



Jeffrey W. Patton
Chief Executive Officer

www.iskzoo.org
(269) 553-8000

Administrative Services:
610 South Burdick Street
Kalamazoo, MI 49007

Community • Independence • Empowerment

24-HOUR CRISIS HOTLINE or NON-EMERGENCY CLINICAL SERVICES: (269) 373-6000

AGENDA

February 23, 2026

Name: INTEGRATED Services of Kalamazoo Board of Directors
Location: 610 South Burdick Street/Kalamazoo, MI., 2nd Floor – ISK Boardroom #220
Commencement Time: 4:30PM

- I. CALL TO ORDER – CITY & COUNTY DECLARATION
- II. Moment of Silence - Ms. Sharon Marie Spears
- III. AGENDA
 - VII. CONSENT CALENDAR/VERBAL MOTION- Given the importance and time-sensitive nature of this matter, the Chair recommends moving this item earlier on the agenda.
 - a. Minutes January 26, 2026
 - b. Quality Management (V.09)(Policy)
 - c. Board Travel (II.14)(Policy)
 - d. Collaboration (V.10)(Policy & Report)
 - VIII. FINANCIAL REPORTS - Given the importance and time-sensitive nature of this matter, the Chair recommends moving this item earlier on the agenda.
 - a. Financial Condition Report
 - b. Utilization Report
 - c. January 2026 Disbursement/**MOTION**
- IV. CITIZEN TIME
- V. RECIPIENT RIGHTS
 - a. Recipient Rights Monthly Report
- VI. PROGRAM SERVICE REPORT
 - a. Timothy Kelly, Director of Outpatient Services
 - b. Beth Ann Meints, Administrator of Clinical Services, CCBHC Report
- VII. CONSENT CALENDAR/VERBAL MOTION- **MOVED UP ON THE AGENDA**
 - a. Minutes January 26, 2026
 - b. Quality Management (V.09)(Policy)
 - c. Board Travel (II.14)(Policy)
 - d. Collaboration (V.10)(Policy & Report)
- VIII. FINANCIAL REPORTS - **MOVED UP ON THE AGENDA**
 - a. Financial Condition Report
 - b. Utilization Report
 - c. January 2026 Disbursement/**MOTION**
- IX. CHIEF EXECUTIVE OFFICER VERBAL REPORT
 - a. CEO Report
- X. CITIZEN TIME



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XI. ACKNOWLEDGEMENT of MERITORIOUS STATUS

- a. *Ms. Kathy Lentz*, Retired from ISK after 18 years of service!
- b. *Dr. Gopal Bedi*, Retired from ISK after 24 years of service!

XII. BOARD MEMBER TIME

- a. SWMBH (Southwest Michigan Behavioral Health) Updates/**Michael Seals**
- b. Board Ownership Linkage Survey for CMH Boards/**Karen Longanecker**

XIII. ADJOURNMENT

V.a.

Office of Recipient Rights
Report to the Mental Health Board
On Complaints/Allegations
Closed in: January 2026

Office of Recipient Rights Report to the Mental Health Board
Complaints/Allegations Closed in January 2026

	January 2026	FY 25-26	January 2025	FY 24-25
Total # of Complaints Closed	32	154	28	134
Total # of Allegations Closed	42	206	50	230
Total # of Allegations Substantiated	20	85	13	69

The data below represents the total number of closed allegations and substantiations for the following categories:
Consumer Safety, Dignity/Respect of Consumer, Treatment Issues, and Abuse/Neglect.

ALLEGATIONS	January 2026		January 2025	
Category	TOTAL	SUBSTANTIATED	TOTAL	SUBSTANTIATED
Consumer Safety	2	0	4	0
Dignity/Respect of Consumer	10	5	8	2
Treatment Issues/Suitable Services (Including Person Centered Planning)	8	3	6	1
Abuse I	0	0	0	0
Abuse II	3	1	0	0
Abuse III	7	3	2	0
Neglect I	0	0	0	0
Neglect II	0	0	1	1
Neglect III	5	5	6	4
	35	17	27	8

APPEALS	January 2026	FY 25-26	January 2025	FY 24-25
Uphold Investigative Findings & Plan of Action	0	3	0	0
Return Investigation to ORR; Reopen or Reinvestigate	0	0	0	0
Uphold Investigative Findings but Recommend Respondent Take Additional or Different Action to Remedy the Violation	0	0	0	0
Request an External Investigation by the State ORR	0	0	0	0

ABUSE AND NEGLECT DEFINITIONS – SUMMARIZED

Abuse Class I means serious injury to the recipient by staff. Also, sexual contact between a staff and a recipient.

Abuse Class II means non-serious injury or exploitation to the recipient by staff and includes using unreasonable force, even if no injury results.

Abuse Class III means communication by staff to a recipient that is threatening or degrading. (such as; putting down, making fun of, insulting)

Neglect Class I means a serious injury occurred because a staff person DID NOT do something he or she should have done (an omission). It also includes failure to report apparent or suspected abuse I or neglect I of a recipient.

Neglect Class II means a non-serious injury occurred to a recipient because a staff person DID NOT do something he or she should have done (an omission). It also includes failure to report apparent or suspected abuse II or neglect II of a recipient

Neglect Class III means a recipient was put at risk of physical harm or sexual abuse because a staff person DID NOT do something he or she should have done per rule or guideline. It also includes failure to report apparent or suspected abuse III or neglect III of a recipient.

ORR ADDENDUM TO MH BOARD REPORT

February 2026

Re: January 2026 Abuse/Neglect Violations

January

Abuse Violations

- There was one substantiated Abuse II violation in January 2026.
 - The remedial action for this violation was Written Reprimand (1), and Training (1).
- There were three substantiated Abuse III violations in January 2026.
 - The remedial actions for these violations were Contract Action (2), Written Counseling (1), and Training (1).

Two of the three violations occurred at the same agency, and the same program site.

Neglect Violations

- There were five substantiated Neglect III violations in January 2026.
 - The remedial actions for these violations were Employee Terminated (1), Written Counseling (4), Written Reprimand (2), and Training (5). One of the five violations was a Failure to Report.

Three of the five violations occurred at the same agency, and two of those occurred at the same program site.

Outpatient Department Program Services Board Report February 23, 2026

Department Clinical Teams: Adult Outpatient Therapy, Youth and Family Therapy, SAMM for Adults with Co-Occurring Disorders, Dialectical Behavior Therapy (DBT), Navigate Coordinated Specialty Care for Early Psychosis

Staffing

Full Time Staff	Current	Vacant
Adult Outpatient	13	1
Youth Outpatient	5	1
SAMM	8	NA
DBT	8	1
Navigate	5	NA

Program Census

Adult Outpatient	1033
Youth Outpatient	241
SAMM	234
DBT	116
Navigate	43
Total	1667



FY 26 First Quarter Data

Referrals

	Adult OPT	Youth OPT	SAMM	DBT	Navigate	Department
SDA Referrals	85	58	50	13	4	210
Internal Referrals	87	26	25	16	5	159
Total Referrals	172	84	75	29	9	369

Program Exits

	Adult OPT	Youth OPT	SAMM	DBT	Navigate	Department
Discharges	138	86	73	14	4	315
Transfer Out	25	16	10	3	4	58
Total Exits	163	102	83	17	8	373
Goals Met at Exit	52%	55%	42%	65%	75%	53%

Additional Outcome Data for Specialty Programs

DBT utilizes a standard symptom measure—the BSL 23—to compare symptoms at the beginning to the end of treatment. Scores on this measure improved on average from a 2.38 (High Symptom Severity) at the beginning, to a .88 (Low Symptom Severity) at the end of treatment.

In the Navigate program, 76% of individuals served in the quarter were either enrolled in school or working during the quarter, exceeding the goal for the program and a much higher rate than that found in treatment as usual for this population. A key goal of the program is maintaining progress in work and school for this transition age population.

SAMM maintains a partnership with the Drug Treatment Court to serve adjudicated individuals with co-occurring disorders.

Access to Services

All teams are maintaining availability for initial appointments for new individuals within 14 days of assessment. However, the no show rate for first service remains high. We are partnering with the engagement team to assist individuals who may be at risk of dropping out before their first service.

Evidence Based Treatment and the CCBHC Model

We currently exceed CCBHC standards for availability of evidence supported treatment within our outpatient department. Our specialty teams are current with external quality reviews and are meeting or exceeding standards. Our evidence-based treatments have grown considerably over the past year. We now have evidence-based trauma specific treatment available on all outpatient therapy teams.

