HEALTHWEST

FINANCE COMMITTEE MEETING MINUTES

November 13, 2026
8:00 a.m.

CALL TO ORDER

The regular meeting of the Finance Committee was called to order by Committee Chair Fortenbacher at 8:00a.m.

ROLL CALL

Committee Members Present:	Jeff Fortenbacher, Janet Thomas, Thomas Hardy, John M. Weerstra
Committee Members Absent:	Charles Nash, Michelle Hazekamp, Remington Sprague, M.D.
Also Present:	Rich Francisco, Holly Brink, Brandy Carlson, Gina Maniaci, Melina Barrett, Kristi Chittenden, Linda Anthony, Kim Davis, Lea Streblow, Helen Dobb, Stephanie Baskin, Kris Redman, Gina Kim, Anissa Goodno, Suzanne Beckeman, Jennifer Hoeker, Chris McGuigan

ITEMS FOR CONSIDERATION

A. *Approval of Expenditures for October 2026 and September 2026*

It was moved by Mr. Hardy, seconded by Ms. Thomas, to approve expenditures for the month of October 2026 totaling $2,609,206.59 and expenditures for September 2026 totaling $4,585,454.17.

MOTION CARRIED

B. *Monthly Report from the Chief Financial Officer*

Ms. Carlson, Chief Financial Officer, presented the September report, noting an overall cash balance of $8,286,685.17 as of September 30, 2026.

C. *Authorization to Seek Legal Counsel*

It was moved by Mr. Hardy, seconded by Ms. Thomas, to authorize the HealthWest Board of Directors to approve HealthWest to develop, issue, and administer an appropriate competitive procurement process for legal, governance, financial, operational, labor, and regulatory implications associated with:
1. Remaining organized as a County Special Revenue Fund;
2. Establishing a Community Mental Health Authority pursuant to Michigan law; and
3. Operating under an Enterprise Fund structure.

MOTION CARRIED

D. *Authorization to Enter Agreement with National Association of Counties*

It was moved by Mr. Weestra, seconded by Mr. Hardy, to approve the HealthWest Board to authorize the Chief Finance Officer, or designee, to enter into an agreement with the National Association of Counties (NACo) for participation in the Professional Development Academy for HealthWest's remaining managers and supervisors, at a cost not to exceed $30,000.

MOTION CARRIED

E. *Authorization to Cheyenne Kaufman*

It was moved by Mr. Hardy, seconded by Mr. Weerstra, to authorize the HealthWest Executive Director to sign a contract with Cheyenne Kaufman for Speech Language Pathology services November 23rd, 2026, through April 30, 2027, in an amount not to exceed $25,000, to provide specialized clinical services related to dysphagia management, assessments, consultation, training, and clinical oversight for eligible HealthWest consumers.

MOTION CARRIED

F. *Authorization to Contract with Golden Life, AFC*

It was moved by Mr. Hardy, seconded by Mr. Weerstra, to authorize the HealthWest Executive Director to sign a contract with Golden Life AFC, LLC. Effective December 1, 2026, through September 30, 2027, to provide specialized residential services at the provider's Westshore AFC home in Grawn, MI. Funding will be paid through Medicaid within the approved HealthWest AFC Specialized Residential budget.

MOTION CARRIED

G. *Authorization to Amend Contract with Procare Landscape Management Inc.*

It was moved by Mr. Hardy, seconded by Mr. Weerstra, to authorize the HealthWest Executive Director to sign an amendment to the contract with Procare Landscape Management Inc. to adjust snow and ice removal service rates as outlined above for the remainder of the contract term ending March 2028.

MOTION CARRIED

H. *Authorization to Approve Funding for Home Modifications.*

It was moved by Mr. Hardy, seconded by Ms. Thomas, to approve funding for the proposed home modifications and ramp installation by Lakeshore Barrier Free LLC in an amount not to exceed $49,000, utilizing approved HSW funds.

MOTION CARRIED

I. *Authorization to Increase Five Funding Sources*

It was moved by Mr. Hardy, seconded by Ms. Thomas, to authorize the HealthWest Board of Directors to approve the increase for the FY2026 contracted Vendors/Providers listed under the five funding sources. The total budget for the five funding services is $56,175,429 effective immediately for FY2026 services.

