0.15 Per Capita Increases for 2024**

County	Population	Current Per Capita	Current Allocation	Increase (Per Capita)	Increase (Total \$ Amount)	Proposed Allocation	Increase
	*Based on 2020 Census*						
Branch*	43,439	5.30	\$ 230,227	0.15	\$ 6,516	\$ 236,743	2.83%
Hillsdale	45,746	5.30	\$ 242,454	0.15	\$ 6,862	\$ 249,316	2.83%
St.Joseph	60,939	5.30	\$ 322,977	0.15	\$ 9,141	\$ 332,118	2.83%
<b>Total</b>	<b>150,124</b>		<b>\$ 795,657</b>		<b>\$ 22,519</b>	<b>\$ 818,176</b>	

\*Census Data adjusted to remove persons incarcerated in prison. (44,862 - 1,423 = 43,439)

2023 rates listed are subject to change until final on February 1, 2024

CountyCode	CountyName	MillagePurpose	MillageRate	MillageRateType	DNRTaxAuth	Imported
01	Alcona	ALLOC/CHARTER	4.1602			0
01	Alcona	SENIORS	0.8214			0
01	Alcona	LIBRARY	0.4978			0
01	Alcona	MSU EXTENSION	0.1393			0
01	Alcona	EMS 911/CENTRAL DISPATCH	0.2489			0
01	Alcona	AMBULANCE/ALS/EMS	0.4978			0
01	Alcona	VETERANS	0.1991			0
01	Alcona	EMS/BLDG MAINT.	1.2500			0
<b>01</b>	<b>Total</b>		7.8145			
02	Alger	CONSERVATION DISTRICT	0.2470			0
02	Alger	ALLOC/CHARTER	4.9920			0
02	Alger	EMS 911/CENTRAL DISPATCH	0.9897			0
02	Alger	AMBULANCE/ALS/EMS	1.8278			0
02	Alger	LIBRARY	0.2950			0
02	Alger	MSU EXTENSION	0.2474			0
02	Alger	SENIORS	0.4948			0
02	Alger	VETERANS	0.1000			0
<b>02</b>	<b>Total</b>		9.1937			
03	Allegan	MEDICAL CARE	0.2448			0
03	Allegan	CONSERVATION DISTRICT	0.0979			0
03	Allegan	ALLOC/CHARTER	5.1272			0
03	Allegan	ROADS	0.9654			0
03	Allegan	SENIORS	0.4930			0
03	Allegan	VETERANS	0.0200		CH	0
<b>03</b>	<b>Total</b>		6.9483			
04	Alpena	AMBULANCE/ALS/EMS	1.4925			0
04	Alpena	LIBRARY	0.9949			0
04	Alpena	RECREATION	0.5000			0
04	Alpena	SENIORS	0.5500			0
04	Alpena	SENIORS	0.0000			0
04	Alpena	VETERANS	0.2100			0
04	Alpena	JAIL	0.9950			0
04	Alpena	ALLOC/CHARTER	4.7763			0
<b>04</b>	<b>Total</b>		9.5187			
05	Antrim	ALLOC/CHARTER	5.0500			0
05	Antrim	EMS 911/CENTRAL DISPATCH	0.4826			0
05	Antrim	MEADOWBROOK RETIREMENT CENTER	0.9653			0
05	Antrim	SENIORS	0.2550			0

2023 rates listed are subject to change until final on February 1, 2024

CountyCode	CountyName	MillagePurpose	MillageRate	MillageRateType	DNRTaxAuth	Imported
05	Antrim	CONSERVATION DISTRICT	0.0975			0
05	Antrim	RECYCLING	0.1710			0
<b>05 Total</b>			7.0214			
06	Arenac	VETERANS	0.1000			0
06	Arenac	TRANSIT	0.5977			0
06	Arenac	AMBULANCE	0.2490			0
06	Arenac	ALLOC/CHARTER	5.1807			0
06	Arenac	AMBULANCE/ALS/EMS	0.4981			0
06	Arenac	EMS 911/CENTRAL DISPATCH	1.3450			0
06	Arenac	POLICE	1.2453			0
06	Arenac	ROADS	0.9963			0
06	Arenac	SENIORS	0.7472			0
<b>06 Total</b>			10.9593			
07	Baraga	ALLOC/CHARTER	8.5338			0
07	Baraga	ROADS	1.9856			0
07	Baraga	SENIORS	0.9923			0
<b>07 Total</b>			11.5117			
08	Barry	ALLOC/CHARTER	5.2091			0
08	Barry	EMS 911/CENTRAL DISPATCH	0.9416			0
08	Barry	MEDICAL CENTER/CARE FACILITY	0.6524		DB	0
08	Barry	SENIORS	0.4705			0
08	Barry	PARKS/REC	0.2164			0
08	Barry	TRANSIT/BUS	0.2377			0
<b>08 Total</b>			7.7277			
09	Bay	ALLOC/CHARTER	5.7078			0
09	Bay	EMS 911/CENTRAL DISPATCH	1.0500			0
09	Bay	HISTORICAL SOCIETY/MUSEUM	0.0948			0
09	Bay	LIBRARY	1.7445			0
09	Bay	MEDICAL	0.7476			0
09	Bay	MOSQUITO	0.5482			0
09	Bay	SENIORS	0.8500			0
09	Bay	MEDICAL CENTER/CARE FACILITY	0.9969			0
09	Bay	ANIMAL CONTROL/SHELTER	0.7000			0
09	Bay	VETERANS	0.0996			0
09	Bay	GYPSY MOTH	0.0996			0
<b>09 Total</b>			12.6390			
10	Benzie	SCHOOL LIASON POLICE OFFICER	0.1800			0
10	Benzie	ALLOC/CHARTER	3.3378			0