Department Goals

- Reduce overall case load size on our Adult Outpatient Team with the goal of increasing frequency of service, and earlier program completion.
- Develop a Dashboard to better monitor referral, discharge and outcome data.
- Increase access to group services.
- Increase parent participation in evidence-based parent training model.





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INTEGRATED Services of Kalamazoo
 (ISK) Board of Director's Meeting
 INTEGRATED Services of Kalamazoo
 610 South Burdick Street
 Kalamazoo MI 49007

January 26, 2026

VII.a.

<u>ISK Board Member</u>	<u>Board Members PRESENT</u>	<u>Declaration of Location City/County</u>	<u>Board Members ABSENT</u>
Karen Longanecker, <i>CHAIR</i>	X	Kalamazoo/Kalamazoo	
Michael Seals, <i>VICE CHAIR</i>	X	Kalamazoo/Kalamazoo	
Nkenge Bergan	X	Kalamazoo/Kalamazoo	
Catherine Huynh			X
Patrick Dolly	X	Kalamazoo/Kalamazoo	
Pat Guenther	X	Kalamazoo/Kalamazoo	
Ramona Lumpkin	X	Kalamazoo/Kalamazoo	
Michael Raphelson			X
Sharon Spears			X
Melissa Woosley			X
Abigail Wheeler, <i>COMMISSIONER</i>			

ISK - Staff Present:

Jeff Patton, *CHIEF EXECUTIVE OFFICER*
 Alecia Pollard
 Willa Burns
 Beth Ann Meints
 Sheila Hibbs
 Amy Rottman
 Charlotte Bowser
 Wanda Brown
 Michael Schlack, *CORPORATE COUNSEL*
 Lisa Smith
 Dianne Shaffer
 Lindsey O'Neil
 Teresa Moser
 Tammie Natho
 Demeta Wallace, *BOARD LIAISON*

Providers & Guests:

Sarah Drumm, Community Member
Abigail Wheeler, Community Member
Shenetta Coleman, CEO
 Residential Opportunities, Incorporated
Dianne Marquess, Chief Executive Officer
 Family & Children Services

ISK - Staff Absent:

Chantel Graham
 Ed Sova

Call to Order

The Board of Directors (Integrated Services of Kalamazoo) held their meeting on Monday, January 26, 2026. It began @ 4:30PM and was presided over by Chair, *Karen Longanecker*.

Agenda

MOTION

Member Guenther,

“I move to approve the agenda by having the following items placed at the start of the agenda due to their time sensitivity, decision-making priority, or strategic importance.” Supported by Member Dolly and carried without dissent.

- Financial Reports
- Monitoring Reports
- Consent Calendar Reports

MOTION PASSED.

Financial Reports/Financial Condition Reports

Amy Rottman, ISK, Chief Financial Officer, presented the Financial Condition Reports for December 31, 2025.

To review the financial reports, please use the following link: <https://iskzoo.org/about-us/board/>

Utilization Reports

Charlotte Bowser, ISK, Director of Finance, presented the Utilization Report for the period ending December 31, 2025.

- Autism Services is at (33) clients and is favorable at \$274,514.
- Youth Community Inpatient Services is at (15) days and is unfavorable at \$18,661.
- MI Adult Community Inpatient Services is at (23) days and is favorable at \$58,811.
- Community Living Supports, Personal Care, and Crisis Residential is unfavorable at \$47,132.

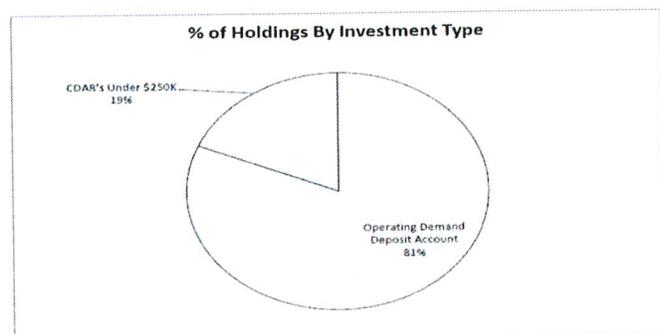
Investment Report

Charlotte Bowser, ISK, Director of Finance, presented the Investment Report for the period ending December 31, 2025.

Quarterly Cash & Investments Report
Quarter Ending December 30th, 2025

Financial Institution	Type of Investment	Cost Basis	Maturity Date	% Yield
CASH PNC	Operating Demand Deposit Account	\$18,670,778	NA	0.03%
	Payroll Account	\$5,000		
	Accrued Leave Reserve	\$124,331		
	Pretax Reimbursement Account	\$50,247		
	Various Petty Cash Funds	\$780		
	Total Cash Accounts		\$18,891,136	
INVESTMENTS CDAR's (via Independent Bank) Total CDAR's	CD's Issued Under FDIC Limit of \$250,000	\$4,251,054		3.16%
		\$4,251,054		
	Total Investments	\$4,251,054		
TOTAL CASH AND INVESTMENTS		\$23,142,190		

% of Holdings By Institution		% of Holdings By Investment Type	
PNC - Cash	81.63%	Cash	81.63%
CDAR's (via Independent Bank)	18.37%	CDAR's	18.37%
	100.00%		100.00%



Capital Purchase Request – LaptopsMOTION

Member Guenther, “I MOVE THAT THE ISK BOARD APPROVE THE CAPITAL PURCHASE OF 180 LAPTOPS FOR ITS OPERATIONS IN THE AMOUNT OF \$215,640.00.” Supported by Vice Chair Seals.

MOTION PASSED.

November & December DisbursementsMOTION

Member Guenther, “BASED ON THE BOARD FINANCE MEETING REVIEW, I move that ISK approve the November 2025 vendor disbursements of \$11,333,717.26 and the December 2025 vendor disbursements of \$12,189,146.17.” Supported by Vice Chair Seals.

MOTION PASSED.

Consent CalendarMOTION

Chair Longanecker, “Is there anything that is on the Consent Calendar that anyone wants pulled out?” No materials were requested to be removed.

- a. *Minutes November 24, 2025*
- b. MISSION/VISION/VALUE STATEMENT (I.01) (Policy)
- c. Bylaws and Rules of Procedure(I.02) (Policy)
- d. ENDS Development Process (II.06) (Policy)
- e. ENDS for Individual Served (IV.01) (Policy)

Member Guenther, “I MOVE TO ACCEPT THE CONSENT AGENDA [CALENDAR] AS PRESENTED.” Supported by Member Bergan. MOTION PASSED.

Monitoring ReportsMOTION

- a. Annual Board Planning Cycle - 2026 Schedule (II.08) (Policy & Report)
- b. Quality Improvement Plan (Report)
- c. Performance Measurement and Management Plan/MOTION
- d. Strategic Plan (Report)

Summary of Request

The Michigan Department of Health and Human Services (MDHHS) requires that each CMHSP is to have an annual Quality Improvement Program (QIP). CARF International requires an established Performance Measurement and Management Plan for each behavioral health organization accredited through CARF. The attached Quality Improvement Program and Plan and Performance Measurement and Management Plan meets the requirements for Integrated Services of Kalamazoo.

Vice Chair Seals, "I MOVE APPROVAL OF THE ISK QUALITY IMPROVEMENT PROGRAM PLAN and ISK PERFORMANCE MEASUREMENT AND MANAGEMENT PLAN FOR FISCAL YEAR 2025/2026." Supported by Member Bergan. MOTION PASSED.

To review the monitoring reports, please use the following link: <https://iskzoo.org/about-us/board/>

Program Services Report

The following individuals gave Program Services Reports to the board:

- ✚ Lindsey O'Neil, Director of Justice Services
- ✚ Teresa Moser, Clinical Director of Emergency Services and Access, **MCR is AMAZING!**
- ✚ Tammie Natho, Housing Supervisor, and David Anderson, Senior Executive/Housing and Facilities, HUD (U.S. Department of Housing and Urban Development) Grants

To review the program services reports, please use the following link: <https://iskzoo.org/about-us/board/>

That concludes the report.

Citizen Time No citizens came forth.

Recipient Rights

Lisa Smith ISK, Director of ORR, presented the complaints/allegations closed in November & December 2025.

November Abuse Violations

- There were two substantiated Abuse II violations in November 2025.
 - The remedial actions for these violations were Employment Termination (1), Written Reprimand (3), Training (3).