MOTION CARRIED

J. *Authorization to Approve Position Changes*

It was moved by Mr. Hardy, seconded by Mr. Weerstra, to authorize the HealthWest Board of Directors to approve eliminating Registered Nurse Positions N65008 and N65010 and layoff employee E93034121 and employee E93034616, effective December 18, 2026.

MOTION CARRIED

OLD BUSINESS

There was no old business.

NEW BUSINESS

There was no new business.

COMMUNICATIONS

There was no communication.

DIRECTOR'S COMMENTS

Mr. Francisco, Executive Director, presented his Formal Director's report.

- **MDHHS/LRE updates:**
  - The LRE from the finance ROAT has now completed developing their budget projection for FY27. In a previous update, I stated that LRE received their final rates from Milliman with a pretty low estimate for our region for enrollment drops in HMP. The region decided to go with a higher drop rate which makes our revenue lower and not overstated. The LRE is going to use a 15% drop rate in enrollment for the estimate, as it is more realistic estimate when compared to other states. The impact of HR1 is still unknown, which is why the estimate the LRE recommends is higher than what the Milliman rate projects.
- **CMH Level updates:**
  - I have been meeting with various Commissioners and HealthWest board members to discuss the procurement for legal counsel as it relates to authority status, HealthWest's role, and the county role in the administration of the public mental health system. So far, I have talked to five of the commissioners and still have meetings left with two more. Thus far, all have been in favor of the procurement to provide an evaluation and analysis for HW and the county to better understand if pursuing an authority at this point is the direction both boards would like to go. The goal is that after procurement of legal counsel, there will be an evaluation, and then we will schedule a board work session for both boards (combined) to attend and get the information presented and questions answered.

AUDIENCE PARTICIPATION

There was no audience participation.

ADJOURNMENT

There being no further business to come before the committee, the meeting adjourned at 8:30 a.m.

Respectfully,

Jeff Fortenbacher
Committee Chair

/hb

HealthWest
Muskegon's Behavioral Wellness Connection

FINANCE COMMITTEE

November 13, 2026 – 8:00 a.m.
376 E. Apple Ave. Muskegon, MI 49442

Committee Chair: Jeff Fortenbacher
Committee Vice-Chair: Janet Thomas

AGENDA

1.	Call to Order	Quorum
2.	Approval of Agenda	Action
3.	Items for Consideration	
	A. Approval of the Expenditures for October 2026 and September 2026 (Attachment #1 pg. 1)	Action
	B. Monthly Report from the Chief Financial Officer (Attachment #2 pg. 2-5)	Information
	C. Authorization to Seek Legal Counsel (Attachment #3 pg. 6)	Action
	D. Authorization to Enter Agreement with National Association of Counties (Attachment #4 pg. 7-9)	Action
	E. Authorization to Contract with Cheyenne Kaufman (Attachment #5 pg. 10)	Action
	F. Authorization to Contract with Golden Life, AFC (Attachment #6 pg. 11)	Action
	G. Authorization to Amend Contract with Procare Landscape Management Inc. (Attachment #7 pg. 12)	Action
	H. Authorization to Approve Funding for Home Modifications (Attachment #8 pg. 13-34)	Action
	I. Authorization to Increase Five Funding Sources (Attachment #9 pg. 35)	Action
	J. Authorization to Approve Position Changes (Attachment #10 pg. 36)	Action
4.	Old Business	
5.	New Business	
6.	Communication	
7.	Audience Participation	
8.	Adjournment	Action

REQUEST FOR HEALTHWEST BOARD CONSIDERATION AND AUTHORIZATION

COMMITTEE	BUDGETED	NON-BUDGETED	PARTIALLY BUDGETED
Finance Committee	X		

REQUESTING DIVISION	REQUEST DATE	REQUESTOR SIGNATURE
Finance	November 13, 2026	Brandy Carlson, Chief Financial Officer

SUMMARY OF REQUEST (GENERAL DESCRIPTION, FINANCING, OTHER OPERATIONAL IMPACT, POSSIBLE ALTERNATIVES)

Total expenditures for October 2026 were $2,609,206.59 and $4,585,454.17 of total expenditures were paid with a date of September 30, 2026. Significant expenditure included:

