

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

Table of Contents

Executive Summary

Public Feedback

Access Services

Direct Service Request

2027–2029 MYP Goals

Planned Service Array

Program Development Spending Plan

Advocacy Strategy

Planning and Service Area Aging Landscape

Greatest Economic and Greatest Social Need

Coordination to Serve Native American Elders and Family Caregivers

Executive Summary

1. Provide a brief history of your AAA and PSA including the mission statement, vision, service population, and primary focus for the next three years.

Region IV Area Agency on Aging (RIV AAA) is a private, not-for-profit organization, established in 1974 to plan, develop, and coordinate a comprehensive system of services designed to meet the needs of older adults and caregivers in Southwest Michigan. RIV AAA works to ensure that older adults have access to the supports and services necessary to remain independent, healthy, and engaged in their communities for as long as possible. Since its inception, the agency has served as a regional leader in identifying emerging needs, building community partnerships, and leveraging federal, state and local resources to improve the quality of life for aging adults.

RIV AAA is designated by the Michigan Department of Health and Human Services through the Bureau of Aging, Community Living, and Supports (ACLS Bureau) to carry out the responsibilities of an Area Agency on Aging, as authorized under the Older Americans Act and its subsequent amendments. The Older Americans Act established the national infrastructure for delivering home and community-based services that promote independence, dignity, and well-being for individuals age 60 and older. In Michigan, the work of the aging network is further strengthened by the Older Michiganians Act, which provides additional state resources to support programs and services for older residents. Together, these laws provide the framework through which RIV AAA plans, coordinates, funds, and evaluates services designed to address the needs of older adults and caregivers.

RIV AAA is governed by an independent Board of Directors and supported by an Advisory Council that reflects the demographic and geographic diversity of the region. The Advisory Council helps ensure that the voices of those served by the agency are incorporated into planning and decision-making processes. Through this governance structure, RIV AAA maintains strong community accountability while aligning regional priorities with state and federal aging policies.

The agency operates under the mission “Offering Choices for Independent Lives,” with the vision that “through choice and range of service, every aging adult lives a quality life.” These guiding principles emphasize consumer choice, dignity, and self-determination. RIV AAA strives to ensure that older adults and caregivers have access to the information, resources, and services they need to remain independent and actively engaged in their communities.

RIV AAA serves as the focal point for aging services within its designated Planning and Service Area (PSA), which includes Berrien, Cass, and Van Buren counties in Southwest Michigan. This three-county region is home to a growing and increasingly diverse population of older adults. Current demographic estimates indicate that more than 80,000 residents across the region are aged 60 and older, representing a significant and steadily increasing portion of the total population. As in many parts of Michigan, the aging population within the PSA is expected to continue to grow over the next decade. This demographic shift is accompanied by an increasing prevalence of chronic conditions, mobility challenges, and caregiving needs, placing greater demand on community-based services and supports.

Within its PSA, RIV AAA prioritizes services for individuals with the greatest economic and social needs. The agency also places special emphasis on supporting family caregivers who provide essential unpaid care to older relatives and loved ones. By focusing resources on those most in need, RIV AAA helps ensure that

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

vulnerable residents are able to maintain independence and remain safely in their homes and communities.

To accomplish this work, RIV AAA manages and administers a broad range of programs and services funded through federal, state, and local sources. These services include, but are not limited to, nutrition programs, caregiver support services, transportation assistance, in-home supports, health promotion and disease prevention programs, information and assistance, and advocacy initiatives. The agency works collaboratively with a network of community-based organizations, local governments, healthcare providers, and nonprofit partners to ensure services are delivered efficiently and effectively throughout the region .

The RIV AAA Multi-Year Plan (MYP) for the period of October 1, 2026, through September 30, 2029, outlines the agency's strategic direction for the next three years. The plan builds upon regional planning and community engagement and reflects the evolving needs of the population served. The MYP sets forth strategies to maintain and strengthen a coordinated system of home and community-based services that enable aging adults and individuals with disabilities to live independently while also supporting caregivers in their vital role.

Over the next three years, RIV AAA will focus on several key priorities designed to address emerging challenges and opportunities within the aging services network. A primary focus will be expanding access to home and community-based services that allow older adults to safely age in place. This includes strengthening in-home support programs, enhancing access to personal care and homemaker services, and ensuring that individuals are able to remain in their homes for as long as possible with the appropriate services.

Another major priority will be supporting and strengthening family caregivers. Caregivers provide most of the long-term care for older adults, often at significant personal, financial, and emotional cost. RIV AAA will continue to expand caregiver education, respite services, and support programs that help caregivers maintain their own health and well-being while providing care to others.

Addressing workforce challenges within the direct care system is also a critical focus area. Like many regions across the country, Southwest Michigan is experiencing shortages of direct care workers, which can limit access to essential home-based services. RIV AAA will continue to work with community partners, workforce development organizations, and training providers to strengthen the direct care workforce pipeline and promote sustainable employment opportunities within the caregiving sector.

RIV AAA will also prioritize efforts to inspire dementia-friendly and age-friendly communities throughout the region. As the number of individuals living with Alzheimer's disease and other forms of dementia continues to increase, communities must be equipped to respond with understanding, resources, and supportive environments. Through education, partnerships, and community engagement initiatives, the agency will work to reduce stigma and improve community capacity to support individuals experiencing cognitive change.

Reducing social isolation and improving access to essential services will remain a key component of RIV AAA's work. The agency will continue to strengthen programs that address nutrition, transportation, and adult day services, recognizing that access to these services play a significant role in maintaining physical health, emotional well-being, and community connection for older adults.

Finally, RIV AAA will continue to build and strengthen partnerships across the aging network and broader community. Collaborating with stakeholders is essential to addressing the complex needs of an aging

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

population. By fostering strong relationships and coordinated strategies, RIV AAA will help ensure that the region is well positioned to respond to evolving needs of older adults and caregivers.

Through its mission-driven approach and strong community partnerships, RIV AAA remains committed to enhancing the quality of life for older adults and caregivers throughout Southwest Michigan. The agency will continue to serve as a trusted leader and convener within the region, working collaboratively to create communities where aging adults have the support, choice, and opportunity to live healthy, independently, and fulfilling lives.

2. Describe how the AAA used data from the assessment of unmet needs and the perspectives of older adults, family caregivers, service providers, and the public to inform and develop the multi-year plan. [See OAA §1321.65(b)(3); OMA 400.586; Operating Standard for AAAs C-2(4).]

As part of the development of the Multi-Year Plan (MYP), Region IV Area Agency on Aging (RIV AAA) conducted a robust and comprehensive assessment of the needs of older adults, family caregivers, service providers, and community stakeholders throughout its three-county Planning and Service Area (PSA), which includes Berrien, Cass, and Van Buren counties. The assessment process was designed to ensure that the MYP reflects the real and emerging needs of the region's aging population.

To gather input directly from the community, RIV AAA designed and distributed four separate surveys targeted at key stakeholder groups. These included surveys for older adults, caregivers, community partners/providers, and internal staff. Each survey was developed to capture perspectives on current services, barriers to accessing support, emerging community needs, and opportunities for improvement. The surveys were distributed widely using both digital and community-based outreach strategies. Online survey links were shared through the RIV AAA website, social media platforms, and email distribution lists. Surveys were also sent directly to RIV AAA provider networks, partner organizations, and community stakeholders. Recognizing the importance of hearing from diverse populations, RIV AAA intentionally engaged Advisory Council members and community partners who have connections to minority populations, rural communities, and other historically underserved groups. These individuals assisted in sharing survey opportunities and encouraging participation among individuals who may not otherwise have been aware of the process. This targeted outreach helped ensure that the voices of individuals with the greatest economic and social needs were included in the planning process. In total, 546 individuals completed the surveys, representing a wide cross-section of consumers, caregivers, service providers, and community stakeholders from across the three counties. Responses provided valuable insights into service utilization patterns, gaps in available services, and emerging needs among the region's aging population.

In addition to surveys, RIV hosted community conversations and stakeholder interviews to gather more in-depth feedback. These conversations allowed participants to share personal experiences, discuss challenges related to aging and caregiving, and provide recommendations for improving services. A total of 26 individuals participated in the community conversations and stakeholder interviews. These discussions provided rich qualitative insights and allowed RIV AAA staff to explore themes that emerged from the surveys in greater depth. Participants spoke about the importance of maintaining independence, the challenges of navigating available resources, and the need for stronger coordination among service providers.

RIV AAA also examined internal program and service utilization data to identify trends and unmet needs within the region. This included reviewing information collected through the agency's Information and Assistance (I&A) services. Analysis of call data provided insight into the most frequently requested services, common

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

barriers encountered by older adults and caregivers, and emerging areas of demand. By combining community input with operational data, RIV AAA was able to develop a clearer picture of service gaps and opportunities for system improvement.

In addition to primary data collection, RIV AAA conducted a thorough review of secondary data to provide a broader context for regional planning. These data sources included demographic trends, health indicators, economic conditions, and population projections relevant to older adults and caregivers in Southwest Michigan. Key secondary data sources included Community Needs Assessments conducted by regional partners, including Corewell Health, Bronson Health, InterCare Community Health Network, Southwest Michigan Community Action Agency, and Berrien County Community Mental Health Authority. These reports provided important information related to chronic disease prevalence, behavioral health concerns, social determinants of health, and healthcare access barriers affecting residents in the region. Additional data sources included the U.S. Census, regional demographic reports, the Eldercare Locator Data Report, and the Caregiving in the United States Report. These resources helped identify trends related to population aging, caregiver demographics, income levels, housing conditions, and other factors that influence the well-being of older adults.

Analysis of the combined data revealed several consistent themes and priority areas that informed the development of the Multi-Year Plan.

Aging in Place. Many respondents indicated a strong desire to remain in their homes and communities as they age. However, barriers such as limited access to in-home services, home maintenance challenges, and safety concerns can make this difficult. As a result, the MYP prioritizes expanding access to personal care and homemaker services, increasing availability of chore and minor home repair assistance, and coordinating home modification services.

Transportation and Mobility. Reliable transportation was identified as one of the most significant barriers facing older adults in the region, particularly in rural areas. Respondents emphasized the need for expanded transportation options to access medical appointments, grocery stores, community programs, and other essential destinations. RIV AAA will focus on strengthening coordinated transportation services, prioritizing medical and essential trips, and improving outreach to underserved populations.

Housing Stability and Home Safety. The data also highlighted concerns related to housing affordability, accessibility, and safety. Many older adults live in homes that require repairs or modifications to remain safe and functional. The MYP includes strategies to connect individuals to affordable housing resources, expand access to home safety modifications and repairs, and integrate fall prevention strategies into housing interventions.

Caregiver and Dementia Support. Family caregivers play a critical role in supporting older adults but often report high levels of stress and limited access to respite services. Additionally, the growing prevalence of dementia creates additional challenges for caregivers and communities. As a result, the MYP prioritizes caregiver education and training, expanded respite services, and increased availability of dementia-specific programs and supports.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

Care Coordination and Case Management. Many survey respondents and focus group participants noted that navigating available services can be confusing and overwhelming. Strengthening care coordination and case management was identified as an important strategy for helping individuals access the services they need. RIV AAA will continue to provide comprehensive assessment and care planning, strengthen referral and follow-up processes, and improve coordination among service providers.

The information gathered through surveys, community conversations, stakeholder interviews, internal data review, and secondary data analysis played a central role in shaping the priorities, goals, and strategies outlined in the Multi-Year Plan. By integrating community perspectives with objective data sources, RIV AAA ensured that the plan reflects both current needs and anticipated future challenges. This data-driven approach allows RIV AAA to allocate resources strategically, strengthen partnerships across the aging network, and implement targeted initiatives that improve outcomes for older adults and caregivers throughout Southwest Michigan. Through continued evaluation and engagement with community stakeholders, RIV AAA will monitor progress and adapt strategies as needed to ensure the region remains responsive to the evolving needs of its aging population.

3. List all awards and accreditations received by the AAA.

Accreditations:

- Inform USA Certified
- NCQA Accreditation
- MiGen LGBTQ+ Affirming Organization
- Michigan Veteran Connector

Awards:

- 2023 Aging Innovations Award from USAging in the Health-Longterm Services and Supports Integration Category
- Runner Up for The John A. Hartford Foundation 2023 Business Innovation Award
- 2024 Aging Innovations Award from USAging in the Healthy Aging Category
- 2025 Herald Palladium Readers' Choice Award
- 2025 Aging Innovations Award from USAging in the Healthy Aging Category
- 2025 Aging Achievement Award from USAging in the Healthy Aging Category
- Moody on the Market 20 Best Places to Work in Southwest Michigan

4. Does your AAA have a Strategic/Long-Term Plan?

Yes No

Please describe your Strategic/Long-Term Plan and how it informed the development of the MYP.

Region IV Area Agency on Aging (RIV AAA) maintains an ongoing, multi-layered strategic planning process that guides long-term organizational direction and informs the development of the Multi-Year Plan (MYP). This process extends beyond any single planning document or board cycle and reflects continuous assessment of community need, program performance, policy direction, financial sustainability, and RIV AAA's evolving role within the broader health and human services system.

Within this broader strategic framework, the Board of Directors plays a critical role. In FY26, RIV AAA is

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

intentionally using regularly scheduled board meetings as a key forum for structured strategic engagement. These board discussions are designed to complement and strengthen the organization’s ongoing strategic planning work by providing governance-level perspective, policy alignment, and long-range guidance on priority areas.

Each FY26 board meeting includes targeted strategic content—supported by CEO reports, financial and programmatic dashboards, and forward-looking issue briefs—that invites board dialogue on emerging trends, risks, and opportunities. This iterative engagement allows strategic priorities to be refined over time, rather than addressed through a one-time planning exercise and ensures that board input is integrated into management-led planning and implementation.

The MYP reflects the convergence of these efforts. It translates the organization’s ongoing strategic planning work, informed and reinforced through FY26 board engagement, into a coherent multi-year roadmap. In doing so, the MYP balances continuity of core Older Americans Act responsibilities with innovation, infrastructure development, and the AAA’s long-term vision for strengthening community-based systems that support older adults’ independence and well-being.

Demographic Data for PSA

Population	Census (most current data available)	AAA Population Served Last Fiscal Year (NAPIS)
Total Population 60+ (%)	28.56	2.60
Race/Ethnicity 60+ (%)		
a. Black/African American	7.01	13.61
b. Asian	0.70	0.24
c. White	87.81	71.17
d. Hispanic/Latino	2.12	1.51
e. Other	4.48	2.63
Total 60+ Population in Rural areas (%)	100.00	98.10
Total 60+ Population at Poverty Level (%)	10.62	24.99
Total 85+ Population (%)	8.91	21.58
Total 60+ Non-English-Speaking Population (%)	4.12	0.34

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

Public Feedback

1. Did the AAA hold at least one public hearing on the MYP in your PSA? Yes No
2. Was the meeting held in an accessible facility or virtually following AAA requirements? Yes No
3. Did the AAA send an official notification of the complete MYP to your county/local government and Tribes within the PSA for review and consultation? Yes No
4. Was the Notice of Public Hearing(s) sent at least 30 days in advance of the scheduled hearing(s)? Yes No
5. Did the hearing notice include accessibility information for participants seeking to attend either in person or virtually? Yes No
6. Did a representative from either the Policy and/or Advisory Board(s) attend the hearing(s)? [See OAA 1321.63(a)(2)(3)(4)(5).] Yes No

7. Describe how your agency involved the Policy and/or Advisory Boards in encouraging and promoting participation to capture public feedback.

Region IV Area Agency on Aging (RIV AAA) actively engaged its Advisory Council and Board of Directors throughout the development of the Multi-Year Plan (MYP) to ensure that the planning process reflected the needs, experiences, and priorities of older adults, caregivers, and community stakeholders across the region. RIV AAA recognizes that community participation and consumer input are essential components of effective planning within the aging network. By involving the Advisory Council in outreach and engagement activities, RIV AAA strengthened its ability to capture meaningful public feedback and ensure the plan reflects the diverse perspectives of its Planning and Service Area (PSA). RIV AAA's Advisory Council played a particularly important role in representing the interests of older adults and caregivers within the agency's service area. The Council includes individuals who reflect the demographic, geographic, and professional diversity of the region, including older adults, family caregivers, service providers, advocates, and representatives from community-based organizations. This structure allows the Advisory Council to serve as a critical bridge between RIV AAA and the communities it serves.

During the MYP development process, the Advisory Council was engaged early and consistently to help guide outreach efforts and promote participation in the needs assessment activities. Council members were informed about the planning process, timelines, and engagement opportunities, and were encouraged to actively assist in expanding awareness of the surveys, community conversations, and public comment opportunities throughout the region.

One of the primary ways the Advisory Council supported community engagement was by promoting participation in the multi-stakeholder surveys that were distributed as part of the needs assessment process. Members shared survey information with their personal and professional networks, including local organizations, community groups, and advocacy groups. By leveraging existing relationships and community connections to Council members, RIV AAA was able to extend outreach beyond traditional service networks and reach individuals who may not otherwise have been aware of the opportunity to provide input.

Advisory Council members also played a key role in encouraging participation among populations that may be more difficult to reach through traditional outreach methods. Several members have direct connections

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

to minority communities, rural populations, and underserved groups within the PSA. These members helped promote participation among individuals who may face barriers to engagement, including limited access to technology, transportation challenges, or limited familiarity with aging services programs. This targeted outreach helped ensure that the feedback collected during the needs assessment process reflected a broad range of perspectives.

In addition to promoting surveys, Advisory Council members assisted in raising awareness about community conversations that were conducted during the planning process. Members shared information about these opportunities through community meetings, professional networks, and local organizations, helping to increase participation and ensure representation from residents across Berrien, Cass, and Van Buren counties. The Council's involvement in outreach helped create a more inclusive engagement process and reinforced the agency's commitment to transparency and community collaboration.

Beyond outreach activities, the Advisory Council also served an important consultative role in interpreting the results of the needs assessment and identifying emerging issues that should be addressed through the Multi-Year Plan. Following the completion of survey collection and community conversations, RIV AAA staff presented summary findings to the Advisory Council during a regularly scheduled meeting. The presentation included key data points, common themes identified through community feedback, and emerging trends related to aging, caregiving, housing, transportation, and access to services.

Council members reviewed and discussed these findings in detail, providing valuable insight based on their professional experience and direct knowledge of community conditions. Members were encouraged to ask questions, share observations from their own work and communities, and identify additional considerations that may not have been fully captured through the data alone. These discussions helped contextualize the survey findings and ensured that the planning process incorporated both quantitative data and real-world experience.

Through these conversations, the Advisory Council provided recommendations regarding priority issues that should be addressed within the MYP. Council members emphasized the importance of strengthening access to home and community-based services, expanding transportation options, supporting family caregivers, and improving coordination among service providers. They also highlighted the growing need for dementia-related education and community awareness, as well as the importance of addressing social isolation and housing stability for older adults.

The Board of Directors was also kept informed throughout the planning process and provided oversight to ensure that the development of the MYP remained aligned with the organization's mission and strategic priorities. Updates on the needs assessment process, community engagement activities, and emerging themes were shared with the Board during regular meetings. Board members offered additional perspectives on community trends, policy considerations, and opportunities for collaboration with other regional partners.

Together, the Advisory Council and Board of Directors helped reinforce the agency's commitment to a participatory planning process. Their involvement not only expanded outreach and engagement efforts but also helped validate the findings of the needs assessment and ensure that the priorities reflected in the MYP are responsive to community needs.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

The engagement of these leadership bodies also strengthened transparency and accountability throughout the planning process. By reviewing findings, discussing community input, and contributing recommendations, Advisory Council and Board members ensured that the voices of older adults, caregivers, and service providers remained central to the development of the plan.

Through these combined efforts, RIV AAA was able to capture diverse perspectives from across its service area and ensure that the Multi-Year Plan reflects the priorities, challenges, and opportunities identified by the communities it serves. The continued involvement of the Advisory Council and Board of Directors will remain an important component of implementing the plan and monitoring progress over the next three years, ensuring that RIV AAA remains responsive to the evolving needs of older adults and caregivers throughout Southwest Michigan.

8. Please provide a description of the use of U.S. Mail and electronic means for MYP distribution.

Region IV Area Agency on Aging (RIV AAA) utilizes a comprehensive, multi-modal approach to distribute its Multi-Year Plan (MYP), ensuring broad accessibility, transparency, and meaningful stakeholder engagement across Berrien, Cass, and Van Buren counties. Recognizing the diverse communication preferences, technological access levels, and needs of older adults, caregivers, service providers, and community partners, RIV AAA strategically employs both traditional U.S. Mail and a variety of electronic methods to maximize reach and participation.

U.S. Mail remains a critical component of RIV AAA's MYP distribution strategy, particularly for reaching older adults, rural residents, and individuals with limited or no internet access. RIV AAA ensures that individuals receiving services, as well as those on mailing lists for newsletters or program updates, Advisory Council members, Board of Directors, local government officials, and community-based organizations throughout the region are notified of the MYP's availability and opportunity for input. Mailings include clear instructions on how to request a full printed copy of the plan, submit comments, and participate in public hearings. Self-addressed, stamped response options are provided when feasible to reduce barriers to engagement.

This approach is especially important in rural areas within the region where broadband access may be inconsistent. By leveraging U.S. Mail, RIV AAA ensures equitable access to planning documents and reinforces its commitment to inclusivity for individuals who may otherwise be excluded from digital communication channels.

Complementing its traditional outreach, RIV AAA employs a robust electronic distribution strategy to efficiently disseminate the MYP to a wide and diverse audience. The agency prominently posts the full MYP document and public comment notices on its official website, ensuring that materials are accessible, downloadable, and compliant with accessibility standards.

Email distribution lists are a primary tool for outreach, enabling RIV AAA to quickly share MYP materials with thousands of stakeholders, including service providers, caregivers, and community members. Emails include direct links to the plan and information regarding public hearings.

Social media platforms further expand the reach of the MYP. RIV AAA uses these channels to share visually engaging posts and reminders about opportunities for public input. Social media allows for real-time interaction and helps engage a broader audience, including family caregivers and community members who may not be connected through traditional aging network channels.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

Through the combined use of U.S. Mail and electronic means, RIV AAA ensures that its Multi-Year Plan is widely accessible, promotes inclusive participation, and reflects the needs and priorities of the diverse communities it serves. This balanced approach underscores the agency's commitment to transparency and community-driven planning.

9. Please provide a summary of oral and written testimony received, and its impact on the development of the MYP.

TBD

10. Describe the AAA's approach to ensure the MYP was shared with the aging network, family caregivers, service providers and the public.

Region IV Area Agency on Aging (RIV AAA) is committed to maintaining a transparent, inclusive, and collaborative planning process that ensures community stakeholders remain informed and engaged in shaping services for older adults and caregivers. RIV AAA implemented a comprehensive communication and outreach strategy to ensure that the Multi-Year Plan (MYP) was widely shared with the aging network, family caregivers, service providers, and the public throughout the Planning and Service Area (PSA).

The agency's approach to sharing the MYP included multiple communication channels designed to reach a broad and diverse audience. Recognizing that stakeholders access information in different ways, RIV AAA used both digital and in-person methods to distribute information, promote public review opportunities, and encourage feedback. This multi-faceted strategy ensured that individuals, organizations, and community partners across Berrien, Cass, and Van Buren counties had meaningful opportunities to learn about the plan and participate in the planning process.

One of the primary tools used to share the MYP was the RIV AAA website. The website serves as a central hub for information related to programs, services, and agency initiatives, and it was used to make the Multi-Year Plan publicly available for review. The plan and supporting materials were posted online, allowing community members and stakeholders to access the document at their convenience. Information about opportunities for public comment was also included to provide context and encourage engagement.

In addition to website postings, RIV AAA utilized its email communication systems to distribute information about the MYP. Email communication allowed the agency to directly reach its network of contracted service providers and partner organizations. These providers play a critical role in delivering services, and their input is essential to ensuring that the plan reflects operational realities and service delivery challenges. By sharing the plan directly with providers, RIV AAA encouraged feedback from organizations that work closely with older adults and caregivers on a daily basis.

Community engagement also occurred through participation in broader stakeholder gatherings and coalition meetings throughout the region. RIV AAA staff regularly participate in community collaboratives, healthcare partnership meetings, and regional planning groups. These forums provided valuable opportunities to share information about the MYP, discuss emerging issues affecting older adults and caregivers, and encourage stakeholders to review and comment on the plan.

Collaboration with partner organizations further expanded the reach of the MYP. RIV AAA works closely with a wide range of community partners, including nonprofit organizations, healthcare systems, senior centers, and advocacy groups. These partners helped share information about the plan through their own communication channels. By leveraging these partnerships, the agency was able to extend outreach beyond its immediate networks and reach additional community members.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

Public comment opportunities were clearly communicated through all outreach channels. Stakeholders were invited to review the draft plan and provide feedback through multiple mechanisms, including written comments, email submissions, and participation in community discussions. This open feedback process allowed the agency to gather additional perspectives and ensure that the final plan reflects community priorities.

Throughout the outreach process, RIV AAA emphasized the importance of community involvement in shaping the future of aging services within the region. The agency recognizes that the needs of older adults and caregivers continue to evolve, and that effective planning requires ongoing dialogue with the communities it serves. By proactively sharing the MYP and encouraging feedback, RIV AAA reinforced its commitment to collaborative planning and community accountability.

These outreach and communication efforts helped ensure that the MYP was widely accessible to the aging network, service providers, family caregivers, and the general public. By utilizing a combination of digital communication, community engagement, partner collaboration, and direct outreach, RIV AAA was able to reach a broad audience and promote transparency throughout the planning process.

Moving forward, RIV AAA will continue to share updates on the implementation of the MYP and maintain open communication with stakeholders. Ongoing engagement with community partners, service providers, and residents will remain an important component of ensuring that the agency's programs and initiatives continue to respond effectively to the needs of older adults and caregivers throughout Southwest Michigan .

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

Access Services

Care Management

Starting Date 10/01/2026 Ending Date 09/30/2029

Total of Federal Dollars Total of State Dollars

Geographic area to be served

Berrien, Cass, Van Buren

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

Goal: Provide comprehensive, person-centered Care Management to older adults that promote independence and quality of life and enables them to continue living safely in their home.

Activities:

- Continue to implement a holistic, person-centered model of care coordination that allows Care Managers the flexibility to provide care, support, and services based on the unique needs and preferences of participants and their chosen or legal representative(s).
- Provide comprehensive telephonic and in-person professional assessment, consultation, care planning, and service arrangement and monitoring.
- Provide ongoing home and community-based services and supports to meet needs as identified during the person-centered planning process.
- Provide health coaching and motivational interviewing to engage and empower participants and their caregivers towards action that improves management of chronic conditions, self-care, and overall quality of life.
- Provide conflict-free information and assistance in accessing community resources.
- Engage participants in person-centered emergency preparedness planning.
- Provide seamless transition of participants among programs as changes in eligibility allow.
- Assure high quality service is being provided through annual participant surveys.
- Implement continuous quality improvement efforts to meet or exceed ACLS Bureau Quality Outcome Measures.
- Provide staff in-services and training opportunities specifically designed to increase knowledge and understanding of the program and participants and improve skills in completion of job tasks.
- Engage in interdepartmental training, collaboration, and horizontal process improvement to explore and implement efficiencies that maximize staff expertise to provide seamless transition and support for consumers served.
- Perform reviews of at least 10% of active caseload annually.

Case Coordination and Support

Starting Date 10/01/2026 Ending Date 09/30/2029

Total of Federal Dollars Total of State Dollars

Geographic area to be served

Berrien, Cass, Van Buren

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

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

Goal: Provide comprehensive, person-centered Case Coordination & Support to older adults that promotes independence and quality of life and enables them to continue living safely in their home.

Activities:

- Continue to implement a holistic, person-centered model of care coordination that allows Care Managers the flexibility to provide care, support, and services based on the unique needs and preferences of participants and their chosen or legal representative(s).
- Provide comprehensive telephonic and in-person professional assessment, consultation, care planning, and service arrangement and monitoring.
- Provide ongoing home and community-based services and supports to meet needs as identified during the person-centered planning process.
- Provide health coaching and motivational interviewing to engage and empower participants and their caregivers towards action that improves management of chronic conditions, self-care, and overall quality of life.
- Provide conflict-free information and assistance in accessing community resources.
- Engage participants in person-centered emergency preparedness planning.
- Provide seamless transition of participants among programs as changes in eligibility allow.
- Assure high quality service is being provided through annual participant surveys.
- Implement continuous quality improvement efforts to meet ACLS Bureau Quality Outcome Measures .
- Provide staff in-services and training opportunities specifically designed to increase knowledge and understanding of the program and participants and improve skills in completion of job tasks.
- Engage in interdepartmental training, collaboration, and horizontal process improvement to explore and implement efficiencies that maximize staff expertise to provide seamless transition and support for consumers served.
- Perform reviews of at least 10% of active caseload annually.