Neglect Violations

- There were seven substantiated Neglect III violations in November 2025.
 - The remedial actions for these violations were Written Reprimand (4), Written Counseling (1), Training (3), Staff Transfer (1), Policy Revision/Development (1) and Pending (1).

Three violations occurred at the same agency but different program sites. Another three violations occurred at the same agency but different program sites.

December Abuse Violations

- There were three substantiated Abuse II violations in December 2025.
 - The remedial actions for these violations were Employment Termination (1), Employee left agency (1), Written Reprimand (3), Policy Revision/Development (3) and Training (2).

The 3 violations occurred at different agencies.

- There was one substantiated Abuse III violation in December 2025.
 - The remedial action for this violation is Pending (1).

Neglect Violations

- There was one substantiated Neglect II violation in December 2025, and it was a Failure to Report.
 - The remedial action for this violation was Written Counseling (1).
- There were two substantiated Neglect III violations in December 2025.
 - The remedial actions for these violations were Written Counseling (1), Written Reprimand (1), and Training (1).

The 2 violations occurred at same agency but different program sites.

All of the ORR case information is sent to the ISK Population Directors on a monthly basis for any tracking/trending of the RR information in their areas of authority. *(Agencies can include ISK).

Recipient Rights Annual Report

Lisa Smith, ISK, Director of ORR, presented the Recipient Rights SEMI-ANNUAL Report covering [October 1, 2024, through September 30, 2025.](#)

This comprehensive report details the activities throughout the preceding year. Its purpose is to provide users, such as our ISK Board of Directors, with information about the operations of the Office of Recipient Rights regarding Abuse, Neglect, Dignity, Respect and other key indicators.

To review the ORR report, please use the following link: <https://iskzoo.org/about-us/board/>.

Chief Executive Officer Report

On October 14, 2025, the court issued an opinion and order granting in part that Michigan law allows MDHHS to transition from a single-source procurement system to a competitive procurement system. The court also decided that the MDHHS may reduce number of prepaid inpatient health plan (PIHP) regions from ten to three. However, the court denied the 2025 RFP that the Michigan Department of Technology, Management, and Budget (DTMB) issued on behalf of MDHHS to implement this transaction due to the conflicts with Michigan law and prohibits the CMHSPs to carry out their statutory mandated duties.

Based on the evidence presented in the record, the court ruled that the RFP violates Michigan law by inhibiting the CMHSPs from fulfilling many statutory mandates in the Michigan Mental Health Code, MCL 330.1011 *et seq.*

By no means is this initiative over, I am almost certain that more challenges to privatize the public mental health system are on the horizon. I will stay diligent and keep the board informed about all updates as they happen.

Mila Todd and I are staying in close communication, specifically about the MDHHS obligation to make the PIHPs financially whole.

That concludes my report.

Citizen Time

No citizens came forth.

ACKNOWLEDGEMENT of MERITORIOUS STATUS

Ms. Kathy Huffman, Retired from ISK after 28 years of service!



oral Health) Updates/Michael Seals

Top key bullet points:

- SWMBH has a \$14M deficit.
- Mila Todd has been doing a great job as the Interim Executive Director, working diligently to make SWMBH financially whole.
- SWMBH will be offering the Board Ownership Survey again for all CMH Boards. Therefore, future meetings will be held with all the board chairs and members.

That concludes my report.

Meeting adjourned by voice vote @ 6:00PM.
MOTION PASSED.

Demeta J. Wallace
Administrative Coordinator & Board Liaison
Office of the CEO
Integrated Services of Kalamazoo Board of Directors



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INTEGRATED SERVICES OF KALAMAZOO

BOARD POLICY V.09

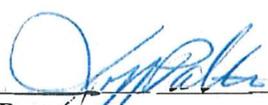
AREA: Governance	
SECTION: System Governance	PAGE: 1 of 1
SUBJECT: QUALITY MANAGEMENT	SUPERSEDES: 02/24/2014 REVISED: 02/22/2016

PURPOSE/EXPLANATION

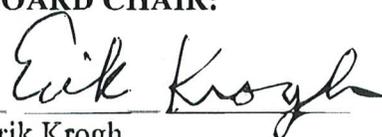
To establish limitations of means regarding the management of organizational quality.

POLICY

- I. With respect to quality management, the Chief Executive Officer (CEO) may not deviate from accepted standards of practice, stifle improvement efforts, nor promote the dissemination of inaccurate or misleading information. Accordingly, they may not:
 - A. Promote practices that are inconsistent with applicable accreditation, state, and federal quality standards.
 - B. Fail to implement the PIHP Quality Assessment Performance Improvement Program as indicated through Southwest Michigan Behavioral Health (SWMBH) and the development and implementation of the ISK Quality Improvement Plan and Performance Measurement Plans which meet both accreditation standards and the Michigan Department of Health and Human Services (MDHHS) requirements.
- II. This policy will be monitored through internal mechanisms on a semi-annual basis. One report will focus on the review compliance with elements of this policy. The second will be a year-end summary of results of the ISK Quality Improvement Plan. A summary of the results of external quality reviews will be in the semi-annual reports.

CHIEF EXECUTIVE OFFICER:


Jeff Patton
Chief Executive Officer

BOARD CHAIR:


Erik Krogh
Board Chair

INTEGRATED SERVICES OF KALAMAZOO

BOARD POLICY II.14

AREA:	Governance		
SECTION:	Board Governance Process	PAGE:	1 of 3
SUBJECT:	BOARD TRAVEL	SUPERSEDES:	03/28/2022
		REVISED	02/24/2025

PURPOSE/EXPLANATION

To provide a uniform method for approval and payment of board member travel.

POLICY

It is the policy of the board to continually support the education of board members in the areas of board governance and evidenced based practices.

The board annually budgets an amount towards that end.

PROCEDURE**I. APPROVAL**

- A. Board members are encouraged to participate in the Community Mental Health Association of Michigan (CMHAM) conferences, which cover many topics related to board governance and evidenced-based practices.

Administrative staff will register board members and make hotel arrangements once notified by a board member that they wish to attend. The board member will follow all guidelines on reimbursement following the conference to receive reimbursement for any other travel related expenditures.

- B. Board members may request funding assistance for other conferences or trainings. Below are the procedures a board member must follow to request funding assistance:
1. Provide written description of the relevance of the conference or training to the work of the board.
 2. Completion of a ISK board member's Overnight/Out-of-State Travel Request form detailing the cost.
 3. Funding assistance will be limited to \$500 per conference, per board member, and only be available if funds are available in the board conference budget line.
 4. The request will be submitted to the board chair. The board chair will consult with staff as to the relevance of the conference or training. If the board chair determines that the conference or training is relevant to the

member's service on the board, the chair will appoint two additional board members who are to review the request with the chair and determine whether to approve the request. The review and determination are to occur within a reasonable period of time. The two additional board members will be selected on a rotating basis in alphabetical order, excluding the member making the request.

5. Once approved, the board member will follow all guidelines on reimbursement following the conference to receive reimbursement.

II. REIMBURSEMENT

- A. All requests for reimbursement must be accompanied with legible, detailed receipts for all items requested for reimbursement. A summary receipt is not sufficient and not subject to reimbursement by ISK. All vendors can provide a detailed receipt, however one may need to be requested from the vendor indicating the date, time, amount and detail where possible.
- B. If receipts are not attached, no reimbursement will be made.
- C. The mileage reimbursement rate shall be the Internal Revenue Service (IRS) standard deductible mileage allowance for the current year.
- D. Mileage and business expense claims should be submitted to the Finance Department within 30 days of travel. A ISK Travel Voucher form must be completed specifying the purpose of the trip, point of origin, destination and the actual number of miles traveled (rounded to the nearest whole number).

III. MEALS

- A. ISK utilizes a blended Meals and Incidental Expenses for all in State travel as computed from the applicable IRS Per Diem Rates. Any travel outside of Michigan shall be determined by utilizing the applicable IRS Per Diem Rate for the specific travel destination. Effective 10/01 of every year the maximum meals reimbursement rate shall be the recomputed based on the applicable IRS Per Diem Rates.
- B. Meals may be reimbursed to board members when ISK business requires a board member to travel out-of-county. The approved rates of reimbursement for meals, including tips, are as follows:

Meal(s)	Travel Time Requirement	Maximum Allowed
Breakfast	Prior to 7:00 a.m. & extends beyond 9:00 a.m.	\$12.00
Lunch	Prior to 12:00 p.m. & extends beyond 2:00 p.m.	\$17.00
Dinner	Prior to 6:30 p.m. & extends beyond 7:00 p.m.	\$39.00
Per Diem	Prior to 7:00 a.m. & extends beyond 7:00 p.m.	\$68.00

Note: All maximums include tips (not to exceed 15% of the bill) and other incidental expenses.