- Beacon Services - $221,618.12 for Residential Services
- Behavioral Health JV Grant Rapids LLC - $106,360.00 for Community Inpatient Services
- Cherry Street Services, Inc. - $216,964.68 for Substance Use Services
- Flatrock Manor - $152,703.00 for Residential Services
- Forest View Psychiatric Hospital - $138,579.64 for Community Inpatient Services
- Guardian Trac LLC - $133,114.69 for Outpatient and Fiscal Intermediary Services
- HGA Nonprofit Homes - $134,553.27 for Residential Services
- IvyRehab Michigan - $198,455.74 for Autism Services
- Mercy General Health Partners - $322,114.00 for Community Inpatient Services
- MOKA Corporation - $664,655.43 for Outpatient and Residential Services
- Professional Rehabilitation Services - $231,039.00 for Autism Services
- Walloon Lake Recovery Lodge - $130,634.97 for Substance Use Services

SUGGESTED MOTION (STATE EXACTLY AS IT SHOULD APPEAR IN THE MINUTES)

I move to approve expenditures for October 2026 totaling $2,609,206.59 and expenditures for September 2026 totaling $4,585,454.17.

COMMITTEE DATE	COMMITTEE APPROVAL
November 13, 2026	_____ Yes _____ No _____ Other
BOARD DATE	**BOARD APPROVAL**
November 20, 2026	_____ Yes _____ No _____ Other

HWB 11-F

HealthWest



September 2026

Board Report

This financial report is for internal use only. It has not been audited, and no assurance is provided.

COMMUNITY MENTAL HEALTH
INTERIM BALANCE SHEET 2220
MENTAL HEALTH

September 30, 2026

ASSETS	THIS YEAR	LAST YEAR
Cash in Bank	8,286,685.17	8,609,204.52
Cash in Transit	-	-
Imprest (Petty) Cash	700.00	1,600.00
Due from Credit Cards	301.00	282.50
Accounts Receivable	381,788.27	319,497.94
Security Deposits	2,000.00	1,000.00
Due From Other Funds	57,259.64	774.01
Prepaid Expenses	696,362.17	506,930.59
Due from other governments	1,254,166.48	451,210.26
Total Assets	$ 10,679,262.73	$ 9,890,499.82
LIABILITIES AND EQUITY		
Accounts Payable	$ 4,546,639.73	$ 7,975,314.46
Undistributed Receipts	16,272.86	6,562.73
Due to Federal	2,197.50	-
Total Liabilities and Equity	$ 6,065,586.13	$ 9,173,714.81
DEFFERED INFLOWS OF RESOURES		
Deferred Medicaid fee for services and capitation	$ -	$ 22,296.57
Fund Balance at beginning of year	417,630.85	942,565.51
Nonspendable FB-Prepaids	507,930.59	420,673.60
**Total Fund Balance	$ 925,561.44	$ 1,363,239.11
TOTAL LIABILITIES, DEFERRED INFLOWS OF RESOURCES, AND FUND BALANCE	$ 6,991,147.57	$ 10,559,250.49
NET OF REVENUES VS EXPENDITURES	$ 3,688,115.16	$ (668,750.67)

Transferred to County Equipment Revolving Account for:			
Mental Health Center Building	(6660-0000-349.220)	$2,193,690.85	$2,356,196.17
Future Equipment Purchases	(6660-0000-349.222)	$119,122.10	$86,607.86

COMMUNITY MENTAL HEALTH
INTERIM BALANCE SHEET 7930
CMH CLIENT FUNDS

September 30, 2026

ASSETS

	THIS YEAR	LAST YEAR
Cash	$ 211,850.47	$ 489,186.42
Imprest Cash	$ -	$ -
Accounts Receivable	$ -	$ -
Total Assets	$ 211,850.47	$ 489,186.42

LIABILITIES AND EQUITY

Accounts Payable	$ -	$ -
Due to Other Funds	$ 988.24	$ 350.00
Undistributed Receipts	$ 210,862.23	$ 488,836.42
	$ 211,850.47	$ 489,186.42