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CountyCode	CountyName	MillagePurpose	MillageRate	MillageRateType	DNRTaxAuth	Imported
10	Benzie	AMBULANCE/ALS/EMS	0.8000			0
10	Benzie	ANIMAL CONTROL/SHELTER	0.1400			0
10	Benzie	CONSERVATION DISTRICT	0.1222			0
10	Benzie	JAIL	1.2660			0
10	Benzie	MEDICAL CENTER/CARE FACILITY	0.3626			0
10	Benzie	MEDICAL CENTER/CARE FACILITY	0.4500		DB	0
10	Benzie	NARCOTICS	0.1000			0
10	Benzie	ROADS	0.9666			0
10	Benzie	SENIORS	0.8177			0
10	Benzie	VETERANS	0.0400			0
<b>10</b>	<b>Total</b>		8.5829			
11	Berrien	POLICE	0.3496			0
11	Berrien	SENIORS	0.2997			0
11	Berrien	ALLOC/CHARTER	4.7680			0
11	Berrien	EMS 911/CENTRAL DISPATCH	0.4495			0
11	Berrien	PARKS/REC	0.0999			0
<b>11</b>	<b>Total</b>		5.9667			
12	Branch	JAIL	1.2375			0
12	Branch	ALLOC/CHARTER	4.7076			0
12	Branch	EMS 911/CENTRAL DISPATCH	0.9900			0
12	Branch	SENIORS	0.4857			0
12	Branch	SENIORS	0.2399			0
12	Branch	VETERANS	0.0988		CH	0
<b>12</b>	<b>Total</b>		7.7595			
13	Calhoun	ALLOC/CHARTER	5.3698			0
13	Calhoun	SENIORS	0.7440			0
13	Calhoun	PARKS/REC	0.1997			0
13	Calhoun	EMS 911/CENTRAL DISPATCH	0.9800			0
13	Calhoun	MEDICAL	0.2482			0
13	Calhoun	VETERANS	0.1000			0
<b>13</b>	<b>Total</b>		7.6417			
14	Cass	MEDICAL CENTER/CARE FACILITY	0.4944			0
14	Cass	ALLOC/CHARTER	4.5702			0
14	Cass	DRUG ENFORCEMENT	0.4751			0
14	Cass	EMS 911/CENTRAL DISPATCH	0.2000			0
14	Cass	SENIORS	0.9858			0
<b>14</b>	<b>Total</b>		6.7255			
15	Charlevoix	ALLOC/CHARTER	4.4500			0

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CountyCode	CountyName	MillagePurpose	MillageRate	MillageRateType	DNRTaxAuth	Imported
15	Charlevoix	MEDICAL	0.7334			0
15	Charlevoix	PARKS/REC	0.1500			0
15	Charlevoix	RECYCLING	0.1466			0
15	Charlevoix	ROADS	0.9707			0
15	Charlevoix	SENIORS	0.6356			0
15	Charlevoix	TRANSIT/BUS	0.2500			0
15	Charlevoix	VETERANS	0.1000			0
<b>15 Total</b>			7.4363			
16	Cheboygan	ROADS	1.0000			0
16	Cheboygan	SENIORS	0.5000			0
16	Cheboygan	AMBULANCE/ALS/EMS	0.4939			0
16	Cheboygan	EMS 911/CENTRAL DISPATCH	0.5000			0
16	Cheboygan	ALLOC/CHARTER	5.6711			0
<b>16 Total</b>			8.1650			
17	Chippewa	ALLOC/CHARTER	6.1143			0
17	Chippewa	ANIMAL CONTROL/SHELTER	0.0994			0
17	Chippewa	FIRE/AMBULANCE	0.4275			0
17	Chippewa	RECYCLING	0.5000			0
17	Chippewa	ROADS	0.9821			0
17	Chippewa	SENIORS	0.7456			0
<b>17 Total</b>			8.8689			
18	Clare	ALLOC/CHARTER	4.6902			0
18	Clare	EMS 911/CENTRAL DISPATCH	0.3486			0
18	Clare	SENIORS	0.4781			0
18	Clare	TRANSIT/BUS	0.5000			0
18	Clare	ANIMAL CONTROL/SHELTER	0.2988			0
18	Clare	MSU 4H	0.1295			0
18	Clare	SENIORS	0.2700			0
18	Clare	GYPSY MOTH	0.9964			0
<b>18 Total</b>			7.7116			
19	Clinton	EMS 911/CENTRAL DISPATCH	0.8384			0
19	Clinton	ALLOC/CHARTER	5.7189			0
<b>19 Total</b>			6.5573			
20	Crawford	ALLOC/CHARTER	5.9891			0
20	Crawford	LIBRARY	0.3000		DB	0
20	Crawford	LIBRARY	0.4381			0
20	Crawford	POLICE	1.4235			0
20	Crawford	SENIORS - SENIOR CENTER	0.3125		DB	0

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20	Crawford	RECREATION	0.4762			0
20	Crawford	ROADS	0.9830			0
20	Crawford	SENIORS	0.9830			0
20	Crawford	TRANSIT/BUS	0.6906			0
20	Crawford	VETERANS	0.2455			0
<b>20 Total</b>			11.8415			
21	Delta	ALLOC/CHARTER	5.0317			0
21	Delta	COMMUNITY ACTION	0.8000			0
21	Delta	EMS 911/CENTRAL DISPATCH	0.7500			0
21	Delta	POLICE	1.3000			0
21	Delta	RECYCLING	0.3000			0
21	Delta	JAIL	0.8500		DB	0
<b>21 Total</b>			9.0317			
22	Dickinson	VETERANS	0.0999			0
22	Dickinson	MEDICAL	0.0999			0
22	Dickinson	HEALTH DEPT. SERVICES	0.4195			0
22	Dickinson	ALLOC/CHARTER	6.1323			0
22	Dickinson	BAY COLLEGE EXT	0.9987			0
22	Dickinson	EMS 911/CENTRAL DISPATCH	0.3995			0
22	Dickinson	LIBRARY	0.8988			0
22	Dickinson	ROADS	0.4994			0
22	Dickinson	SENIORS	0.3995			0
<b>22 Total</b>			9.9475			
23	Eaton	ALLOC/CHARTER	5.2096			0
23	Eaton	EMS 911/CENTRAL DISPATCH	0.9490			0
23	Eaton	JAIL	0.6993			0
23	Eaton	JUVENILE	0.3496			0
23	Eaton	MEDICAL CARE	0.1248			0
23	Eaton	ROADS	1.4985			0
23	Eaton	TRANSIT/BUS	0.2497			0
23	Eaton	PARKS/REC	0.5000			0
<b>23 Total</b>			9.5805			
24	Emmet	MEDICAL CENTER	0.2463			0
24	Emmet	EMS 911/CENTRAL DISPATCH	0.2964			0
24	Emmet	ALLOC/CHARTER	4.8500			0
24	Emmet	AMBULANCE/ALS/EMS	0.6739			0
24	Emmet	SENIORS	0.5000			0
<b>24 Total</b>			6.5666			