EXHIBITS

- A. Overnight/Out-of-State Travel Request
- B. ISK Travel Voucher

CHIEF EXECUTIVE OFFICER



 Jeff Patton
 Chief Executive Officer

APPROVED



 Karen Longanecker
 Board Chair

ISK BOARD MEMBER TRAVEL REQUEST

Board Members' Name _____

Conference/Seminar _____

Destination _____

Conference Dates _____ to _____

Date of Departure _____

Date of Return _____

Reason for Early Departure/Late Return _____

REGISTRATION	Attach agenda & registration form
Vendor	_____
Address	_____ _____
Type of Payment	<input type="checkbox"/> Credit <input type="checkbox"/> Check <input type="checkbox"/> Reimb
Amount	_____

ACCOMMODATION	Attach hotel rate information
Vendor	_____
Address	_____ _____
Date of Stay	_____ to _____
Confirmation Number	_____
Type of Payment	<input type="checkbox"/> Credit <input type="checkbox"/> Check <input type="checkbox"/> Reimb
Amount	_____

TRANSPORTATION	Attach transportation information
Vendor	_____
Address	_____ _____
Type of Transportation	<input type="checkbox"/> Plane <input type="checkbox"/> Car <input type="checkbox"/> Other
Type of Payment	<input type="checkbox"/> Credit <input type="checkbox"/> Check <input type="checkbox"/> Reimb
Amount	_____

MEALS & MISC.	Per Board travel policy
Meals	_____
Misc.	_____
Parking	_____
Total \$	-

CAR RENTAL	Attach rental information
Vendor	_____
Address	_____ _____
Type of Payment	<input type="checkbox"/> Credit <input type="checkbox"/> Check <input type="checkbox"/> Reimb
Amount	_____

ADVANCE REQUEST	Attach mapquest est.
Meals & Misc.	_____
Mileage	_____
Advance Pymt \$	-

TOTAL EXPECTED COST \$ -

Board Chair Date

Chief Operating Officer Date

Financial Analyst Date

Account # _____

INTEGRATED SERVICES OF KALAMAZOO

BOARD POLICY V.10

AREA: Governance	
SECTION: Executive Limitations	PAGE: 1 of 1
SUBJECT: COLLABORATION	SUPERSEDES: 06/27/2011 REVISED: 03/28/2016

PURPOSE/EXPLANATION

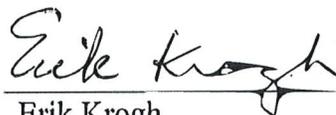
To establish limitations of means regarding the use of collaboration with stakeholders.

POLICY

- I. The Chief Executive Officer (CEO) may not fail to initiate opportunities and/or take advantage of benefits resulting from collaboration in the development and implementation of services and activities of the ISK programs.
- II. This policy will be monitored through internal mechanisms and available external information on an annual basis.

CHIEF EXECUTIVE OFFICER

Jeff Patton
Chief Executive Officer

BOARD CHAIR

Erik Krogh
Board Chair

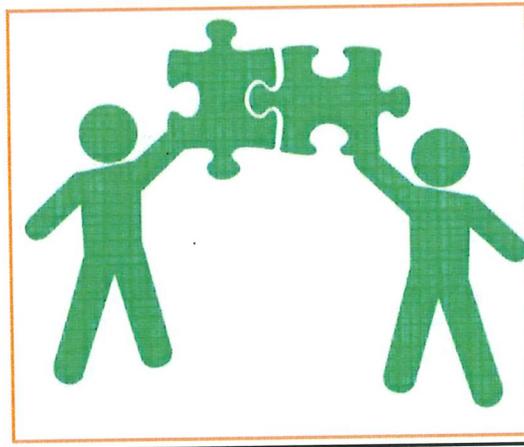


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POLICY V.10: COLLABORATION

Report of Collaboration Activities To the Board of Directors ~ February 2026 ~

Collaboration Activity Summary for January 1 - December 31, 2025



Policy Response:

Integrated Services of Kalamazoo (ISK) seeks out opportunities to collaborate within our community. The purposes of collaboration efforts are to take advantage of community expertise in the development and implementation of services for our customers. This report to the ISK Board of Directors is one monitoring tool used to review the key ISK collaborative activities implemented under the leadership of the Chief Executive Officer (CEO). New and continued collaboration efforts during this year may reflect changes in community needs, ISK operations, and/or means of collaboration.

Below is a summary of key Collaboration Activities by ISK during the year 2025:

ISK Program Services Providers:

Organizations contracting with ISK as a “DCO” (Designated Collaborating Organization) for identified services to support our Certified Community Behavioral Health Clinic (CCBHC) initiatives:

- **ASK Family Services**
 - ✓ Family Support and Training
 - ✓ Peer Delivered Services/Peer Mentoring
- **Community Healing Center – Elizabeth Upjohn Community Healing Center**
 - ✓ Targeted Case Management
 - ✓ Homebased Services
 - ✓ Outpatient Therapy
 - ✓ Family Support and Training
- **Community Living Options**
 - ✓ Skill Building Assistance
 - ✓ Supported Employment
 - ✓ Behavior Treatment Plan Development and Implementation
- **Family & Children’s Services**
 - ✓ Targeted Case Management
 - ✓ Homebased Services
 - ✓ Psychological Testing and Evaluation Services
- **Interface Consultation Services d/b/a Passages Behavioral Health**
 - ✓ Skill Building Assistance
- **KPEP**
 - ✓ Outpatient Therapy
- **Milestone Senior Services**
 - ✓ Targeted Case Management
- **MRC Industries**
 - ✓ Targeted Case Management
 - ✓ Skill Building Assistance
 - ✓ Supported Employment
- **Recovery Institute of Southwest Michigan**
 - ✓ Peer Delivered Services
- **Western Michigan University Unified Clinics - Resiliency Center for Assessment and Treatment**
 - ✓ Individual/Family/Group Outpatient Therapy
 - ✓ Psychological Testing and Evaluation Services

Organizations contracting with ISK for the delivery of other community mental health services:

Applied Behavioral Analysis (ABA) Autism Benefit Services	
ABA Pathways	PAVO Behavioral Therapy
Acorn Health of Michigan	Rebound Home and Community Therapy
Autism Spectrum Therapies	ROI Great Lakes Autism Center
Centria Healthcare LLC	Synthesis ABA LLC
VAV Operations d/b/a Lighthouse Autism Center	WMU Kalamazoo Autism Center of Excellence
Specialized Residential Services (Personal Care and Community Living Support Services)	
Anikare, Inc.	Hernandez Home, LLC
Arnold AFC	Hope Network Behavioral Health/HN West Mich.
Beacon Specialized Living	Hudson's Country Manor
Brookside Care LLC	Phillips AFC
Burell AFC	Pine Rest Christian Mental Health Services
Care from the Heart	Pine Way Group
CD Mended Hearts	Prader Willi Homes of Oconomowoc
Colemanz AFC	Precious Care Assisted Living
Community Living Options	Residential Opportunities, Inc
Cornerstone AFC	Sakshaug Group Homes
Eden Haven, LLC	South County Home Care
Evergreen Meadow AVC	Turning Leaf AFC
Flatrock Manor, Inc	Warming Hearts AFC
Good Samaritan Specialized Care	Wellspring Lutheran Services
Harmony Enterprises, Inc	
Emergency/Crisis Intervention Service	
Gryphon Place	Pine Rest Christian Mental Health Services
Community Living Supports and/or Skill Building Assistance (offered at home residence, community, program site)	
Advantage Private Nursing, Inc	MOKA Corporation
Battle Buddies Home Healthcare, LLC	Progressive Alternatives
Cornerstone Empowerment Program	Ripple Effects Community Inclusion Center
Social Care Elite	The Center for Growth and Independence
Outpatient Therapy (MH)	
Community Healing Center	
Western Michigan University Unified Clinics - Resiliency Center for Assessment and Treatment	
Occupational Therapy	
The Therapy Place	
Respite Services	
Ripple Effects Community Inclusion Center	
Music Therapy	
Advanced Therapeutic Solutions	
Financial Management Services	
Stuart Wilson	
Nursing Home Monitoring, OBRA Screening	
Milestone Senior Services	
Independent Facilitation of Person-Centered Planning	
Sheldon Schwitek	