HealthWest

Statement of Revenues, Expenditures and Changes in Fund Balances

Budget to Actual

For the Period from October 1, 2025 through September 30, 2026

	Amended Budget	YTD Budget	YTD Actual	Over (Under) YTD Budget
Revenues				
Medicaid funding:				
Medicaid capitation	$ 59,828,768	$ 59,828,768	$ 58,886,109	$ (942,659)
Medicaid - Autism capitation	13,345,975	13,345,975	13,868,115	522,140
Medicaid capitation - settlement	-	-	(8,978,139)	(8,978,139)
Healthy Michigan Plan	6,256,128	6,256,128	7,065,822	809,694
Healthy Michigan Plan - settlement	-	-	4,617,415	4,617,415
CCBHC Revenue	24,513,925	24,513,925	27,508,187	2,994,262
State General Fund:				
Formula Fundings	2,066,287	2,066,287	2,081,287	15,000
Grant Revenue	6,477,699	6,477,699	5,824,016	(653,683)
Local revenue:				
County appropriation	706,819	706,819	706,819	-
Client and third party fees	631,435	631,435	770,017	138,582
Quality Bonus Payment	1,397,953	1,397,953	1,512,091	114,138
Interest income	280,250	280,250	223,382	(56,868)
Other revenue	314,354	314,354	2,020,444	1,706,090
Total revenue	115,819,593	115,819,593	116,105,565	285,972
Expenditures				
Salaries and wages	29,971,270	29,971,270	31,533,127	1,561,857
Fringe benefits	19,528,821	19,528,821	19,091,740	(437,081)
Staff professional development	580,268	580,268	411,513	(168,755)
Contractual expense	58,663,990	58,663,990	62,635,533	3,971,543
Overhead expense	3,115,310	3,115,310	3,051,866	(63,444)
Supplies	927,816	927,816	812,970	(114,846)
Utilities	282,040	282,040	270,170	(11,870)
Insurance	468,073	468,073	468,073	-
Capital outlay	(105)	(105)	(70)	35
Other expenses	2,049,175	2,049,175	1,002,314	(1,046,861)
Transfers	232,935	232,935	232,932	(3)
Total expenditures	115,819,593	115,819,593	119,510,168	3,690,575
Net change in fund balance	-	-	(3,404,603)	(3,404,603)
Fund balance, beginning of year	925,562	925,562	925,562	-
Fund balance, end of year	$ 925,562	$ 925,562	$ (2,479,041)	$ (3,404,603)

This financial report is for internal use only. It has not been audited, and no assurance is provided.

REQUEST FOR HEALTHWEST BOARD CONSIDERATION AND AUTHORIZATION

COMMITTEE	BUDGETED	NON BUDGETED	PARTIALLY BUDGETED
Finance Committee		X	

REQUESTING DIVISION	REQUEST DATE	REQUESTOR SIGNATURE
Finance	November 13, 2026	Brandy Carlson, Chief Financial Officer

SUMMARY OF REQUEST (GENERAL DESCRIPTION, FINANCING, OTHER OPERATIONAL IMPACT, POSSIBLE ALTERNATIVES)

HealthWest is currently evaluating whether its existing organizational structure as a County Special Revenue Fund remains the most effective model to support its long-term mission, governance responsibilities, financial sustainability, and operational flexibility. As part of this evaluation, HealthWest desires to explore the potential benefits, risks, requirements, and implications associated with alternative organizational structures, including establishment as a Community Mental Health Authority under Michigan law and operation as an Enterprise Fund.

HealthWest recognizes that such an evaluation involves complex legal, financial, governance, labor, regulatory, Medicaid, and contractual considerations that require specialized expertise beyond the scope of routine legal services. An independent legal review would provide objective analysis of available options and help ensure that future decisions are informed by a comprehensive understanding of the legal obligations, opportunities, and risks associated with each organizational model.

The proposed procurement would seek firms with demonstrated experience in Michigan municipal law, public-sector governance, governmental finance, healthcare law, community mental health operations, and public entity restructuring. The selected firm would be asked to evaluate and compare the County Special Revenue Fund, Community Mental Health Authority, and Enterprise Fund models, identify legal and operational implications of each structure, assess impacts on employees, assets, liabilities, contracts, pension obligations, Medicaid funding, and regulatory compliance, and provide recommendations regarding governance, financial accountability, and long-term sustainability.

HealthWest further recognizes that issuing an procurement is an information-gathering step only. Authorization to solicit does not commit either Muskegon County or HealthWest to retain a firm, implement organizational changes, establish an authority, or convert to an enterprise structure. Any future recommendations regarding consultant selection, contractual agreements, or organizational restructuring would be presented to the Board of Commissioners for separate consideration and approval.