Information and Assistance

<u>Starting Date</u>	10/01/2026	<u>Ending Date</u>	09/30/2029
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<u>Total of Federal Dollars</u>		<u>Total of State Dollars</u>	
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Geographic area to be served

Berrien, Cass, Van Buren

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

Goal: Provide comprehensive, person-centered Information and Assistance (I&A) that promotes independence and quality of life and empowers older adults and caregivers to make informed decisions and access community resources needed to support their long-term care choices.

Activities:

- Facilitate person-centered, conflict-free access to information and home and community-based services for individuals (professional and community) by answering all requests timely and completely.
- Conduct screening, assessment, and intake for appropriate program referrals.
- Provide staff in-services and training opportunities specifically designed to increase knowledge and understanding of the program and participants, and to improve skills in completion of job tasks.
- Maintain SHIP counselor certification for all I&A staff. New staff hired will become SHIP certified within one year of hire.
- Implement training for AIRS certification for new staff.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

- Maintain a resource database to ensure individuals are provided with an array of current and accurate information to meet the needs of the aging, disability, and caregiver population in the service area.
- Assure high quality service is being provided by annually surveying participant satisfaction levels.
- Continue to extrapolate and analyze data from the I&A data system for outcome-driven quality improvement.
- Continue refining review documentation process.
- Engage in interdepartmental training, collaboration, and horizontal process improvement to explore and implement efficiencies that maximize staff expertise to provide seamless transition and support for consumers served.
- Provide education and outreach at senior centers, health fairs, housing complexes, and other professional agencies and events.

Outreach

Starting Date 10/01/2026 Ending Date 09/30/2029

Total of Federal Dollars Total of State Dollars

Geographic area to be served

Berrien, Cass, Van Buren

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

Goal: Provide inclusive, culturally, and linguistically appropriate outreach and communication that engages older adults, caregivers, community groups, and human services agencies and builds awareness of and access to aging resources and information.

Activities:

- Facilitate conflict-free outreach and communication about aging information and resources.
- Create materials that reflect the diverse population served in a variety of formats including, but not limited to print, digital, social media, presentations, events, and other efforts to reach broad and diverse audiences.
- Build relationships with a wide range of community-based partners, including, but not limited to, health providers, community focal points, media outlets, and organizations and leaders within the community known and trusted for serving members of minority and underserved populations.
- Provide outreach staff in-services and training opportunities specifically designed to increase knowledge and understanding of aging services, providers, and population served, and to improve skills in competition of job tasks.
- Engage in interdepartmental training, collaboration, and horizontal process improvement to explore and implement efficiencies that maximize staff expertise to provide seamless transition and support for consumers served.
- Provide education and outreach at senior centers, health fairs, housing complexes, community groups, faith-based organizations, health care facilities, and other professional agencies and events.
- Empower AAA staff, volunteers, board and advisory council members, providers, and other key community partners, organizations, and businesses to be brand ambassadors for RIV AAA.

Options Counseling

Starting Date 10/01/2026 Ending Date 09/30/2029

Total of Federal Dollars Total of State Dollars

Geographic area to be served

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

- Provide immediate and short-term home and community-based services and supports to meet needs as identified during the person-centered planning process.
- Provide health coaching and motivational interviewing to engage and empower participants and their caregivers towards action that improves management of chronic conditions, self-care, and overall quality of life.
- Provide conflict-free information and assistance in accessing community resources.
- Engage participants in person-centered emergency preparedness planning.
- Provide seamless transition of participants among programs as changes in eligibility allow.
- Assure high quality service is being provided through participant exit surveys.
- Provide staff in-services and training opportunities specifically designed to increase knowledge and understanding of the program and participants and improve skills in completion of job tasks.
- Engage in interdepartmental training, collaboration, and horizontal process improvement to explore and implement efficiencies that maximize staff expertise to provide seamless transition and support for consumers served.
- Perform reviews of at least 10% of active caseload annually.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

Direct Service Request

Caregiver Support Groups

Total of Federal Dollars

Total of State Dollars

Geographic Area Served Berrien, Cass, Van Buren

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

Goal:

Reduce caregiver stress and isolation by providing consistent, accessible, and supportive peer environments where family caregivers can share experiences, gain emotional support, and build coping strategies.

Objectives:

1. Increase access to caregiver support groups across Berrien, Cass, and Van Buren counties, including rural and underserved areas.
2. Reduce caregiver isolation and stress through regular peer engagement and facilitated discussion.
3. Enhance caregiver resilience and emotional well-being by promoting shared learning and coping strategies.
4. Ensure support groups are inclusive, culturally responsive, and accessible in multiple formats.

Planned Activities:

- Offer regularly scheduled caregiver support groups facilitated by trained staff, volunteers or qualified partners. Groups will provide a safe, confidential space for caregivers to share experiences, challenges, and solutions.
- Provide in-person, virtual, and hybrid support group formats to reduce barriers related to transportation, geography, and scheduling.
- Incorporate guided discussions, educational components, and resource sharing into support group sessions to enhance value and reinforce learning.
- Promote support groups through healthcare providers, community organizations, social media, and direct outreach to caregivers identified through other RIV AAA services.
- Collect participant feedback and track attendance to continuously improve group structure, topics, and accessibility.
- Connect support group participants to additional services such as respite, education, and information and assistance to ensure a comprehensive support system.

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

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

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

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

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

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

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

RIV AAA is requesting to directly provide Caregiver Support Groups due to demonstrated regional need , inconsistent provider availability, and the importance of maintaining quality, continuity, and accessibility of services.

Regional assessments, caregiver surveys, and service data consistently indicate high levels of caregiver stress, burnout, and social isolation. Many caregivers report feeling overwhelmed and lacking emotional support, particularly those caring for individuals with dementia or complex medical needs. Rural caregivers in Berrien, Cass, and Van Buren counties face additional barriers, including transportation challenges and limited access to local support networks. Support groups are identified as a critical intervention to address these needs and improve caregiver well-being.

RIV AAA has explored partnerships with local organizations, healthcare providers, and community groups to offer caregiver support groups. While some providers offer limited or condition-specific groups, availability is inconsistent across the region, and many areas—particularly rural communities—lack regular, accessible support group options. Additionally, existing groups may not be caregiver-specific, may not be facilitated by trained staff, or may not be sustained over time due to funding or staffing constraints .

Effective caregiver support groups require skilled facilitation , consistency, and adherence to best practices to ensure a safe and supportive environment. Direct provision by RIV AAA ensures:

- Trained facilitators with expertise in caregiver issues
- Consistent scheduling and availability
- Standardized protocols for confidentiality and group management
- Integration of resource information and referrals

This level of quality control is difficult to achieve through a decentralized provider network .

Providing support groups directly is a cost-effective strategy. Group-based services allow RIV AAA to serve multiple caregivers simultaneously, maximizing impact with relatively low per-participant cost. Utilizing existing staff, virtual platforms, and community spaces minimizes overhead expenses. Contracting with multiple providers would increase administrative costs and may not result in consistent service delivery across the region.

RIV AAA continues to engage with community partners to expand the availability of caregiver support groups by:

- Sharing facilitation training and best practices
- Encouraging co-facilitation models with partner organizations
- Providing outreach and referral support to existing groups
- Exploring opportunities to host groups in community-based settings

Despite these efforts, provider capacity remains limited and unevenly distributed, necessitating direct service provision to ensure equitable access.

Direct provision allows RIV AAA to strategically locate and schedule support groups to reach caregivers

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

with the greatest need, including those in rural or underserved communities. Virtual options further enhance accessibility for caregivers who cannot attend in person due to caregiving responsibilities or transportation barriers.

By providing services directly, RIV AAA can track participation, measure outcomes (e.g., reduced caregiver stress and isolation), and ensure continuous quality improvement. This supports accountability and strengthens program effectiveness.

Caregiver Support Groups are classified as a direct service under the Older Americans Act, as they provide direct emotional and social support to caregivers. While certain administrative functions (e.g., scheduling, outreach, and data tracking) support implementation, the primary activity—facilitated group engagement that directly benefits caregivers—constitutes a direct service. Direct provision aligns with program intent and ensures effective delivery of this critical support.

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

Caregiver Training

Total of Federal Dollars

Total of State Dollars

Geographic Area Served Berrien, Cass, Van Buren

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

Goal:

Equip family caregivers in Berrien, Cass, and Van Buren counties with hands-on skills, practical knowledge, and confidence to safely and effectively perform caregiving tasks and manage complex care needs.

Objectives:

1. Increase caregiver competency in essential caregiving skills, including personal care, mobility assistance, and condition-specific care.
2. Improve caregiver confidence and preparedness to manage complex and evolving care situations.
3. Reduce preventable health risks and injuries for both caregivers and care recipients through proper training.
4. Expand access to skill-based, practical training opportunities for caregivers across the region, including rural and underserved populations.

Planned Activities:

- Provide interactive, hands-on training sessions focused on core caregiving skills.
- Offer targeted training modules addressing the needs of caregivers supporting individuals with specific conditions.
- Deliver training through a combination of in-person, virtual, and recorded formats to ensure accessibility for caregivers with varying schedules, transportation limitations, and geographic barriers.
- Provide caregivers with take-home materials, instructional guides, and videos to reinforce learning and support ongoing skill development.
- Collaborate with healthcare professionals, therapists, and subject matter experts to co-develop and deliver high-quality training content.
- Identify caregiver training needs through intake and assessment processes and connect individuals

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

to relevant training opportunities.

- Conduct follow-up contacts to assess skill application, address challenges, and connect caregivers to additional supports as needed.

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

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

RIV AAA is requesting to directly provide Caregiver Training services due to significant regional need , limited availability of accessible and affordable training providers , and the importance of ensuring consistent, high-quality, and practical skill development for caregivers.

Regional needs assessments, caregiver feedback, and service data indicate that many caregivers lack the hands-on skills necessary to safely perform caregiving tasks. Caregivers frequently report feeling unprepared to manage physical care needs, complex medical conditions, and behavioral challenges, particularly in cases involving dementia or post-acute care transitions. This lack of training contributes to caregiver stress, increased risk of injury, and potential negative health outcomes for care recipients. Rural caregivers face additional barriers, including limited access to training opportunities and transportation challenges.

RIV AAA has assessed the availability of caregiver training providers within Berrien , Cass, and Van Buren counties. While some healthcare organizations and private entities offer limited training , these services are often:

- Cost-prohibitive for caregivers
- Focused on professional staff rather than family caregivers
- Not available on a consistent or region-wide basis
- Limited in scope or not tailored to caregiver-specific needs

As a result, there is no comprehensive, accessible caregiver training system available to meet the needs of the region.

Caregiver training must be practical, accessible, and tailored to the needs of family and kinship caregivers, who often balance caregiving with other responsibilities. Direct provision by RIV AAA ensures that training is:

- Low-cost or no-cost to participants

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

- Designed specifically for non-professional caregivers
- Offered at convenient times and in accessible formats
- Responsive to evolving caregiver needs

Providing caregiver training directly is a cost-effective approach that leverages RIV AAA's existing staff, partnerships, and infrastructure. Group-based training sessions allow the agency to reach multiple caregivers simultaneously, reducing per-participant costs. Additionally, hybrid and virtual delivery models minimize facility and travel expenses. Contracting with external providers would likely increase costs and limit flexibility in program design and delivery.

RIV AAA has made efforts to collaborate with local healthcare providers, educational institutions, and community organizations to expand caregiver training opportunities. These efforts include:

- Partnering with subject matter experts to deliver training sessions
- Exploring co-facilitation and shared programming models
- Referring caregivers to existing training resources when available

Despite these efforts, provider capacity remains limited, and existing programs do not fully address the needs of family caregivers. Direct service provision is necessary to fill these gaps while continuing to build community capacity.

Direct provision allows RIV AAA to ensure consistent quality, evidence-informed content, and adherence to best practices in caregiver training. The agency can standardize curricula, provide trained facilitators, and monitor outcomes to ensure effectiveness.

By providing services directly, RIV AAA can prioritize caregivers with the greatest economic and social need and ensure equitable access across all three counties. This includes offering training in rural communities, providing virtual options, and addressing barriers such as cost and transportation.

Caregiver Training is classified as a direct service under the Older Americans Act, as it provides tangible, skill-based benefits to caregivers that directly improve their ability to provide care. While administrative functions (e.g., program coordination, scheduling, and reporting) support implementation, the primary activity—delivering hands-on training to caregivers—constitutes a direct service. Direct provision aligns with program intent and ensures that caregivers receive the practical support needed to sustain their caregiving role.

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

Respite Care

Total of Federal Dollars

Total of State Dollars

Geographic Area Served Berrien, Cass, Van Buren

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

Goal:

Enhance the well-being of family caregivers by increasing access to high-quality, flexible respite care services while also creating meaningful volunteer opportunities for low-income older adults to support their peers and communities.

Objectives:

1. Increase the availability and utilization of respite care services across Berrien, Cass, and Van Buren

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

counties.

- 2.Reduce caregiver stress and burnout through timely and person-centered respite interventions.
- 3.Expand engagement of low-income older adult volunteers in the delivery of respite and caregiver support services.
- 4.Improve awareness of respite care options among caregivers, healthcare providers, and community partners.
- 5.Ensure equitable access to respite services for individuals with greatest economic and social need, including rural residents and underserved populations.

Activities:

- Utilize trained low-income senior volunteers to provide non-medical, in-home respite support, including companionship, supervision, and assistance with routine, non-clinical activities. Volunteers will serve as a critical extension of the caregiving support system, particularly for caregivers who need short-term relief.
- Recruit low-income older adults through targeted outreach, including coordination with senior centers, nutrition programs, and community partners. Provide comprehensive training to ensure volunteers are prepared to deliver safe, compassionate, and person-centered respite services, including topics such as dementia awareness, boundaries, and caregiver sensitivity.
- Conduct comprehensive caregiver assessments to determine appropriate levels and types of respite support. Match caregivers with trained volunteers based on needs, preferences, and compatibility to ensure effective and supportive relationships.
- Offer a range of respite options, including short-duration, intermittent, and scheduled volunteer visits to meet diverse caregiver needs. Volunteers will complement, not replace, professional respite services, particularly in situations requiring non-skilled support.
- Provide ongoing supervision, support, and recognition for volunteers to ensure service quality and retention. Staff will monitor service delivery, provide technical assistance, and ensure adherence to program standards.
- Increase awareness of respite services and volunteer opportunities through targeted outreach efforts. Promote the dual benefit of supporting caregivers while engaging older adults in meaningful service roles that enhance social connectedness and purpose.
- Continue efforts to build a broader respite network, with volunteers helping to fill gaps where professional providers are unavailable, particularly in rural and underserved areas.
- Implement ongoing monitoring of volunteer-delivered respite services, including caregiver satisfaction surveys, volunteer feedback, and staff oversight to ensure safety, effectiveness, and continuous improvement.
- Integrate volunteer respite services with other caregiver supports, including education, counseling, and case management, to provide a comprehensive system of care.

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STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

services.

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

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

Region IV Area Agency on Aging (RIV AAA) is requesting approval to provide respite care services directly, including through the engagement of low-income senior volunteers, due to persistent gaps in provider capacity, workforce shortages, and unmet caregiver needs across the service region.

Regional data, including findings from the Community Needs Assessment and caregiver feedback , indicate a significant and growing demand for respite services. Caregivers—particularly those supporting individuals with dementia or complex health conditions—report high levels of stress, limited informal supports, and difficulty accessing affordable, reliable respite care. These challenges are especially pronounced in rural areas and among low-income households.

At the same time, many low-income older adults within the region seek meaningful opportunities for engagement, social connection, and supplemental income or stipends. Leveraging this population as trained volunteers creates a dual-impact model that addresses both caregiver needs and older adult engagement.

The region continues to experience a shortage of professional respite care providers due to workforce limitations, including recruitment and retention challenges within the direct care industry. Providers are often unable or unwilling to deliver short-duration or flexible respite services, particularly in geographically isolated areas.

RIV AAA has undertaken extensive efforts to expand its provider network, including outreach to home care agencies, open enrollment processes, and technical assistance to encourage participation. Despite these efforts, provider availability remains insufficient to meet the demand for respite services, particularly for non-medical and intermittent care.

In addition to traditional provider recruitment strategies, RIV AAA has explored innovative approaches to service delivery, including the development of a volunteer-based respite model. By recruiting and training low-income senior volunteers, RIV AAA is expanding service capacity in a cost-effective and community-centered manner.

Utilizing trained volunteers, particularly low-income older adults who may receive stipends through allowable programs, is a cost-effective strategy that maximizes available funding while expanding service reach. This model reduces reliance on higher-cost contracted services for non-skilled respite needs and allows professional providers to focus on higher-acuity cases.

Administrative costs associated with volunteer coordination, training, and supervision are offset by the increased service capacity and reduced per-unit cost of service delivery. Additionally, this model leverages existing community assets and promotes sustainability.

Direct service provision, including volunteer-delivered respite, is necessary to address critical service gaps and ensure timely access to support for caregivers. This approach allows RIV AAA to:

- Rapidly deploy trained volunteers to meet immediate respite needs;

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

- Provide services in rural and underserved areas where providers are limited or unavailable;
- Offer flexible, short-term respite options that are not typically supported by traditional providers;
- Enhance community engagement by involving low-income older adults in meaningful service roles.

The inclusion of volunteers does not replace professional services but rather complements them, creating a more responsive and comprehensive respite system.

Respite care services delivered through both staff and trained volunteers are classified as program services and are not considered administrative activities. Volunteer coordination, training, and supervision are essential components of service delivery and are conducted in accordance with applicable federal and state program guidelines.

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

Kinship Caregiver Case Management

Total of Federal Dollars

Total of State Dollars

Geographic Area Served Berrien, Cass, Van Buren

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

Goal:

Support kinship caregivers in Berrien, Cass, and Van Buren counties by providing comprehensive, individualized case management services that enhance caregiver capacity, reduce stress, and promote the well-being of both the kinship caregivers and kinship care recipients.

Objectives:

1. Provide personalized assessment and care planning for kinship caregivers to identify needs, resources, and risk factors.
2. Connect kinship caregivers to appropriate services and supports, including respite, education, and community resources.
3. Monitor kinship caregiver outcomes and adjust care plans to ensure ongoing support and effectiveness.
4. Increase awareness of kinship caregiver support services among families, community partners, and healthcare providers.
5. Prioritize services for kinship caregivers with greatest economic and social need, including underserved populations and those living in rural areas.

Activities:

- Conduct thorough kinship caregiver assessments to identify physical, emotional, social, and financial needs, as well as caregiving challenges and risk factors for stress or burnout.
- Develop and document care plans tailored to each kinship caregiver's specific needs, goals, and circumstances. Include referrals to respite, training, education programs, and other support services as appropriate.
- Link kinship caregivers to community resources, healthcare providers, legal assistance, and financial support programs. Ensure timely follow-up and coordination to reduce service gaps.
- Conduct periodic follow-up to evaluate kinship caregiver satisfaction, service effectiveness, and

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

emerging needs. Adjust care plans and referrals as necessary.

-Maintain detailed records of assessments, care plans, referrals, and outcomes. Utilize data for program evaluation, quality improvement, and reporting to funding agencies.

-Conduct outreach to raise awareness about kinship caregiver resources, identify new caregivers in need of support, and promote access to services.

-Integrate case management with other AAA services to provide a holistic support systems for kinship caregivers and kinship care recipients.

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

Region IV Area Agency on Aging (RIV AAA) requests approval to provide Kinship Caregiver Case Management directly to ensure timely, high-quality, and individualized support to kinship caregivers.

Kinship caregivers in the region face significant challenges, including physical strain, emotional stress, social isolation, and financial burden. Data from regional assessments and surveys indicate a high demand for structured support, with many kinship caregivers lacking knowledge of available resources or facing barriers to accessing services. Effective case management is critical to supporting the health and well-being of both kinship caregivers and kinship care recipients.

Few external providers offer comprehensive kinship caregiver case management in the region. Many community organizations lack the staffing, training, or infrastructure to provide individualized assessment, ongoing care planning, monitoring, and integration with other services at the level required.

RIV AAA provides training, technical assistance, and support to local agencies to strengthen kinship caregiver service capacity. However, the specialized, confidential, and individualized nature of kinship caregiver case management requires direct involvement by AAA staff to ensure quality, continuity, and integration with other AAA services.

Direct service provision allows RIV AAA to efficiently allocate resources, ensuring kinship caregivers receive high-impact, coordinated support. Costs include professional kinship case manager salaries, training, supervision, and administrative support for documentation and reporting. Direct provision reduces

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

duplication of services and improves outcomes by linking kinship caregivers promptly with needed resources.

Direct service provision is necessary because:

- Case management requires individualized assessment, planning, monitoring, and follow-up that cannot be replicated by external providers alone;
- Integration with other AAA programs ensures holistic, coordinated support for kinship caregivers and kinship care recipients;
- Direct provision ensures equity of access, particularly for high-risk, underserved, or rural kinship caregivers;
- Professional oversight is critical to maintain program quality, confidentiality, and compliance with federal and state guidelines.

While administrative oversight is required, these activities are essential components of the program and are classified as programmatic service delivery, not administrative functions. Authority for these activities is provided under Title III-E of the Older Americans Act and relevant state guidelines.

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

Kinship Caregiver Education

Total of Federal Dollars

Total of State Dollars

Geographic Area Served Berrien, Cass, Van Buren

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

Goal:

Enhance the knowledge, skills, and confidence of kinship caregivers across Berrien, Cass, and Van Buren counties to improve caregiver outcomes and reduce caregiver stress.

Objectives:

1. Increase kinship caregiver access to evidence-based and relevant educational opportunities.
2. Improve kinship caregiver competency.
3. Reduce kinship caregiver burden and social isolation through structured learning and peer engagement opportunities.
4. Expand culturally responsive and accessible education tailored to underserved and high-need populations.

Planned Activities:

- Deliver established, evidence-based kinship caregiver education programs. These may include in-person, virtual, or hybrid formats to maximize accessibility.
- Offer recurring educational workshops.
- Provide structured sessions to help kinship caregivers understand and access local, state, and federal resources.
- Incorporate facilitated discussion groups and peer learning opportunities into educational programming to reinforce knowledge and reduce caregiver isolation.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

- Develop and deliver culturally appropriate education to reach rural kinship caregivers, low-income households, and underserved populations.
- Collaborate with healthcare providers, community organizations, and subject matter experts to co-develop and deliver high-quality kinship caregiver education.

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

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

RIV AAA is requesting to provide Kinship Caregiver Education services directly due to a demonstrated regional need, limited provider capacity, and the agency's unique position as a trusted leader within the aging network.

Data from regional needs assessments, surveys, and stakeholder feedback consistently identify kinship caregiver education as a critical unmet need across Berrien, Cass, and Van Buren counties. Kinship caregivers report gaps in knowledge related to navigating service systems, and maintaining their own well-being. Rural geography and transportation barriers further limit access to in-person educational opportunities, while digital literacy challenges impact access to online resources.

RIV AAA has conducted outreach to local service providers, healthcare systems, and community-based organizations to assess the availability of kinship caregiver education programming. While some partners offer limited, topic-specific trainings, there is no comprehensive, coordinated kinship caregiver education system available across the three-county region. Existing providers often lack the capacity to deliver ongoing, evidence-based programming or to reach kinship caregivers in rural and underserved communities. Efforts to expand provider capacity through partnerships will continue; however, gaps remain that necessitate direct service provision.

Providing kinship caregiver education directly allows RIV AAA to maximize cost efficiency by leveraging existing staff expertise, infrastructure, and partnerships. The agency can deliver group-based educational programming at a lower per-participant cost compared to contracted services, while maintaining quality and consistency. Additionally, virtual and hybrid delivery models reduce transportation and facility costs, further improving cost-effectiveness.

RIV AAA has established expertise in kinship caregiver support programming, including experience delivering evidence-based interventions, facilitating support groups, and providing information and

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

assistance. The agency maintains strong relationships with community partners and has the technological capacity to deliver both in-person and virtual education. This infrastructure positions RIV AAA to effectively implement and scale kinship caregiver education services.

In addition to direct service provision, RIV AAA will continue to build regional capacity by:

- Training community partners to co-facilitate educational programs
- Sharing curricula and resources with local organizations
- Coordinating a regional network of kinship caregiver support providers
- Exploring opportunities for co-location and shared service delivery

These efforts will support long-term sustainability while addressing immediate service gaps.

Kinship Caregiver Education is not considered an administrative activity, as it constitutes a direct service that provides tangible benefits to eligible caregivers. The service aligns with allowable Title III-E activities under the Older Americans Act, which authorizes kinship caregiver education, training, and support to assist kinship caregivers in their roles. RIV AAA's provision of this service directly supports program goals related to kinship caregiver well-being and reduced burden.

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

Kinship Caregiver Information and Assistance

Total of Federal Dollars

Total of State Dollars

Geographic Area Served Berrien, Cass, Van Buren

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

Goal:

Ensure kinship caregivers in Berrien, Cass, and Van Buren counties have timely, accurate, and person-centered access to information, assistance, and resource navigation.

Objectives:

1. Increase kinship caregiver awareness of available services, supports, and benefits at the local, state, and federal levels.
2. Provide person-centered assistance that addresses the unique needs, preferences, and circumstances of kinship caregivers and kinship care recipients.
3. Reduce barriers to accessing services, particularly for rural, low-income, and underserved populations

Planned Activities:

- Provide comprehensive, person-centered I&A services via phone, in-person, and online platforms. Trained staff will assess kinship caregiver needs, provide relevant information, and assist with identifying appropriate services and supports.
- Utilize standardized intake processes to identify kinship caregiver needs and ensure appropriate referrals.
- Maintain and continuously update a comprehensive database of services and supports.
- Disseminate information through community presentations, partner organizations, social media, and targeted outreach campaigns to increase awareness of kinship caregiver supports and how to access them.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

- Provide language access, plain-language materials, and culturally appropriate communication strategies to ensure equitable access for diverse populations, including rural kinship caregivers and underserved communities.
- Collaborate with social service agencies and community organizations to ensure seamless referrals and coordinated service delivery for kinship caregivers.
- Align I&A services with kinship caregiver education, respite, and case management to ensure a holistic, coordinated approach to kinship caregiver support.

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

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RIV AAA is requesting to directly provide Kinship Caregiver Information and Assistance services due to the critical nature of these services.

Regional data, including community needs assessments, surveys, and stakeholder input, consistently demonstrate that kinship caregivers face significant challenges in identifying, accessing, and navigating available services. These challenges are amplified for rural residents, individuals with limited digital access, and those experiencing economic hardship.

RIV AAA is uniquely positioned to provide unbiased, comprehensive, and person-centered information and assistance. Kinship caregivers frequently rely on the agency as a trusted source for accurate and up-to-date information. Direct service provision ensures consistency, quality, and neutrality in service delivery.

Providing I&A services directly is a cost-effective approach that leverages RIV AAA's existing infrastructure, including trained staff, resource databases, and communication systems. Centralizing I&A services reduces duplication across the network, improves efficiency in service delivery, and minimizes administrative overhead associated with contracting multiple providers. Additionally, economies of scale allow the agency to serve a higher volume of kinship caregivers at a lower per-unit cost.

RIV AAA continues to build capacity among community partners by:

- Sharing resource information and referral protocols
- Providing training on kinship caregiver needs and system navigation
- Encouraging coordinated referral pathways

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

·Supporting integration with the agency's centralized resource database

Despite these efforts, the level of coordination and comprehensiveness required for effective kinship caregiver I&A necessitates direct service provision by the AAA.

Direct provision allows RIV AAA to maintain strong quality assurance standards, including staff training, standardized protocols, data tracking, and performance monitoring. This ensures that kinship caregivers receive accurate, timely, and consistent information and that outcomes can be effectively measured and reported.

Kinship Caregiver Information and Assistance is classified as a direct service rather than an administrative activity. Under the Older Americans Act, Information and Assistance is a core service that provides direct benefit to eligible individuals by helping them access needed supports and make informed decisions. While certain elements (e.g., database maintenance or system coordination) may support administrative functions, the primary activity—engaging directly with kinship caregivers to assess needs and provide tailored information and referrals—constitutes a direct service.