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25	Genesee	ALLOC/CHARTER	5.3921			0
25	Genesee	AMBULANCE/ALS/EMS	0.4743			0
25	Genesee	ANIMAL CONTROL/SHELTER	0.1957			0
25	Genesee	HEALTH DEPT. SERVICES	0.9790			0
25	Genesee	MSU EXTENSION	0.0800			0
25	Genesee	PARKS/REC	0.7500			0
25	Genesee	SENIORS	0.6852			0
25	Genesee	VETERANS	0.0984			0
25	Genesee	MENTAL HEALTH	0.9338			0
25	Genesee	COMMUNITY SERVICES	0.9417			0
<b>25</b>	<b>Total</b>		10.5302			
26	Gladwin	CONSERVATION DISTRICT	0.1493			0
26	Gladwin	ANIMAL CONTROL/SHELTER	0.2000			0
26	Gladwin	EMS 911/CENTRAL DISPATCH	1.0000			0
26	Gladwin	GYPSY MOTH	0.7500			0
26	Gladwin	EMS/BLDG MAINT.	1.0000			0
26	Gladwin	ALLOC/CHARTER	4.3866			0
26	Gladwin	DIAL-A-RIDE	0.4979			0
26	Gladwin	MSU EXTENSION	0.1095			0
26	Gladwin	ROADS/HWY/BRIDGES	1.9916			0
26	Gladwin	SENIORS	0.7468			0
<b>26</b>	<b>Total</b>		10.8317			
27	Gogebic	ALLOC/CHARTER	6.6419			0
27	Gogebic	ANIMAL CONTROL/RECYCLING	0.2000			0
27	Gogebic	MEDICAL CARE BLDG SITE	0.3977			0
27	Gogebic	MEDICAL CARE M.O.E.	0.2000			0
27	Gogebic	SENIORS	0.5965			0
27	Gogebic	TRANSIT/BUS	0.1900			0
27	Gogebic	AMBULANCE	1.0000			0
<b>27</b>	<b>Total</b>		9.2261			
28	Grand Traverse	ROADS/BRIDGES	0.9734			0
28	Grand Traverse	VETERANS	0.1135			0
28	Grand Traverse	ANIMAL CONTROL/SHELTER	0.0370			0
28	Grand Traverse	CONSERVATION DISTRICT	0.0958			0
28	Grand Traverse	ALLOC/CHARTER	4.7268			0
28	Grand Traverse	SENIORS - SENIOR CENTER	0.0945			0
28	Grand Traverse	SENIORS	0.4739			0
<b>28</b>	<b>Total</b>		6.5149			

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29	Gratiot	LIBRARY	0.4994			0
29	Gratiot	ALLOC/CHARTER	5.5206			0
29	Gratiot	PARKS/REC	0.3494			0
29	Gratiot	POLICE	0.4486			0
29	Gratiot	PROMOTION / ADVERTISING - PA 359/PA88	0.4500			0
29	Gratiot	SENIORS	0.6492			0
<b>29 Total</b>			7.9172			
30	Hillsdale	MEDICAL CENTER/CARE FACILITY	0.5889			0
30	Hillsdale	MEDICAL CENTER/CARE FACILITY	0.3500		DB	0
30	Hillsdale	MENTAL HEALTH	0.4907			0
30	Hillsdale	ALLOC/CHARTER	4.8619			0
30	Hillsdale	AMBULANCE/ALS/EMS	0.8343			0
30	Hillsdale	AMBULANCE/ALS/EMS	0.1472			0
30	Hillsdale	SENIORS	0.4873			0
30	Hillsdale	SENIORS	0.4904			0
<b>30 Total</b>			8.2507			
31	Houghton	ALLOC/CHARTER	6.2220			0
31	Houghton	MEDICAL	2.2331			0
31	Houghton	ROADS	1.3427			0
31	Houghton	VETERANS	0.1478			0
<b>31 Total</b>			9.9456			
32	Huron	ALLOC/CHARTER	4.3807			0
32	Huron	MEDICAL	0.5000			0
32	Huron	ROADS	1.0000			0
32	Huron	SENIORS	0.2500			0
32	Huron	TRANSIT/BUS	0.2000			0
32	Huron	VETERANS	0.0800			0
32	Huron	EMS 911/CENTRAL DISPATCH	0.4000			0
<b>32 Total</b>			6.8107			
33	Ingham	SENIORS	0.2994			0
33	Ingham	ANIMAL CONTROL/SHELTER	0.2000			0
33	Ingham	JAIL/LAW ENFORCEMENT	0.8476			0
33	Ingham	ALLOC/CHARTER	6.7479		CH	0
33	Ingham	EMS 911/CENTRAL DISPATCH	0.8483			0
33	Ingham	FARMLAND PRESERV.	0.1395			0
33	Ingham	HEALTH DEPT. SERVICES	0.0000			0
33	Ingham	JUVENILE	0.6000			0
33	Ingham	PARKS/REC	0.4986			0