SUGGESTED MOTION (STATE EXACTLY AS IT SHOULD APPEAR IN THE MINUTES)

I move to authorize the HealthWest Board of Directors to approve HealthWest to develop, issue, and administer an appropriate competitive procurement process for legal, governance, financial, operational, labor, and regulatory implications associated with:

1. Remaining organized as a County Special Revenue Fund;
2. Establishing a Community Mental Health Authority pursuant to Michigan law; and
3. Operating under an Enterprise Fund structure.

COMMITTEE DATE	COMMITTEE APPROVAL
November 13, 2026	_____ Yes _____ No _____ Other
BOARD DATE	**BOARD APPROVAL**
November 20, 2026	_____ Yes _____ No _____ Other

HWB 12-F

REQUEST FOR HEALTHWEST BOARD CONSIDERATION AND AUTHORIZATION

COMMITTEE	BUDGETED	NON-BUDGETED	PARTIALLY BUDGETED
Finance Committee	X		

REQUESTING DIVISION	REQUEST DATE	REQUESTOR SIGNATURE
Administration	November 13, 2026	Brandy Carlson, Chief Financial Officer

SUMMARY OF REQUEST (GENERAL DESCRIPTION, FINANCING, OTHER OPERATIONAL IMPACT, POSSIBLE ALTERNATIVES)

HealthWest Board authorization is requested to authorize the Chief Finance Officer, or designee, to enter into an agreement with the **National Association of Counties (NACo)** for participation in the Professional Development Academy for HealthWest's remaining managers and supervisors, at a cost not to exceed $30,000.

HealthWest has made a strategic investment in leadership development through participation in the NACo Professional Development Academy, a nationally recognized leadership training program designed for county and local government professionals. The Academy provides practical skill development in leadership, communication, employee engagement, performance management, strategic thinking, organizational effectiveness, and team development.

To date, all HealthWest executives, directors, and the majority of managers have successfully completed the program. Approval of this agreement will allow the remaining managers and supervisors to participate, completing HealthWest's organization-wide leadership development initiative. This investment will ensure consistency in leadership practices and strengthen the organization's ability to recruit, develop, and retain effective leaders at all levels.

The standard cost of the program is $2,995 per participant. Through HealthWest's ongoing partnership with NACo, the organization has received a discounted rate of $1,995 per participant, resulting in significant cost savings. The total cost of the agreement will not exceed $30,000.

Administration recommends approval of the agreement with the National Association of Counties (NACo) Professional Development Academy for the remaining managers and supervisors to complete HealthWest's leadership development initiative and further strengthen organizational leadership capacity.

SUGGESTED MOTION (STATE EXACTLY AS IT SHOULD APPEAR IN THE MINUTES)

I move to approve the HealthWest Board to authorize the Chief Finance Officer, or designee, to enter into an agreement with the National Association of Counties (NACo) for participation in the Professional Development Academy for HealthWest's remaining managers and supervisors, at a cost not to exceed $30,000.

COMMITTEE DATE	COMMITTEE APPROVAL
November 13, 2026	_____ Yes _____ No _____ Other
BOARD DATE	**BOARD APPROVAL**
November 20, 2026	_____ Yes _____ No _____ Other

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Zoho Sign Document ID: 2A9781E5-OCDWWQTBR7S-0EAPEBCKV6AJR5HJCEZ3FZ1-U44RMVA

Enrollment Agreement

Program Name/Services	Program Start	Program End	# of Users*	Retail Price/User**	Discounts/ User	Total Invoice Amount†
High Performance	1.11.2027	12.17.2027	30	2,995.00	$1,995.00	$30,000.00

* # of Users: If the number of users is specified, access and the license below are limited to that number of users.
**Notes for discounts: Standard NACo County Member Discounts.
†This is the fee for enrollment plus applicable sales tax per user after discounts.

AGREEMENT NOTES

COMPANY IS: Muskegon County MI

Enrollment contact

Treina Smith-Slatt

PAYMENT TERMS: Cost of enrollment will be invoiced within 5 days of signing this Agreement. Payment is due within thirty (30) days upon receipt of invoice or prior to the start of the program, whichever is earlier. Payment via credit card will be assessed an additional 3.5% processing fee.

ACCOUNTING CONTACT INFORMATION

Name: **Title:** **Phone:**

Mailing Address: **Email Address**

TERMS & CONDITIONS: This Letter of Agreement and associated Fees are non-cancelable and non-refundable. We reserve the right to postpone sessions if there is any risk to the quality of the Participant experience. In the case of postponement, Participants will be accommodated at later Program Start dates.