Memorandums of Understanding for Supportive Services:

Augusta Police Department	LISC
Battle Creek VA Medical Center	Maryville University
Ascension Borgess / Beacon Kalamazoo	Michigan Commission for the Blind
Bronson Healthcare Group / Bronson Hospital	Michigan State University
CARES	Ministry with Community
Catholic Charities	MSHDA
Climax Scotts Community Schools	Nottawaseppi Huron Band of the Potawatomi
Comstock Public Schools	Outfront Kalamazoo
Family Health Center	Parchment Public Schools
Galesburg Augusta Schools	Pine Grove Housing Services
Gryphon Place	Portage Police Department
Gull Lake Schools	Portage Public Schools
Helping Hands	Richland Police Department
Centrica Care Navigators	River Church
Kalamazoo County 8 th District MH Recovery Court	Schoolcraft Community Schools
Kalamazoo County 9 th District Judicial Court	Schoolcraft Police Department
Kalamazoo County Collaborative	The Salvation Army
Kalamazoo County Fire Chiefs Association	Trestlewood Pediatrics
Kalamazoo County MDHHS: Child Welfare Division	Upjohn Institute
Kalamazoo County Health/Community Services Dpt.	Van Buren CMHSP
Kalamazoo County Sheriff's Department	Vicksburg Community Schools
Kalamazoo Department of Public Safety	Vicksburg Police Department
Kalamazoo Gospel Mission	Victory Clinical Services
Kalamazoo Public Schools	WMU Police Department
Kalamazoo Township Police	WMU School of Medicine including Pediatrics, PC
Kalamazoo Valley Community College	YWCA
KRESA	

ISK Training Department Community Collaborations:

Aside from collaborations with the ISK service network to provide necessary staff training, ISK has been collaborating with a variety of community partners to provide Mental Health First Aid training. For the year 2025, ISK has trained approximately 650 in Adult classes and approximately 40 in Youth classes in these evidenced-based educational programs. Adult and Youth MHFA training were provided free of charge in 2025. We can offer the Adult MHFA program with funding from ISK's Mental Health Awareness Training Grant from SAMSHA.

Some of community partners in MHFA training this year include:

- ❖ Kalamazoo County Court Staff
- ❖ Staff who work with Veteran's
- ❖ Kalamazoo Valley Community College
- ❖ Westwood United Methodist Church
- ❖ Milestone Senior Services
- ❖ Community Members

- ❖ Portage Public Library
- ❖ Kalamazoo County Fire Departments
- ❖ Life EMS
- ❖ Kalamazoo Public School
- ❖ Gospel Mission Staff
- ❖ Senior Care Partners
- ❖ Kalamazoo Fire Academy Students
- ❖ Western Michigan University, WMU School of Medicine, OT Students, Athletic Department
- ❖ Vets in Farming Conference
- ❖ Kellogg Community College Nursing Students
- ❖ KRESA
- ❖ KVCC Nursing Students
- ❖ Chapel Hill Community Church
- ❖ Constellium Automotive
- ❖ Air National Guard Base

Zero Suicide Grant Activities

Zero Suicide Team and the Training Department collaborated and trained ISK staff, Community Partner Staff and Community members in the following Suicide Prevention Trainings: safeTALK (Suicide Alertness for Everyone), ASIST (Applied Suicide Intervention Skills training), AMSR for Outpatient and Direct Care Staff (Assessing and Managing Suicide Risk). ISK and Gryphon collaborated on several trainings via shared trainers. Zero Suicide team launched the Kalamazoo LOSS (Local Outreach to Suicide Survivors) Team in partnership with Gryphon Place and Kalamazoo County Sheriff Office Victim Services Unit (KCSO VSU). The Zero Suicide team built and launched a page on the iskzoo.org website information on Suicide Prevention Trainings and a page on Suicide Prevention and Postvention Resources. Zero Suicide project coordinator is actively involved in the rebranding and relaunching of SPAN (Suicide Prevention Action Network) with Gryphon Place.

ZS trained roughly 404 individuals in one of the above-mentioned evidence-based trainings.

Trained 79 individuals in specific topic requested trainings.

ZS Coordinator trained at a few conferences in 2025.

ZS Team provided 46 + days of training specific to suicide safer care and practices.

ZS Coordinator collaborated by invitation with the National LOSS TEAM and five Loss Team leads to write: *Self-Wellness for the Heart that Helps: A Practical Guide to Self-Wellness for LOSS team volunteers.*

Collaboration with Western Michigan University School of Medicine:

Integrated Health Services Clinic – IHSC: This collaboration started in fiscal year 2019-2020. Now, almost 5.5 years after inception, ISK and the Western Michigan University Homer Stryker M.D. School of Medicine Department of Psychiatry are working jointly on projects such as: rotations of first- and second-year residents along with medical students providing an opportunity to observe the real-time operations of ISK staff performing their day-to-day tasks in the community setting. Often, they can ride along with the Assertive Community Treatment team (ACT) or observe services in the Integrated Services Health Clinic. The rotations provide an early introduction of the vast number services that are offered from ISK.

Additionally, a W-Med psychiatrist is providing evidenced based lectures and best practice presentations, to the clinical team members in addition to other training opportunities on topics not limited to polypharmacy, quality improvement, best practice, and standards of care.

The Western Michigan University Homer Stryker M.D. School of Medicine Department of Psychiatry continues its partnership with the ISK Integrated Health Services Clinic. There are several research studies currently in progress involving the ISK staff and patients. These studies provide opportunities

for patient enrollment and participation in clinical research aimed at advancing psychiatric care within the community and the world at large.

Services for Youth and Families: From Autumn 2023 through Autumn 2025, Pediatrics residents from WMED participated in behavioral health mini-rotation, one afternoon a week in divided into four-week rotations, partnering with the Youth and Families teams, such as Targeted Case Management, Homebased, Wraparound, Intake, and Mobile Crisis Response. This collaboration assisted with sharing knowledge about the mental health field overall and services for youth and families in the community to WMED residents and nursing students.

Kalamazoo Protect and Connect

Founded in October 2021, Kalamazoo Protect and Connect (KPAC) was created to strengthen collaboration across law enforcement, first responders, behavioral health providers, and community partners in Kalamazoo County. What began as a pilot has evolved into a more coordinated, countywide effort focused on improving how our systems respond to behavioral health crises, particularly by increasing diversion, strengthening follow-up, and reducing law-enforcement involvement in situations that are non-criminal in nature. During 2024–2025, KPAC focused on building out crisis-response infrastructure and using data to guide decisions rather than relying on anecdote or tradition. The expanded use of the Behavioral Health (BH) Code across participating law-enforcement agencies has allowed partners to identify and track behavioral health-related calls for service more consistently. This information is now actively used to inform staffing patterns, deployment hours, training priorities, and proactive outreach to individuals who have repeated contact with emergency services.

Integrated Services of Kalamazoo (ISK) continues to serve as a core operational partner, embedding clinicians with law enforcement through co-response while also expanding Mobile Crisis Response (MCR) capacity across the county. KPAC supported the deployment of clinicians alongside both specialized units and patrol, while also continuing to grow stand-alone mobile crisis services that can respond independently or in coordination with law enforcement based on acuity and public-safety needs. Planning toward more comprehensive and extended-hours crisis response has remained intentional and phased, driven by call-volume trends and clearly identified system gaps. KPAC has also prioritized workforce development and officer engagement through continued investment in Crisis Intervention Team (CIT) training. Multiple weeklong CIT trainings were supported, including reimbursement for overtime and backfill, which has helped reduce barriers to participation and increase agency buy-in.

Looking ahead, KPAC will continue refining and expanding crisis-response models, strengthening data-informed decision-making, and deepening cross-system partnerships. Key priorities include improving follow-up and care-coordination for individuals with high system utilization, sustaining and evolving CIT training, and continuing to shift appropriate behavioral health crises away from law enforcement and into timely, community-based care, improving outcomes for individuals, first responders, and the broader Kalamazoo County community.

Collaborations continuing into 2026:

- ISK's Substance Use Disorder (SUD) Teams continue to partner with the Family Health Center and Victory Clinic to provide improved care coordination for mutual clients receiving medication assisted treatment for opiate use disorders.