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

Kinship Caregiver Training

Total of Federal Dollars

Total of State Dollars

Geographic Area Served Berrien, Cass, Van Buren

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

Goal:

Equip kinship caregivers in Berrien, Cass, and Van Buren counties with skills, knowledge, and confidence to safely and effectively perform caregiving tasks.

Objectives:

1. Increase kinship caregiver competency.
2. Improve kinship caregiver confidence and preparedness.
3. Expand access to skill-based, practical training opportunities for kinship caregivers across the region, including rural and underserved populations.

Planned Activities:

- Provide interactive training sessions focused on kinship caregiving skills.
- Deliver training through a combination of in-person, virtual, and recorded formats to ensure accessibility for kinship caregivers with varying schedules, transportation limitations, and geographic barriers.
- Provide kinship caregivers with take-home materials, instructional guides, and videos to reinforce learning and support ongoing skill development.
- Collaborate with subject matter experts to co-develop and deliver high-quality training content.
- Identify kinship caregiver training needs through intake and assessment processes and connect individuals to relevant training opportunities.
- Conduct follow-up contacts to assess skills application, address challenges, and connect kinship caregivers to additional supports as needed.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

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RIV AAA is requesting to directly provide Kinship Caregiver Training services due to significant regional need, limited availability of accessible and affordable training providers, and the importance of ensuring consistent, high-quality, and practical skill development for kinship caregivers.

Regional needs assessments, caregiver feedback, and service data indicate that many kinship caregivers lack the skills necessary to perform caregiving tasks. Kinship Caregivers frequently report feeling unprepared to manage needs and behavioral challenges. This lack of training contributes to kinship caregiver stress and burnout. Rural kinship caregivers face additional barriers, including limited access to training opportunities and transportation challenges.

Kinship Caregiver training must be practical, accessible, and tailored to the needs of kinship caregivers, who often balance caregiving with other responsibilities. Direct provision by RIV AAA ensures that training is:

- Low-cost or no-cost to participants
- Designed specifically for kinship caregivers
- Offered at convenient times and in accessible formats
- Responsive to evolving kinship caregiver needs

Providing kinship caregiver training directly is a cost-effective approach that leverages RIV AAA's existing staff, partnerships, and infrastructure. Group-based training sessions allow the agency to reach multiple kinship caregivers simultaneously, reducing per-participant costs. Additionally, hybrid and virtual delivery models minimize facility and travel expenses. Contracting with external providers would likely increase costs and limit flexibility in program design and delivery.

RIV AAA has made efforts to collaborate with local healthcare providers, educational institutions, and community organizations to expand kinship caregiver training opportunities. These efforts include:

- Partnering with subject matter experts to deliver training sessions
- Exploring co-facilitation and shared programming models
- Referring kinship caregivers to existing training resources when available

Despite these efforts, provider capacity remains limited, and existing programs do not fully address the

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

needs of kinship caregivers. Direct service provision is necessary to fill these gaps while continuing to build community capacity.

Direct provision allows RIV AAA to ensure consistent quality, evidence-informed content, and adherence to best practices in kinship caregiver training. The agency can standardize curricula, provide trained facilitators, and monitor outcomes to ensure effectiveness.

By providing services directly, RIV AAA can prioritize kinship caregivers with the greatest economic and social need and ensure equitable access across all three counties. This includes offering training in rural communities, providing virtual options, and addressing barriers such as cost and transportation.

Kinship Caregiver Training is classified as a direct service under the Older Americans Act, as it provides tangible, skill-based benefits to caregivers that directly improve their ability to provide care. While administrative functions (e.g., program coordination, scheduling, and reporting) support implementation, the primary activity—delivering training to kinship caregivers—constitutes a direct service. Direct provision aligns with program intent and ensures that kinship caregivers receive the practical support needed to sustain their caregiving role.

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

Kinship Caregiver Support Groups

Total of Federal Dollars

Total of State Dollars

Geographic Area Served Berrien, Cass, Van Buren

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

Goal:

Reduce kinship caregiver stress and isolation by providing consistent, accessible, and supportive peer environments where kinship caregivers can share experiences, gain emotional support, and build coping strategies.

Objectives:

1. Increase access to kinship caregiver support groups across Berrien, Cass, and Van Buren counties, including rural and underserved areas.

2. Reduce kinship caregiver isolation and stress through regular peer engagement and facilitated discussion.

3. Enhance kinship caregiver resilience and emotional well-being by promoting shared learning and coping strategies.

4. Ensure support groups are inclusive, culturally responsive, and accessible multiple formats.

Planned Activities:

-Offer regularly scheduled kinship caregiver support groups, facilitated by trained staff, volunteers, or qualified partners. Groups will provide a safe, confidential space for kinship caregivers to share experiences, challenges, and solutions.

-Provide in-person, virtual, and hybrid support group formats to reduce barriers related to transportation, geography, and scheduling.

-Incorporate guided discussions, educational components, and resource sharing into support group sessions to enhance value and reinforce learning.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

- Promote support groups through community organizations, social media, and direct outreach to kinship caregivers identified through other RIV AAA services.
- Collect participant feedback and track attendance to continuously improve group structure, topics, and accessibility.
- Connect support group participants to additional services to ensure a comprehensive support system.

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RIV AAA is requesting to directly provide Kinship Caregiver Support Groups due to demonstrated regional need, inconsistent provider availability, and the importance of maintaining quality, continuity, and accessibility of services.

Regional assessments, caregiver surveys, and service data consistently indicate high levels of kinship caregiver stress, burnout, and social isolation. Many kinship caregivers report feeling overwhelmed and lacking emotional support. Rural kinship caregivers in Berrien, Cass, and Van Buren counties face additional barriers, including transportation challenges and limited access to local support networks. Support groups are identified as a critical intervention to address these needs and improve caregiver well-being.

Effective kinship caregiver support groups require skilled facilitation , consistency, and adherence to best practices to ensure a safe and supportive environment. Direct provision by RIV AAA ensures:

- Trained facilitators with expertise in kinship caregiver issues
- Consistent scheduling and availability
- Standardized protocols for confidentiality and group management
- Integration of resource information and referrals

This level of quality control is difficult to achieve through a decentralized provider network .

Providing support groups directly is a cost-effective strategy. Group-based services allow RIV AAA to serve multiple kinship caregivers simultaneously, maximizing impact with relatively low per-participant cost.

Utilizing existing staff, virtual platforms, and community spaces minimizes overhead expenses. Contracting with multiple providers would increase administrative costs and may not result in consistent service delivery

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

across the region.

RIV AAA continues to engage with community partners to expand the availability of kinship caregiver support groups by:

- Sharing facilitation training and best practices
- Encouraging co-facilitation models with partner organizations
- Providing outreach and referral support to existing groups
- Exploring opportunities to host groups in community-based settings

Despite these efforts, provider capacity remains limited and unevenly distributed, necessitating direct service provision to ensure equitable access.

Direct provision allows RIV AAA to strategically locate and schedule support groups to reach kinship caregivers with the greatest need, including those in rural or underserved communities. Virtual options further enhance accessibility for kinship caregivers who cannot attend in person due to caregiving responsibilities or transportation barriers.

By providing services directly, RIV AAA can track participation, measure outcomes (e.g., reduced caregiver stress and isolation), and ensure continuous quality improvement. This supports accountability and strengthens program effectiveness.

Kinship Caregiver Support Groups are classified as a direct service under the Older Americans Act, as they provide direct emotional and social support to caregivers. While certain administrative functions (e.g., scheduling, outreach, and data tracking) support implementation, the primary activity—facilitated group engagement that directly benefits kinship caregivers—constitutes a direct service. Direct provision aligns with program intent and ensures effective delivery of this critical support.

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

Kinship Caregiver Supplemental Services

Total of Federal Dollars

Total of State Dollars

Geographic Area Served Berrien, Cass, Van Buren

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

Goal:

Provide flexible, responsive supplemental supports to kinship caregivers in Berrien, Cass, and Van Buren counties to address unmet needs and reduce kinship caregiver burden.

Objectives:

1. Address immediate, short-term gaps in services that cannot be met through other programs or funding sources.
2. Enhance kinship caregiver capacity to safely and effectively provide care through access to essential goods and services.
3. Prevent kinship caregiver burnout.
4. Ensure equitable access to supplemental supports for kinship caregivers with the greatest economic and social need, including rural and underserved populations.

Planned Activities:

-Offer limited, short-term financial assistance or direct provision of goods and services that directly

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

support the kinship caregiver role.

-Conduct person-centered assessments to determine eligibility and identify specific supplemental needs that cannot be met through other available resources.

-Ensure supplemental services are provided only after exploring and exhausting other funding sources and community resources. Staff will coordinate with local providers and programs to avoid duplication and maximize resource allocation.

-Utilize a capped, needs-based allocation model to ensure equitable distribution of resources while maintaining the ability to respond to urgent and diverse kinship caregiver needs.

-When appropriate, coordinate with vendors or directly purchase approved goods and services to ensure timely access and cost control.

-Conduct follow-up with kinship caregivers to assess the effectiveness of supplemental supports in reducing burden and improving kinship caregiver capacity.

-Align supplemental services with kinship caregiver information and assistance, education, and case management to provide a comprehensive support system.

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RIV AAA is requesting to directly provide Kinship Caregiver Supplemental Services due to the highly individualized, time-sensitive nature of these supports, limited provider availability, and the need for flexible and efficient service delivery.

Regional needs assessments, caregiver feedback, and service utilization data consistently demonstrate that kinship caregivers experience unmet needs that fall outside traditional service categories. Rural geography, economic disparities, and limited local resources further exacerbate these challenges in Berrien, Cass, and Van Buren counties.

Kinship Caregiver Supplemental Services are inherently flexible and episodic, requiring rapid response and individualized decision-making. Contracting these services through external providers is often not feasible due to the unpredictable and varied nature of requests. Direct provision allows RIV AAA to respond quickly to urgent needs, tailor supports to individual circumstances, and ensure that resources are used effectively.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

Direct provision of supplemental services is cost-effective and minimizes administrative burden. By managing funds internally, RIV AAA can:

- Avoid additional administrative costs associated with contracting multiple providers
- Ensure funds are used strictly for allowable, high-impact supports
- Maintain tight oversight of expenditures and prevent duplication of services

This approach allows for maximum impact per dollar spent while maintaining fiscal accountability. RIV AAA actively works to identify and collaborate with local providers, community agencies, and vendors to meet kinship caregiver needs whenever possible. Staff routinely refer kinship caregivers to existing resources and funding streams prior to authorizing supplemental services. Additionally, the agency supports capacity-building efforts by:

- Sharing information about kinship caregiver needs with community partners
- Encouraging development of low-cost, community-based solutions
- Facilitating connections between kinship caregivers and local resources

Despite these efforts, gaps persist that necessitate direct service provision to ensure kinship caregivers receive timely and adequate support.

Direct provision ensures equitable access to supplemental supports, particularly for kinship caregivers in rural or underserved areas who may have limited access to providers or financial resources. RIV AAA can prioritize individuals with the greatest economic and social need and ensure fair distribution of limited funds across the region.

Providing services directly enables RIV AAA to maintain consistent eligibility criteria, documentation standards, and outcome tracking. This ensures compliance with funding requirements and allows the agency to evaluate the effectiveness of supplemental supports in achieving program goals.

Kinship Caregiver Supplemental Services are classified as direct services under the Older Americans Act, as they provide tangible, direct benefits to eligible caregivers by addressing specific, identified needs. While administrative functions (e.g., fiscal management, vendor coordination) support the program, the primary activity—delivering goods and services that directly assist kinship caregivers—constitutes a direct service. Direct provision is both appropriate and necessary to fulfill the intent of the program and meet regional needs effectively.

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

Kinship Caregiver Respite Care

Total of Federal Dollars

Total of State Dollars

Geographic Area Served Berrien, Cass, Van Buren

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

Goal:

Enhance the well-being of kinship caregivers by increasing access to high-quality, flexible respite care services.

Objectives:

1. Increase the availability and utilization of respite care services across Berrien, Cass, and Van Buren counties.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

2.Reduce kinship caregiver stress and burnout through timely and person-centered respite interventions.

3.Improve awareness of kinship caregiver respite care options among kinship caregivers and community partners.

4.Ensure equitable access to kinship caregiver respite for individuals with greatest economic and social need, including rural residents and underserved populations.

Planned Activities:

-Conduct comprehensive kinship caregiver assessments to determine appropriate levels and types of respite support.

-Offer a range of respite options to meet diverse kinship caregiver needs .

-Increase awareness of kinship caregiver respite through targeted outreach efforts .

-Continue efforts to build a broader kinship caregiver respite network , particularly in rural and underserved areas.

-Implement ongoing monitoring of kinship caregiver respite, including satisfaction surveys and staff oversight to ensure safety, effectiveness, and continuous improvement.

-Integrate kinship caregiver respite services with other kinship caregiver supports to provide a comprehensive system of care.

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Region IV Area Agency on Aging (RIV AAA) is requesting approval to provide Kinship Caregiver Respite Care services directly, due to unmet kinship caregiver needs across the service region.

Regional data, including findings from the Community Needs Assessment and caregiver feedback , indicate a significant and growing demand for kinship caregiver respite services. Kinship caregivers report high levels of stress, limited informal supports, and difficulty accessing affordable, reliable respite care. These challenges are especially pronounced in rural areas and among low-income households.

The region continues to experience a shortage of professional respite care providers due to workforce limitations, including recruitment and retention challenges within the direct care industry. Providers are

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

often unable or unwilling to deliver short-duration or flexible respite services, particularly in geographically isolated areas.

RIV AAA has undertaken extensive efforts to expand its provider network. Despite these efforts, provider availability remains insufficient to meet the demand for kinship respite services, particularly for non-medical and intermittent care.

Direct service provision is necessary to address critical service gaps and ensure timely access to support for kinship caregivers. This approach allows RIV AAA to:

- Provide services in rural and underserved areas where providers are limited or unavailable;
- Offer flexible, short-term respite options that are not typically supported by traditional providers;

Kinship Caregiver Respite Care services are classified as program services and are not considered administrative activities.

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

Friendly reassurance

Total of Federal Dollars

Total of State Dollars

Geographic Area Served Berrien, Cass, Van Buren

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

Goal:

Promote independence, safety, and emotional well-being among older adults through regular, supportive contact provided by trained low-income senior volunteers, while also creating meaningful engagement opportunities for volunteers.

Objectives:

- 1.Reduce social isolation and loneliness among older adults across Berrien, Cass, and Van Buren counties.
- 2.Increase regular contact and monitoring for older adults at risk of isolation, health decline, or crisis.
- 3.Expand engagement of low-income older adult volunteers in meaningful, community-based service roles.
- 4.Enhance early identification of unmet needs through consistent, relationship-based communication.
- 5.Ensure equitable access to friendly reassurance services for individuals with greatest economic and social need, including rural and underserved populations.

Activities:

- Provide scheduled telephone calls, virtual check-ins, and/or in-person visits conducted by trained low-income senior volunteers. These interactions will offer companionship, emotional support, and informal wellness checks to help ensure participant safety and well-being.
- Recruit low-income older adults through community outreach, including partnerships with senior centers, nutrition programs, and local organizations. Volunteers will receive training on communication skills, recognizing signs of distress, confidentiality, boundaries, and procedures for reporting concerns.
- Identify individuals in need of friendly reassurance through referrals from case managers, healthcare providers, community partners, and self-referrals. Priority will be given to individuals at high risk of

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

isolation, including those living alone, with limited mobility, or experiencing cognitive or health challenges.

- Match participants with volunteers based on shared interests, preferences, and cultural considerations to foster meaningful and consistent relationships that build trust over time.
- Establish clear protocols for volunteers to report concerns identified during contacts, such as changes in health status, unmet needs, or safety risks. Staff will follow up as appropriate and coordinate additional services when needed.
- Offer varying levels of contact frequency (e.g., daily, weekly) based on participant need and risk level. Utilize phone-based reassurance as a primary strategy, with in-person options available when appropriate.
- Provide ongoing supervision, support, and recognition to volunteers. Staff will monitor interactions, provide guidance, and ensure adherence to program standards and participant safety.
- Promote the program through community partners, healthcare systems, and public awareness efforts to increase participation among both volunteers and service recipients.
- Collect data on service utilization, participant outcomes, and satisfaction. Use feedback from both participants and volunteers to improve program effectiveness and responsiveness.

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Region IV Area Agency on Aging (RIV AAA) is requesting approval to provide Friendly Reassurance services directly through the engagement of low-income senior volunteers due to identified service gaps, limited availability of comparable services, and the unique value of a volunteer-driven model.

Findings from the regional Community Needs Assessment and stakeholder input consistently identify social isolation and loneliness as significant concerns among older adults, particularly those living alone, in rural areas, or with limited mobility. These conditions are associated with increased risk of depression, declining health, and premature institutionalization.

Many individuals in the region lack consistent informal supports and would benefit from regular, structured

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

contact to promote emotional well-being and early identification of emerging needs. Friendly reassurance services are especially critical for individuals who may not yet qualify for more intensive services but remain at risk.

Additionally, there is a strong interest among low-income older adults in opportunities to remain engaged, contribute to their communities, and build social connections. This service model effectively addresses both needs.

Friendly reassurance is not widely available through traditional service providers, as it is generally considered a non-medical, low-reimbursement service that is not financially sustainable for private agencies to deliver. Existing providers prioritize higher-acuity, billable services, leaving a gap in preventive, relationship-based supports.

RIV AAA has explored partnerships with community-based organizations and service providers to deliver friendly reassurance; however, few entities have the capacity, funding structure, or workforce to implement and sustain such a program at scale. As a result, reliance on external providers has not proven feasible for meeting the identified need.

To address this gap, RIV AAA has developed and expanded a volunteer-based service model that leverages the skills and availability of low-income senior volunteers. Through targeted recruitment, structured training, and ongoing supervision, RIV AAA has created a sustainable framework for delivering friendly reassurance services.

The use of trained volunteers, including low-income older adults who may receive stipends where allowable, represents a highly cost-effective approach to service delivery. Compared to hiring professional staff or contracting services, this model significantly reduces personnel costs while maintaining high levels of participant engagement and satisfaction.

Program costs are primarily associated with volunteer coordination, training, supervision, and minimal administrative support. These costs are offset by the expanded reach of services and the preventive impact of reducing isolation and avoiding more costly interventions such as emergency services or institutional care.

Direct provision of Friendly Reassurance services is necessary to ensure consistent, reliable, and equitable access across the region. This approach allows RIV AAA to:

- Fill a critical service gap not addressed by the existing provider network;
- Deliver services in rural and underserved areas where other supports are limited;
- Provide flexible, participant-centered contact tailored to individual needs;
- Rapidly respond to emerging concerns identified through volunteer interactions;
- Engage low-income older adults in meaningful roles that promote dignity, purpose, and community connection.

The volunteer-based model enhances community capacity while strengthening peer-to-peer support networks.

Friendly Reassurance services delivered through trained volunteers are classified as program services rather than administrative activities. While coordination, training, and supervision are required to support volunteers, these functions are integral to service delivery and are conducted in accordance with applicable federal and state guidelines.

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

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

Disease Prevention/Health Promotion

Total of Federal Dollars

Total of State Dollars

Geographic Area Served Berrien, Cass, Van Buren

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

Goal:

Improve the health, independence, and quality of life of older adults by increasing access to evidence-based and community-based disease prevention and health promotion programs.

Objectives:

1. Increase participation in evidence-based health promotion and disease prevention programs across Berrien, Cass, and Van Buren counties.
2. Reduce the incidence and impact of chronic disease among older adults through education, behavior change, and early intervention.
3. Improve access to health promotion programs for individuals with greatest economic and social need, including rural and underserved populations.
4. Strengthen partnerships with healthcare providers and community organizations to support coordinated, preventive care efforts.

Activities:

- Provide evidence-based disease prevention and health promotion programs such as chronic disease self-management, falls prevention, physical activity, and nutrition education. Programs will be delivered in community settings, virtually, and in-home when appropriate to maximize accessibility.
- Conduct targeted outreach to identify and enroll participants, with a focus on individuals at high risk for chronic disease or with limited access to preventive services. Outreach will include collaboration with healthcare providers, senior centers, housing sites, and community organizations.
- Collaborate with local health systems, public health departments, and community-based organizations to coordinate referrals, share resources, and expand program reach.
- Offer programs in a variety of formats (in-person, virtual, hybrid) and locations, including rural and underserved areas. Provide accommodations such as transportation coordination, language access, and adaptive materials as needed.
- Incorporate basic health screenings (where appropriate) and referral pathways to connect participants with additional services, including medical care, nutrition programs, and caregiver supports.
- Ensure all evidence-based programs are delivered with fidelity to established models. Monitor program outcomes, participant satisfaction, and health indicators to support continuous improvement.
- Track participation, completion rates, and health outcomes (e.g., improved self-management, reduced falls risk) to evaluate program effectiveness and inform future planning.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

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Region IV Area Agency on Aging (RIV AAA) is requesting approval to provide Disease Prevention/Health Promotion services directly to ensure consistent access, quality, and delivery of evidence-based programs across the service area.

Regional data, including the Community Needs Assessment and public health sources, indicate high prevalence of chronic conditions among older adults, including diabetes, heart disease, arthritis, and fall-related injuries. Many older adults—particularly those living in rural areas or with limited incomes—face barriers to accessing preventive services due to transportation challenges, cost, or limited availability. Evidence-based programs delivered directly by RIV AAA address these gaps by providing accessible education, wellness interventions, and support for behavior change.

While some community organizations and healthcare entities offer health promotion activities, availability of evidence-based programs delivered with fidelity is limited, particularly in rural and underserved areas. Many providers lack the staffing, training, or infrastructure to implement and sustain these programs at scale.

RIV AAA has actively explored partnerships and contracts with community-based organizations, healthcare providers, and public health agencies to deliver disease prevention programs. Despite these efforts, provider participation has been inconsistent, and capacity remains insufficient to meet regional demand—especially for programs requiring trained facilitators and ongoing fidelity monitoring.

RIV AAA supports capacity-building among partners through training, sharing resources, and facilitating collaboration. However, these efforts have not fully addressed service gaps, making direct service provision necessary to ensure continuity and equitable access.

Delivering disease prevention and health promotion programs directly is cost-effective, as it allows for centralized staffing, resource management, and streamlined program delivery. Direct provision ensures efficient use of funds while maintaining high-quality, evidence-based interventions. Costs associated with program delivery include trained staff, materials, transportation, and program administration, which are justified by the measurable health benefits and preventive impact for participants.

Direct provision is necessary to ensure that evidence-based programs are consistently available, accessible, and delivered with fidelity throughout the region. Direct service allows RIV AAA to:

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

- Fill gaps in service availability, particularly in rural and underserved communities;
- Maintain quality control and adherence to evidence-based standards;
- Offer flexible, participant-centered programming;
- Coordinate follow-up and referrals for participants with emerging health needs.

Disease Prevention/Health Promotion services delivered directly are classified as program services rather than administrative activities. Planning, coordination, and oversight are integral to program delivery and comply with applicable federal and state guidelines governing Older Americans Act programs.

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

Long Term Care Ombudsman

Total of Federal Dollars

Total of State Dollars

Geographic Area Served Berrien, Cass, Van Buren

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

Goal:

Protect and promote the rights, well-being, and quality of life of residents in long-term care facilities by providing independent advocacy and oversight in accordance with federal and state regulations.

Objectives:

1. Investigate, resolve, and prevent complaints made by or on behalf of residents in long-term care settings, including nursing homes, assisted living facilities, and adult foster care homes.
2. Educate residents, family members, facility staff, and the public about resident rights, complaint procedures, and quality-of-care standards.
3. Promote systemic improvements in long-term care through policy advocacy and collaboration with regulatory agencies.
4. Ensure equitable access to ombudsman services for all residents, including those with greatest economic and social need.
5. Maintain professional, certified Ombudsman staff and volunteers to provide consistent and high-quality service delivery.

Activities:

- Respond to and investigate resident complaints, advocating for timely resolution while respecting confidentiality and resident autonomy. Track outcomes and trends to identify systemic issues.
- Conduct educational sessions for residents, families, and facility staff on resident rights, advanced directives, and the complaint process. Disseminate printed materials, host workshops, and provide individual guidance.
- Conduct regular visits to licensed long-term care facilities to monitor compliance with state and federal regulations. Report findings to appropriate regulatory bodies and stakeholders.
- Collaborate with state agencies, local health departments, and other advocacy organizations to address systemic issues, develop best practices, and inform public policy related to long-term care quality.
- Integrate Ombudsman services with other Region IV Area Agency on Aging programs, ensuring that residents and their families have access to complementary supports such as caregiver resources, legal

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

assistance, and health promotion programs.

·Maintain detailed records of complaints, resolutions, and facility assessments. Use data to inform continuous improvement, training needs, and advocacy priorities.

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Region IV Area Agency on Aging (RIV AAA) requests approval to provide Long Term Care Ombudsman services directly, in compliance with the Older Americans Act, due to the specialized, legally mandated nature of the service and the need for independence in advocacy.

The region includes numerous long-term care facilities serving vulnerable populations, including low-income seniors and individuals with cognitive or physical impairments. Residents frequently face challenges in exercising their rights, reporting abuse or neglect, and accessing support. Data from state oversight agencies and facility complaint records indicate ongoing demand for professional Ombudsman services to safeguard resident welfare.

Long Term Care Ombudsman services are federally mandated and require certified staff or volunteers trained in resident rights, complaint resolution, and facility monitoring. There are no external providers in the region authorized to provide these services independently; outsourcing is not a viable option due to confidentiality, independence, and statutory requirements.

RIV AAA collaborates with the State Long Term Care Ombudsman Program, other Area Agencies on Aging, and local partners to coordinate services and training. While some aspects of facility education and outreach could be delivered by external organizations, the direct investigation of complaints, advocacy on behalf of residents, and systemic policy work must be conducted by the AAA's certified Ombudsman staff.

Direct service provision by RIV AAA is cost-efficient and necessary to meet federal and state obligations. Staffing includes certified Ombudsman professionals and trained volunteers whose supervision ensures program fidelity and compliance. Administrative costs are limited to program oversight, volunteer management, and reporting, allowing the majority of resources to directly support residents' rights and well-being.

Direct service provision is essential because:

·Ombudsman services are legally required to be independent and federally certified;

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

- No other providers in the region are authorized to investigate complaints or advocate on behalf of residents;
- Direct provision ensures immediate and confidential response to complaints;
- Staff Ombudsmen can proactively monitor facilities and provide education to prevent rights violations ;
- Integration with AAA services enhances resident support and system-wide advocacy.

While administrative functions such as program oversight, volunteer coordination, and recordkeeping are required, they are integral to the direct service delivery of Ombudsman services and not considered separate administrative activities. Authority for these activities is provided under Title III-B of the Older Americans Act and the State Long Term Care Ombudsman Program guidelines.

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

Prevention of Elder Abuse, Neglect and Exploitation

Total of Federal Dollars

Total of State Dollars

Geographic Area Served Berrien, Cass, Van Buren

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

Goal:

Protect the safety, rights, and well-being of older adults by preventing, identifying, and responding to instances of elder abuse, neglect, and exploitation, while increasing community awareness and capacity to safeguard vulnerable individuals.

Objectives:

- 1.Increase awareness of elder abuse, neglect, and exploitation among older adults, caregivers, families, and community members.
- 2.Provide timely intervention and advocacy for victims of elder abuse, neglect, or exploitation.
- 3.Strengthen coordination with legal, law enforcement, financial, and social service partners to address and prevent abuse.
- 4.Support training and capacity-building for professionals and community members to recognize and respond to abuse, neglect, and exploitation.
- 5.Ensure services are accessible to all older adults, with priority given to those with greatest economic and social need.

Activities:

- Conduct workshops, informational campaigns, and targeted outreach to educate older adults, caregivers, and community members about recognizing and preventing abuse, neglect, and exploitation. Distribute educational materials in community centers, senior housing, and faith-based organizations.
- Provide direct assistance to victims or individuals at risk by conducting confidential assessments, developing action plans, and offering advocacy services to protect rights and safety.
- Coordinate with Adult Protective Services, law enforcement, legal aid, financial institutions, healthcare providers, and other community partners to ensure timely and effective intervention for cases of abuse, neglect, or exploitation.
- Offer training sessions to staff, volunteers, and community partners on recognizing signs of abuse,

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

mandated reporting requirements, and prevention strategies.