The abovementioned number of users ("Participants") at COMPANY will be enrolled in the selected Program. Participants are expected to begin the Academy at the Program Start date. After enrollment, participants may not reschedule. Substitute participants are permissible before the start of Week 1 of the Program. We ask that the Primary Contact / Signatory below select the substitute participant.

During the term of the Agreement, the Professional Development Academy grants individual Participants a personal, non-exclusive, royalty-free, revocable, non-transferable and non-assignable license to use the Materials. To be sure, Materials means Program-specific materials and resources including publications, websites, webinars, tools and services prepared by the Professional Development Academy, including all portions, subsets and derivatives thereof and additionally: access to program participant learning management system/web portal; live event webinars; ongoing learning activities pre- and post-learning sessions; and graduation packets.

Individual program participants may continue to use Materials following the Program End date, but access to any online tools may be terminated at the Program End date. COMPANY understands and agrees that the license to the Materials is on a per user basis and such Materials may not be shared, copied or otherwise distributed within the COMPANY. COMPANY further agrees to not sublicense, sell, transfer, assign, or display the Materials for any third party. Except for the license granted herein, the Professional Development Academy shall retain all ownership, title and interest in any and all intellectual property relating to the Materials and Services. Access for additional participants can be purchased by contacting your enrollment director. [In recognition of the preferred pricing reflected in this Agreement, COMPANY agrees to provide the Professional Development Academy with a reasonable opportunity to capture and document the value created by the Professional Development Academy at COMPANY for potential use in marketing communications or as a general endorsement of the value of the Professional Development Academy to potential customers. All documentation and value capture from COMPANY will be conducted in compliance with COMPANY's policy regarding endorsements and shall be done utilizing mutually agreeable and convenient methods. Any Professional Development Academy marketing communications or general endorsements comprised of COMPANY information will only be made with COMPANY's prior written consent.]

Signature **Print Name** **Date**

This is a 10-week online program with content provided by industry leading executives. The curriculum provides best practices in leadership, organizational development and change management, negotiation and collaboration, effective business communication, and how to deliver increased value from high performance county management.

Course 1: Leadership Mindset & Positive Engagement

This course provides insights from members of the program's National Leadership Board on the ways leaders shift their mindset from being excellent individual contributors to becoming highly effective leaders. The course also focuses on increasing empowerment and engagement to achieve individual, team and enterprise success. The second half of this course demonstrates how leaders enable "positively deviant" performance and engender positive culture and communication.

Course 2: Leading Effective Change

The emphasis of this course is to prepare participants to engage in change initiated by others and to drive effective change as an active change agent. This course illustrates three facets of organizational change, including planning, executing and sustaining successful change. A balance of theoretical and pragmatic insights allows participants to understand the strategic, financial or market-based reasons for change and drive toward breakthrough results.

Course 3: Communication and Collaboration

Participants learn and practice the skills needed to improve the quality of interpersonal communication in a variety of contexts. Participants will learn how to effectively speak the language of business and convey information across diverse stakeholder groups, as well as break down silos between business divisions to drive better decision making. Each participant will understand effective communication as it relates to leading others, managing conflict, providing and receiving feedback, and negotiating with the Mutual Gains Approach.

COURSE 1: January 11th – February 12th

Module 1: Your Leadership Mindset
Module 2: Your Potential as a Positive Leader
Module 3: Positive Leadership and Your Team: Empowerment & Engagement
Module 4: Leadership Rules and Your Oath

COURSE 2: February 8th – March 5th

Module 1: The Process of Change: Planning
Break Week: February 15th – February 19th
Module 2: The Process of Change: Executing
Module 3: The Process of Change: Sustaining

COURSE 3: March 8th – March 26th

Module 1: Speaking the Language of Business
Module 2: Mutual Gains Approach
Module 3: It's All About People
Graduation: March 26th

"Many frontline managers are exactly the people we cannot afford to lose. The NACo High Performance County Leadership Academy helps to retain these vital employees and helps enable them to be better leaders."