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33	Ingham	TRANSIT/BUS	0.5988			0
33	Ingham	VETERANS	0.0328		CH	0
33	Ingham	ZOO	0.4986			0
<b>33</b>	<b>Total</b>		11.3115			
34	Ionia	ALLOC/CHARTER	4.5711			0
34	Ionia	LIBRARY	1.2159			0
34	Ionia	SENIORS	0.4921			0
34	Ionia	ROADS	0.9867			0
<b>34</b>	<b>Total</b>		7.2658			
35	losco	PARKS/REC	0.2498			0
35	losco	EMS 911/CENTRAL DISPATCH	0.6795			0
35	losco	VETERANS	0.1000			0
35	losco	TRANSIT/BUS	0.1449			0
35	losco	SENIORS	0.2088			0
35	losco	ALLOC/CHARTER	3.9105			0
35	losco	AMBULANCE/ALS/EMS	0.5996			0
35	losco	ANIMAL CONTROL/SHELTER	0.1500			0
35	losco	MEDICAL CARE	0.4554			0
35	losco	MSU 4H	0.1199			0
35	losco	SENIORS	0.2908			0
<b>35</b>	<b>Total</b>		6.9092			
36	Iron	ALLOC/CHARTER	6.3683			0
36	Iron	HEALTH DEPT. SERVICES	0.4159			0
36	Iron	MEDICAL	1.4855			0
36	Iron	MEDICARE BOND	0.2800		DB	0
36	Iron	ROADS	0.4951			0
36	Iron	SENIORS	0.2673			0
36	Iron	YOUTH CAMP	0.4951			0
36	Iron	AMBULANCE/ALS/EMS	1.0000			0
36	Iron	HEALTHCARE BENEFIT ASSISTANCE	0.0989			0
36	Iron	SENIORS - MEALS	0.0989			0
36	Iron	EMS 911/CENTRAL DISPATCH	0.9904			0
36	Iron	VETERANS	0.0742			0
<b>36</b>	<b>Total</b>		12.0696			
37	Isabella	ALLOC/CHARTER	6.6100		ST	0
37	Isabella	MEDICAL CARE REMODEL & OP	1.0000		ST	0
37	Isabella	PARKS/REC	0.3500		ST	0
37	Isabella	SENIORS	0.8776		ST	0

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37	Isabella	TRANSIT/BUS	0.8620		ST	0
<b>37 Total</b>			9.6996			
38	Jackson	ALLOC/CHARTER	5.0660			0
38	Jackson	MEDICAL	0.2476			0
38	Jackson	SENIORS	0.5966			0
38	Jackson	ANIMAL CONTROL/SHELTER	0.2476			0
38	Jackson	PARKS/REC	0.4954			0
38	Jackson	MENTAL HEALTH	0.4947			0
<b>38 Total</b>			7.1479			
39	Kalamazoo	SENIORS	0.3462			0
39	Kalamazoo	LOCAL HOUSING ASST FUND	0.7453			0
39	Kalamazoo	EMS 911/CENTRAL DISPATCH	0.6459			0
39	Kalamazoo	ALLOC/CHARTER	4.6318			0
39	Kalamazoo	DEBT - JUV. HOME	0.1613		DB	0
39	Kalamazoo	SAFETY	1.4380			0
<b>39 Total</b>			7.9685			
40	Kalkaska	ALLOC/CHARTER	5.3691			0
40	Kalkaska	KALISIUM	0.2461			0
40	Kalkaska	LIBRARY	0.2461			0
40	Kalkaska	ROADS	0.9848			0
40	Kalkaska	SENIORS	0.4923			0
40	Kalkaska	TRANSIT/BUS	0.2461			0
40	Kalkaska	RECYCLING	0.1140			0
40	Kalkaska	ANIMAL CONTROL/SHELTER	0.1307			0
40	Kalkaska	SENIORS	0.4955			0
40	Kalkaska	CONSERVATION DISTRICT	0.2461			0
<b>40 Total</b>			8.5708			
41	Kent	MUSEUM/ZOO	0.4206			0
41	Kent	CHILD SUPPORT SERV	0.2409			0
41	Kent	ALLOC/CHARTER	4.1310			0
41	Kent	JAIL	0.7546			0
41	Kent	SENIORS	0.5000			0
41	Kent	VETERANS	0.0500			0
<b>41 Total</b>			6.0971			
42	Keweenaw	ALLOC/CHARTER	6.0801			0
42	Keweenaw	POLICE	0.4899			0
42	Keweenaw	REPAIRS	0.4899			0
42	Keweenaw	VETERANS	0.0971			0

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42	Keweenaw	ROADS	1.9601			0
<b>42 Total</b>			9.1171			
43	Lake	AMBULANCE	0.7336			0
43	Lake	VETERANS	0.0973			0
43	Lake	ALLOC/CHARTER	5.8657			0
43	Lake	EMS 911/CENTRAL DISPATCH	1.6994			0
43	Lake	LIBRARY	0.2427			0
43	Lake	POLICE	2.9135			0
43	Lake	SENIORS	0.6318			0
43	Lake	TRANSIT/BUS	0.3717			0
<b>43 Total</b>			12.5557			
44	Lapeer	POLICE	1.4500			0
44	Lapeer	MEDICAL CENTER/CARE FACILITY	0.3196			0
44	Lapeer	AMBULANCE	0.8814			0
44	Lapeer	ALLOC/CHARTER	3.6258			0
44	Lapeer	SENIORS	0.2430			0
44	Lapeer	VETERANS	0.1813			0
<b>44 Total</b>			6.7011			
45	Leelanau	ALLOC/CHARTER	3.3580			0
45	Leelanau	ROADS	0.5000			0
45	Leelanau	SENIORS	0.3134			0
45	Leelanau	CHILD SUPPORT SERV	0.2111			0
<b>45 Total</b>			4.3825			
46	Lenawee	VETERANS	0.0996			0
46	Lenawee	ALLOC/CHARTER	5.4000			0
46	Lenawee	MEDICAL CARE	0.1889			0
46	Lenawee	SENIORS	0.7478			0
<b>46 Total</b>			6.4363			
47	Livingston	EV OPER. GENERAL	0.0564			0
47	Livingston	VETERANS	0.0000			0
47	Livingston	ALLOC/CHARTER	3.2089			0
47	Livingston	AMBULANCE/ALS/EMS	0.2836			0
<b>47 Total</b>			3.5489			
48	Luce	LIBRARY	0.7500		OB	0
48	Luce	ALLOC/CHARTER	5.2726		CH	0
48	Luce	AMBULANCE/ALS/EMS	0.9917		OB	0
48	Luce	EXTENSION	0.4978		OB	0
48	Luce	PARKS/REC	0.4978		OB	0