- Analyze data trends to identify patterns of abuse or neglect in the community, advocate for systemic improvements, and implement proactive strategies to reduce risk factors among vulnerable populations.
- Conduct ongoing follow-up with individuals who have experienced or are at risk for abuse to ensure safety, well-being, and connection to appropriate supports.
- Link abuse prevention services with other AAA programs, including caregiver support, case management, and legal assistance, to provide a holistic approach to elder safety and well-being.

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Region IV Area Agency on Aging (RIV AAA) requests approval to provide Elder Abuse, Neglect, and Exploitation prevention services directly due to the specialized, sensitive nature of the work, limited availability of external providers, and the need for immediate, confidential, and professional intervention. Data from the Community Needs Assessment, Adult Protective Services, and community stakeholders indicate that elder abuse, neglect, and financial exploitation continue to affect a significant portion of older adults in Berrien, Cass, and Van Buren counties. Vulnerable populations—including those who are socially isolated, have cognitive or physical impairments, or live with limited income—are at heightened risk. Timely intervention and preventive education are critical to protecting older adults and reducing the long-term impact of abuse.

Specialized elder abuse prevention services require trained professionals capable of confidential assessment, advocacy, and coordination with multiple agencies. Few community organizations or private providers possess the required expertise or capacity to deliver these services with the confidentiality and responsiveness necessary for effective intervention. Consequently, relying solely on external providers would leave significant gaps in service delivery.

RIV AAA has engaged community partners—including legal aid organizations, law enforcement, financial institutions, and healthcare providers—to enhance the availability of complementary services. While these partnerships support systemic response and prevention, they cannot replace the direct provision of confidential intake, assessment, and advocacy services provided by trained AAA staff.

RIV AAA invests in staff training, cross-sector collaboration, and volunteer education to expand regional capacity for elder abuse prevention. Despite these efforts, direct service provision remains essential to ensure timely and professional response to cases and the continuity of prevention programming.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

Direct service provision allows RIV AAA to efficiently allocate resources to high-priority, high-risk individuals. Costs include professional staff, training, outreach, and program materials. Delivering services directly ensures that interventions are rapid, confidential, and high-quality, reducing potential long-term costs associated with untreated abuse, neglect, or exploitation, including medical, legal, and social service expenditures.

Direct service provision is necessary because:

- Elder abuse prevention requires immediate, confidential, and legally informed intervention;
- Staff must coordinate directly with Adult Protective Services, law enforcement, and other partners while maintaining resident trust;
- Few external providers are equipped to provide confidential intake, assessment, advocacy, and follow-up services;
- Direct provision ensures equitable access for vulnerable and high-risk populations;
- Integration with other AAA programs enhances the effectiveness of prevention, advocacy, and referral services.

Activities such as planning, staff oversight, and coordination with external partners support the direct delivery of services and are considered essential programmatic functions, not separate administrative activities. Authority for these activities is provided under Title III-B of the Older Americans Act and Michigan state guidelines for elder abuse prevention and advocacy.

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

Caregiver Case Management

Total of Federal Dollars

Total of State Dollars

Geographic Area Served Berrien, Cass, Van Buren

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

Goal:

Support family caregivers in Berrien, Cass, and Van Buren counties by providing comprehensive, individualized case management services that enhance caregiver capacity, reduce stress, and promote the well-being of both caregivers and care recipients.

Objectives:

1. Provide personalized assessment and care planning for caregivers to identify needs, resources, and risk factors.
2. Connect caregivers to appropriate services and supports, including respite, education, counseling, and community resources.
3. Monitor caregiver outcomes and adjust care plans to ensure ongoing support and effectiveness.
4. Increase awareness of caregiver support services among families, community partners, and healthcare providers.
5. Prioritize services for caregivers of older adults with greatest economic and social need, including underserved populations and those living in rural areas.

Activities:

- Conduct thorough caregiver assessments to identify physical, emotional, social, and financial needs,

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

as well as caregiving challenges and risk factors for stress or burnout.

- Develop and document care plans tailored to each caregiver's specific needs, goals, and circumstances. Include referrals to respite, training, education programs, and other support services as appropriate.
- Link caregivers to community resources, healthcare providers, legal assistance, and financial support programs. Ensure timely follow-up and coordination to reduce service gaps.
- Conduct periodic follow-up to evaluate caregiver satisfaction, service effectiveness, and emerging needs. Adjust care plans and referrals as necessary.
- Provide caregivers with information and training on care techniques, stress management, disease-specific guidance, and accessing local support networks.
- Maintain detailed records of assessments, care plans, referrals, and outcomes. Utilize data for program evaluation, quality improvement, and reporting to funding agencies.
- Conduct outreach to raise awareness about caregiver resources, identify new caregivers in need of support, and promote access to services.
- Integrate case management with other AAA services (e.g., respite, disease prevention, legal assistance) to provide a holistic support system for caregivers and care recipients.

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Region IV Area Agency on Aging (RIV AAA) requests approval to provide Caregiver Case Management directly to ensure timely, high-quality, and individualized support to caregivers.

Caregivers of older adults in the region face significant challenges, including physical strain, emotional stress, social isolation, and financial burden. Data from regional assessments and caregiver surveys indicate a high demand for structured support, with many caregivers lacking knowledge of available resources or facing barriers to accessing services. Effective case management is critical to preventing caregiver burnout, maintaining care in the home, and supporting the health and well-being of both caregivers and care recipients.

Few external providers offer comprehensive caregiver case management in the region. Many community organizations lack the staffing, training, or infrastructure to provide individualized assessment, ongoing care planning, monitoring, and integration with other services at the level required.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

RIV AAA has explored contracting with community-based providers and partnerships with healthcare agencies to deliver caregiver support. Despite these efforts, gaps persist, particularly in rural areas, for caregivers of individuals with complex or high-need conditions.

RIV AAA provides training, technical assistance, and support to local agencies to strengthen caregiver service capacity. However, the specialized, confidential, and individualized nature of caregiver case management requires direct involvement by AAA staff to ensure quality, continuity, and integration with other AAA services.

Direct service provision allows RIV AAA to efficiently allocate resources, ensuring caregivers receive high-impact, coordinated support. Costs include professional case manager salaries, training, supervision, and administrative support for documentation and reporting. Direct provision reduces duplication of services and improves outcomes by linking caregivers promptly with needed resources.

Direct service provision is necessary because:

- Case management requires individualized assessment, planning, monitoring, and follow-up that cannot be replicated by external providers alone;
- Integration with other AAA programs ensures holistic, coordinated support for caregivers and care recipients;
- Direct provision ensures equity of access, particularly for high-risk, underserved, or rural caregivers;
- Professional oversight is critical to maintain program quality, confidentiality, and compliance with federal and state guidelines.

While administrative oversight (e.g., documentation, supervision, reporting) is required, these activities are essential components of the program and are classified as programmatic service delivery, not administrative functions. Authority for these activities is provided under Title III-E of the Older Americans Act and relevant state guidelines.

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

Caregiver Education

Total of Federal Dollars

Total of State Dollars

Geographic Area Served Berrien, Cass, Van Buren

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

Goal:

Enhance the knowledge, skills, and confidence of family caregivers across Berrien, Cass, and Van Buren counties to improve caregiving outcomes, reduce caregiver stress, and support individuals to remain safely in their homes and communities.

Objectives:

1. Increase caregiver access to evidence-based and locally relevant educational opportunities.
2. Improve caregiver competency in key caregiving domains, including dementia care, chronic disease management, and navigating long-term services and supports.
3. Reduce caregiver burden and social isolation through structured learning and peer engagement opportunities.
4. Expand culturally responsive and accessible education tailored to underserved and high-need

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

populations.

Planned Activities:

- Deliver established, evidence-based caregiver education programs such as dementia-specific training, chronic disease self-management, and caregiver skill-building workshops. These may include in-person, virtual, and hybrid formats to maximize accessibility.
- Offer recurring educational workshops
- Provide structured sessions to help caregivers understand and access local, state, and federal resources, including respite services, benefits counseling, and long-term care options.
- Incorporate facilitated discussion groups and peer learning opportunities into educational programming to reinforce knowledge and reduce caregiver isolation.
- Develop and deliver culturally appropriate education to reach rural caregivers, low-income households, and underserved populations.
- Collaborate with healthcare providers, community organizations, and subject matter experts to co-develop and deliver high-quality caregiver education.

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RIV AAA is requesting to provide Caregiver Education services directly due to a demonstrated regional need, limited provider capacity, and the agency's unique position as a trusted leader within the aging network.

Data from regional needs assessments, caregiver surveys, and stakeholder feedback consistently identify caregiver education as a critical unmet need across Berrien, Cass, and Van Buren counties. Caregivers report gaps in knowledge related to managing complex health conditions (particularly dementia), navigating service systems, and maintaining their own well-being. Rural geography and transportation barriers further limit access to in-person educational opportunities, while digital literacy challenges impact access to online resources.

RIV AAA has conducted outreach to local service providers, healthcare systems, and community-based organizations to assess the availability of caregiver education programming. While some partners offer limited, topic-specific trainings, there is no comprehensive, coordinated caregiver education system

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

available across the three-county region. Existing providers often lack the capacity to deliver ongoing, evidence-based programming or to reach caregivers in rural and underserved communities. Efforts to expand provider capacity through partnerships will continue; however, gaps remain that necessitate direct service provision.

Providing caregiver education directly allows RIV AAA to maximize cost efficiency by leveraging existing staff expertise, infrastructure, and partnerships. The agency can deliver group-based educational programming at a lower per-participant cost compared to contracted services, while maintaining quality and consistency. Additionally, virtual and hybrid delivery models reduce transportation and facility costs, further improving cost-effectiveness.

RIV AAA has established expertise in caregiver support programming, including experience delivering evidence-based interventions, facilitating support groups, and providing information and assistance. The agency maintains strong relationships with community partners and has the technological capacity to deliver both in-person and virtual education. This infrastructure positions RIV AAA to effectively implement and scale caregiver education services.

In addition to direct service provision, RIV AAA will continue to build regional capacity by:

- Training community partners to co-facilitate educational programs
- Sharing curricula and resources with local organizations
- Coordinating a regional network of caregiver support providers
- Exploring opportunities for co-location and shared service delivery

These efforts will support long-term sustainability while addressing immediate service gaps.

Caregiver Education is not considered an administrative activity, as it constitutes a direct service that provides tangible benefits to eligible caregivers. The service aligns with allowable Title III-E activities under the Older Americans Act, which authorizes caregiver education, training, and support to assist caregivers in their roles. RIV AAA's provision of this service directly supports program goals related to caregiver well-being, reduced burden, and delayed institutionalization of care recipients.

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

Caregiver Information and Assistance

Total of Federal Dollars

Total of State Dollars

Geographic Area Served Berrien, Cass, Van Buren

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

Goal:

Ensure family caregivers in Berrien, Cass, and Van Buren counties have timely, accurate, and person-centered access to information, assistance, and resource navigation to support informed decision-making and sustained caregiving.

Objectives:

1. Increase caregiver awareness of available services, supports, and benefits at the local, state, and federal levels.
2. Improve caregiver ability to navigate complex long-term services and supports (LTSS) systems.
3. Provide person-centered assistance that addresses the unique needs, preferences, and

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

circumstances of caregivers and care recipients.

4.Reduce barriers to accessing services, particularly for rural, low-income, and underserved populations.

Planned Activities:

·Provide comprehensive, person-centered I&A services via phone, in-person, and online platforms. Trained staff will assess caregiver needs, provide relevant information, and assist with identifying appropriate services and supports.

·Offer in-depth assistance to caregivers navigating complex care decisions, including long-term care options, in-home supports, respite services, and financial assistance programs. This includes helping caregivers understand eligibility criteria, application processes, and service availability.

·Utilize standardized intake processes to identify caregiver needs and ensure appropriate referrals.

·Maintain and continuously update a comprehensive database of services and supports, including healthcare providers, community-based services, and caregiver-specific resources. Ensure accessibility through multiple channels, including print materials and digital platforms.

·Disseminate information through community presentations, partner organizations, social media, and targeted outreach campaigns to increase awareness of caregiver supports and how to access them.

·Provide language access, plain-language materials, and culturally appropriate communication strategies to ensure equitable access for diverse populations, including rural caregivers and underserved communities.

·Collaborate with healthcare systems, social service agencies, and community organizations to ensure seamless referrals and coordinated service delivery for caregivers.

·Align I&A services with caregiver education, respite, and case management to ensure a holistic, coordinated approach to caregiver support.

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

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

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

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

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

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

RIV AAA is requesting to directly provide Caregiver Information and Assistance services due to the critical nature of these services.

Regional data, including community needs assessments, caregiver surveys, and stakeholder input, consistently demonstrate that caregivers face significant challenges in identifying, accessing, and navigating available services. The complexity of the long-term services and supports system, combined

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

with fragmented service delivery and limited public awareness, creates substantial barriers for caregivers. These challenges are amplified for rural residents, individuals with limited digital access, and those experiencing economic hardship.

As the recognized entry point for aging services in the region, RIV AAA is uniquely positioned to provide unbiased, comprehensive, and person-centered information and assistance. Caregivers frequently rely on the agency as a trusted source for accurate and up-to-date information. Direct service provision ensures consistency, quality, and neutrality in service delivery, which is essential for informed decision-making.

RIV AAA has engaged in ongoing efforts to identify and partner with community-based organizations capable of providing caregiver-focused I&A services. While some agencies offer limited information or referral services, there is no single entity within the region that provides comprehensive, coordinated, and caregiver-specific information and assistance across all three counties. Existing providers often have narrow service scopes, eligibility restrictions, or limited capacity, resulting in fragmented access for caregivers.

Providing I&A services directly is a cost-effective approach that leverages RIV AAA's existing infrastructure, including trained staff, resource databases, and communication systems. Centralizing I&A services reduces duplication across the network, improves efficiency in service delivery, and minimizes administrative overhead associated with contracting multiple providers. Additionally, economies of scale allow the agency to serve a higher volume of caregivers at a lower per-unit cost.

RIV AAA continues to build capacity among community partners by:

- Sharing resource information and referral protocols
- Providing training on caregiver needs and system navigation
- Encouraging coordinated referral pathways
- Supporting integration with the agency's centralized resource database

Despite these efforts, the level of coordination and comprehensiveness required for effective caregiver I&A necessitates direct service provision by the AAA.

Direct provision allows RIV AAA to maintain strong quality assurance standards, including staff training, standardized protocols, data tracking, and performance monitoring. This ensures that caregivers receive accurate, timely, and consistent information and that outcomes can be effectively measured and reported. Caregiver Information and Assistance is classified as a direct service rather than an administrative activity. Under the Older Americans Act, Information and Assistance is a core service that provides direct benefit to eligible individuals by helping them access needed supports and make informed decisions. While certain elements (e.g., database maintenance or system coordination) may support administrative functions, the primary activity—engaging directly with caregivers to assess needs and provide tailored information and referrals—constitutes a direct service.

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

Caregiver Supplemental Services

Total of Federal Dollars

Total of State Dollars

Geographic Area Served Berrien, Cass, Van Buren

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

Goal:

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

Provide flexible, responsive supplemental supports to family caregivers in Berrien, Cass, and Van Buren counties to address unmet needs, reduce caregiver burden, and sustain caregiving in home and community-based settings.

Objectives:

1. Address immediate, short-term gaps in services that cannot be met through other programs or funding sources.
2. Enhance caregiver capacity to safely and effectively provide care through access to essential goods and supports.
3. Prevent caregiver burnout and delay or avoid institutionalization of care recipients.
4. Ensure equitable access to supplemental supports for caregivers with the greatest economic and social need, including rural and underserved populations.

Planned Activities:

- Offer limited, short-term financial assistance or direct provision of goods and services that directly support the caregiving role.
- Conduct person-centered assessments to determine eligibility and identify specific supplemental needs that cannot be met through other available resources.
- Ensure supplemental services are provided only after exploring and exhausting other funding sources and community resources. Staff will coordinate with local providers and programs to avoid duplication and maximize resource utilization.
- Utilize a capped, needs-based allocation model to ensure equitable distribution of resources while maintaining the ability to respond to urgent and diverse caregiver needs.
- When appropriate, coordinate with vendors or directly purchase approved goods and services to ensure timely access and cost control.
- Conduct follow-up with caregivers to assess the effectiveness of supplemental supports in reducing burden and improving caregiving capacity.
- Align supplemental services with caregiver information and assistance, education, and case management to provide a comprehensive support system.

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

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

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

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

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STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

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

RIV AAA is requesting to directly provide Caregiver Supplemental Services due to the highly individualized, time-sensitive nature of these supports, limited provider availability, and the need for flexible and efficient service delivery.

Regional needs assessments, caregiver feedback, and service utilization data consistently demonstrate that caregivers experience unmet needs that fall outside traditional service categories. These include lack of access to basic caregiving supplies, home safety concerns, and financial barriers to obtaining necessary equipment or services. Such gaps can quickly escalate into caregiver stress, health decline, or premature institutionalization of care recipients. Rural geography, economic disparities, and limited local resources further exacerbate these challenges in Berrien, Cass, and Van Buren counties.

Caregiver Supplemental Services are inherently flexible and episodic, requiring rapid response and individualized decision-making. Contracting these services through external providers is often not feasible due to the unpredictable and varied nature of requests. Direct provision allows RIV AAA to respond quickly to urgent needs, tailor supports to individual circumstances, and ensure that resources are used effectively.

RIV AAA has explored partnerships with community organizations, vendors, and service providers to deliver supplemental supports. However, there is no comprehensive provider network capable of delivering the full range of allowable supplemental services in a coordinated and flexible manner. Many providers have limited scopes of service, restrictive eligibility requirements, or lack the capacity to address small-scale or one-time needs. As a result, caregivers frequently encounter gaps that cannot be addressed through existing systems.

Direct provision of supplemental services is cost-effective and minimizes administrative burden. By managing funds internally, RIV AAA can:

- Avoid additional administrative costs associated with contracting multiple providers
- Ensure funds are used strictly for allowable, high-impact supports
- Maintain tight oversight of expenditures and prevent duplication of services

This approach allows for maximum impact per dollar spent while maintaining fiscal accountability.

RIV AAA actively works to identify and collaborate with local providers, community agencies, and vendors to meet caregiver needs whenever possible. Staff routinely refer caregivers to existing resources and funding streams prior to authorizing supplemental services. Additionally, the agency supports capacity-building efforts by:

- Sharing information about caregiver needs with community partners
- Encouraging development of low-cost, community-based solutions
- Facilitating connections between caregivers and local resources

Despite these efforts, gaps persist that necessitate direct service provision to ensure caregivers receive timely and adequate support.

Direct provision ensures equitable access to supplemental supports, particularly for caregivers in rural or underserved areas who may have limited access to providers or financial resources. RIV AAA can prioritize individuals with the greatest economic and social need and ensure fair distribution of limited funds across the region.

Providing services directly enables RIV AAA to maintain consistent eligibility criteria, documentation

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

standards, and outcome tracking. This ensures compliance with funding requirements and allows the agency to evaluate the effectiveness of supplemental supports in achieving program goals .

Caregiver Supplemental Services are classified as direct services under the Older Americans Act , as they provide tangible, direct benefits to eligible caregivers by addressing specific, identified needs. While administrative functions (e.g., fiscal management, vendor coordination) support the program, the primary activity—delivering goods and services that directly assist caregivers—constitutes a direct service. Direct provision is both appropriate and necessary to fulfill the intent of the program and meet regional needs effectively.

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

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

2027–2029 MYP Goals

MYP Goal

A. Strengthen access to services that support health, independence, and social connectedness.

State Goal Match: 1

Objectives

1. Increase the number of older adults and caregivers accessing RIV AAA services .
2. Expand evidence-based and social engagement programming in all three counties.
3. Reduce reported social isolation among participants through targeted interventions.

Planned Activities

1. Reduce reported social isolation among participants through targeted interventions.

Timeline: 10/01/2026 to 09/30/2029

Planned

- Develop and support social connection initiatives, including friendly visitor programs, telephone reassurance, and peer support groups
- Expand group-based programming that fosters meaningful engagement
- Collaborate with local organizations to create inclusive, culturally responsive opportunities for connection
- Leverage technology to connect participants who are homebound or in rural areas

Expected Outcome

-Increase the percentage of participants reporting improved social connectedness by at least 20% from pre- to post-program surveys.

-Decrease the percentage of participants reporting frequent feelings of loneliness or social isolation by 20%, as measured through post-surveys.

-Increase the number of individuals participating in social connection initiatives by 10%, tracked through program enrollment data.

Progress

2. Increase the number of older adults and caregivers accessing RIV AAA services .

Timeline: 10/01/2026 to 09/30/2029

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

Planned

- Expand in-home and community-based services, including respite care, personal care, and caregiver support programs, with targeted outreach to underserved populations.
- Enhance transportation coordination efforts to reduce access barriers.
- Conduct targeted outreach and marketing campaigns across Berrien, Cass, and Van Buren counties, prioritizing rural areas and individuals with greatest economic and social need.
- Strengthen referral pathways with healthcare providers, community organizations, and Tribal partners to increase awareness and access to services.
- Utilize data-driven approaches to identify service gaps and adjust resource allocation accordingly.

Expected Outcome

-Increase the number of unduplicated older adults and caregivers served annually by 10%, as measured through RIV AAA client tracking data.

-Increase overall service utilization rates in Berrien, Cass, and Van Buren counties by 5%, as measured quarterly.

-Increase the percentage of new participants accessing services for the first time by 25%, tracked through intake data.

-Increase the number of referrals received from healthcare providers, community organizations, and Tribal partners by 15%.

Progress

3. Expand evidence-based and social engagement programming in all three counties.

Timeline: 10/01/2026 to 09/30/2029

Planned

- Increase availability of evidence-based programs in both in-person and virtual formats.
- Develop partners with community centers, senior centers, libraries, and faith-based organizations to host programs in accessible locations.
- Recruit and train facilitators to ensure sustainability and geographic coverage across all counties.
- Integrate social engagement opportunities into existing programs.
- Pilot innovative programming models.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

Expected Outcome

-Increase total participation in evidence-based and social engagement programs by 10% annually, as measured by unduplicated participant counts.

-Increase the number of evidence-based program offerings across all formats (in-person and virtual) by 10%.

-Deliver a minimum of 3 program offerings per quarter in each county, including at least one rural location per county.

-Achieve a program completion rate of at least 80% and a participant retention rate of at least 75% annually, tracked by program enrollment and attendance records.

-At least 85% of participants will report improved social connectedness or well-being, as measured through post-program surveys and qualitative feedback.

Progress

B. Advance collaborative partnerships to strengthen the aging network.

State Goal Match: 2

Objectives

1. Formalize or expand cross-sector partnerships
2. Increase collaboration with Tribal partners and culturally specific organizations

Planned Activities

1. Formalize or expand cross-sector partnerships.

Timeline: 10/01/2026 to 09/30/2029

Planned

- Strengthen partnerships with MDHHS, healthcare systems, behavioral health providers, and community-based organizations
- Engage local governments, housing agencies, and transportation providers to collaboratively address social determinants of health
- Develop standardized referral pathways and communication protocols to improve care coordination across partner organizations
- Convene regular partner network meetings to foster collaboration, share updates, and identify emerging community needs

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

Expected Outcome

-Achieve participation from at least 25 unique partner organizations annually, with 75% attending at least two partner network meetings per year, as tracked through meeting attendance records.

-Implement 1 joint cross-sector initiative annually, documented through partnership agreements and project reports.

-Increase the number of cross-sector referrals made and received between RIV AAA and partner organizations by 15%, tracked through referral system data.

-Achieve at least 90% partner satisfaction with collaboration and communication efforts, as measured through an annual partner survey.

Progress

2. Increase collaboration with Tribal partners and culturally specific organizations .

Timeline: 10/01/2026 to 09/30/2029

Planned

·Collaborate with Title VI Tribal grantees to ensure culturally responsive, coordinated service delivery for Native American elders and caregivers

·Establish or strengthen processes with Tribal partners to support ongoing communication, planning, and program alignment

·Partner with culturally specific organizations to co-design and deliver programs that reflect the needs, preferences, and traditions of diverse communities

·Provide training and technical assistance to staff and partners on cultural humility, cultural responsiveness, and equitable service delivery

·Support participation of Tribal and culturally specific partners in advisory councils, workgroups, and partner network meetings

Expected Outcome

-Ensure representation from at least 5 Tribal and culturally specific organizations annually, with 70% participating in at least two meetings or workgroups per year, as tracked through attendance logs.

-Develop or adapt at least 2 culturally responsive programs or services annually, in collaboration with Tribal and culturally specific partners, tracked through program records.

-Achieve at least 90% positive feedback from participants and partners regarding cultural relevance and accessibility, with at least 85% reporting that services reflect their cultural needs and preferences, as measured through surveys and qualitative feedback.

Progress

C. Improve awareness and navigation of aging services and supports.

State Goal Match: 3

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

Objectives

1. Increase outreach to individuals with greatest economic and social need.
2. Improve consumer awareness of available services.
3. Enhance responsiveness and accessibility of information and assistance services across all counties.

Planned Activities

1. Increase outreach to individuals with greatest economic and social need.
Timeline: 10/01/2026 to 09/30/2029

Planned

- Expand outreach through community events, health fairs, senior centers, food distribution sites, and other high-impact community touchpoints.
- Partner with healthcare providers, behavioral health agencies, and trusted community leaders to reach individuals who may not otherwise engage with the aging network.
- Develop and implement targeted outreach strategies for rural residents, low-income individuals, racial and ethnic minorities, and family caregivers.
- Utilize multiple communication channels, including print materials, social media, local media, and direct community engagement, to ensure broad and equitable reach.
- Deploy mobile outreach and in-person navigation support in underserved and rural areas across Berrien, Cass, and Van Buren counties.

Expected Outcome

-Conduct at least 20 outreach events annually, reaching a minimum of 500 individuals per year, as documented through outreach tracking logs.

-Increase outreach engagement among priority populations by 15%, as measured through demographic data collection.

-Deliver 100% of outreach activities across Berrien, Cass, and Van Buren counties annually, with at least 25% occurring in rural or underserved areas, tracked quarterly.

Progress

2. Enhance responsiveness and accessibility of information and assistance services across all counties.
Timeline: 10/01/2026 to 09/30/2029

Planned

- Strengthen Information & Assistance services by improving staffing capacity, training, and use of technology to ensure timely and accurate responses.
- Monitor and improve call handling processes, including response times, call resolution rates, and customer service quality.
- Provide language access services, including interpretation and translation, to ensure equitable access for individuals with limited English proficiency.
- Expand availability of I&A services through multiple access points, including phone, in-person, and online platforms.
- Implement continuous quality improvement processes based on consumer feedback and service data.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

Expected Outcome

-Achieve a call resolution rate of at least 85% on first contact.

-Provide timely assistance to at least 90% of individuals seeking I&A services annually, tracked through service logs.

-Increase the number of individuals accessing I&A services through multiple entry points by 10%, as measured through intake data.

-Achieve at least 90% consumer satisfaction with I&A services annually, as measured through surveys or follow-up contacts.

-Increase service utilization among priority populations by 15%, ensuring proportional representation across Berrien, Cass, and Van Buren counties, as measured through demographic reporting.

Progress

3. Improve consumer awareness of available services.

Timeline: 10/01/2026 to 09/30/2029

Planned

·Strengthen Information & Assistance (I&A) services to provide clear, accurate, and person-centered information about available programs and supports.

·Improve website usability.

·Utilize multiple communication channels to promote services consistently.

·Develop and distribute culturally appropriate and language-accessible materials tailored to diverse communities.

·Implement coordinated messaging campaigns with partners to increase visibility of aging services across the region.

Expected Outcome

-Increase website traffic by 20%, as measured through website analytics.

-Reach at least 4,000 individuals annually through awareness campaigns and informational outreach, tracked through campaign and event data.

-Increase inquiries to Information & Assistance services by 10%, as measured through call, email, and online inquiry data.

-Achieve a 20% increase in consumer awareness of available services, as measured through community needs assessment.

Progress

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

D. Promote positive messaging that celebrates aging and caregiving.

State Goal Match: 4

Objectives

1. Integrate strength-based, inclusive messaging into RIV AAA communications.
2. Increase community engagement with positive aging campaigns.
3. Elevate caregiver recognition and support through targeted initiatives.