- SUD Teams are also partnering with Bronson hospital on their “Emergency Department Medications for Opioid Use Disorder (ED-MOUD) Work Group”.
- Mobile Crisis Response (MCR) team partnered with Gryphon Place and expanded MCR services to more individuals throughout Kalamazoo County throughout 2025.
- ISK is partnering with Western Michigan University and Family & Children Services towards the development of a Kalamazoo Behavioral Health Data Collaboration
- ISK continues to partner and collaborate with Certified Community Behavioral Health Clinics (CCBHCs) and the Michigan Department of Health and Human Services towards continued integration and growth of the CCBHC model of care in the state of Michigan.
- Western Michigan University Homer Stryker M.D. School of Medicine Department of Psychiatry, contract for psychiatrists for Integrated Health Services Clinic and psychiatric resident rotations, and clinical research.
- Western Michigan University, College of Health and Human Services Kalamazoo Behavioral Data Collaborative.

Community education/resources partnerships:

- Community Advocates
- Aradia Pharmacy – housed at the Integrated Services Health Clinic

Community Collaborations of the ISK Human Resources Department:

- Partnered with various universities to offer internships/shadowing/preceptors/residencies for students
- Hosted Bronson Nursing Students for a shadowing experience
- Respecting Differences – collaboration with City of Kalamazoo, City of Portage, Kalamazoo College, Kalamazoo County, Western Michigan University, and Kalamazoo Valley Community College to provide an annual diversity awareness program to our respective employees and to the community as a whole
- Maintained Bronze Certification as a Veteran friendly employer from Michigan Veterans Affairs Agency
- Participated in WMU Government and Nonprofit 2026 Career Fair
- Maintained membership with NASW and participated in the NASW Career Fair
- Actively participate in a CMH HR networking community, collaborating on topics as necessary
- Membership in West Michigan Hispanic Chamber of Commerce
- Maintained a broad reach within the community and expanded pool of diverse candidates
- Partnered with local gyms to obtain membership discounts for employees
- Hosted two on-site ISK Job Fairs open to the public
- Participated in the 2025 Kalamazoo Future Forward - Career & Resource Expo hosted by Steps to Victory Inc.
- Attended the 2025 WMU Networking Like a Bronco event
- Participated in the Kalamazoo College 2025 Employer Connection Fair

ISK staff members participate on a variety of Boards, Coalitions and Groups:

ISK is a Member Organization of the Community Mental Health Association of Michigan (CMHAM). Staff participate in a variety of conferences and meetings as planners, featured speakers, and participants.

- CEO; Chair of the Western Michigan University College of Health and Human Services Board of Directors
- CEO; Member of the Irving S. Gilmore Foundation Board
- CEO; Trustee of Kalamazoo Valley Community College Board
- CEO; Member of Pokagon Band of Potawatomi Health Advisory Board in Dowagiac, Michigan
- CEO; Member of the Kalamazoo Funders Group
- CEO; Member of Coalition for SPARK CIN
- CEO; Member of Western Michigan University Homer Stryker M.D. School of Medicine Board of Directors
- CEO; Participated in the 9th Annual Regional Healthcare Policy Forum
- CEO; Participated in the Sequential Intercept Mapping Workshop – with Leaders from Law Enforcement, Behavioral Health and Medical Professions
- CEO or designee; continues to be Presenter/Speaker at the Wellness and Recovery Fair Activities
- Chief Project Officer; member of Kalamazoo Downtown Rotary
- Chief Project Officer; participant on Governance Board for Cradle Kalamazoo and Steering Team for Southwest Michigan Perinatal Quality Improvement Collaborative, both community initiatives to improve maternal and infant health and end infant mortality with a special focus on the racial disparities
- Chief Project Officer; coordinator with County Medical Director for Kalamazoo County Opioid Coalition
- Chief Project Officer; member of Executive Committee for Great Start Collaborative through KRESA to improve the early childhood system
- Senior Executive Officer---Chair of the Adult Foster Care Advisory Council
- Senior Executive—appointed to the Michigan Technology First Task Force, advancing the use of Enabling Technology to promote independence.
- Senior Executive Officer—appointed member of the MDHHS IDDA Practice Improvement Team
- Corrections Program Supervisor; member Community Corrections Advisory Board for the Office of Community Corrections.
- ISK's Substance Use Disorder Teams; partnering with Bronson Hospital on their "Emergency Department Medications for Opioid Use Disorder (ED-MOUD)" Work Group
- Integrated Services of Kalamazoo (ISK) continues to partner with Kalamazoo County Law Enforcement agencies to develop and implement a cross system, comprehensive Kalamazoo Police-Mental Health Collaboration (PMHC).
- ZS project coordinator and Chief Project Officer participate on the following community-based review boards: CDR, FIRM, OFR, Cradle Kalamazoo.

INTEGRATED
SERVICES OF
KALAMAZOO



Period Ended
January 31, 2026

Monthly Finance
Report

INTEGRATED SERVICES OF KALAMAZOO

Statement of Net Position

January 31, 2026

	January 2025 (unaudited)	January 2026
Assets		
Current assets		
Cash and investments	\$ 19,946,072	\$ 22,146,999
Accounts receivable	4,003,856	9,905,304
Due from other governments	15,085,985	7,534,342
Prepaid items	1,387,166	1,615,671
Total current assets	<u>40,423,079</u>	<u>41,202,316</u>
Non-current assets		
Capital assets, net of accumulated depreciation	14,541,611	14,812,222
Net pension asset, net of deferred outflows	8,442,339	8,442,339
Total non-current assets	<u>22,983,950</u>	<u>23,254,561</u>
Total assets	<u>\$ 63,407,029</u>	<u>\$ 64,456,877</u>
Liabilities		
Current liabilities		
Accounts payable	\$ 11,551,576	\$ 10,239,490
Due to other governments	169,788	131,988
Accrued payroll and payroll taxes	3,115,940	3,096,864
Unearned revenue	78,103	129,833
Total current liabilities	<u>14,915,407</u>	<u>13,598,175</u>
Net position		
Designated	9,171,891	13,905,501
Undesignated	24,640,759	24,537,302
Investment in fixed assets	14,541,611	13,277,168
Previous year close	-	-
Net gain (loss) for period	137,361	(861,269)
Net position	<u>\$ 48,491,622</u>	<u>\$ 50,858,702</u>

INTEGRATED SERVICES OF KALAMAZOO

Statement of Revenue, Expenses and Change in Net Position

October 1, 2025 through January 31, 2026

Percent of Year is 33.33%

	Original 2026 Budget	YTD Totals 1/31/26	Remaining Budget	Percent of Budget - YTD
Operating revenue				
Medicaid:				
Traditional Capitation	\$ 86,641,701	28,370,956	\$ 58,270,745	32.75%
Healthy Michigan Capitation	9,119,193	2,353,958	6,765,235	25.81%
Formula Fundings	3,900,516	1,300,172	2,600,344	33.33%
CCBHC Demonstration	34,258,759	11,106,732	23,152,027	32.42%
CCBHC Quality Bonus	1,326,190	-	1,326,190	0.00%
County Allocation	1,550,400	516,800	1,033,600	33.33%
Client Fees	1,069,711	250,103	819,608	23.38%
Other grant revenue	6,780,003	2,018,895	4,761,109	29.78%
Other earned contracts	1,958,805	795,152	1,163,653	40.59%
Interest	157,232	52,730	104,502	33.54%
Local revenue	508,606	10,227	498,379	2.01%
Total operating revenue	\$ 147,271,116	\$ 46,775,724	\$ 100,495,393	31.76%
Operating expenses				
Salaries and wages	\$ 32,403,237	10,032,028	22,371,209	30.96%
Employee benefits	12,643,544	3,309,258	9,334,285	26.17%
Staff development	300,933	39,601	261,332	13.16%
Payments to providers	93,008,476	30,231,149	62,777,327	32.50%
Administrative contracts	8,262,621	2,903,645	5,358,976	35.14%
IT software and equipment	928,129	298,487	629,642	32.16%
Client transportation	52,900	14,285	38,615	27.00%
Staff travel	386,676	89,087	297,589	23.04%
Office expenses	685,668	181,839	503,829	26.52%
Insurance expense	168,769	75,523	93,246	44.75%
Depreciation expense	585,704	189,256	396,448	32.31%
Utilities	363,874	119,899	243,975	32.95%
Facilities	36,265	51,234	(14,969)	141.28%
Local match	305,108	101,703	203,405	33.33%
Total operating expenses	\$ 150,131,903	\$ 47,636,993	\$ 102,494,911	31.73%
Change in net position	(2,860,787)	(861,269)	\$ (1,999,518)	
Beginning net position	51,719,971	51,719,971		
Ending net position	\$ 48,859,184	\$ 50,858,702		