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48	Luce	PUBLIC AIRPORT	0.4978		OB	0
48	Luce	SENIORS	0.4985		OB	0
48	Luce	VETERANS	0.4978		OB	0
48	Luce	ANIMAL CONTROL/SHELTER	0.4985		OB	0
48	Luce	CHILD SUPPORT SERV	0.4985		OB	0
48	Luce	POLICE EQUIP	0.9970		OB	0
48	Luce	AMBULANCE	1.5000		OB	0
<b>48 Total</b>			12.9980			
49	Mackinac	ALLOC/CHARTER	4.4802			0
49	Mackinac	HOSPITAL	1.1915			0
49	Mackinac	SENIORS	0.2489			0
49	Mackinac	VETERANS	0.0996			0
<b>49 Total</b>			6.0202			
50	Macomb	ALLOC/CHARTER	4.3200			0
50	Macomb	DRAIN DEBT, CHAPTER 20	0.0000		DB	0
50	Macomb	VETERANS	0.0690			0
<b>50 Total</b>			4.3890			
51	Manistee	CONSERVATION DISTRICT	0.0984			0
51	Manistee	DIAL-A-RIDE	0.4927			0
51	Manistee	EMS 911/CENTRAL DISPATCH	0.9855			0
51	Manistee	LIBRARY	0.9855			0
51	Manistee	MEDICAL CARE	0.4927			0
51	Manistee	SENIORS	0.4680			0
51	Manistee	ALLOC/CHARTER	5.4204			0
51	Manistee	CONSERVATION DISTRICT	0.1250			0
<b>51 Total</b>			9.0682			
52	Marquette	ALLOC/CHARTER	5.2446			0
52	Marquette	EMS 911/CENTRAL DISPATCH	0.4923			0
52	Marquette	MEDICAID OE	0.5448			0
52	Marquette	RESCUE	0.1510			0
52	Marquette	SENIORS	0.4431			0
52	Marquette	TRANSIT/BUS	0.5970			0
52	Marquette	VETERANS	0.0800			0
<b>52 Total</b>			7.5528			
53	Mason	ALLOC/CHARTER	5.0967			0
53	Mason	EMS 911/CENTRAL DISPATCH	0.1400			0
53	Mason	JAIL	0.5800			0
53	Mason	MEDICAL CENTER/CARE FACILITY	0.9715			0

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CountyCode	CountyName	MillagePurpose	MillageRate	MillageRateType	DNRTaxAuth	Imported
53	Mason	SENIORS	0.2979			0
53	Mason	VETERANS	0.0030	CH		0
53	Mason	POLICE/PUBLIC SAFETY	0.3000			0
<b>53 Total</b>			7.3891			
54	Mecosta	ALLOC/CHARTER	5.8765			0
54	Mecosta	EMS 911/CENTRAL DISPATCH	0.9342			0
54	Mecosta	SENIORS	0.4954			0
<b>54 Total</b>			7.3061			
55	Menominee	EMS 911/CENTRAL DISPATCH	0.6152			0
55	Menominee	LIBRARY	0.3692			0
55	Menominee	ALLOC/CHARTER	6.9515			0
55	Menominee	POLICE	1.7671			0
55	Menominee	SENIORS	0.5906			0
<b>55 Total</b>			10.2936			
56	Midland	ALLOC/CHARTER	4.8955			0
56	Midland	AMBULANCE	0.5500			0
56	Midland	EMS 911/CENTRAL DISPATCH	0.7000			0
56	Midland	MCF - PINECREST	0.3700			0
56	Midland	MOSQUITO	0.4000			0
56	Midland	TRANSIT/BUS	0.2500			0
56	Midland	ROADS	1.0000			0
56	Midland	SENIORS	0.8500			0
56	Midland	ROADS	1.0000			0
56	Midland	SCHOOL LIASON POLICE OFFICER	0.3000			0
56	Midland	GYPSY MOTH	0.3000			0
<b>56 Total</b>			10.6155			
57	Missaukee	ALLOC/CHARTER	4.8695			0
57	Missaukee	EMS 911/CENTRAL DISPATCH	0.9937			0
57	Missaukee	POLICE	1.2500			0
57	Missaukee	SENIORS	0.7500			0
57	Missaukee	CONSERVATION DISTRICT	0.1490			0
57	Missaukee	RECYCLING	0.2484			0
<b>57 Total</b>			8.2606			
58	Monroe	ALLOC/CHARTER	4.7952			0
58	Monroe	MEDICAL CENTER/CARE FACILITY	0.1250			0
58	Monroe	MUSEUM	0.1500			0
58	Monroe	SENIORS	0.5280			0
58	Monroe	VETERANS	0.0020	CH		0

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CountyCode	CountyName	MillagePurpose	MillageRate	MillageRateType	DNRTaxAuth	Imported
<b>58 Total</b>			5.6002			
59	Montcalm	ALLOC/CHARTER	4.3066			0
59	Montcalm	AMBULANCE/ALS/EMS	0.6500			0
59	Montcalm	LIBRARY	0.8818			0
59	Montcalm	SENIORS	0.4200			0
59	Montcalm	JAIL/LAW ENFORCEMENT	0.9799			0
59	Montcalm	VETERANS	0.2459			0
59	Montcalm	MSU 4H	0.1959			0
<b>59 Total</b>			7.6801			
60	Montmorency	MSU EXTENSION	0.2480			0
60	Montmorency	EV OPER. GENERAL	0.5901			0
60	Montmorency	VETERANS	0.1000			0
60	Montmorency	ALLOC/CHARTER	5.1136			0
60	Montmorency	LIBRARY	0.5953			0
60	Montmorency	POLICE	0.9923			0
60	Montmorency	ROADS	0.9923			0
60	Montmorency	SENIORS	0.9923			0
<b>60 Total</b>			9.6239			
61	Muskegon	SENIORS	0.4921			0
61	Muskegon	ALLOC/CHARTER	5.6097			0
61	Muskegon	EMS 911/CENTRAL DISPATCH	0.2952			0
61	Muskegon	MUSEUM	0.3169			0
61	Muskegon	VETERANS	0.0739			0
<b>61 Total</b>			6.7878			
62	Newaygo	ALLOC/CHARTER	5.2142			0
62	Newaygo	MEDICAL CENTER/CARE FACILITY	0.3600			0
62	Newaygo	POLICE	0.9681			0
62	Newaygo	SENIORS	0.9693			0
62	Newaygo	VETERANS	0.0976			0
<b>62 Total</b>			7.6092			
63	Oakland	ALLOC/CHARTER	3.9686			0
63	Oakland	PARKS/REC	0.3431			0
63	Oakland	TRANSIT	0.9500			0
<b>63 Total</b>			5.2617			
64	Oceana	MEDICAL CENTER/CARE FACILITY	0.0379		DB	0
64	Oceana	EMS 911/CENTRAL DISPATCH	0.1374			0
64	Oceana	MEDICAL CENTER/CARE FACILITY	1.9730			0
64	Oceana	SENIORS	0.9838			0