Planned Activities

1. Elevate caregiver recognition and support through targeted initiatives.

Timeline: 10/01/2026 to 09/30/2029

Planned

- Highlight stories of caregiver resilience and contributions through newsletters, social media, and community events.
- Develop caregiver recognition initiatives, such as awards, appreciation events, and public acknowledgements.
- Collaborate with community partners, employers, and healthcare organizations to promote caregiver awareness and support resources.
- Integrate caregiver-focused messaging into broader outreach and awareness campaigns.
- Provide platforms for caregivers to share their experiences and connect with one another.

Expected Outcome

-Conduct at least 2 campaigns annually, specifically highlighting caregivers, documented through communications records.

-Increase participation in caregiver-focused events by 20%, as measured through attendance data.

-Increase engagement with caregiver-related content by 20%, as measured through analytics.

-Recognize at least 10 caregivers annually through formal initiatives (awards, storytelling, etc.), tracked through program and communication records.

Progress

2. Integrate strength-based, inclusive messaging into RIV AAA communications.

Timeline: 10/01/2026 to 09/30/2029

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

Planned

- Develop and implement a comprehensive communications plan that reflects positive, empowering, and age-inclusive language across all platforms and materials.
- Provide training to staff, board members, and partner organizations on age-inclusive, strength-based, and culturally responsive messaging.
- Conduct regular reviews of outreach materials, website content, and publications to ensure alignment with positive aging principles.
- Incorporate diverse images and narratives that reflect the experiences of older adults, caregivers, and priority populations across Berrien, Cass, and Van Buren counties.

Expected Outcome

- Increase overall communications engagement by 20%, as measured through social media and website analytics.
- Review and update 100% of core communications materials to ensure that at least 90% of materials align with strength-based, inclusive messaging, documented through communication audits.
- Train at least 90% of staff on age-inclusive, strength-based, and culturally responsive communication practices, tracked through training attendance records.

Progress

3. Increase community engagement with positive aging campaigns.

Timeline: 10/01/2026 to 09/30/2029

Planned

- Conduct public awareness campaigns during key observances that highlight the value and contributions of older adults and caregivers
- Partner with local media outlets, community organizations, and influencers to amplify positive aging messages
- Utilize multiple communication channels to maximize recognition events
- Align campaigns with broader age-friendly and livable community initiatives to reinforce consistent messaging

Expected Outcome

- Implement at least 2 positive aging campaigns, including campaigns aligned with national and local observances, documented through communications plans and reports.
- Achieve a 15% annual increase in campaign-specific engagement metrics, as measured through analytics.
- Increase attendance and community participation in awareness events by 20%, as measured through event registration and attendance tracking.
- Secure a minimum of 5 earned media placements per year, tracked through media logs and reports.

Progress

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

E. Inspire and advance dementia-friendly communities across the region.

State Goal Match: 1, 2, 3, 4

Objectives

1. Expand dementia-friendly initiatives in all three counties
2. Increase the number of dementia-friendly community partners and businesses
3. Improve support for individuals living with dementia and their caregivers through expanded programming

Planned Activities

1. Improve support for individuals living with dementia and their caregivers through expanded programming.

Timeline: 10/01/2026 to 09/30/2029

Planned

- Expand Memory Café programs across all three counties
- Increase availability of caregiver support services, including respite, support groups, and education programs.
- Collaborate with healthcare providers to promote referral pathways into dementia-related services and supports.
- Enhance coordination between RIV AAA programs and community partners to ensure seamless access to services.
- Develop culturally responsive and accessible programming tailored to diverse populations.

Expected Outcome

-Increase participation in Memory Cafes and caregiver support programs by 15% annually, with at least 60% repeat participation, tracked through attendance logs.

-Increase referrals to dementia-specific services and supports by 20%, as measured through referral tracking systems.

-Achieve at least 85% of caregivers reporting reduced stress and increase confidence in caregiving, as measured through pre/post surveys.

-Increase utilization of respite caregiver support services by 15%, tracked through service utilization data.

Progress

2. Expand dementia-friendly initiatives in all three counties

Timeline: 10/01/2026 to 09/30/2029

Planned

- Lead and support dementia-friendly community initiatives in Berrien, Cass, and Van Buren counties.
- Promote inclusive community design and accessibility by collaborating with local governments, planners, and businesses to incorporate dementia-friendly principles into public spaces and services.
- Integrate dementia-friendly practices into existing community initiatives.
- Provide technical assistance and toolkits to communities seeking to become dementia-friendly.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

Expected Outcome

-Support at least 2 communities to adopt dementia-friendly practices, including documented policy changes, environmental modifications, or formal organizational commitments.

-Establish and sustain at least 2 active dementia-friendly initiatives per county annually, tracked through program and partner reports.

Progress

3. Increase the number of dementia-friendly community partners and businesses.

Timeline: 10/01/2026 to 09/30/2029

Planned

- Provide dementia education and training for businesses, first responders, healthcare providers, faith-based organizations, and community members.
- Develop and promote a dementia-friendly designation for participating organizations and businesses.
- Conduct targeted outreach to key sectors to encourage participation.
- Partner with chambers of commerce and economic development organizations to expand engagement among local businesses.
- Offer ongoing support and refresher training to sustain dementia-friendly practices among partners.

Expected Outcome

-Train at least 100 individuals annually across key sectors, tracked through training records.

-Achieve at least 10 businesses and organizations designated as dementia-friendly annually, documented through program records.

-Ensure that at least 70% of trained partners remain actively engaged within 12 months, tracked through follow-up and participation data.

Progress

STATE OF MICHIGAN
 Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
 FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

Planned Service Array

Category	Services
Provided by Area Agency	<p>Access</p> <ul style="list-style-type: none"> • Care Management • Care Transition Coordination and Support • Case Coordination and Support • Information and Assistance • Options Counseling • Outreach <p>In-Home</p> <ul style="list-style-type: none"> • Friendly Reassurance <p>Community</p> <ul style="list-style-type: none"> • Disease Prevention/Health Promotion • Long Term Care Ombudsman • Prevention of Elder Abuse, Neglect and Exploitation <p>Caregivers of Older Adults Services</p> <ul style="list-style-type: none"> • Caregiver Case Management • Caregiver Counseling • Caregiver Education • Caregiver Information and Assistance • Caregiver Supplemental Services • Caregiver Support Groups • Caregiver Training • Respite Care <p>Regional Services</p> <ul style="list-style-type: none"> • Case Coordination & Support for the Deaf and Hard of Hearing • Kinship Caregiver Case Management • Kinship Caregiver Education • Kinship Caregiver Information and Assistance • Kinship Caregiver Respite Care • Kinship Caregiver Supplemental Services • Kinship Caregiver Support Groups • Kinship Caregiver Training

STATE OF MICHIGAN
 Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

<p>Contracted by Area Agency</p>	<p>Access</p> <ul style="list-style-type: none"> • Transportation <p>In-Home</p> <ul style="list-style-type: none"> • Assistive Devices & Technologies • Chore • Home Injury Control • Homemaking • Medication Management • Personal Care <p>Community</p> <ul style="list-style-type: none"> • Counseling Services • Home Repair • Legal Assistance <p>Nutrition Services</p> <ul style="list-style-type: none"> • Congregate Meals • Home Delivered Meals • Nutrition Counseling • Nutrition Education • Supplemental Nutrition Services - Food • Supplemental Nutrition Services - Oral Nutrition Supplements <p>Caregivers of Older Adults Services</p> <ul style="list-style-type: none"> • Adult Day Services • Caregiver Education • Caregiver Training • Respite Care
<p>Local Millage Funded</p>	<p>Access</p> <ul style="list-style-type: none"> • Information and Assistance * • Options Counseling * • Outreach * • Transportation * <p>In-Home</p> <ul style="list-style-type: none"> • Chore * • Friendly Reassurance * • Home Injury Control * • Homemaking *

STATE OF MICHIGAN
 Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
 FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

	<p>In-Home</p> <ul style="list-style-type: none"> • Personal Care * <p>Community</p> <ul style="list-style-type: none"> • Senior Center Operations * <p>Nutrition Services</p> <ul style="list-style-type: none"> • Congregate Meals * • Home Delivered Meals * <p>Caregivers of Older Adults Services</p> <ul style="list-style-type: none"> • Adult Day Services * • Caregiver Education * • Caregiver Support Groups * • Caregiver Training * • Respite Care *
<p>Participant Private Pay</p>	<p>Access</p> <ul style="list-style-type: none"> • Care Management • Case Coordination and Support • Options Counseling • Transportation <p>In-Home</p> <ul style="list-style-type: none"> • Assistive Devices & Technologies • Chore • Friendly Reassurance • Home Care Assistance • Home Health Aide • Home Injury Control • Homemaking • Medication Management • Personal Care <p>Community</p> <ul style="list-style-type: none"> • Assistance to Hearing Impaired & Deaf Community • Counseling Services • Health Screening • Home Repair • Legal Assistance • Vision Services

STATE OF MICHIGAN
 Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
 FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

	<p>Nutrition Services</p> <ul style="list-style-type: none"> • Congregate Meals • Home Delivered Meals • Nutrition Counseling • Nutrition Education <p>Caregivers of Older Adults Services</p> <ul style="list-style-type: none"> • Adult Day Services • Respite Care
<p>Funded by Other Sources</p>	<p>Access</p> <ul style="list-style-type: none"> • Disaster Advocacy & Outreach

* Not PSA-wide

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

Program Development Spending Plan

Does the MYP budget reflect the use of Program Development funds?

Yes No

If yes, please describe how the funds will be used.

Advocacy Strategy

Please describe the following:

1. How will the AAA monitor, evaluate, and comment on policies, programs, hearings, levies, and community actions which affect older individuals and family caregivers which the area agency considers to be aligned with the interests identified in the Act?

Region IV Area Agency on Aging (RIV AAA) will implement a comprehensive and structured approach to monitor, evaluate, and comment on policies, programs, hearings, levies, and community actions that impact older adults and family caregivers. This approach is grounded in the agency's responsibility to serve as a visible and effective advocate for the interests of older individuals, particularly those with the greatest economic and social need.

RIV AAA will maintain a proactive system for identifying and tracking relevant developments at the local, regional, state, and federal levels. This includes monitoring proposed legislation, administrative rules, ballot initiatives, budget proposals, and public hearings that may affect services, funding, or quality of life for older adults and caregivers. Staff will regularly review updates from the state unit on aging, legislative tracking systems, professional associations, and trusted advocacy organizations. Participation in statewide and national aging networks will further ensure timely awareness of emerging issues and policy trends. At the community level, RIV AAA will stay informed about local millages, transportation initiatives, healthcare system changes, and other actions that may impact access to services and supports. Staff will maintain relationships with local government entities, community coalitions, and service providers to ensure early identification of relevant developments.

Once a policy, program, or community action is identified, RIV AAA will conduct a structured internal review to assess its potential impact on older adults and family caregivers. This review will include consideration of how the issue aligns with the priorities of the OAA, including promoting independence, protecting rights, and ensuring access to person-centered, culturally responsive services.

When appropriate, RIV AAA will utilize available data sources – including community needs assessments, service utilization data, consumer feedback, and demographic trends – to inform its analysis. This data-driven approach ensures that positions taken by RIV AAA are grounded in both evidence and lived experience.

The RIV AAA recognizes that effective advocacy must be informed by the voices of those it serves. To that end, the agency will actively engage its Advisory Council, Board of Directors, and community partners in reviewing and discussing relevant issues. These groups provide diverse perspectives, including representation from older adults, caregivers, service providers, and community leaders. Special attention will be given to ensuring that perspectives of underserved and underrepresented populations are included in the decision-making process. In addition, the RIV AAA will collaborate with advocacy organizations, coalitions, and provider networks to share information, coordinate responses, and amplify collective impact when appropriate.

Based on its analysis, RIV AAA will determine whether and how to take action. Actions may include submitting formal written comments, providing testimony at public hearings, or engaging in public education efforts. RIV AAA will ensure that all advocacy activities are nonpartisan and consistent with applicable regulations governing the use of public funds. When developing official positions, RIV AAA will clearly articulate how the issue aligns with the goals and priorities of the OAA and the needs identified in the Multi-Year Plan. Positions

Region IV Area Agency on Aging, Inc.

FY 2027

will emphasize the potential impact on vulnerable populations and highlight recommendations to improve outcomes for older adults and caregivers.

RIV AAA will serve as a trusted source of information for stakeholders by communicating relevant policy developments and their implications. This includes sharing updates through newsletters, partner meetings, website content, and social media channels. RIV AAA will also provide education and resources to empower older adults, caregivers, and community members to engage in advocacy efforts themselves. By fostering transparency and open communication, RIV AAA helps to ensure that stakeholders are informed and able to participate meaningfully in decisions that affect their lives.

Through a systematic and inclusive approach, RIV AAA will fulfill its role as a leader and advocate in the aging network. By continuously monitoring relevant developments, engaging stakeholders, and taking informed and strategic action, RIV AAA ensures that the interests of older adults and family caregivers are represented and advanced. This commitment supports the broader mission of promoting dignity, independence, and quality of life for all older individuals within the planning and service area.

2. How will the AAA solicit comments from the public on the needs of older individuals and family caregivers?

Region IV Area Agency on Aging (RIV AAA) will implement a comprehensive, inclusive, and continuous approach to soliciting comments from the public regarding the needs of older adults and family caregivers. This approach ensures that community input is not only gathered regularly, but also meaningfully incorporated into planning, service delivery, and advocacy efforts. RIV AAA is committed to engaging a diverse cross-section of the population, with intentional outreach to individuals with the greatest economic and social need.

To maximize participation and accessibility, RIV AAA will utilize a variety of methods to solicit public comment. These methods will include both formal and informal engagement opportunities designed to meet individuals where they are. Key strategies include community surveys, public hearings, focus groups, listening sessions, and participation in community events. Surveys will be distributed in both digital and paper formats to ensure access for individuals with varying levels of technological proficiency. Public hearings will be held in geographically diverse locations throughout the planning and service area, with virtual participation options available to reduce barriers related to transportation, mobility, or caregiving responsibilities. Listening sessions and focus groups will be held to facilitate deeper conversations around specific issues. These sessions will be conducted in partnership with trusted community organizations to increase participation and foster open dialogue.

Recognizing the importance of equitable engagement, RIV AAA will implement targeted outreach strategies to ensure that input is received from individuals with the greatest economic and social need. Outreach efforts will include collaboration with community-based organizations, faith communities, housing providers, healthcare partners, and social service agencies that serve these populations. Materials will be translated into languages reflective of the community, and interpretation services will be made available during public engagement activities as needed. RIV AAA will also utilize culturally responsive approaches to engagement, ensuring that outreach methods and messaging are respectful and relevant to diverse populations.

RIV AAA will leverage its established network of partners and providers to expand outreach and encourage participation. This includes RIV AAA's Advisory Council, Board of Directors, service providers, and community coalitions. These partners will play a key role in disseminating information about opportunities for public comment and encouraging the individuals they serve to participate. Partner and Provider Network meetings

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

will serve as additional venues for gathering feedback from professionals who work closely with older adults and caregivers. These stakeholders often provide valuable insights into emerging needs, service gaps, and system-level challenges.

In addition to structured engagement activities, RIV AAA will maintain ongoing mechanisms for collecting consumer feedback. This includes satisfaction surveys, program evaluations, and direct communication through the Consumer Advisory Council. RIV AAA will also utilize its website and social media platforms to provide accessible avenues for public input.

Public input will be systematically integrated into RIV AAA's planning and decision-making processes, including the development and implementation of the Multi-Year Plan (MYP) and annual updates. Data collected through public engagement will be analyzed alongside demographic trends, service utilization data, and other relevant information to identify priority needs and inform strategic goals. RIV AAA will ensure transparency by sharing how the public has influenced decisions. Summaries of feedback and resulting actions will be communicated through reports, presentations, and public-facing materials. This feedback loop reinforces trust and demonstrates the value of community participation.

To ensure broad and equitable participation, RIV AAA will take proactive steps to reduce barriers to engagement. This includes offering events at various times of day, providing transportation or virtual options, ensuring ADA-accessible locations, and offering accommodations such as large-print materials, or assistive devices. Efforts will also be made to create welcoming and inclusive environments where participants feel comfortable sharing their experiences and perspectives.

Through a robust and inclusive public engagement framework, RIV AAA will ensure that the voices of older adults and family caregivers are central to its work. By offering multiple avenues for input, prioritizing outreach to underserved populations, and integrating feedback into planning and decision-making, RIV AAA upholds its responsibility to be responsive, transparent, and community driven. This approach not only strengthens programs and services but also empowers individuals to play an active role in shaping the systems that support their health, independence, and quality of life.

3. How will the AAA represent the interests of older individuals and family caregivers to local level and executive branch officials, public and private agencies, or organizations?

Region IV Area Agency on Aging (RIV AAA) will serve as a visible, credible, and effective advocate for older adults and family caregivers by representing their interests across local governments, executive branch entities, and public and private organizations. Informed by regional data, community input, and lived experiences RIV AAA will utilize a coordinated and strategic approach to ensure that the needs of older individuals – particularly those with the greatest economic and social need – are consistently elevated in decision-making processes.

RIV AAA will maintain strong, ongoing relationships with local elected officials, municipal leaders, county administrators, and relevant executive branch agencies. Through regular communication, participation in public meetings, and direct outreach, RIV AAA will ensure that policymakers are informed about the needs, challenges, and priorities of older adults and caregivers within the region. RIV AAA leadership and designated staff will attend local meetings and legislative briefings to remain informed and to provide timely input when issues affecting older adults arise. RIV AAA will also engage with state-level departments and agencies that influence aging services, including those related to health, human services, housing, and transportation. By maintaining open lines of communication with these entities, RIV AAA can provide input on program design, implementation, and policy development to better align with the needs of the aging population.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

To effectively represent the interests of older adults and caregivers, RIV AAA will ground its advocacy efforts in data and evidence. The agency will utilize findings from its community needs assessments, Multi-Year Plan (MYP), service utilization data, and consumer feedback to identify key issues and trends. These data points will be translated into clear, compelling messages that highlight both the challenges faced by older adults and the opportunities for improved outcomes through targeted investments and policy changes. RIV AAA will develop issues briefs, policy summaries, and presentations tailored to specific audiences, ensuring that decision-makers understand the local impact of broader policy decisions. Emphasis will be placed on demonstrating how proposed actions affect vulnerable populations.

RIV AAA will engage in a range of advocacy activities to represent community interests. These include submitting formal comments on proposed rules and regulations, providing testimony at public hearings, and participating in advisory committees and workgroups. In addition to formal channels, RIV AAA will engage in informal advocacy through one-on-one meetings with policymakers, participation in community coalitions, and collaboration with other stakeholders. These efforts allow for more nuanced discussions and relationship-building, which are critical for influencing long-term change. All advocacy activities will be conducted in a nonpartisan manner and in compliance with applicable federal, state and local regulations governing the use of public funds.

A central component of RIV AAA's advocacy strategy is ensuring that the voices of older adults and caregivers are directly heard by decision-makers. RIV AAA will create and support opportunities for individuals to share their experiences through public testimony and storytelling initiatives. When appropriate, RIV AAA will assist consumers in preparing to speak at public meetings or connect them with opportunities to engage in advocacy efforts. The Advisory Council and Board of Directors, which include representation from older adults and community members, will also play a key role in shaping advocacy priorities and providing input on emerging issues. Their perspectives will be incorporated into RIV AAA's communications with policymakers and partner organizations.

RIV AAA will collaborate with a broad range of public and private partners to strengthen its advocacy efforts. By working collaboratively, RIV AAA can align messaging, share resources, and amplify the collective voice of the aging network. RIV AAA will also actively participate in regional and statewide coalitions on aging, caregiving, and related issues. These partnerships enhance RIV AAA's ability to influence policy and program development while ensuring that regional perspectives are represented in broader discussions.

In addition to direct advocacy, RIV AAA will prioritize educating policymakers, partners, and the public about the needs of older adults and caregivers. This includes hosting informational sessions, presenting at conferences and community meetings, and disseminating reports and data summaries. By increasing awareness and understanding, RIV AAA will help build support for policies and programs that benefit the aging population.

Through a coordinated, data-informed, and community-driven approach, Region IV Area Agency on Aging will effectively represent the interests of older adults and family caregivers across multiple sectors. By building strong relationships, amplifying consumer voices, and engaging in strategic advocacy, RIV AAA ensures that the needs and priorities of the aging population are recognized and addressed in policies, programs, and community actions. This commitment reinforces RIV AAA's role as a trusted leader and advocate within the region, dedicated to promoting independence, dignity, and quality of life for all older individuals.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

4. How will the AAA consult with and support the State's Long-Term Care Ombudsman Program?

Region IV Area Agency on Aging (RIV AAA) is committed to maintaining a strong, collaborative relationship with the State Long-Term Care Ombudsman Program (LTCOP) to ensure the rights, dignity, and well-being of residents in long-term care settings are protected and promoted. As part of this commitment, RIV AAA supports the Ombudsman Program through the staffing of one and half Ombudsman positions and through ongoing coordination, consultation, and resource alignment to effectively serve residents and their families within the Planning and Service Area (PSA).

RIV AAA recognizes the critical and distinct role of the Ombudsman Program as an independent advocate for residents of nursing homes, assisted living facilities, and other long-term care settings. While maintaining the program's required independence, RIV AAA provides administrative and operational support to ensure Ombudsman staff are equipped to carry out their responsibilities effectively. This balance between independence and support is foundational to the relationship between RIV AAA and the LTCOP.

RIV AAA supports the Ombudsman Program through the recruitment, hiring, and supervision of 1 1/2 qualified Ombudsman staff. RIV AAA ensures that Ombudsman staff receive appropriate onboarding, ongoing training, and professional development opportunities in alignment with state and federal requirements.

To facilitate effective consultation, RIV AAA maintains regular communication and coordination with the State Office of the Long-Term Care Ombudsman. RIV AAA ensures that Ombudsman staff are supported in participation in statewide meetings, trainings, and technical assistance opportunities.

RIV AAA also fosters internal coordination between the Ombudsman Program and other RIV AAA services, including Information and Assistance, care management, and caregiver support programs. While respecting confidentiality and the independence of the Ombudsman role, RIV AAA promotes appropriate collaboration to ensure that residents and their families are connected to additional resources when needed.

In addition to staffing support, RIV AAA provides administrative infrastructure and resources necessary for the effective operation of the Ombudsman Program. This includes technology, supplies, and access to organizational support functions such as human resources and fiscal management. RIV AAA ensures that Ombudsman staff have the tools and resources needed to perform their duties efficiently and in compliance with program requirements.

RIV AAA is committed to supporting the Ombudsman Program's efforts to advocate for systemic improvements in long-term care. Staff are encouraged to identify trends, patterns, and systemic issues affecting residents and to communicate these findings to RIV AAA leadership. RIV AAA uses this information to inform planning, policy development, and quality improvement efforts within the region. Additionally, RIV AAA supports Ombudsman participation in community education and outreach efforts to raise awareness of residents' rights and the role of the Ombudsman Program.

RIV AAA also supports the Ombudsman Program's role in community engagement and education. Ombudsman staff are provided opportunities to present at community events, provider trainings, and stakeholder meetings to increase awareness of the program and to educate the public about residents' rights and available advocacy services. RIV AAA assists in promoting these efforts through its communication channels and partner networks.

Throughout the FY2027-FY2029 period, RIV AAA will continue to strengthen its partnership with the State

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

Long-Term Care Ombudsman Program by maintaining open communication, supporting staff development, and aligning resources to meet the needs of long-term care residents. By staffing dedicated Ombudsman and providing support, RIV AAA demonstrates its commitment to protecting the rights of vulnerable adults and enhancing the quality of care within long-term care settings.

5. How will the AAA coordinate with public and private organizations, including units of general-purpose local government to promote new or expanded benefits and opportunities for older individuals and family caregivers?

Region IV Area Agency on Aging (RIV AAA) will implement a comprehensive and collaborative approach to coordinating with public and private organizations, including units of general-purpose local government, to promote new and expanded benefits and opportunities for older adults and family caregivers. This coordination strategy is designed to strengthen community capacity, reduce service gaps, and enhance the overall system of supports available to aging populations.

RIV AAA will actively cultivate and maintain partnerships with a broad network of stakeholders. These relationships are essential for identifying emerging needs, leveraging resources, and developing innovative solutions that improve access to services and supports. RIV AAA will engage units of general-purpose local government through regular communication, participation in public meetings, and collaborative planning efforts. By positioning itself as a trusted resource and subject matter expert on aging, RIV AAA will work with local leaders to integrate the needs of older adults and caregivers into broader community planning initiatives.

A key mechanism for coordination will be the RIV AAA Partner Network, which brings together individuals and organizations with a shared interest in supporting older adults and caregivers. Through regular meetings and information-sharing opportunities, the Partner Network fosters collaboration, builds relationships, and promotes alignment across sectors. The network provide a platform for collective action and enable partners to co-develop and implement initiatives that expand benefits and opportunities for the populations served.

RIV AAA will use data from community needs assessments, service utilization, and consumer feedback to identify service gaps and opportunities for expansion. This information will be shared with partners and local governments to inform joint planning and resource allocation. By aligning data across organizations, RIV AAA can help ensure that efforts are targeted, efficient, and responsive to community needs. RIV AAA will also encourage innovation by supporting pilot programs and demonstration projects that address identified gaps.

To maximize impact, RIV AAA will work with partners to align and braid funding from multiple sources, including federal, state, local, and private funds. This coordinated approach allows for the expansion of services beyond what any single funding stream could support. RIV AAA will provide technical assistance to partners on funding opportunities, grant development, and program design to support the implementation of new or expanded initiatives. Collaboration with local governments may include joint funding of services, support for millage initiatives, or integration of aging services into broader community budgets. RIV AAA will also explore partnerships with healthcare systems and managed care organizations to align services that support older adults and caregivers, particularly those with complex health and social needs.

RIV AAA will work with local governments and community partners to promote age-friendly and inclusive community initiatives. This includes supporting communities in adopting policies and practices that enhance accessibility, safety, and engagement for older adults. RIV AAA will provide guidance, tools, and technical assistance to help communities assess their readiness and implement age-friendly strategies. These efforts may include improving walkability, expanding accessible transportation, increasing availability of affordable and appropriate housing, and creating opportunities for social participation and civic engagement. By

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

embedding aging considerations into community planning, RIV AAA helps ensure that older adults can remain active and engaged in their communities.

Recognizing the importance of a strong direct care workforce, RIV AAA will collaborate with educational institutions, workforce development agencies, and employers to promote training, recruitment, and retention strategies. Initiative such as the Southwest Michigan Direct Care Workforce Coalition exemplify how cross-sector collaboration can address workforce shortages and improve the quality of care. RIV AAA will also support opportunities for older adults to remain engaged in the workforce or volunteer roles, recognizing the value of their experience and contributions. Partnerships with local businesses and organizations will help create pathways for meaningful engagement and economic participation.

RIV AAA will coordinate with partners to promote awareness of available benefits and opportunities through joint outreach and communication efforts. This includes co-branded campaigns, shared messaging, and coordinated events that highlight services and resources for older adults and caregivers. RIV AAA will utilize multiple communication channels to disseminate information and ensure that individuals are aware of and able to access available supports. Partners will be encouraged to share information through their own networks, expanding the reach of outreach efforts.

Through intentional coordination with public and private organizations, including units of local government, Region IV AAA will expand the availability and accessibility of benefits and opportunities for older adults and family caregivers. By fostering collaboration, leveraging resources, and promoting innovation, RIV AAA strengthens the regional system of supports and advances its mission to promote independence, dignity, and quality of life for all individuals it serves.

6. How will the AAA take a leadership role in the PSA to assist communities in targeting resources from all appropriate sources to meet the needs of older adults and family caregivers with greatest economic and social need, particularly low-income minorities?

Region IV Area Agency on Aging (RIV AAA) will take a proactive and visible leadership role within its Planning and Service Area (PSA) to ensure that resources from all appropriate sources are effectively targeted to meet the needs of older adults and family caregivers with the greatest economic and social need. RIV AAA's leadership approach is rooted in data-driven decision making, intentional collaboration, equity-focused strategies, and a commitment to building sustainable community capacity.

RIV AAA will lead with a strong foundation of data to identify, understand, and prioritize the needs of vulnerable populations. Through a comprehensive community needs assessment, demographic analyses, service utilization data, and consumer feedback, RIV AAA will identify geographic areas and population groups experiencing the greatest economic and social need. RIV AAA will utilize data to uncover disparities and ensure that the unique needs of individuals are clearly understood and addressed. Findings will be shared with community partners, local governments, and stakeholders to create a common understanding of priority needs and to guide coordinated action. By serving as a central hub for data and analysis, RIV AAA will help align efforts across sectors and ensure that resources are directed where they are most needed.