LAMAZOO

Revenues and Change in Net Position
 for the Year Ended
 December 31, 2026

Specialty Services		Healthy Michigan		SUD Block Grant		Totals		
Budget	YTD Totals 1/31/26	YTD Budget	YTD Totals 1/31/26	YTD Budget	YTD Totals 1/31/26	YTD Budget	YTD Totals 1/31/26	Variance
\$ 28,880,567	\$ 30,555,050	\$ -	\$ -	\$ -	\$ -	\$ 28,880,567	\$ 30,555,050	\$ 1,674,483
-	-	3,039,731	2,473,548	-	-	3,039,731	2,473,548	(566,183)
1,475,810	(2,184,095)	(1,022,993)	(119,590)	-	-	452,817	(2,303,685)	(2,756,502)
2,423	-	27	-	-	-	2,451	-	(2,451)
<u>\$ 30,358,800</u>	<u>\$ 28,370,956</u>	<u>\$ 2,016,766</u>	<u>\$ 2,353,958</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 32,375,566</u>	<u>\$ 30,724,914</u>	<u>\$ (1,650,652)</u>
\$ 755,195	\$ 1,011,294	\$ 4,652	\$ 2,540	\$ -	\$ -	\$ 759,846	\$ 1,013,834	253,987
25,415,043	24,187,934	1,733,863	2,088,258	-	-	27,148,906	26,276,192	(872,714)
4,188,562	3,171,728	278,250	263,161	-	-	4,466,813	3,434,888	(1,031,925)
<u>\$ 30,358,800</u>	<u>\$ 28,370,956</u>	<u>\$ 2,016,766</u>	<u>\$ 2,353,958</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 32,375,566</u>	<u>\$ 30,724,914</u>	<u>\$ (1,650,652)</u>
-	-	-	-	-	-	-	-	-

only. It has not been audited, and no assurance is provided.

LAMAZOO

es and Change in Net Position
31, 2026

State General Fund		CCBHC		Other Funding Sources		Totals		
YTD Budget	YTD Totals 1/31/26	YTD Budget	YTD Totals 1/31/26	YTD Budget	YTD Totals 1/31/26	YTD Budget	YTD Totals 1/31/26	Variance
\$ 1,300,172	\$ 1,300,172	\$ -	\$ -	\$ -	\$ -	\$ 1,300,172	\$ 1,300,172	\$ -
-	-	12,436,835	11,580,275	-	-	12,436,835	11,580,275	(856,560)
-	-	-	-	1,991,725	2,018,895	1,991,725	2,018,895	27,169
-	-	-	-	354,830	193,863	354,830	193,863	(160,967)
-	-	-	-	52,411	52,730	52,411	52,730	319
-	-	-	-	516,800	516,800	516,800	516,800	-
2,374	-	-	-	169,535	10,227	171,910	10,227	(161,683)
-	-	24,633	284,389	-	-	24,633	284,389	259,756
<u>\$ 1,302,546</u>	<u>\$ 1,300,172</u>	<u>\$ 12,461,468</u>	<u>\$ 11,864,664</u>	<u>\$ 3,085,301</u>	<u>\$ 2,792,514</u>	<u>\$ 16,849,315</u>	<u>\$ 15,957,350</u>	<u>\$ (891,966)</u>
\$ 295,509	\$ 262,420	\$ 12,776,709	\$ 12,664,560	927	\$ 3,227	\$ 13,073,145	\$ 12,930,207	\$ (142,938)
810,001	642,225	-	-	218,833	310,042	1,028,835	952,267	(76,567)
-	-	-	-	2,239,379	1,760,389	2,239,379	1,760,389	(478,989)
-	-	-	-	607,290	553,389	607,290	553,389	(53,901)
172,403	111,138	-	-	-	-	172,403	111,138	(61,265)
-	-	-	-	128,505	99,191	128,505	99,191	(29,315)
24,633	284,389	-	-	-	-	24,633	284,389	259,756
-	-	-	-	101,703	101,703	101,703	101,703	0
-	-	-	-	19,038	27,266	19,038	25,945	6,907
<u>\$ 1,302,546</u>	<u>\$ 1,300,172</u>	<u>\$ 12,776,709</u>	<u>\$ 12,664,560</u>	<u>\$ 3,315,675</u>	<u>\$ 2,855,207</u>	<u>\$ 17,394,930</u>	<u>\$ 16,818,618</u>	<u>(576,312)</u>
0	(0)	(315,241)	(799,896)	(230,374)	(62,693)	\$ (545,615)	(861,269)	(315,654)

only. It has not been audited, and no assurance is provided.

SERVICES OF KALAMAZOO

through January 31, 2026
is 33.33%

	CCBHC Medicaid	CCBHC Healthy MI	CCBHC Non-Medicaid	CCBHC YTD Totals
	\$ 8,386,105	\$ 2,720,627	\$ -	\$ 11,106,732
	-	-	250,103	250,103
Grant	-	-	223,440	223,440
Rate (PPS-1 of \$318.50 x encounters)	\$ 8,386,105	\$ 2,720,627	\$ 473,543	\$ 11,580,275
	\$ 6,393,881	\$ 1,820,350	\$ 1,302,645	\$ 9,516,877
	2,030,156	691,830	425,698	3,147,684
Expenses	\$ 8,424,037	\$ 2,512,180	\$ 1,728,343	\$ 12,664,560
Net position	(37,932)	208,447	(1,254,800)	(1,084,285)
Over Non-Medicaid	-	-	284,389	284,389
Position	\$ (37,932)	\$ 208,447	\$ (970,411)	\$ (799,896)

CCBHC Cost per daily visit

	2023	FY 2024	FY 2025	1/31/26
Cost	\$ 27,687,187	\$ 31,777,786	\$ 35,393,270	\$ 12,664,560
	99,802	110,326	125,458	39,042
Rate	277.42	288.04	282.11	324.38

Internal use only. It has not been audited, and no assurance is provided.

AUTISM SERVICES
Report Period: October 1st, 2025 through January 31st, 2026

UTILIZATION COMPARISONS FY 25/26									
	FY 24/25 Actual		FY 25/26 Budget		FY 25/26 Actual		Clients Served Difference Favorable (Unfavorable)	Cost Difference Favorable (Unfavorable)	Cost YTD Favorable (Unfavorable)
		Dollars	Clients Served	Dollars	Clients Served	Dollars			
OCTOBER	187	\$944,462	194	\$1,098,509	168	\$1,046,127	26	\$52,382	\$52,382
NOVEMBER	175	\$899,151	194	\$1,098,509	169	\$1,012,381	25	\$86,128	\$86,128
DECEMBER	170	\$801,707	194	\$1,098,509	183	962,505	11	\$136,004	\$136,004
JANUARY	190	\$943,870	194	\$1,098,509	187	907,344	7	\$191,165	\$191,165
FEBRUARY	197	\$898,764	194	\$1,098,509	-	-			
MARCH	193	\$1,054,656	194	\$1,098,509	-	-			
APRIL	189	\$1,160,440	194	\$1,098,509	-	-			
MAY	188	\$1,027,319	194	\$1,098,509	-	-			
JUNE	192	\$1,048,980	194	\$1,098,509	-	-			
JULY	184	\$1,018,918	194	\$1,098,509	-	-			
AUGUST	187	\$934,104	194	\$1,098,509	-	-			
SEPTEMBER	187	\$1,120,200	194	\$1,098,509	-	-			
TOTALS	2,239	\$11,852,571	2,328	\$13,182,110	707	\$3,928,357	69	\$465,679	
MONTHLY AVERAGES	187		194		177				
GROSS ANNUAL COST		\$11,852,571		\$13,182,110		\$3,928,357		\$465,679	

Favorable/(Unfavorable):

Total **465,679**

YOUTH COMMUNITY INPATIENT SERVICES
Report Period: October 1st, 2025 through January 31st, 2026