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CountyCode	CountyName	MillagePurpose	MillageRate	MillageRateType	DNRTaxAuth	Imported
64	Oceana	VETERANS	0.0986			0
64	Oceana	ALLOC/CHARTER	5.6571			0
64	Oceana	AMBULANCE/ALS/EMS	0.9000			0
<b>64 Total</b>			9.7878			
65	Ogemaw	ALLOC/CHARTER	6.0931			0
65	Ogemaw	SENIORS	0.7486			0
65	Ogemaw	TRANSIT/BUS	0.2994			0
65	Ogemaw	VETERANS	0.1247			0
65	Ogemaw	MSU EXTENSION	0.1461			0
65	Ogemaw	VETERANS	0.0400			0
65	Ogemaw	TRANSIT	0.2994			0
65	Ogemaw	POLICE	0.9983			0
<b>65 Total</b>			8.7496			
66	Ontonagon	ALLOC/CHARTER	6.4574			0
66	Ontonagon	AMBULANCE/ALS/EMS	1.2379			0
66	Ontonagon	ANIMAL CONTROL/SHELTER	0.1485			0
66	Ontonagon	COMMUNITY ACTION	0.2970			0
66	Ontonagon	ROADS	4.9521			0
66	Ontonagon	SENIORS	0.4952			0
66	Ontonagon	TRANSIT/BUS	0.9904			0
<b>66 Total</b>			14.5785			
67	Osceola	ALLOC/CHARTER	6.3217			0
67	Osceola	POLICE	1.0000			0
67	Osceola	SENIORS	0.9879			0
67	Osceola	POLICE	1.0000			0
67	Osceola	MSU EXTENSION	0.2500			0
67	Osceola	AMBULANCE/ALS/EMS	1.3139			0
<b>67 Total</b>			10.8735			
68	Oscoda	VETERANS	0.3333			0
68	Oscoda	POLICE EQUIP	0.2500			0
68	Oscoda	AMBULANCE	0.2500			0
68	Oscoda	AMBULANCE	1.5000			0
68	Oscoda	GYPSY MOTH	0.4999			0
68	Oscoda	ALLOC/CHARTER	5.8705			0
68	Oscoda	DRUG ENFORCEMENT	0.2499			0
68	Oscoda	POLICE	0.9998			0
68	Oscoda	SENIORS	0.9998			0
<b>68 Total</b>			10.9532			

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CountyCode	CountyName	MillagePurpose	MillageRate	MillageRateType	DNRTaxAuth	Imported
69	Otsego	ALLOC/CHARTER	4.0214			0
69	Otsego	AMBULANCE/ALS/EMS	0.7744			0
69	Otsego	ANIMAL CONTROL/SHELTER	0.2978			0
69	Otsego	PARKS/REC	0.2500			0
69	Otsego	RECYCLING	0.2500			0
69	Otsego	ROADS	0.9929			0
69	Otsego	SENIORS	0.9929			0
69	Otsego	SPORTSPLEX	0.2482			0
69	Otsego	TRANSIT/BUS	0.5957			0
69	Otsego	LIBRARY	0.3971			0
69	Otsego	UNIVERSITY CENTER/M-TEC	0.9730			0
<b>69 Total</b>			9.7934			
70	Ottawa	MENTAL HEALTH	0.2859			0
70	Ottawa	ROADS	0.4767			0
70	Ottawa	ALLOC/CHARTER	3.9000			0
70	Ottawa	EMS 911/CENTRAL DISPATCH	0.4195			0
70	Ottawa	PARKS/REC	0.3163			0
<b>70 Total</b>			5.3984			
71	Presque Isle	ALLOC/CHARTER	5.6932			0
71	Presque Isle	RECYCLING	0.2000			0
71	Presque Isle	SENIORS	0.7470			0
71	Presque Isle	SENIORS - TRANSPORTATION	0.2490			0
71	Presque Isle	VETERANS	0.0248		CH	0
71	Presque Isle	SCHOOL LIASON POLICE OFFICER	0.3287			0
<b>71 Total</b>			7.2427			
72	Roscommon	ROADS	0.4914			0
72	Roscommon	ANIMAL CONTROL/SHELTER	0.1474			0
72	Roscommon	ALLOC/CHARTER	3.5194			0
72	Roscommon	ANIMAL CONTROL/SHELTER	0.2454			0
72	Roscommon	EMS 911/CENTRAL DISPATCH	1.0000			0
72	Roscommon	GYPSY MOTH	0.1228			0
72	Roscommon	POLICE	1.5000			0
72	Roscommon	SENIORS	0.9822			0
72	Roscommon	VETERANS	0.1640			0
<b>72 Total</b>			8.1726			
73	Saginaw	MOSQUITO	1.0000			0
73	Saginaw	ALLOC/CHARTER	4.8485			0
73	Saginaw	ANIMAL CONTROL/SHELTER	0.4243			0

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CountyCode	CountyName	MillagePurpose	MillageRate	MillageRateType	DNRTaxAuth	Imported
73	Saginaw	EVENT CENTER	0.4493			0
73	Saginaw	HOSPITAL	0.4300	DB		0
73	Saginaw	MUSEUM	0.1994			0
73	Saginaw	PARKS/REC	0.2937			0
73	Saginaw	POLICE	1.7473			0
73	Saginaw	SENIORS	0.5891			0
73	Saginaw	HEALTH DEPT. SERVICES	0.4792			0
73	Saginaw	ZOO	0.1997			0
73	Saginaw	EMS 911/CENTRAL DISPATCH	0.2795			0
<b>73 Total</b>			10.9400			
74	Saint Clair	DRUG ENFORCEMENT	0.5598			0
74	Saint Clair	AMBULANCE	0.5000			0
74	Saint Clair	ALLOC/CHARTER	5.3153			0
74	Saint Clair	LIBRARY	1.2000			0
74	Saint Clair	PARKS/REC	0.4944			0
74	Saint Clair	ROADS	0.2495			0
74	Saint Clair	SENIORS	0.7983			0
74	Saint Clair	VETERANS	0.0998			0
<b>74 Total</b>			9.2171			
75	Saint Joseph	ROADS	0.9942			0
75	Saint Joseph	SENIORS	0.7456			0
75	Saint Joseph	TRANSIT/BUS	0.3280			0
75	Saint Joseph	ALLOC/CHARTER	4.5217			0
75	Saint Joseph	EMS 911/CENTRAL DISPATCH	0.9942			0
75	Saint Joseph	PARKS/REC	0.2492			0
<b>75 Total</b>			7.8329			
76	Sanilac	RECYCLING	0.1500			0
76	Sanilac	ALLOC/CHARTER	4.0482			0
76	Sanilac	DRUG ABUSE	0.5000			0
76	Sanilac	EMS 911/CENTRAL DISPATCH	0.2000			0
76	Sanilac	MEDICAL	0.2000			0
76	Sanilac	MEDICAL CENTER/CARE FACILITY	0.2000			0
76	Sanilac	PARKS/REC	0.2000			0
76	Sanilac	ROADS	2.0000			0
76	Sanilac	SENIORS	0.2500			0
76	Sanilac	VETERANS	0.2000			0
76	Sanilac	SAVE - SANILAC ABUSE VIOLENCE ELIMINATION	0.2000			0
<b>76 Total</b>			8.1482			