As the lead agency for aging services in the region, RIV AAA will integrate equity and targeted resource allocation into its MYP and all strategic initiatives. RIV AAA will establish clear policies that focus on reducing disparities, improving access to services, and enhancing outcomes for older adults and caregivers with the greatest need. These priorities will be developed in collaboration with the Advisory Council, ensuring that diverse perspectives inform decision-making. RIV AAA will also align its priorities with state and federal initiatives, as well as local community plans, to maximize impact and avoid duplication of efforts.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

RIV AAA will serve as a convener and facilitator, bringing together public and private organizations, local governments, healthcare systems, community-based organizations, and advocacy groups to address the needs of vulnerable populations. Through its Partner Network and participation in regional coalitions, RIV AAA will foster collaboration, encourage shared responsibility, and promote coordinated service delivery. By creating spaces for dialogue and joint planning, RIV AAA will help partners identify opportunities to pool resources, align strategies, and implement solutions that are responsive to community needs.

Recognizing that individuals with the greatest need are often the hardest to reach, RIV AAA will implement targeted outreach strategies to engage low-income and minority older adults and caregivers. This includes partnering with trusted community organizations, faith-based groups, cultural associations, and local leaders who have established relationships within these communities. RIV AAA will ensure that outreach materials and communication strategies are culturally and linguistically appropriate, and that services are delivered in a manner that is respectful and accessible. Efforts will be made to reduce barriers to participation. By building trust and fostering meaningful relationships, RIV AAA will ensure that underserved populations are not only reached but actively engaged in shaping services and supports.

As a leader in the aging network, RIV AAA will advocate for policies and system changes that improve access to resources and reduce disparities for older adults and caregivers. RIV AAA will elevate the voices of those with lived experience, ensuring that their perspectives are included in policy discussions and that their needs are reflected in program design. By addressing systemic barriers and promoting inclusive policies, RIV AAA will help create a more equitable and responsive system of supports.

Through strong leadership and strategic coordination, Region IV Area Agency on Aging will play a central role in ensuring that resources are effectively targeted to meet the needs of older adults and family caregivers with the greatest economic and social need. By leveraging partnerships, aligning resources, and amplifying community voices, RIV AAA will help build a more inclusive, responsive, and sustainable system of supports that promotes independence, dignity, and quality of life for all individuals within the PSA.

7. How will the AAA work with other aging network providers, including other AAAs, in coordinated effort?

Region IV Area Agency on Aging (RIV AAA) will actively engage in coordinated efforts with other aging network providers, including fellow Area Agency on Aging (AAAs) to strengthen service delivery, improve system alignment, and ensure that older adults and family caregivers receive comprehensive, high-quality support across organizational and geographic boundaries. Recognizing that the needs of older adults are complex and often extend beyond a single service provider or jurisdiction, RIV AAA is committed to fostering collaboration, reducing duplication, and promoting consistency throughout the aging network.

RIV AAA will maintain strong working relationships with other AAAs across the state through participation in statewide meetings, workgroups, and committees. These collaborative forums provide opportunities to share best practices, discuss emerging trends, and align strategies related to service delivery, program development, and policy implementation. By engaging in regular communication with peer AAAs, RIV AAA contributes to a unified and cohesive aging network that is responsive to both regional and statewide priorities. RIV AAA will also collaborate with state-level partners, including the State Unit on Aging and other coordinating bodies, to ensure consistency in program implementation and compliance with federal and state requirements.

RIV AAA recognizes that older adults and caregivers may access services across county or regional lines. To

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

address this, RIV AAA will work closely with neighboring AAAs to coordinate service delivery, streamline referral processes, and ensure continuity of care.

RIV AAA will partner with other aging network providers to design and implement joint programs that address shared challenges and opportunities. By pooling resources and expertise, RIV AAA can expand the reach and impact of these initiatives while maximizing efficiency. RIV AAA will also participate in pilot projects and demonstration programs that test innovative approaches to service delivery. Lessons learned from these efforts will be shared across the network to inform future planning and replication of successful models.

RIV AAA will work in partnership with other AAAs and aging network organizations to advocate for policies and system changes that benefit older adults and caregivers. Through coordinated advocacy efforts, the network can present a unified voice on key issues.

RIV AAA will collaborate with other aging network providers to support workforce development initiatives that strengthen the capacity of the system. This includes joint training opportunities, shared curricula, and coordinated recruitment and retention strategies for direct care workers and other professionals serving older adults. Collaborative training efforts ensure that staff across the network are equipped with the knowledge and skills needed to deliver high-quality, person-centered care.

Through intentional collaboration, shared learning, and coordinated action, RIV AAA will work closely with other aging network providers, including fellow AAAs, to build a more integrated and effective system of care. These coordinated efforts enhance service delivery, promote equity, and ensure that older adults and family caregivers receive the support they need, regardless of where they live. By strengthening partnerships and aligning strategies, RIV AAA contributes to a resilient and responsive aging network that is well positioned to meet the evolving needs of the population it serves.

Planning and Service Area Aging Landscape

1. Describe notable changes in trends since the last MYP providing a picture of potentially eligible service population.

Since the development of the previous Multi-Year Plan (MYP), Region IV Area Agency on Aging (RIV AAA) has observed several notable demographic, economic, and service delivery trends that are shaping the current and future needs of older adults and caregivers across its Planning and Service Area (PSA), which includes Berrien, Cass, and Van Buren counties. These trends provide important context for understanding the potentially eligible population for programs and they inform RIV AAA's priorities and planning efforts for the coming years.

One of the most significant trends affecting the region is the continued growth of the older adult population . Over the past several years, the proportion of residents age 60 and older has steadily increased across the PSA. Current demographics indicate that older adults now represent more than one-quarter of the total population within the three-county region.

Population projections suggest that this growth will continue over the next decade. This increase in the aging population will expand the number of individuals potentially eligible for services funded through the aging network, including nutrition services, caregiver supports, transportation assistance, and home and community-based services. As the population grows, so does the demand for coordinated systems that can help individuals remain independent and engaged in their communities.

Another notable trend is the gradual increase in racial, ethnic, and cultural diversity among older adults in the region. While the PSA historically has had a majority White population , some communities have seen growth in Black, Hispanic/Latino, and other minority populations. This shift highlights the importance of culturally responsive outreach and service delivery to ensure that all eligible residents are aware of and able to access available supports. RIV AAA has recognized the need to strengthen engagement with diverse communities , including individuals who may experience language barriers, cultural differences, or historical mistrust of public systems. Ensuring equitable access to information and services will remain an important focus as the agency works to serve a broader and more diverse aging population.

Data reviewed during the planning process also indicates a growing number of older adults living alone (40.4% across the PSA). Many individuals are aging without the support of nearby family members due to geographic mobility of adult children, smaller family sizes, or the loss of spouses and partners. Older adults who live alone are more likely to experience social isolation and may face greater challenges in managing daily activities, accessing transportation, and maintaining safe housing. This trend has implications for the types of services that may be needed in the future. Individuals living alone are more likely to require assistance with household tasks, meal preparation, transportation, and home safety modifications. They may also benefit from social engagement opportunities, wellness programs, and outreach initiatives designed to reduce isolation and maintain community connection.

Family caregivers continue to play a critical role in supporting older adults throughout the region. However, the needs and circumstances of caregivers are evolving. Many caregivers are part of the "sandwich generation," simultaneously caring for aging parents while also supporting children or grandchildren. Others may be older adults themselves who are caring for spouses or partners with complex medical conditions. Recent data and community feedback indicate that caregivers are experiencing increased stress, financial

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

strain, and limited access to respite services. The complexity of caregiving responsibilities has also grown as individuals live longer with chronic health conditions and cognitive impairments. As a result, the number of individuals potentially eligible for caregiver support services – including education, respite care, and counseling – continues to expand.

Another trend affecting the eligible service population is the increasing prevalence of chronic health conditions and cognitive impairments among older adults. Conditions such as diabetes, heart disease, arthritis, and mobility limitations are common among the aging population and can significantly impact an individual's ability to live independently. Additionally, the number of individuals living with Alzheimer's disease and other forms of dementia is expected to rise as the population ages. These conditions create additional support needs for both individuals and their caregivers. Communities are increasingly recognizing the importance of dementia education, caregiver support programs, and services that help individuals remain safely in their homes and communities for as long as possible.

Housing stability and affordability have emerged as growing concerns for older adults across the region . Rising housing costs, property taxes, and utility expenses have placed financial strain on many individuals living on fixed incomes. At the same time, many homes in the region are older and require repairs or modifications to remain safe and accessible for aging residents. As a result, more older adults may require assistance with home maintenance, accessibility modifications, and housing-related resources. These challenges are particularly significant for low-income individuals and those living in rural areas, where housing options may be limited.

Transportation continues to be a major barrier for older adults , particularly in rural parts of the PSA. Limited public transit options, long travel distances, and mobility limitations can make it difficult for individuals to access healthcare, grocery stores, social services, and community programs. As the number of older drivers decreases due to age-related changes in vision, mobility, or health status, the need for reliable transportation alternatives is expected to increase. This trend highlights the importance of coordinated transportation systems and partnerships that can help individuals maintain access to essential services.

Another notable trend impacting the eligible service population is the ongoing shortage of direct care workers and other service providers who support older adults in the community. Workforce shortages in home care, transportation, and supportive service roles can limit the availability of services, even when individuals are eligible to receive them. These workforce challenges have been reported by both service providers and caregivers throughout the region and represent an important factor in planning for the future of home and community-based services.

Taken together, these trends provide a clearer picture of the evolving needs of potentially eligible populations within the RIV AAA service area. The growing number of older adults, combined with increasing longevity and prevalence of chronic health conditions, suggests that demand for services funding through the aging network will continue to increase. At the same time, social and economic factors – including housing affordability, transportation barriers, caregiver stress, and workforce shortages – are creating additional challenges for individuals seeking to maintain independence in their homes and communities.

In response to these trends, RIV AAA continues to prioritize strategies that expand access to home and community-based services, strengthen caregiver supports, promote age-friendly and dementia-friendly

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

communities, and improve coordination across the aging network services. By monitoring demographic changes and community needs, the agency is better positioned to ensure that services remain responsive to the populations most in need. Understanding these trends allows RIV AAA to anticipate future service demands and plan strategically for the delivery of programs that support independence, dignity, and quality of life for older adults and caregivers throughout Southwest Michigan.

2. Describe how the AAA coordinates a comprehensive system of aging services within the PSA.

Region IV Area Agency on Aging (RIV AAA) serves as the central coordinating entity for aging services within its Planning and Service Area (PSA), which includes Berrien, Cass, and Van Buren counties in Southwest Michigan. RIV AAA is responsible for planning, developing, and coordinating a comprehensive and integrated system of services designed to support older adults and family caregivers. Through strategic partnerships, service coordination, community engagement, and effective resource management, the agency works to ensure that individuals across the region have access to the supports they need to maintain independence and quality of life.

RIV AAA coordinates a wide range of programs by contracting with community-based organizations to deliver services throughout the three-county region. These providers play a vital role in implementing programs funded through federal, state, and local resources. Services supported through these partnerships include nutrition programs, transportation assistance, in-home services, caregiver supports, health promotion activities, and information and referral services. The agency manages a competitive procurement process to ensure that services are delivered by qualified providers with the capacity to meet community needs. Once contracts are established, RIV AAA provides ongoing oversight through performance monitoring, program evaluation, and technical assistance. This oversight helps ensure that services meet quality standards, comply with regulatory requirements, and effectively serve older adults and caregivers. In addition to monitoring compliance, RIV AAA works collaboratively with providers to address challenges, improve service delivery, and identify opportunities for innovation. Regular communication with providers helps strengthen coordination and allows the agency to respond quickly to changing needs within the community.

A critical component of coordinating a comprehensive service system is ensuring that individuals can easily access information about available resources. RIV AAA provides Information and Assistance (I&A) services that serve as a central access point for older adults, caregivers, and community members seeking support. Through the I&A program, trained staff provide personalized independence assistance to individuals who are navigating aging services. Staff conduct needs assessments, provide information about available programs, and connect individuals with appropriate resources both within and outside of the aging network. This service helps ensure that residents receive accurate and timely information while reducing barriers to accessing services. The I&A program also collects valuable data on service requests and emerging community needs. This information helps the agency identify trends, assess service gaps, and inform future planning and program development.

RIV AAA also coordinates services through care coordination and case management programs that support individuals with complex needs. These programs provide comprehensive assessment, care planning, and ongoing support to help individuals remain safely in their homes and communities. Care managers work directly with older adults and caregivers to identify needs, develop individualized service plans, and connect individuals with appropriate programs and resources. This may include arranging in-home services, coordinating transportation, linking individuals with healthcare providers, and ensuring access to nutrition programs and other supports. Through regular follow-up and monitoring, care managers help ensure that services remain appropriate and responsive as individuals' needs change over time. This approach promotes continuity of care and reduces fragmentation across service systems.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

RIV AAA recognizes that no single organization can meet all the needs of an aging population. As a result, collaboration with community partners is a central component of the agency's approach to coordinating services. The agency maintains strong partnerships with healthcare systems, senior centers, local governments, nonprofit organizations, and advocacy groups. These partnerships allow RIV AAA to leverage resources, share expertise, and develop coordinated strategies that address complex issues affecting older adults. Collaborative initiatives may focus on areas such as caregiver support, dementia education, transportation coordination, and social isolation. The agency also participates in regional coalitions and community collaboratives that address broader health and social service issues. By engaging in these partnerships, RIV AAA helps integrate aging services into the broader health and human services landscape, ensuring that older adults remain a priority in community planning efforts.

Family caregivers play an essential role in the aging services system by providing the majority of long-term care for older adults. RIV AAA coordinates a range of programs designed to support caregivers and strengthen their ability to provide care. These services include caregiver education, respite services, and support groups. The agency also works to raise awareness about caregiver needs and promotes policies and programs that support caregivers within the community. Through partnerships with healthcare providers and community organizations, RIV AAA helps ensure that caregivers are connected to resources that can reduce stress, improve caregiving skills, and maintain the well-being of both caregivers and care recipients.

To ensure that services are accessible to all eligible residents, RIV AAA conducts ongoing outreach and education throughout the PSA. Staff regularly provide presentations, attend community events, and collaborate with partner organizations to share information about available programs and resources. These outreach efforts help raise awareness about aging services, reduce stigma associated with seeking assistance, and encourage individuals to access support before crises occur. Outreach activities also provide opportunities for the agency to receive feedback from community members and identify emerging needs.

In addition to coordinating services, RIV AAA plays an important advocacy role on behalf of older adults and caregivers. The agency works with policymakers, community leaders, and partner organizations to promote policies that support aging in place, expand access to services, and address systemic challenges affecting the aging population. RIV AAA also works continuously to improve the efficiency and effectiveness of the regional aging services system. This includes evaluating program outcomes, identifying service gaps, and implementing strategies that enhance coordination across providers and sectors.

Through these combined efforts, RIV AAA helps ensure that older adults and caregivers in Berrien, Cass, and Van Buren counties have access to a coordinated and comprehensive system of aging services. By bringing together community partners, service providers, and public stakeholders, the agency creates a network of supports that addresses a wide range of needs, from basic assistance to more complex care coordination.

As the population continues to age and community needs evolve, RIV AAA will continue to strengthen this coordinated system, leveraging partnerships, data, and community engagement to ensure that services remain accessible, effective, and responsive to the residents of Southwest Michigan.

3. Describe ways in which the AAA is informing, educating and advocating within their communities.

Region IV Area Agency on Aging (RIV AAA) plays a central role in informing, educating, and advocating for older adults and caregivers across its Planning and Service Area (PSA), which includes Berrien, Cass, and

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

Van Buren counties. RIV AAA is committed to ensuring that individuals have access to accurate information, meaningful educational opportunities, and a strong voice in shaping policies and services that impact their lives. Through a combination of outreach, community education, partnerships, and advocacy efforts, RIV AAA works to build awareness, empower individuals, and strengthen community capacity to support aging populations.

RIV AAA utilizes a comprehensive communication strategy to ensure that older adults, caregivers, and community stakeholders are informed about available services, supports, and resources. A key component of this effort is the agency's Information and Assistance (I&A) program, which serves as a central access point for individuals seeking guidance on aging-related services. Trained staff provide personalized support by answering questions, assessing needs, and connecting individuals with appropriate programs within the aging network and broader community. This direct interaction ensures that individuals receive accurate, timely, and relevant information tailored to their unique circumstances. In addition to one-on-one assistance, RIV AAA disseminates information through a variety of communication channels. The agency maintains an up-to-date website that provides details on programs, services, eligibility requirements, and community resources. Electronic newsletters and email communications are distributed regularly to stakeholders, including service providers, community organizations, and caregivers to share updates on programs, resources, and emerging issues. Social media platforms are also used to increase awareness and reach broader audiences, particularly those who may not be connected to traditional service networks. Through these platforms, RIV AAA shares educational content, promotes events, and highlights available resources. Printed materials, including brochures and program flyers are distributed at community locations such as senior centers, libraries, healthcare facilities, and partner organizations to ensure access for individuals who may have limited internet connectivity.

Education is a cornerstone of RIV AAA's approach to empowering individuals and strengthening communities. The agency provides a wide range of educational programs and workshops designed to promote health, independence, and informed decision-making among older adults and caregivers. Health promotion and disease prevention programs are a key component of these efforts. RIV AAA supports evidence-based programs that address chronic disease management, fall prevention, physical activity, and overall wellness. These programs not only provide valuable information but also help participants build skills and confidence to manage their health effectively. RIV AAA also places a strong emphasis on caregiver education. Family caregivers often face complex responsibilities and may lack access to training or support. The agency offers educational opportunities that cover topics such as caregiving techniques, stress management, navigating healthcare systems, and understanding available resources. These programs help caregivers feel more prepared and supported in their roles. Dementia education is another important focus area. As the number of individuals living with Alzheimer's disease and other forms of dementia continue to grow, RIV AAA works to increase community awareness and understanding of cognitive changes. Educational sessions are provided to caregivers, community members, and organizations to promote dementia-friendly practices and reduce stigma. These efforts contribute to the development of more inclusive and supportive communities. In addition to structured programs, RIV AAA staff regularly conduct presentations and trainings for community groups, partner organizations, and local agencies. These presentations may cover topics such as aging services, caregiver resources, and strategies for supporting older adults. By tailoring presentations to specific audiences, the agency ensures that information is relevant and actionable.

RIV AAA actively engages with the community through outreach efforts designed to connect with individuals

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

where they live, work, and gather. Staff participate in community events, health fairs, and local meetings to share information and build relationships with residents and organizations. These events provide opportunities to reach individuals who may not otherwise seek out services and to raise awareness about available supports.

The agency also collaborates with trusted community partners to extend its reach. Partnerships with nonprofit agencies, healthcare providers, faith-based organizations, libraries, senior centers, and many more allow RIV AAA to share information through established networks. These collaborations are particularly important for reaching underserved populations, including rural residents, low-income individuals, and minority communities. Outreach efforts are designed to be inclusive and accessible, recognizing that different populations may require different approaches. RIV AAA works to ensure that materials and presentations are culturally responsive and accessible to individuals with varying levels of health literacy.

Advocacy is a core function of RIV AAA, carried out at both the individual and system levels. At the individual level, the agency supports older adults and caregivers in understanding their rights, accessing benefits, and navigating complex service systems. Through Information and Assistance and case management services, staff advocate on behalf of individuals to ensure they receive appropriate services and are treated with dignity and respect. At the system level, RIV AAA engages in broader advocacy efforts to influence policies and programs that affect older adults and caregivers. The agency works with local, state, and federal partners to promote policies that support aging in place, expand access to home and community-based services, and address barriers such as transportation, housing, and workforce shortages. RIV AAA also participates in coalitions, advisory groups, and statewide initiatives focused on aging and disability issues. Through these efforts, the agency contributes to the development of policies and programs that reflect the needs of the communities it serves. Collaboration with advocacy organizations and professional associations further strengthens the agency's ability to influence change. An important aspect of RIV AAA's advocacy work is empowering older adults and caregivers to have a voice in decisions that affect them. By creating opportunities for individuals to share their experiences and perspectives, RIV AAA helps ensure that services and policies are informed by those they are intended to serve. The Advisory Council plays a key role in this process by representing the interests of older adults and caregivers and providing input on agency priorities and initiatives. This structure helps ensure that community voices are integrated into planning and decision-making processes.

Through a comprehensive approach that integrates communication, education, outreach and advocacy, Region IV AAA plays a vital role in supporting older adults and caregivers throughout Southwest Michigan. By informing individuals about available resources, providing education that promotes independence and well-being, and advocating for policies and systems that support aging populations, RIV AAA helps create a community where all individuals have the opportunity to live with dignity, independence, and quality of life.

**4. Describe what home and community-based Medicaid services are available within the PSA.
(Examples: PACE, MI Choice Waiver, etc.)**

PACE

MI Choice Waiver

5. Describe other significant initiatives and grants leveraged by the AAA. (Examples: MI Options, SCSEP, MHEP, etc.)

Foster Grandparents/Senior Companions – In partnerships with the National Corporation for Community Service (CNCS)/AmeriCorps Seniors, RIV AAA sponsors Foster Grandparent (FGP) and Senior Companion

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

(SCP) programs with the dual purpose to engage persons 55 years and older with limited incomes, in volunteer service to meet critical community needs, and to provide a high-quality experience that will enrich the lives of their volunteers. FGP volunteers provide one-on-one support to children to improve their academic, social, or emotional development. The volunteers in this program help children learn to read and provide one-on-one tutoring. SCP volunteers provide supportive, individualized services to help older adults maintain their dignity and independence.

Dementia Minds – In partnership with the National Council of Dementia Minds, RIV AAA hosts a local Dementia Minds group. National Council of Dementia Minds is led by people living with dementia whose vision is to transform the worldview of living with a Neurocognitive Disorder. The Dementia Minds group consists of 6-10 people living with dementia or mild cognitive impairments who, with the help of a Support Facilitator, meet together to process and share their unique experiences of being diagnosed with and living with dementia. Dementia Minds aims to create opportunities for dialogue and education for persons living with dementia, families and caregivers.

Community Care Hub – The Community Care Hub builds a complex care ecosystem, creating infrastructure that integrates social care into the delivery of health care. The Community Care Hub creates a structurally connected community of care centered around the needs and desires of older adults and addresses social determinants of health and clinical care needs leading to improved health outcomes and reduced overall costs.

Southwest Michigan Direct Care Workforce Coalition – Partnerships are underway to develop a training pipeline to address the shortage of direct care workers in the region. To retain currently employed direct care workers, and address hardship needs that often result in DCWs leaving the workforce, RIV AAA created, and subsequently received support from Michigan Association of Area Agencies on Aging, for the Provider Employee Needs Fund. The fund is available to assist a direct care worker who is employed by a RIV AAA provider and is experiencing hardship which is preventing them from being able to meet the requirements of their position as a direct care worker.

Campus for Creative Aging: RIV AAA's efforts to laud age as a time of Purpose, Creativity, Growth, and Learning will gain further momentum as a virtual campus movement that promotes expanded educational offerings and connectivity in areas such as technology, volunteerism, health, retirement, financial planning, and enrichment.

6. a. Describe how the AAA addresses unmet needs by referring individuals to organizations such as Commissions/Councils on Aging, Departments on Aging, Health Care Organizations/Systems, Veterans Agencies, Tribal Organizations, Faith-based Organizations, Public Health, Mental Health, Community Action Agencies, Legal Assistance and Elder Rights Programs, etc.

Region IV Area Agency on Aging (RIV AAA) recognizes that while it plays a central role in coordinating and delivering aging services, it cannot meet every need of older adults and caregivers within its Planning and Service Area (PSA). As a result, the agency has developed a comprehensive approach to identifying unmet needs and connecting individuals to a broader network of community resources. Through these strong referral systems, collaborative partnerships, and ongoing relationship-building efforts, RIV AAA ensures that individuals receive the support they need.

RIV AAA's process for addressing unmet needs begins with direct engagement with older adults and caregivers through its Information and Assistance (I&A) services, care coordination programs, and provider network. When individuals contact the agency, trained staff conduct comprehensive assessments to identify

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

needs related to health, safety, housing, nutrition, transportation, caregiving, and overall well-being. These assessments often reveal needs that extend beyond the services directly funded or administered by RIV AAA. When a need is identified that cannot be met through in-house programs or contracted services, staff work to connect individuals with appropriate external resources. This may include referrals to community-based organizations, healthcare providers, housing agencies, behavioral health services, legal assistance programs, financial support resources, and others. By maintaining a broad and up-to-date knowledge of available services with the region, RIV AAA is able to provide targeted and meaningful referrals that address the specific circumstances of each individual. The agency utilizes structured referral processes to ensure that individuals are connected to appropriate resources in a timely manner. Information about referrals is documented within internal systems, allowing staff to track needs, identify service gaps, and follow up when necessary. In many cases, staff provide “warm referrals,” which involve directly connecting individuals with partner organizations rather than simply providing contact information. This approach helps reduce barriers to access and increases the likelihood that individuals will successfully receive services. The Information and Assistance program serves as a key hub for connecting individuals to services across the broader community. Staff are trained to navigate a wide range of service systems and maintain familiarity with eligibility requirements, application processes, and program availability. This expertise allows them to guide individuals through complex systems and ensure that they are referred to appropriate resources. In addition to responding to individual requests, RIV AAA analyzes I&A data to identify patterns of unmet need within the PSA. For example, frequent requests for services that are unavailable or have long waitlists may indicate a gap in the service system. This information is used to inform planning efforts, support advocacy initiatives, and guide the development of new partnerships. Many individuals served by RIV AAA experience multiple, interrelated needs that require coordination across different service sectors. In these cases, RIV AAA staff work to coordinate referrals across multiple organizations to ensure a holistic approach to addressing needs. Care managers play a critical role in this process by working closely with individuals and caregivers to develop comprehensive service plans. These plans may include a combination of services provided by RIV AAA and referrals to external partners. Ongoing follow-up helps ensure that services are effectively meeting the individual’s needs and allow for adjustments as circumstances change.

6. b. How does the AAA foster relationships with these community partners?

The effectiveness of RIV AAA’s referral system is directly tied to the strength of its relationships with community partners. The agency actively works to build and maintain partnerships with a wide range of organizations across the PSA, including healthcare systems, housing providers, transportation services, behavioral health organizations, nonprofit agencies, and local governments. These partnerships are developed through ongoing communication, collaboration, and shared commitment to serving the community. RIV AAA regularly engages with partners through meetings, coalitions, and collaborative initiatives that focus on addressing the needs of older adults and caregivers. Participation in these groups allows the agency to stay informed about available resources, emerging issues, and opportunities for coordination. RIV AAA plays a leadership role in fostering a coordinated network of services by bringing partners together to address common challenges. The agency facilitates and participates in regional collaboratives and workgroups focused on issues such as direct care workforce, dementia-friendly communities, transportation coordination, and nutrition. These collaborative efforts help break down silos between organizations and promote a more integrated approach to service delivery. By working together, partners can share resources, align strategies, and develop solutions that address complex community needs.

Effective communication is essential to maintaining strong partnerships. RIV AAA regularly shares information with community partners through email communications and meetings. These communications

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

include updates on programs, policy changes, and community initiatives. The agency also encourages two-way communication by creating opportunities for partners to share feedback, identify challenges, and suggest improvements. This open dialogue helps ensure that partnerships remain responsive and mutually beneficial. RIV AAA also works to strengthen the capacity of its partners by providing training, technical assistance, and resources. By supporting partner organizations, RIV AAA helps enhance the overall effectiveness of the service system and ensures that individuals receive high-quality care and support.

Through a comprehensive approach that integrates effective referral systems and community partnerships, Region IV Area Agency on Aging ensures that individuals within its PSA have access to a wide range of services and supports. By identifying unmet needs, connecting individuals to appropriate resources, and fostering collaborative relationships with community partners, RIV AAA helps create a coordinated and responsive service system that promotes independence, dignity, and quality of life for older adults and caregivers throughout Southwest Michigan.

7. Describe how the AAA identifies veterans during intake and coordinates veteran-related support services and/or referral programs with appropriate veteran agencies.

Region IV Area Agency on Aging (RIV AAA) recognizes that veterans represent an important and often underserved segment of the older adult population. Many veterans face unique challenges related to health, income, housing, and access to benefits, and may be eligible for specialized services through the U.S. Department of Veterans Affairs (VA) and other veteran-focused programs. As part of its commitment to providing a comprehensive and coordinated system of care, RIV AAA has established a process to identify veterans during intake and ensure that they are connected to appropriate veteran-related services and supports.