UTILIZATION COMPARISONS FY 25/26									
	FY 24/25 Actual		FY 25/26 Budget		FY 25/26 Actual		Days Difference Favorable (Unfavorable)	Cost Difference Favorable (Unfavorable)	Cost YTD Favorable (Unfavorable)
		Dollars	Clients Served	Dollars	Days	Dollars			
OCTOBER	111	\$96,759	85	\$84,863	101	\$101,060	(16)	(\$16,197)	(\$16,197)
NOVEMBER	117	\$114,545	85	\$84,863	98	\$98,100	(13)	(\$13,237)	(\$13,237)
DECEMBER	52	\$51,318	85	\$84,863	74	\$74,090	11	\$10,773	\$10,773
JANUARY	97	\$95,247	85	\$84,863	61	\$62,291	24	\$22,572	\$22,572
FEBRUARY	100	\$97,792	85	\$84,863					
MARCH	77	\$75,342	85	\$84,863					
APRIL	80	\$78,400	85	\$84,863					
MAY	82	\$80,360	85	\$84,863					
JUNE	42	\$41,160	85	\$84,863					
JULY	47	\$46,178	85	\$84,863					
AUGUST	35	\$34,329	85	\$84,863					
SEPTEMBER	50	\$48,608	85	\$84,863					
TOTALS	890	\$860,038	1,020	\$1,018,350	334	\$335,541	6	\$3,911	\$3,911
MONTHLY AVERAGES	74		85		84				
GROSS ANNUAL COST		\$860,038		\$1,018,350		\$335,541		\$3,911	

Favorable/(Unfavorable): Total 3,911

COMMUNITY INPATIENT SERVICES
Report Period: October 1st, 2025 through January 31st, 2026

UTILIZATION COMPARISONS FY 25/26										
	FY 24/25 Actual		FY 25/26 Budget			FY 25/26 Actual		Days Difference Favorable (Unfavorable)	Cost Difference Favorable (Unfavorable)	Cost YTD Favorable (Unfavorable)
		Dollars	Clients Served	Dollars		Days	Dollars			
OCTOBER	637	\$551,635	608	\$702,343	567	\$628,504	41	\$73,839	\$73,839	
NOVEMBER	640	\$702,827	608	\$702,343	692	\$765,485	(84)	(\$63,142)	(\$63,142)	
DECEMBER	708	\$777,481	608	\$702,343	578	\$640,016	30	\$62,327	\$62,327	
JANUARY	577	\$635,283	608	\$702,343	642	\$721,607	(34)	(\$19,264)	(\$19,264)	
FEBRUARY	405	\$447,214	608	\$702,343						
MARCH	640	\$706,244	608	\$702,343						
APRIL	525	\$577,375	608	\$702,343						
MAY	503	\$552,904	608	\$702,343						
JUNE	618	\$680,211	608	\$702,343						
JULY	810	\$890,502	608	\$702,343						
AUGUST	662	\$725,577	608	\$702,343						
SEPTEMBER	675	\$739,152	608	\$702,343						
TOTALS	7,400	\$7,986,405	7,296	\$8,428,119	2,479	\$2,755,612	(47)	\$53,760	\$53,760	
MONTHLY AVERAGES	617		608		620					
GROSS ANNUAL COST		\$7,986,405		\$8,428,119		\$2,755,612		\$53,760		

Favorable/(Unfavorable): Total 53,760

**COMMUNITY LIVING SUPPORTS (CLS), PERSONAL CARE (PC) & CRISIS RESIDENTIAL
ALL POPULATIONS**

Report Period: October 1st, 2025 through January 31st, 2026

SERVICE	YTD				FY 25/26 Actual	
	FY 25/26 Budget				Dollars	Favorable / (Unfavorable)
	Avg. Daily Rate	No. Served	Days of Service	Dollars		
PC/CLS	Nov	\$297	386	46,310	\$13,656,567	13,755,250 (\$98,683)
CRISIS RES.		\$606	21	329	\$332,033	\$199,459 \$132,574
CLS (SIP)	Nov	NA	319		\$4,748,331	4,550,303 \$198,028
Annual Cost						\$231,919

Personal Care (P.C.)-hands on of daily personal activities such as laundry, feeding, bathing, etc.

Community Living Supports (CLS)-services to increase or maintain personal self -sufficiency with a goal of community inclusion, independence and productivity.

Specialized Residential (S.R.)-Licensed setting where Personal Care and Community Living Supports occur.

Supported Independent Program (SIP)-more independent setting where Personal Care and Community Living Supports occur.



Integrated Services of Kalamazoo

MOTION

Subject:	<u>January 2026 Disbursements</u>	Approval Date:
Meeting Date:	February 23, 2026	<u>February 23, 2026</u>
Prepared by:	Charlotte Bowser	

Recommended Motion:

“Based on the Board Finance meeting review, I move that ISK approve the January, 2026 vendor disbursements of \$11,711,509.98.”

Summary of Request:

As per the January 2026 Vendor Check Register Report dated 02/10/2026 that includes checks issued from 01/01/2026 to 01/31/2026.

I affirm that all payments identified in the monthly summary above are for previously appropriated amounts.

Staff: Charlotte Bowser, Finance Director

Date of Board
Consideration: February 23, 2026

Integrated Services of Kalamazoo

BOARD OF DIRECTORS RESOLUTION MERITORIOUS STATUS FOR

Kathy Lentz

WHEREAS, Kathy Lentz consistently provided excellent leadership as the Senior Executive for Intellectual Developmental Disabilities Adults who receive services from Integrated Services of Kalamazoo for 18 years beginning in 2007; and

WHEREAS, she has consistently demonstrated professionalism, compassion, and an ability to meet people where they are. She has approached every challenge with integrity and empathy with traits that have not only shaped her career but have also inspired those who have had the privilege of working alongside her, our persons served, and the community. She has made a lasting impact on Integrated Services of Kalamazoo; and

WHEREAS, she has advanced the goal of the IDDA Department to support and empower individuals to create and realize a life of their choosing in their community. Person-Centered Planning is used to identify the dreams, wishes, and desires of individuals to put plans in place to accomplish their life goals; and

WHEREAS, she has been instrumental in the creation of the Action Employment Services (AES) which provides Supported Employment services under the CCBHC and Medicaid. Action Employment services are delivered using the Evidence-Based Individual Placement and Supports model. The model focuses on immediate job seeking with zero exclusions, competitive and Benefits Counselors who will give comprehensive benefits counseling and planning to ISK clients who are interested in, or engaged in employment activities; and

NOW, THEREFORE, BE IT RESOLVED, that in recognition of these many contributions and achievements for promoting and modeling IDDA services and the meaningful difference that you have made within this organization, Integrated Services of Kalamazoo is pleased to grant **MERITORIOUS STATUS** to **Mrs. Kathy Lentz** with all the rights and privileges appertaining thereto.



Community • Independence • Empowerment

Dated this 16th of February 2026

Karen Longanecker

Karen Longanecker
ISK Board Chair

Jeff Patton

Jeffrey W. Patton
ISK Chief Executive Officer

Integrated Services of Kalamazoo

BOARD OF DIRECTORS RESOLUTION
MERITORIOUS STATUS
FOR

Dr. Gopal Bedi, M.D.

WHEREAS, Dr. Bedi consistently provided excellent medical leadership and practice in psychiatry as the Chief Medical Officer of Integrated Services of Kalamazoo for 24 years beginning in 2002; and

WHEREAS, he has provided high quality psychiatric services, medical professionalism, integrity, and compassion for people served, which has made a lasting impact on Integrated Services of Kalamazoo, his patients, and the community; and

WHEREAS, he has provided enthusiasm and commitment to creating rewarding and experiential clinical practice with the medical team at the Integrated Services of Kalamazoo Bronson Healthy Living Campus Integrated Health Services Clinic; and

WHEREAS, his leadership extended prior to and beyond the Integrated Services of Kalamazoo Integrated Health Services Clinic where he served as the Chief of Clinical Affairs at the Kalamazoo Psychiatric Hospital; and

NOW, THEREFORE, BE IT RESOLVED, that in recognition of these many contributions and accomplishments for promoting and modeling psychiatric medical practice and leadership within this organization, Integrated Services of Kalamazoo is pleased to grant **MERITORIOUS STATUS** to **Dr. Gopal Bedi, M.D.** with all the rights and privileges appertaining thereto.



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Dated this 27th of February 2026

Karen Longanecker

Karen Longanecker
ISK Board Chair

Jeff Patton

Jeffrey W. Patton
ISK Chief Executive Officer