2023 rates listed are subject to change until final on February 1, 2024

CountyCode	CountyName	MillagePurpose	MillageRate	MillageRateType	DNRTaxAuth	Imported
77	Schoolcraft	ALLOC/CHARTER	5.1199			0
77	Schoolcraft	LIBRARY	0.2991			0
77	Schoolcraft	MCF/MOE	1.4958			0
77	Schoolcraft	SENIORS	0.6182			0
77	Schoolcraft	TRANSIT/BUS	0.5853			0
77	Schoolcraft	VETERANS	0.1994			0
77	Schoolcraft	CONSERVATION DISTRICT	0.2193			0
<b>77 Total</b>			8.5370			
78	Shiawassee	VETERANS	0.1956		CH	0
78	Shiawassee	ALLOC/CHARTER	5.4220			0
78	Shiawassee	MEDICAL	1.9679			0
78	Shiawassee	MSU EXTENSION	0.0739			0
78	Shiawassee	SENIORS	0.5000			0
78	Shiawassee	VETERANS	0.1000			0
<b>78 Total</b>			8.2594			
79	Tuscola	ALLOC/CHARTER	3.9141			0
79	Tuscola	MEDICAL CARE	0.2500			0
79	Tuscola	MOSQUITO	0.6316			0
79	Tuscola	POLICE	1.3300			0
79	Tuscola	RECYCLING	0.1500			0
79	Tuscola	ROADS	0.9657			0
79	Tuscola	ROADS/HWY/BRIDGES	0.4807			0
79	Tuscola	SENIORS	0.3200			0
79	Tuscola	VETERANS	0.1700			0
79	Tuscola	MSU EXTENSION	0.1000			0
<b>79 Total</b>			8.3121			
80	Van Buren	CONSERVATION DISTRICT	0.0991			0
80	Van Buren	VETERANS	0.0995			0
80	Van Buren	ALLOC/CHARTER	4.4347			0
80	Van Buren	AMBULANCE/ALS/EMS	0.9324			0
80	Van Buren	POLICE	0.5332			0
80	Van Buren	ROADS	0.9721			0
80	Van Buren	TRANSIT/BUS	0.2458			0
<b>80 Total</b>			7.3168			
81	Washtenaw	PARKS/REC	0.2260			0
81	Washtenaw	PARKS/REC	0.2474			0
81	Washtenaw	ROADS	0.4950			0
81	Washtenaw	VETERANS	0.0960			0

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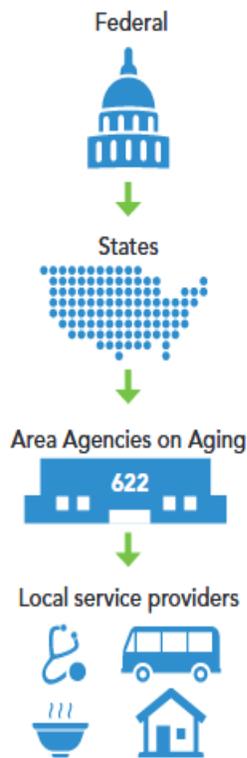
CountyCode	CountyName	MillagePurpose	MillageRate	MillageRateType	DNRTaxAuth	Imported
81	Washtenaw	CONSERVATION DISTRICT	0.0197			0
81	Washtenaw	PUBLIC SAFETY	0.9693			0
81	Washtenaw	ALLOC/CHARTER	4.3512			0
81	Washtenaw	EMS 911/CENTRAL DISPATCH	0.1910			0
81	Washtenaw	PARKS/REC	0.2387			0
<b>81 Total</b>			<b>6.8343</b>			
82	Wayne	ALLOC/CHARTER	5.6099		CH	0
82	Wayne	EV OPER. GENERAL	0.9464		OB	0
82	Wayne	PARKS/REC	0.2442		OB	0
82	Wayne	PUBLIC SAFETY/JAIL	0.9358		OB	0
82	Wayne	VETERANS	0.0365		ST	0
<b>82 Total</b>			<b>7.7728</b>			
83	Wexford	SENIORS	0.9825			0
83	Wexford	VETERANS	0.0981			0
83	Wexford	ALLOC/CHARTER	6.6615			0
83	Wexford	ANIMAL CONTROL/SHELTER	0.1964			0
83	Wexford	PUBLIC SAFETY	1.4246			0
83	Wexford	MSU EXTENSION	0.1669			0
<b>83 Total</b>			<b>9.5300</b>			

Data Source: <https://eequal.bsasoftware.com/ReportSelectionForm.aspx>

## Background & History of Local Appropriations

The Branch-St. Joseph Area Agency on Aging (Region IIC) was formed under the Branch-Hillsdale-St. Joseph Community Health Agency and designated by the Michigan Commission on Services to the Aging on October 1, 1996.

### The Aging Network



Area Agencies on Aging (AAAs) were established under the Older Americans Act (OAA) in 1973 to respond to the needs of Americans 60 and over in every local community. By providing a range of options that allow older adults to choose the home and community-based services and living arrangements that suit them best, AAAs make it possible for older adults to “age in place”. Nationally there are over 620 AAA’s, in Michigan there are 16 regional planning & service areas.