RIV AAA incorporates the identification of veteran status as a standard component of its intake and assessment processes. During initial contact through Information and Assistance (I&A), care coordination, or other program entry points, staff are trained to ask individuals whether they have served in the military. This question is included as part of a broader demographic and needs assessment that helps staff understand the individual's background, eligibility for services, and potential access to additional benefits. When appropriate, staff also ask whether a spouse or caregiver may be a veteran, recognizing that certain VA benefits and programs extend to spouses, surviving spouses, and dependents. This standardized approach ensures that veteran status is consistently captured across programs and allows RIV AAA to identify individuals who may be eligible for specialized services. Information collected during intake is documented in the agency's data systems, which enables staff to track veteran status and incorporate this information into care planning and referrals.

To support effective identification and service coordination, RIV AAA ensures that staff receive training on veteran-related issues, benefits, and available resources. Staff are also trained to recognize common challenges faced by older veterans, including service-related disabilities, mental health concerns, and barriers to accessing benefits. This knowledge enables staff to engage in informed conversations with veterans and provide guidance that is both respectful and responsive to their unique experiences.

Once a veteran is identified, RIV AAA works to connect the individual with appropriate veteran-focused services through coordination with local, state, and federal partners. The agency maintains relationships with County Veterans Service Offices in Berrien, Cass, and Van Buren counties, which serve as key access points for veterans seeking assistance with benefits and claims. RIV AAA also collaborates with regional VA healthcare systems and community-based organizations to support access to medical care, mental health services, and social supports. These partnerships allow the agency to stay informed about available

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

programs and eligibility criteria, ensuring that referrals are accurate and effective.

For veterans receiving care management services through RIV AAA, veteran status is incorporated into the development of individualized care plans. Care managers work with veterans and their families to identify both aging services and veteran-specific resources that can support their needs. This integrated approach helps maximize available resources and avoid duplication of services. Care managers also monitor changes in the individual's needs and eligibility, ensuring that referrals to veteran services remain relevant over time. Ongoing communication with partner agencies supports continuity of care and helps address any challenges that may arise.

RIV AAA also engages in outreach and education efforts to increase awareness of veteran-related services among both community members and partner organizations. Information about veteran benefits and resources is shared through presentations, community events, and informational materials. The agency collaborates with veteran organizations and community partners to participate in events that target veterans and their families, such as resource fairs and outreach initiatives. These efforts help ensure that veterans are aware of available supports and understand how to access them. Additionally, RIV AAA provides information to service providers and community organizations about the importance of identifying veteran status and connecting individuals to appropriate resources. This broader education effort helps strengthen the overall network of support for veterans within the PSA.

Through standardized intake procedures, staff training, strong partnerships, and coordinated referral processes, RIV AAA ensures that veterans within its PSA are identified and connected to the services and supports available to them. By integrating veteran-specific resources into its broader system of care, RIV AAA helps ensure that veterans and their families receive comprehensive, coordinated support that honors their service and promotes their quality of life.

8. Describe services that address incidence of hunger, food insecurity, malnutrition, physical and mental conditions and/or self-direction. [See OAA 306(a)(16) (42 U.S.C. 3026(a)(16)).]

Region IV Area Agency on Aging (RIV AAA) delivers and coordinates a comprehensive array of services designed to address the interconnected challenges of hunger, food insecurity, malnutrition, physical and mental health conditions, and the ability of older adults to direct their own care. RIV AAA prioritizes programs that promote health, independence, and overall well-being while ensuring that individuals have access to the resources necessary to remain safely in their homes and communities.

RIV AAA administers a robust nutrition services program that serves as a cornerstone of its efforts to reduce hunger and food insecurity among older adults. These services are designed to not only provide access to nutritious meals but also to promote social engagement and overall health. Congregate meal programs are offered at senior centers and community locations throughout the PSA, providing older adults with access to balanced, nutritious meals in a group setting. These programs help reduce food insecurity while also addressing social isolation, which is a known contributor to both physical and mental health decline. Participants benefit from regular interaction with peers, access to educational programming, and connections to additional services. For individuals who are homebound or unable to access congregate meal sites, home-delivered meal services provide a critical lifeline. These meals are tailored to meet dietary guidelines and are often accompanied by wellness checks, helping to ensure that recipients are safe and their needs are monitored. This service is particularly important for individuals with mobility limitations, chronic health conditions, or limited support systems. RIV AAA also works collaboratively with community partners to connect individuals with supplemental food resources when additional support is needed. Through Information and Assistance services, staff identify individuals at risk of food insecurity and provide referrals to

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

appropriate community-based resources.

RIV AAA offers a range of services and programs aimed at supporting physical health and managing chronic conditions. Evidence-based health promotion programs are a key component of this effort. These programs are designed to help individuals manage chronic diseases, improve physical activity, and reduce the risk of falls. Programs focused on chronic disease self-management provide participants with tools and strategies to better manage conditions such as diabetes, arthritis, and heart disease. These workshops emphasize goal setting, problem-solving, and building confidence in managing health conditions. Fall prevention programs are another important aspect of promoting physical health. These programs focus on improving strength, balance, and mobility, while also addressing environmental risk factors that can contribute to falls. Reducing the incidence of falls helps prevent injuries and supports continued independence. RIV AAA also supports access to in-home services that assist with activities of daily living, such as personal care, homemaking, and chore services. These supports help individuals maintain safe and healthy living environments and reduce the risk of hospitalization or institutionalization.

Recognizing the strong connection between mental and physical health, RIV AAA integrates services that address mental health, emotional well-being, and social isolation. Many older adults experience loneliness, depression, or anxiety, particularly those who live alone or have limited social connections. Social engagement opportunities are embedded within many of RIV AAA's programs, including congregate meals, group activities, and community events. These opportunities help foster connections and reduce feelings of isolation. The agency also supports caregiver support programs, which address the emotional and mental health needs of family caregivers. Caregivers often experience high levels of stress and burnout, and RIV AAA provides support through respite services, support groups, and educational programs that promote coping strategies and self-care. For individuals experiencing significant mental health challenges, RIV AAA provides referrals to behavioral health services and community mental health organizations. Staff work to ensure that individuals are connected to appropriate resources and receive the support they need.

A central principle of RIV AAA's service delivery model is the promotion of self-direction and person-centered care. The agency is committed to empowering individuals to make informed decisions about their care and to maintain control over their lives. Through Information and Assistance and care coordination services, individuals are provided with options and support in selecting the services that best meet their needs and preferences. Care plans are developed collaboratively, ensuring that individual's goals, values, and priorities are central to the decision-making process. Self-direction is further supported through programs that allow individuals greater flexibility and choice in how services are delivered. This may include selecting service providers, determining schedules, and identifying the types of support that are most meaningful to them. Education also plays a role in promoting self-direction. By providing information about available services, benefits, and community resources, RIV AAA helps individuals make informed decisions and advocate for themselves.

RIV AAA recognizes that hunger, health, and independence are interconnected and its approach to service delivery reflects this understanding. Nutrition services are often linked with health promotion programs, caregiver supports, and in-home services to provide a comprehensive system of care. To enhance the effectiveness of its services, RIV AAA collaborates with a wide range of community partners. These partnerships help expand access to resources and ensure that individuals receive comprehensive support. Through these collaborations, RIV AAA is able to address gaps in services, coordinate care across sectors,

Region IV Area Agency on Aging, Inc.

FY 2027

and respond to emerging community needs. Partnerships also support outreach efforts, helping to identify individuals who may be at risk of food insecurity, poor health outcomes, or social isolation.

Through a comprehensive and coordinated approach, Region IV Area Agency on Aging addresses the complex and interrelated issues of hunger, food insecurity, malnutrition, physical and mental health conditions, and self-direction. By providing nutrition services, health promotion programs, caregiver supports, and person-centered care coordination, RIV AAA helps individuals maintain independence, improve their quality of life, and remain active members of their communities.

9. Describe how the AAA or its subcontractors are maintaining the fidelity of the health promotion/disease prevention programs.

Region IV Area Agency on Aging (RIV AAA) is committed to ensuring that Health Promotion and Disease Prevention programs are implemented with fidelity to their evidence-based models. Maintaining fidelity is essential to achieving the intended outcomes of these programs, including improved health status, increased self-management of chronic conditions, reduced hospitalizations, and enhanced quality of life for older adults.

RIV AAA utilizes a comprehensive, multi-layered approach to ensure that both the agency and its subcontractors consistently deliver Health Promotion/Disease Prevention programs according to established evidence-based standards. This approach includes adhering to approved program models, facilitator training and certification, ongoing monitoring and technical assistance, data collection and evaluation, and continuous quality improvement. RIV AAA prioritizes the implementation of evidence-based programs that have been rigorously evaluated and demonstrated to produce measurable outcomes. These programs are selected based on their alignment with state and federal requirements, as well as their relevance to the needs of the local population. Each evidence-based program utilized by RIV AAA or its subcontractors includes specific protocols, curricula, and implementation guidelines that must be followed to maintain fidelity. These guidelines outline requirements related to session structure, duration, group size, facilitator qualifications, and participant engagement. Subcontractors are required to adhere to these protocols to ensure that the program is delivered as designed.

RIV AAA incorporates these fidelity expectations into its contracts and service agreements with providers. Program requirements, including adherence to model fidelity, are clearly outlined in contractual documents, ensuring that subcontracts understand their responsibilities from the outset.

A critical component of maintaining fidelity is ensuring that program facilitators are properly trained and, when required, certified to deliver evidence-based interventions. RIV AAA requires that all facilitators complete approved training programs specific to the evidence-based model they are implementing. RIV AAA tracks facilitator training and certification status to ensure compliance. Subcontractors are responsible for maintaining up-to-date records of facilitator qualifications and providing documentation to the agency as part of contract monitoring and reporting processes. RIV AAA maintains active oversight of Health Promotion/Disease Prevention programs through regular monitoring and evaluation. This includes both desk and on-site monitoring. Program monitoring activities are designed to assess whether subcontractors are adhering to fidelity requirements, including following the prescribed curriculum, maintaining appropriate group sizes, and delivering sessions within the required time frame. Monitoring may also include review of attendance records, participant feedback, and facilitator documentation. When observations are conducted, RIV AAA staff use standardized tools or checklists aligned with program requirements to evaluate fidelity. Feedback is provided to subcontractors to reinforce strengths and identify areas for improvement. If deviations from the program model are identified, RIV AAA works with the subcontractor to develop corrective

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

action plans and provide additional support as needed.

Data collection and reporting are essential components of maintaining program fidelity and evaluating outcomes. RIV AAA requires subcontractors to collect and report data consistent with the requirements of each evidence-based program. This may include participant enrollment information, attendance records, pre- and post-program assessments, and outcome measures related to health behaviors, self-efficacy, or quality of life. Data is submitted to RIV AAA and is reviewed to ensure completeness, accuracy, and consistency with program expectations. RIV AAA provides ongoing technical assistance to subcontractors to support high-quality program implementation. This includes guidance on program requirements, assistance with troubleshooting challenges, and support for maintaining fidelity. RIV AAA staff work collaboratively with subcontractors to address barriers for implementation, such as participant recruitment, scheduling, or facilitator availability. By fostering a supportive environment, RIV AAA helps ensure that providers have the tools and knowledge needed to maintain fidelity. Maintaining fidelity is an ongoing process that requires evaluation and improvement. Participant satisfaction surveys and outcome evaluations provide valuable insight into program effectiveness and areas where adjustments may be needed. While maintaining fidelity is critical, RIV AAA also recognizes the importance of making programs accessible to diverse populations. The agency works with subcontractors to ensure that programs are delivered in ways that are culturally responsive and accessible while still adhering to core program components.

Through a structured and comprehensive approach that includes adherence to evidence-based models, facilitator training, program monitoring, data collection, and continuous quality improvement, Region IV Area Agency on Aging ensures that Health Promotion and Disease Prevention programs are delivered with fidelity. By supporting subcontractors, RIV helps ensure that these programs achieve their intended outcomes and contribute to improved health, independence, and quality of life for older adults throughout the region.

10. Describe how the AAA promotes health promotion/disease prevention programs to maximize community awareness and participation.

Region IV Area Agency on Aging (RIV AAA) employs a comprehensive, multi-channel approach to promote Health Promotion and Disease Prevention programs and maximize participation among older adults and caregivers across its Planning and Service Area (PSA). RIV AAA's outreach and promotion strategies are designed to increase awareness, reduce barriers to participation, and ensure that evidence-based programs are accessible to those who can benefit most.

RIV AAA utilizes a coordinated communication strategy that leverages multiple platforms to reach a broad and diverse audience. The agency's website serves as a central hub for information on available Health Promotion and Disease Prevention programs, including class descriptions, schedules, locations, and registration details. The website is regularly updated to reflect current offerings and ensure that community members have access to accurate and timely information. Newsletters and targeted email communications are used to promote upcoming workshops and highlight program benefits. These communications are distributed to a wide network that includes older adults, caregivers, service providers, healthcare partners, and community organizations. Social media platforms further expand the agency's reach by providing a dynamic and accessible way to share program information. RIV AAA uses these platforms to post program announcements and reminders about registration deadlines. Social media allows for real-time engagement with the community and helps reach individuals who may not be connected to traditional aging services networks. Printed materials, including flyers and brochures, are distributed throughout the PSA. These materials are especially important for reaching individuals with limited internet access and ensuring equitable access to information.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

RIV AAA works closely with its network of service providers and community partners to promote Health Promotion and Disease Prevention programs. Providers who deliver these programs are actively involved in outreach efforts, sharing information with their clients and communities through their own communication channels. Community partners play a critical role in extending the reach of promotion efforts. RIV AAA provides partners with promotional materials and program information that can be shared through newsletters, social media, and in-person interactions. This collaborative approach ensures consistent messaging and broad dissemination across multiple networks. Healthcare providers are particularly important partners in promoting participation. RIV AAA collaborates with medical professionals to encourage referrals to evidence-based programs, especially for individuals managing chronic conditions or at risk for falls. By integrating program promotion into healthcare settings, RIV AAA helps connect individuals to preventive services that can improve health outcomes.

In addition to digital and partner-based promotion, RIV AAA conducts in-person outreach to raise awareness and encourage participation. Staff and partners participate in community events to provide information about available programs and engage directly with potential participants. Presentations and informational sessions are offered at community locations. These sessions provide an opportunity to explain program benefits and answer questions. In-person engagement helps build trust and increases the likelihood that individuals will participate. RIV AAA also targets outreach efforts to underserved and high-need populations, including rural residents, low-income individuals and minority communities. By working with trusted community organizations and leaders, the agency is able to tailor outreach strategies to meet the unique needs of these populations and reduce barriers to participation.

Health Promotion and Disease Prevention programs are integrated into RIV AAA's broader service delivery system, allowing for direct promotion through existing touchpoints. Information & Assistance staff, care coordinators, and case managers routinely inform clients about relevant programs during service interactions. Home-delivered meal recipients and congregate meal participants are also key audiences for program promotion. Flyers, announcements, and direct communication through meal sites provide opportunities to reach individuals who may benefit from additional health-related services.

RIV AAA recognizes that awareness alone is not sufficient to ensure participation and actively works to reduce barriers that may prevent individuals from enrolling in programs. The agency supports flexible program delivery options, including virtual and hybrid formats, to accommodate varying needs and preferences. Virtual programs have become an important tool for reaching individuals who may be homebound, have mobility limitations, or prefer to participate from home. Efforts are made to ensure that programs are affordable and accessible. Many programs are offered at no cost or low cost, reducing financial barriers. Materials and presentations are designed to be user-friendly and accessible to individuals with varying levels of health literacy.

RIV AAA recognizes the value of participant experience in promoting programs. Positive experiences often lead to word-of-mouth referrals, which are a powerful driver of participation. Participants are encouraged to share their experiences with peers, friends, and family members. Testimonials and success stories are also used in promotional materials and communications to highlight the benefits of participation. These stories help potential participants understand the real-world impact of the programs and build confidence in their value.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

RIV AAA maintains ongoing communication with subcontractors and partners to ensure that promotion efforts remain effective and aligned with program goals. Regular updates provide opportunities to share best practices, discuss challenges, and coordinate outreach strategies. The agency also stays informed about state and national initiatives related to health promotion and disease prevention, incorporating new approaches and resources as appropriate. This commitment to continuous improvement helps ensure that outreach efforts remain relevant and impactful.

Through a comprehensive and coordinated approach that includes strategic communication, community engagement, and strong partnerships, Region IV Area Agency on Aging effectively promotes Health Promotion and Disease Prevention programs throughout its PSA. By increasing awareness, reducing barriers, and integrating promotion into existing services, RIV AAA maximizes participation and ensures that older adults and caregivers have access to programs that support health, independence, and quality of life.

11. Describe Alzheimer's Disease and related disorders programs and education that the AAA offers and/or supports.

Region IV Area Agency on Aging (RIV AAA) is committed to supporting individuals living with Alzheimer's disease and related dementias, as well as their caregivers and communities, through a comprehensive array of programs, education, and community initiatives. As the prevalence of dementia continues to rise, RIV AAA has prioritized the development of dementia-friendly communities across its Planning and Service Area (PSA), which includes Berrien, Cass, and Van Buren counties. The agency works to ensure that individuals affected by dementia have access to supportive services, meaningful engagement opportunities, and informed, compassionate care.

One of the new programs supported by RIV AAA is the development of Memory Cafés throughout the region. Memory Cafés are informal, stigma-free gatherings designed for individuals experiencing memory loss and their care partners. These events provide a welcoming environment where participants can engage in social, recreational, and creative activities such as art, music, games, and storytelling. RIV AAA partners with local libraries to host Memory Cafés in accessible and familiar community settings. By offering these programs in trusted spaces, the agency helps reduce stigma and encourages participation among individuals who may be hesitant to engage in more formal services. Memory Cafés play a critical role in reducing social isolation, promoting emotional well-being, and fostering a sense of community among participants. They also provide caregivers with an opportunity to connect with others who share similar experiences, creating informal support networks. RIV AAA provides guidance, training, and resources to community partners to ensure that Memory Cafés are implemented effectively and remain sustainable over time.

RIV AAA actively promotes and facilitates Dementia Friends sessions as part of its broader effort to build dementia-friendly communities. Dementia Friends is an initiative that aims to increase awareness and understanding of dementia and encourage individuals to take small, meaningful actions to support those living with the condition. Through Dementia Friends sessions, participants learn from trained Dementia Champions, about the signs of dementia, the impact it has on individuals and families, and practical ways to create more inclusive and supportive environments. These sessions are offered to a wide range of audiences, including community members, businesses, service providers, and local organizations. By expanding the number of Dementia Friends within the PSA, RIV AAA helps create communities where individuals living with dementia are understood, respected, and supported. This initiative contributes to reducing stigma and improving the overall quality of life for those affected by dementia.

Recognizing the critical role that caregivers play in supporting individuals with dementia, RIV AAA offers and supports a range of caregiver support groups throughout the PSA. These groups provide a safe and

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

supportive space for caregivers to share experiences, receive emotional support, and learn from one another. Caregiver support groups are facilitated by trained professionals or experienced peers and may be offered in-person, virtually, or in hybrid formats to accommodate different needs. Topics discussed often include coping strategies, stress management, communication techniques, and navigating available resources. Participation in support groups helps reduce caregiver isolation and burnout, improve emotional well-being, and enhances caregivers' ability to provide quality care. RIV AAA works with community partners to ensure that support groups are accessible across the region and responsive to the needs of diverse caregiver populations.

RIV AAA also supports and promotes Dementia Minds, an innovative, evidence-informed program designed to engage individuals living with dementia and their care partners through structured, meaningful activities. Dementia Minds focuses on cognitive stimulation, creativity, and social connection, providing participants with opportunities to engage in art, music, storytelling, and other enriching experiences. This program emphasizes the strengths and abilities of individuals living with dementia, rather than focusing solely on limitations. By fostering engagement and creativity, Dementia Minds helps improve mood, reduce anxiety, and enhance quality of life. It also provides caregivers with practical tools and strategies to support meaningful engagement at home. RIV AAA collaborates with trained facilitators and community partners to deliver Dementia Minds programming throughout the PSA, expanding access to innovative and person-centered dementia supports.

RIV AAA is also engaged in providing the GUIDE (Guiding an Improved Dementia Experience) Model, a federal initiative designed to improve care coordination and support for individuals with dementia and their caregivers. The GUIDE Model focuses on comprehensive, person-centered care that integrates medical, behavioral, and social services. RIV AAA helps connect individuals and caregivers to community-based services that complement clinical care. This includes linking participants to caregiver support programs, respite services, education, and social engagement opportunities. The integration of GUIDE strengthens coordination between healthcare providers and community-based organizations, ensuring that individuals living with dementia receive holistic support that addresses both medical and non-medical needs. RIV AAA's role in this model helps bridge gaps in care and enhances the overall system of support available.

RIV AAA integrates dementia-related programs and education into its broader system of services. Through Information and Assistance and care coordination programs, individuals and caregivers are connected to appropriate services. Care managers work with families to develop individualized plans that address the unique needs of individuals living with dementia. This coordinated approach ensures that services are aligned and responsive to changing needs over time.

Through the services of Memory Cafés, Dementia Friends, Dementia Minds, caregiver support groups, and GUIDE, Region IV Area Agency on Aging plays a leading role in promoting dementia-friendly communities. These efforts are designed to create environments where individuals living with dementia can remain engaged, respected, and supported.

12. Does the AAA administer a senior millage in the PSA? Yes No

13. Are there any counties or townships in the PSA in which the AAA is working with the local officials to initiate potential senior millage? If yes, please describe: Yes No

Greatest Economic and Greatest Social Need

Please describe the following:

1. How the AAA defines Greatest Economic and Greatest Social need for the PSA.

Region IV Area Agency on Aging (RIV AAA) defines “greatest economic need,” as an individual or household with an income at or below 125% of the federal poverty level, or those facing financial hardship due to housing instability, healthcare expenses, or living in a rural area. Additionally, “greatest economic need” also includes individuals or households with incomes below 300% of the federal benefit rate who require care at a nursing home level.

Region IV Area Agency on Aging (RIV AAA) defines “greatest social need” as an individual who meets one or more of the following criteria:

1. Physical and/or mental disability
2. Language barrier
3. Cultural, social, or geographical isolation, including due to:
 1. Racial or ethnic status
 2. Native American identity
 3. Sexual orientation, gender identity, or sex characteristics
 4. Chronic conditions
 5. Housing instability, food insecurity, lack of access to reliable and clear water supply, lack of transportation, or utility assistance needs
 6. Interpersonal safety concerns
 7. Rural location
 8. Veteran
4. At risk of institutionalization (e.g. 2 or more hospitalizations or ER visits in the last 30 days or 1 hospital discharge within the last 3-7 days with acute inability to care for self; nursing facility placement within the last 30 days)
5. Any other status that:
 1. Restricts the ability of an individual to perform normal or routine daily tasks or
 2. Threatens the capacity of the individual to live independently

2. How the AAA educates the public, its partners, and service providers on the Older Americans Act expectations regarding targeting older adults with greatest economic and greatest social need.

Region IV Area Agency on Aging (RIV AAA) is committed to ensuring that services funded through the Older Americans Act are targeted to older adults with the greatest economic and greatest social need, as required by federal and state guidance. To achieve this, RIV AAA has developed a comprehensive and intentional approach to educating the public, service providers, and community partners on these expectations, while also embedding these priorities into all aspects of program planning, service delivery, and community engagement.

RIV AAA places a strong emphasis on educating contracted service providers about their responsibility to prioritize individuals with the greatest economic and social need. This education begins during the procurement and contracting process, where expectations related to targeting priority populations are clearly outlined in Requests for Proposals (RFPs), contracts, and service specifications. Providers are required to demonstrate how they will identify and serve priority populations as part of their program design. This includes outlining outreach strategies, eligibility determination processes, and service delivery approaches

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

that ensure equitable access for individuals most in need. Ongoing education is provided through provider orientation sessions and regular provider network meetings. During these sessions, RIV AAA reinforces expectations related to the Older Americans Act, review definitions of greatest economic and social need, and provides guidance on best practices for reaching and serving these populations. RIV AAA also incorporates these expectations into monitoring and evaluation processes. Providers are required to collect and report demographic and service data that allows the agency to assess whether priority populations are being effectively served. When gaps are identified, RIV AAA works with providers to develop strategies for improvement, including targeted outreach and program adjustments.

RIV AAA also plays a critical role in educating the public about the availability of services and the agency's focus on supporting individuals with the greatest need. Outreach materials, presentations, and community engagement efforts emphasize that services are designed to support those who may face financial, social, or health-related challenges. Public education efforts are conducted through a variety of channels, including the agency's website, social media platforms, newsletters, and community events. Messaging is designed to be inclusive and accessible, ensuring that individuals from diverse backgrounds understand that services are available and that priority is given to those with the greatest need. RIV AAA also works to reduce stigma associated with seeking assistance by framing services as supports that promote independence, health, and quality of life. This approach encourages individuals who may be experiencing hardship to seek help without fear or hesitation.

Community partners play a vital role in helping RIV AAA reach individuals with the greatest economic and social need. Through participation in community collaboratives, coalition meetings, and partner network events, RIV AAA shares information about priority populations and encourages partners to align their efforts with these goals. This includes discussing trends in unmet needs, identifying service gaps, and developing coordinated strategies to reach underserved populations. RIV AAA also collaborates with partners who serve specific populations, such as rural residents, minority communities, veterans, and individuals with disabilities. These partnerships help ensure that outreach and service delivery approaches are culturally responsive and tailored to the unique needs of different groups.

Education about targeting priority populations is reinforced through day-to-day service delivery practices. RIV AAA staff, including Information and Assistance specialists and care managers, are trained to assess both economic and social need during intake and ongoing service interactions. Staff use a person-centered approach to identify barriers to independence and connect individuals with appropriate services. By integrating these considerations into service delivery, RIV AAA ensures that priority populations are consistently identified and served.

Through clear definitions, provider education, public outreach, and partner engagement, Region IV Area Agency on Aging effectively educates the community on the Older Americans Act expectations regarding targeting individuals with the greatest economic and greatest social need. By embedding these priorities into all aspects of its work, RIV AAA ensures that services are directed to those who need them most, promoting equity, independence, and quality of life for older adults and caregivers through Southwest Michigan.

3. AAA's strategy to target priority populations for greatest economic and greatest social need.

Region IV Area Agency on Aging (RIV AAA) employs a comprehensive, data-driven, and person-centered strategy to ensure that services are targeted to older adults with the greatest economic and greatest social need. This strategy is embedded across all levels of the organization – from planning and outreach to service delivery, contracting, and evaluation – and is designed to ensure that limited resources are directed to individuals who face the greatest barriers to independence, health, and well-being.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

RIV AAA begins its targeting strategy with a strong foundation in data. The agency utilizes both primary and secondary data sources to identify populations with the greatest economic and social need across its Planning and Service Area (PSA), which includes Berrien, Cass, and Van Buren counties. Data sources include community needs assessments, U.S. Census data, service utilization data, and Information and Assistance (I&A) call trends.

Through this analysis, RIV AAA identifies geographic areas and population groups experiencing higher rates of poverty, chronic disease, social isolation, transportation barriers, and limited access to services. Particular attention is given to rural communities, minority populations, individuals with disabilities, caregivers, and those at risk of institutionalization. This data-driven approach allows the agency to prioritize outreach and service delivery in areas where need is great and allocate resources in a way that maximizes impact.

RIV has established clear and locally relevant definitions of greatest economic need and greatest social need to guide its targeting efforts. These definitions expand upon federal guidance to reflect the realities of the region. By clearly defining these populations, RIV AAA ensures that staff, providers, and partners have a shared understanding of who should be prioritized for services.

RIV AAA implements targeted outreach strategies to ensure that priority populations are aware of and able to access available services. Outreach efforts are focused on locations and organizations that serve high-need populations, including senior housing complexes, food pantries, healthcare facilities, and faith-based organizations. The agency collaborates with trusted community partners who have established relationships with underserved populations. These partners help facilitate introductions, share information, and build trust within communities that may be hesitant to engage. Outreach materials are designed to be accessible and culturally responsive, taking into account language needs, literacy levels, and cultural considerations. RIV AAA also utilizes multiple communication channels – including in-person outreach, print materials, digital platforms, and partner networks – to ensure broad reach.