After receiving input from consumers, service providers and other interested stakeholders, the AAA develops an Annual Implementation Plan which outlines community needs and recommendations for programs and services targeted to the needs of older adults. The Plan is updated regularly, monitored for compliance by the Bureau of Aging, Community Living, and Supports (ACLS Bureau) and carried out locally by AAA IIC staff.

AAAs are also tasked by the OAA to serve as advocates for older adults, enabling the agency’s leaders to engage on local and state issues beyond the programs and services they fund or deliver.

AAAs contract with local service providers to deliver many direct aging services, such as meals, transportation and in-home services.

Most AAAs are direct providers of Information and Referral/Assistance, case management, benefits/health insurance counseling and family caregiver support programs.

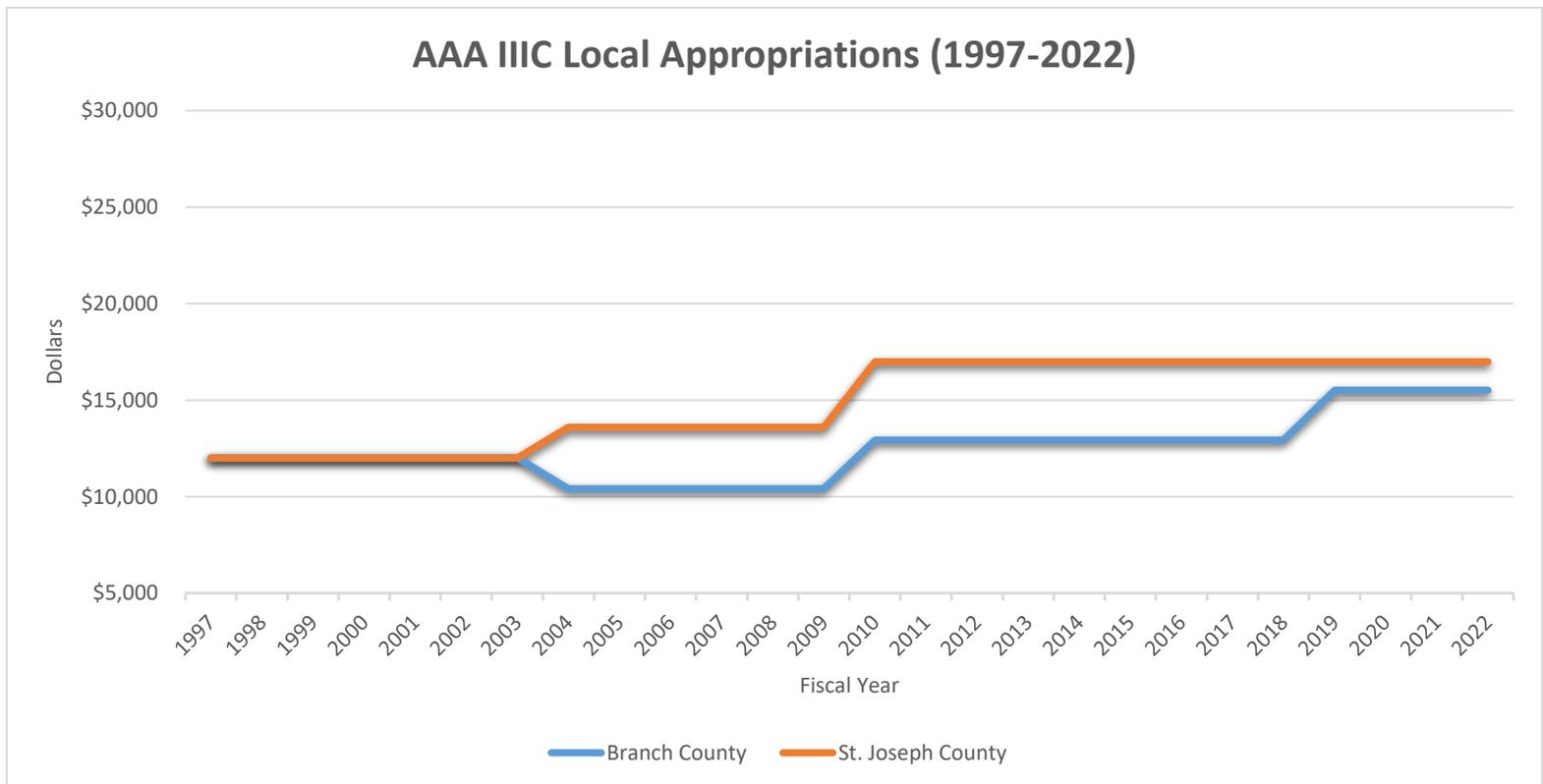
Federal and State dollars are allocated to Area Agencies on Aging for both service provision and administrative function. The Annual Implementation Plan document includes a budget component and a program development component which outlines services, funding and how the region will address unique needs over the coming year. For administrative costs beyond the allowable funding levels under an approved AIP, the matching resources must be provided from non-federal, local sources.

Annually, each County Board of Commissioners makes a local appropriation to AAA Region IIIC to meet the federal and state administrative match requirement as well as to support the local Area Agency on Aging’s Implementation Plan. The BHSJ Community Health Agency Board of Health serves as the AAA Policy Board. As such, the AAA Director is fully engaged with the board and regularly provides information related to:

- Programmatic & local aging network updates
- State/federal guidance & correspondence related to AAA performance
- Engages Board of Health committees for grant making, policy development, and network quality improvement initiatives
- Data trends, community needs and network performance

These local appropriations are used twofold:

1. To meet the required administrative match for state and federal funding sources (*again, this is separate from the service match that AAA sub-grantees provide as a stipulation of receiving fed/state funding*)
2. To carry out agency operations which includes: contract monitoring & compliance, community needs assessment, program development, state/federal programmatic reporting, and provision of core services across the region, including; Information & Assistance/Referral, Community Living Program, health insurance/benefits counseling, and Friendly Reassurance



In FY2020, Branch County approved the requested increase (from \$12,929 to \$15,515). In FY2020 St. Joseph County did not approve the increase. Looking ahead to FY2024, we would request the Board of Health to authorize agency staff to request an increase from the St. Joseph County Board of Commissioners from \$16,989 to \$20,387 (20%).

# PUBLIC COMMENT

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