Targeting priority populations is a central component of RIV AAA's intake and service delivery processes. During initial contact, staff conduct comprehensive assessments that capture information related to income, living situation, health status, and social supports. These assessments are designed to identify individuals who meet the criteria for greatest economic and social need, including those who may not self-identify as needing assistance. Staff are trained to recognize both visible and less visible indicators of need, such as social isolation, caregiver stress, or early functional decline. Care managers and Information and Assistance specialists use this information to prioritize service delivery and develop person-centered plans that address the individual's unique needs. This ensures that those with the greatest need receive timely and appropriate support.

RIV AAA extends its targeting strategy through its network of contracted service providers. Providers are required to demonstrate how they will prioritize individuals with the greatest economic and social need as part of their program design and service delivery. These expectations are clearly outlined in contracts, service specifications, and Requests for Proposals (RFPs). Providers must describe their outreach strategies, eligibility determination processes, and methods for ensuring equitable access to services. RIV AAA monitors provider performance through data reporting, site visits, and program evaluations. Providers are required to collect demographic and service data that allows the agency to assess whether priority populations are being effectively served. When gaps are identified, RIV AAA works collaboratively with providers to implement

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

corrective actions and improve targeting efforts.

Recognizing that no single organization can reach all individuals in need, RIV AAA leverages partnerships to extend its reach. The agency collaborates with healthcare systems, nonprofit agencies, housing organizations, transportation providers and other community groups to identify and serve priority populations. These partnerships are particularly important for reaching individuals who may be disconnected from traditional aging services, such as those experiencing homelessness, individuals with behavioral health needs, or those living in rural or isolated areas. RIV AAA also engages with organizations that serve culturally diverse populations to ensure that outreach and services are inclusive and responsible. By working with trusted community leaders and organizations, the agency is able to build relationships and increase access among populations that may otherwise be underserved.

A key component of RIV AAA's strategy is addressing barriers that may prevent priority populations from accessing services. These barriers may include transportation limitations, lack of awareness, language differences, financial constraints, or stigma associated with seeking assistance. RIV AAA works to reduce these barriers by offering services in accessible locations, providing transportation coordination, and ensuring that programs are affordable. The agency also supports virtual service options when appropriate, expanding access for individuals who may be homebound or have mobility limitations. Staff provide personalized assistance to help individuals navigate complex systems, ensuring that barriers do not prevent access to needed services.

Through a comprehensive strategy that integrates data analysis, targeted outreach, person-centered service delivery, provider accountability, and strong community partnerships, Region IV Area Agency on Aging effectively targets priority populations with the greatest economic and greatest social need. By addressing barriers, promoting equity, and continuously refining its approach, RIV AAA ensures that its services reach those who need them most throughout Southwest Michigan.

4. How the AAA's Advisory Council assisted in targeting individuals with greatest economic and greatest social need. [See OAA § 1321.63(b)]

Region IV Area Agency on Aging (RIV AAA) relies on its Advisory Council as a critical partner in ensuring that services are effectively targeted to individuals with the greatest economic and greatest social needs. The Advisory Council plays an active and ongoing role in informing outreach strategies, identifying underserved populations, shaping service priorities, and strengthening connections between the agency and communities it serves. Through its diverse membership and deep community ties, the Council helps ensure that RIV AAA's programs remain responsive, equitable, and accessible.

The strength of RIV AAA's Advisory Council lies in its composition. Membership reflects the geographic, demographic, and cultural diversity of the Planning and Service Area (PSA), including representation from older adults, caregivers, service providers, and community stakeholders. Many members have direct experience working with or representing populations that meet the criteria for greatest economic and social need, including individuals living in rural areas, those with low incomes, and those experiencing social isolation or health disparities. This diversity allows the Advisory Council to provide valuable insight into the lived experiences of priority populations. Members bring forward perspectives on barriers to accessing services, such as transportation challenges, language barriers, stigma, or lack of awareness. These insights help RIV AAA better understand the nuances of need within the community and tailor its targeting strategies accordingly.

Advisory Council members play an important role in shaping and strengthening outreach efforts to reach

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

individuals with the greatest need. Through their connections to local communities and organizations, Council members help identify effective channels for dissemination of information and engaging underserved populations. Members actively share information about RIV AAA programs, services, and opportunities through their own networks, which may include community groups, faith-based organizations, advocacy groups, and professional associations. This grassroots approach to outreach helps extend the agency's reach beyond traditional communication channels and into communities that may otherwise be difficult to engage. The Council also provides feedback on outreach materials and messaging, ensuring that they are culturally appropriate, accessible, and relevant to diverse audiences. This includes considerations related to language, literacy, and cultural sensitivity, which are critical for effectively reaching individuals with the greatest social need.

Through regular meetings and engagement with their communities, Advisory Council members help RIV AAA identify gaps in services and emerging trends that may disproportionately impact priority populations. Members share observations about unmet needs, such as limited access to affordable housing, increasing food insecurity, or gaps in caregiver support. This information complements formal data collection efforts and provides real-time, community-based insights that may not be captured through traditional data sources. By incorporating this feedback into planning and decision-making processes, RIV AAA is better equipped to allocate resources and design programs that address the most pressing needs.

The Advisory Council plays a key role in the development of the Multi-Year Plan (MYP) and other initiatives. During the planning process, the Council provides recommendations on how to prioritize resources and focus efforts on individuals with the greatest economic and social need. This includes identifying specific populations that may require targeted outreach, such as rural residents, individuals with chronic conditions, caregivers, and those at risk of institutionalization. The Council's input helps ensure that the MYP reflects community priorities and aligns with the requirements of the Older Americans Act, particularly the emphasis on serving those with the greatest need.

The Advisory Council serves as a bridge between RIV AAA and the communities it serves, helping to build trust and encourage engagement among individuals who may be hesitant to seek services. Council members, as trusted voices within their communities, can help reduce stigma and promote understanding of available resources. By advocating for inclusive and equitable service delivery, the Council helps ensure that individuals with the greatest social need feel welcomed and supported. This is particularly important for populations that have historically experienced barriers to accessing services or may be underserved by traditional systems.

RIV AAA maintains an ongoing dialogue with its Advisory Council to ensure that targeting strategies remain effective and responsive to changing community needs. Regular meetings provide opportunities for members to share feedback, discuss challenges, and suggest improvements. The agency values this feedback and incorporates it into program development, outreach strategies, and service delivery practices. This continuous feedback loop helps RIV AAA adapt to evolving needs and strengthen its ability to serve priority populations.

Through its diverse representation, community connections, and active engagement in planning and outreach, the Advisory Council plays a vital role in helping Region IV Area Agency on Aging target individuals with the greatest economic and greatest social need. By providing insight, promoting awareness, identifying

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

service gaps, and advocating for equity, the Council helps ensure that RIV AAA's services are accessible, responsive, and aligned with the priorities of the communities it serves. This collaborative approach strengthens the agency's ability to fulfil its mission and effectively support older adults and caregivers throughout Southwest Michigan.

Coordination to Serve Native American Elders and Family Caregivers

Please describe the following:

1. Methods for collaboration on and sharing of program information and changes.

Region IV Area Agency on Aging (RIV AAA) is committed to fostering meaningful, respectful, and collaborative relationships with Tribal partners and Title VI programs to ensure Native American elders and family caregivers have equitable access to services and supports. RIV AAA recognizes Tribal sovereignty and the importance of culturally grounded approaches in all coordination efforts.

RIV AAA is committed to delivering services in a culturally responsive manner. Staff and providers will receive training in cultural humility and inclusive service delivery. RIV AAA will work collaboratively with Tribal partners to ensure services reflect community values, traditions, and preferences. Emphasis will be placed on honoring self-determination, building trust, and creating safe, respectful service environments. When appropriate, RIV AAA will adapt outreach and service delivery approaches in partnership with Tribal communities to ensure relevance and effectiveness.

RIV AAA provides multiple opportunities for Title VI programs to remain engaged and informed. Tribal partners are invited to participate in provider and partner network meetings, coalitions, and collaborative initiatives. They are included in email distribution lists to receive timely updates on programs, trainings, and resources. RIV AAA also offers opportunities for Title VI representatives to present at meetings, trainings, and community events to share information about Tribal services and priorities. These opportunities support bidirectional communication and strengthen coordination across the aging network.

RIV AAA encourages Tribal participation in advisory and decision-making structures, including the Advisory Council and relevant workgroups or committees. The organization actively seeks Tribal representation to ensure Native American perspectives are reflected in planning and service delivery. Tribal partners are also invited to participate in community coalitions and regional initiatives addressing aging, caregiving, and health equity. RIV AAA will continue to strengthen recruitment and engagement of Tribal representatives throughout the FY2027 – FY2029 period.

RIV AAA conducts outreach to ensure Tribal elders and caregivers are aware of available Title III services. Outreach strategies include participation in community events and gatherings, dissemination of culturally appropriate materials, and collaboration with trusted community leaders.

Region IV Area Agency on Aging will continue to build and strengthen relationships with Tribal partners through regular communication, shared initiatives, and joint planning efforts. Future activities include expanding collaboration on caregiver supports, dementia-friendly initiatives, and outreach strategies. RIV AAA will also explore opportunities for shared training and capacity-building to better serve Native American elders and caregivers. Through these efforts, RIV AAA remains committed to fostering trust-based partnerships that enhance service access, cultural responsiveness, and overall well-being.

2. How services will be provided in a culturally appropriate and trauma-informed manner.

Region IV Area Agency on Aging (RIV AAA) is committed to ensuring that services provided to Native American elders and family caregivers are culturally appropriate, trauma-informed, and responsive to the unique histories, values, and strengths of Tribal communities. RIV AAA recognizes that effective service delivery must be grounded in respect for Tribal sovereignty, an understanding of historical and

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

intergenerational trauma, and a commitment to building trust through sustained, meaningful relationships.

RIV AAA will approach culturally appropriate service delivery through the practice of cultural humility, which emphasizes ongoing learning, self-reflection, and partnership. Staff and contracted providers will be encouraged to engage in continuous education on the histories, traditions, and cultural practices of Native American communities. Training opportunities will be provided to increase awareness of historical trauma and its influence on health, caregiving dynamics, and help-seeking barriers. This foundation will support staff in delivering services that are respectful, non-assumptive, and responsive to individual and community needs.

In coordination with Tribal partners and Title VI programs, RIV AAA prioritizes relationship-building as a core strategy for ensuring cultural appropriateness. Engagement efforts will be guided by Tribal protocols and emphasize listening, collaboration, and mutual respect. Rather than imposing standardized approaches, RIV AAA will seek input from Tribal representatives to inform program design, outreach strategies, and service delivery methods. This collaborative approach will help ensure that services align with community-defined priorities and cultural values.

RIV AAA integrates trauma-informed principles across all programs and services. These principles include promoting physical and emotional safety, fostering trust and transparency, supporting peer connections, encouraging collaboration, and empowering individuals to make informed choices. Staff will be trained to recognize the signs and impacts of trauma and to respond in ways that avoid re-traumatization. This includes being mindful of communication styles, respecting personal boundaries, and allowing individuals to guide their own service experience. Special attention will be given to creating welcoming and inclusive environments where Native American elders and caregivers feel respected and supported.

Service delivery will also be adapted, when appropriate, to reflect cultural preferences and practices. This may include incorporating family and community involvement in care planning, recognizing the importance of extended family systems, and respecting traditional approaches to wellness and caregiving. RIV AAA supports flexibility in service provision to accommodate cultural practices, including participation in community events, ceremonies, or other culturally significant activities when identified by the individual or Tribal partner.

Language and communication will be carefully considered to ensure accessibility and cultural relevance. RIV AAA will work with Tribal partners to develop and disseminate outreach and educational materials that are culturally appropriate and reflective of the communities being served. When possible, messaging will be delivered through trusted community channels and individuals who have established relationships within Tribal communities. This approach will help to increase awareness while reinforcing trust.

RIV AAA also recognizes the importance of addressing barriers to service access that may disproportionately impact Native American elders and caregivers. These barriers may include geographic isolation, limited transportation, historical mistrust of service systems, and lack of awareness of available resources. Through collaboration with Tribal partners, RIV AAA will work to identify and reduce these barriers by coordinating outreach, improving access points, and ensuring that services are delivered in ways that are both accessible and acceptable to the community.

Coordination with Title VI programs plays a critical role in ensuring culturally appropriate and trauma-informed

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

service delivery. RIV AAA values the expertise of Title VI providers and seeks to complement, rather than duplicate, the services they offer. Through ongoing communication and collaboration, RIV AAA and Title VI programs will work together to ensure that individuals receive the most appropriate services based on their needs and preferences. This coordination supports a seamless and respectful service experience for Native American elders and caregivers.

Through these combined efforts, Region IV Area Agency on Aging demonstrates its commitment to providing services that are not only accessible, but also culturally meaningful and trauma-informed. By prioritizing respect, collaboration, and responsiveness, RIV AAA aims to support the health, well-being, and independence of Native American elders and family caregivers while honoring the strengths and resilience of Tribal communities.

3. Communication opportunities that service providers will offer to Title VI programs, such as participation in meetings, inclusion on email distribution lists, and presentation opportunities.

Region IV Area Agency on Aging (RIV AAA) is committed to fostering strong, consistent, and meaningful communication with Title VI programs to support coordinated, responsive, and culturally appropriate services for Native American elders and family caregivers. Recognizing the importance of Tribal sovereignty, and the expertise of Title VI providers, RIV AAA will prioritize communication strategies that are inclusive, transparent and designed to promote bidirectional information sharing.

RIV AAA will offer multiple, ongoing opportunities for Title VI programs to participate in communication channels that support coordination and collaboration. Tribal partners and Title VI program representatives are invited to attend scheduled provider and partner network meetings, which serve as key forums for sharing updates on programs, policy changes, and emerging community needs. These meetings also provide space for dialogue, allowing Title VI partners to share insights, identify service gaps, and contribute to regional planning efforts. Participation options include both in-person and virtual formats to ensure accessibility and flexibility.

RIV AAA will ensure that Title VI programs are included in comprehensive email distributions lists to receive timely and relevant information. Communications shared through these channels include program announcements, updates to services, training opportunities, grant information, policy changes, and community resources. Efforts are made to ensure that communications are clear, concise, and respectful, and that they provide actionable information that supports service coordination.

To further support engagement, RIV AAA will offer opportunities for Title VI program representatives to present at partner meetings, trainings, and community events. These presentation opportunities allow Tribal partners to share information about their programs, services, cultural practices, and community priorities. This not only increases awareness among service providers but also promotes greater understanding and cultural responsiveness across the aging network.

RIV AAA will also promote cross-training opportunities between Title III and Title VI providers. These trainings are designed to increase mutual understanding of available services, eligibility requirements, referral processes, and culturally appropriate practices. Cross-training sessions may be conducted in collaboration with Tribal partners to ensure accuracy and cultural relevance. This approach strengthens the capacity of all providers to effectively serve Native American elders and caregivers while reinforcing coordinated service delivery.

Direct, relationship-based communication will be another key component of RIV AAA's approach. Designated

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

staff members are available to serve as points of contact for Title VI programs, ensuring that communication is accessible, responsive, and consistent. These direct connections allow for timely problem-solving, coordination of individual service needs, and discussion of emerging issues. RIV AAA prioritizes maintaining open lines of communication and encourages ongoing dialogue outside of formal meetings.

RIV AAA will also incorporate Title VI partners into planning and feedback processes, including the development and implementation of the Multi-Year Plan and other strategic initiatives. Tribal partners will be invited to review draft materials, provide input, and participate in planning discussions. This includes considering language, format, and delivery methods that align with community preferences. When appropriate, RIV AAA will support the use of trusted community channels and messengers to enhance the effectiveness of communication efforts.

RIV AAA will also utilize technology-based communication tools to expand access and engagement. Virtual meeting platforms, electronic newsletters, and shared digital resources will be used to ensure that Title VI programs can participate regardless of geographic location. At the same time, RIV AAA remains mindful of potential barriers related to technology access and works with partners to provide alternative communication methods as needed.

Finally, RIV AAA is committed to continuous improvement in communication practices. Feedback from Title VI partners will be actively sought and used to refine communication strategies, ensuring they remain effective, inclusive, and responsive.

By maintaining multiple communication pathways and prioritizing meaningful engagement, Region IV Area Agency on Aging supports strong coordination with Title VI programs and enhances the delivery of services to Native American elders and family caregivers.

4. Opportunities to serve on advisory councils, workgroups and boards. AAAs please note whether your policy and advisory boards have tribal representation.

Region IV Area Agency on Aging (RIV AAA) recognizes that the meaningful inclusion of Native American perspectives in planning, governance, and service delivery is essential to effectively serving Native American elders and family caregivers. While RIV AAA does not currently have Tribal representation on its Advisory Council or governing board, the organization is committed to expanding opportunities for engagement and strengthening Tribal participation across advisory structures during FY2027 – FY2020 period.

RIV AAA maintains several established venues for stakeholder engagement, including its Advisory Council, standing committees, and topic-specific workgroups, which provide input on program development, service delivery, and strategic planning. These bodies are designed to reflect the diversity of the region and to ensure that the needs of older adults and caregivers are represented in decision-making processes. Tribal partners and Title VI program representatives are invited and encouraged to participate in these groups to share their perspectives, identify community needs, and inform priorities.

The RIV AAA Advisory Council plays a key role in guiding the organization's Multi-Year Plan, reviewing program performance, and advising on strategies to reach individuals with the greatest economic and social need. RIV AAA will implement targeted outreach efforts to Tribal partners and Title VI programs to increase awareness of opportunities to serve on the Advisory Council and to encourage participation. This includes direct invitations, relationship-building efforts, and collaboration with existing partners to identify individuals who may be interested in serving in an advisory capacity.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

In addition to the Advisory Council, RIV AAA convenes workgroups and committees focused on priority areas. These workgroups provide flexible and accessible opportunities for Tribal partners to engage in discussions and contribute expertise without the formal commitment required of board or council membership. Participation may be ongoing or project-based, allowing for varying levels of involvement based on interest and capacity.

To support participation, RIV AAA is committed to reducing barriers and creating welcoming, inclusive environments. This includes offering flexible meeting format, such as virtual participation options, and scheduling meetings at times that are accessible to a wide range of participants. RIV AAA also provides clear information about roles, expectations, and time commitments to support informed participation. When appropriate, the organization will work with Tribal partners to ensure that participation aligns with Tribal protocols and respects community priorities.

RIV AAA recognizes that building Tribal representation requires intentional relationship building and trust. As such, the organization prioritizes ongoing engagement with Tribal partners and Title VI programs to better understand community interests, identify appropriate representatives, and create pathways for involvement that are mutually beneficial. This may include attending Tribal events when invited, meeting with Tribal leadership, and collaboration on shared initiatives as a foundation for deeper engagement in advisory roles.

In addition to recruitment, RIV AAA is committed to ensuring that participation is meaningful and impactful. Tribal representatives serving on advisory councils, work groups, or committees will have opportunities to contribute to discussions, influence decision-making, and provide input on policies, programs, and outreach strategies. RIV AAA values these contributions and seeks to incorporate feedback into organizational planning and continuous quality improvement efforts.

RIV AAA will also explore opportunities to provide orientation and support for new members, including those from Tribal communities, to ensure they feel prepared and empowered to participate. This may include providing background information on the aging network, program structures, and current initiatives, as well as offering ongoing support from staff.

Throughout the FY2027-FY2029 period, RIV AAA will evaluate its progress in increasing Tribal engagement within advisory structures and will adjust strategies as needed. This includes tracking participation, seeking feedback from partners, and identifying additional opportunities to strengthen inclusion.

By expanding access to advisory councils, workgroups, and committees, and by actively working to increase Tribal representation, Region IV Area Agency on Aging aims to ensure that Native American elders and family caregivers are more fully represented in the planning and delivery of services. These efforts reflect the organization's commitment to collaboration, equity, and culturally responsive service delivery.

5. How service providers will provide outreach to Tribal elders and family caregivers regarding Title III services for which they may be eligible.

Region IV Area Agency on Aging (RIV AAA) is committed to ensuring that Native American elders and family caregivers are aware of, understand, and are able to access Title III services for which they may be eligible. RIV AAA recognizes that effective outreach to Tribal communities must be grounded in trust, cultural respect, and collaboration with Tribal partners and Title VI programs. As such, outreach efforts are designed to be relationship-based, culturally responsive, and reflective of community preferences.

RIV AAA will work in coordination with service providers and Title VI programs to conduct outreach that is

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

both intentional and respectful of Tribal sovereignty and protocols. Providers will be encouraged to engage with Tribal partners as the primary and most trusted point of connection to Native American elders and caregivers. Whenever possible, outreach efforts will be conducted collaboratively, with input and guidance from Tribal representatives to ensure that messaging, timing, and delivery methods are appropriate and effective.

A key strategy for outreach will be participation in community-based events and gatherings, as invited by Tribal partners. These may include health fairs, cultural events, senior gatherings, and other community activities. Participation in these settings will allow service providers to share information about available Title III services in a manner that is informal, accessible, and relationship focused. Providers will be expected to approach these opportunities with cultural humility, prioritizing listening and relationship-building rather than transactional service promotion.

RIV AAA supports the development and dissemination of culturally appropriate outreach materials that clearly describe available services, eligibility criteria, and how to access assistance. Materials will be designed to be easy to understand and reflective of the communities being served. When appropriate, outreach materials will be reviewed in collaboration with Tribal partners to ensure cultural relevance and accuracy. Providers will be encouraged to use multiple formats, including printed materials, digital communications, and verbal presentations, to reach individuals with varying preferences and levels of access.

Recognizing the importance of trusted messengers, RIV AAA will promote outreach strategies that leverage existing relationships within Tribal communities. This may include working with Tribal staff, community leaders, and other respected individuals to share information about Title III services. Providers will be encouraged to build relationships with these trusted messengers and to support their role in connecting elders and caregivers to available resources. This approach will help to increase credibility and engagement while reducing potential barriers related to mistrust or lack of familiarity with external service systems.

RIV AAA will also encourage service providers to offer in-person and virtual outreach opportunities to ensure accessibility for individuals in both rural and more connected areas. Virtual options may include informational sessions, webinars, or participation in online community forums, while in-person outreach may involve visits to community locations and participation in Tribal events. Providers will be expected to remain flexible and responsive to the preferences of Tribal communities in determining the most appropriate outreach methods.

Outreach efforts will further be supported through coordination with Title VI programs, which play a critical role in connecting with Native American elders and caregivers. RIV AAA works to ensure that Title VI programs are informed about available Title III services and can share this information with individuals they serve. This includes providing clear, up-to-date information about services, eligibility, and referral processes. By aligning outreach efforts with Title VI programs, RIV AAA will help to ensure that messaging is consistent and that individuals receive information through trusted and familiar channels.

Service providers will also be encouraged to integrate outreach into existing service touchpoints, such as interactions with healthcare providers, social service agencies, and community organizations that serve Native American populations. By incorporating information about Title III services into these interactions, providers can reach individuals who may not otherwise seek out aging services. This approach supports early identification of needs and timely connection to appropriate resources.

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

RIV AAA emphasizes the importance of culturally responsive communication in all outreach efforts. Providers will be expected to use language and messaging that is respectful, inclusive, and free of assumptions. Training and guidance will be provided to support providers in understanding cultural considerations, including the importance of family and community, respect for elders, and sensitivity to historical trauma. Outreach efforts will be designed to create a welcoming and supportive environment where individuals feel comfortable seeking information and assistance.

In addition, RIV AAA recognizes that barriers such as geographic isolation, transportation challenges, and limited access to technology may impact outreach effectiveness. Providers will be encouraged to work collaboratively with Tribal partners to identify and address these barriers, including exploring creative approaches to bringing information directly to communities.

RIV AAA also supports ongoing evaluation and improvement of outreach efforts. Feedback from Tribal partners, service providers, and community members will be used to assess the effectiveness of outreach strategies and to identify opportunities for enhancement. This continuous improvement approach ensures that outreach remains responsive to community needs and aligned with best practices.

Through these coordinated, culturally grounded, and relationship-based outreach strategies, Region IV Area Agency on Aging and its service providers aim to ensure that Native American elders and family caregivers are informed about Title III services and are able to access the supports they need. These efforts reflect RIV AAA's commitment to equity, collaboration, and the delivery of services that honor the strengths and values of Tribal communities.

6. Is there a Federally Recognized Tribe within your PSA?

Yes No

7. How Title VI programs may refer individuals for Title III services.

Region IV Area Agency on Aging (RIV AAA) is committed to ensuring that Native American elders and family caregivers experience seamless, respectful, and timely access to Title III services through coordinated referral processes with Title VI programs. Recognizing the critical role that Title VI programs play as trusted providers within Tribal communities, RIV AAA prioritizes the development of clear, flexible, and culturally responsive referral pathways that support collaboration while honoring Tribal sovereignty and individual choice.

Title VI programs may refer individuals to Title III services through multiple, coordinated methods designed to accommodate varying preferences, capacities, and community contexts. RIV AAA will establish and maintain clearly defined points of contact within the organization to support referrals from Title VI programs. These designated staff members will serve as consistent liaisons, ensuring that referrals are received, processed, and followed up on in a timely and respectful manner. Contact information for these staff members will be shared regularly with Title VI partners and updated as needed.

Referrals may be made through direct communication, including phone calls, secure email, or other mutually agreed upon methods. RIV AAA will work with Title VI programs to identify preferred referral processes that align with their workflows and respect any data-sharing considerations. When appropriate and feasible, RIV AAA will also explore opportunities to utilize standardized referral forms or shared documentation tools to streamline the process and ensure that necessary information is captured efficiently. These tools will be designed to be user-friendly and to minimize administrative burden for Title VI staff.

Upon receiving a referral, RIV AAA will provide person-centered information and assistance and options

STATE OF MICHIGAN
Michigan Department of Health & Human Services
BUREAU OF AGING, COMMUNITY LIVING, AND SUPPORTS
FY2027-2029 Multi Year Plan

Region IV Area Agency on Aging, Inc.

FY 2027

counseling to assess the individual's needs, preferences, and eligibility for services. This process emphasizes respect, autonomy, and cultural sensitivity, allowing individuals to make informed decisions about the services they wish to receive. RIV AAA staff will be trained to approach interactions with cultural humility and an understanding of the unique experiences of Native American elders and caregivers .

To support effective referrals, RIV AAA will offer cross-training opportunities for Title VI program staff to increase awareness of available Title III services, eligibility requirements, and referral procedures. By strengthening knowledge and understanding across programs, RIV AAA will help ensure that Title VI staff feel confident in identifying potential needs and initiating referrals.

RIV AAA emphasizes the importance of timely follow-up and communication throughout the referral process. After a referral is made, RIV AAA staff will make reasonable efforts to contact the individual promptly and to keep the referring Title VI program informed, as appropriate and with respect to confidentiality. This ongoing communication will help to ensure continuity of care and reinforce trust between partners. When individuals choose not to pursue services or are determined to be ineligible, RIV AAA will communicate this information back to the referring entity, when permissible, to support coordinated follow-up.

Coordination with Title VI programs also includes efforts to ensure that referrals are culturally appropriate and respectful of individual preferences. RIV AAA recognizes that some individuals may prefer to receive services through the Tribal programs or may wish to involve family or community members in decision-making. The referral process will be designed to honor these preferences and to avoid duplication of services. RIV AAA will work collaboratively with Title VI partners to determine the most appropriate service provider, ensuring that individuals receive support in a manner that aligns with their values and needs.

In addition to individual referrals, RIV AAA supports system-level coordination to enhance referral pathways. This will include regular communication with Title VI programs to review referral processes, identify challenges, and explore opportunities for improvement. RIV AAA is committed to adapting processes as needed based on partner feedback and evolving community needs. This may include refining referral tools, adjusting communication practices, or exploring new approaches to coordination.

RIV AAA also recognizes the importance of confidentiality and data privacy in the referral process . All referrals are handled in accordance with applicable laws, regulations, and policies, and information is shared only with appropriate consent. RIV AAA will work with Title VI programs to ensure that referral practices align with both organizational and Tribal expectations regarding data sharing and privacy .

Through these coordinated referral processes, Region IV Area Agency on Aging and Title VI programs will work together to ensure that Native American elders and caregivers are connected to the services and supports they need. By prioritizing clear communication, cultural responsiveness, and partnership, RIV AAA will demonstrate its commitment to strengthening the aging network and improving outcomes for Tribal communities.

8. Describe any current and future collaborative efforts with Tribe(s) within the PSA including any anticipated outreach efforts.

N/A