Matt Chase, Executive Director, NACo

REQUEST FOR HEALTHWEST BOARD CONSIDERATION AND AUTHORIZATION

COMMITTEE	BUDGETED	NON BUDGETED	PARTIALLY BUDGETED
Finance Committee		X	
REQUESTING DIVISION	**REQUEST DATE**		**REQUESTOR SIGNATURE**
Provider Network Management	November 13, 2026		Anissa Goodno, Provider Network Specialist

SUMMARY OF REQUEST (GENERAL DESCRIPTION, FINANCING, OTHER OPERATIONAL IMPACT, POSSIBLE ALTERNATIVES)

HealthWest requests authorization to enter into a contract with Cheyenne Kaufman, a Speech-Language Pathologist, to provide specialized clinical services for HealthWest consumers with dysphagia and other swallowing-related needs. Services will include clinical assessments, modified diet oversight, mealtime safety recommendations, staff and caregiver training, development of educational materials, consultation with interdisciplinary teams, coordination with physicians and community agencies, and required clinical documentation.

HealthWest currently has a service gap in the provider network for specialized swallowing and feeding supports. These services are necessary to ensure the health and safety of individuals requiring dysphagia management and specialized feeding recommendations, including IDD youth, IDD adults, Waiver consumers and ISPA consumers. The requested hours represent the minimum level of support necessary to provide essential clinical oversight and respond to high-priority swallowing and feeding concerns.

This contract will be effective November 23, 2026, through April 30, 2027, at a rate of $75.00 per hour for up to 60 hours per month, for an amount not to exceed $27,000.00.

SUGGESTED MOTION (STATE EXACTLY AS IT SHOULD APPEAR IN THE MINUTES)

I move to authorize the HealthWest Executive Director to sign a contract with Cheyenne Kaufman for Speech Language Pathology services November 23rd, 2026, through April 30, 2027, in an amount not to exceed $25,000, to provide specialized clinical services related to dysphagia management, assessments, consultation, training, and clinical oversight for eligible HealthWest consumers.

COMMITTEE DATE	COMMITTEE APPROVAL
November 13, 2026	_____ Yes _____ No _____ Other
BOARD DATE	**BOARD APPROVAL**
November 20, 2026	_____ Yes _____ No _____ Other

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REQUEST FOR HEALTHWEST BOARD CONSIDERATION AND AUTHORIZATION

COMMITTEE	BUDGETED	NON BUDGETED	PARTIALLY BUDGETED
Finance Committee	X		

REQUESTING DIVISION	REQUEST DATE	REQUESTOR SIGNATURE
Provider Network Management	November 13, 2026	Anissa Goodno, Provider Network Specialist

SUMMARY OF REQUEST (GENERAL DESCRIPTION, FINANCING, OTHER OPERATIONAL IMPACT, POSSIBLE ALTERNATIVES)

HealthWest Board authorization is requested to contract with Golden Life AFC, LLC. located at 1230 South Lafayette Street, Greenville, MI 48838, to provide specialized residential services in the provider's Westshore AFC Home located in Grawn, Michigan. The contract term will be effective December 1, 2026, through September 30, 2027.

This provider is credentialed through the LRE and will provide specialized residential services to HealthWest consumers. Services will be paid with Medicaid funding within the approved HealthWest AFC Specialized Residential budget of $25,500,000.00

SUGGESTED MOTION (STATE EXACTLY AS IT SHOULD APPEAR IN THE MINUTES)

I move to authorize the HealthWest Executive Director to sign a contract with Golden Life AFC, LLC. effective December 1, 2026, through September 30, 2027, to provide specialized residential services at the provider's Westshore AFC home in Grawn, MI. Funding will be paid through Medicaid within the approved HealthWest AFC Specialized Residential budget.

COMMITTEE DATE	COMMITTEE APPROVAL
November 13, 2026	_____ Yes _____ No _____ Other
BOARD DATE	**BOARD APPROVAL**
November 20. 2026	_____ Yes _____ No _____ Other

HWB 15-F

REQUEST FOR HEALTHWEST BOARD CONSIDERATION AND AUTHORIZATION

COMMITTEE	BUDGETED NON BUDGETED PARTIALLY BUDGETED	
Finance Committee	X	
REQUESTING DIVISION	**REQUEST DATE**	**REQUESTOR SIGNATURE**
Facilities	November 13, 2026	Kristi Chittenden, Chief Information Officer

SUMMARY OF REQUEST (GENERAL DESCRIPTION, FINANCING, OTHER OPERATIONAL IMPACT, POSSIBLE ALTERNATIVES)

HealthWest Board authorization is requested to approve an amendment to the contract with **Procare Landscape Management Inc.**, located at 1505 Steele Avenue, SW. Grand Rapids, MI 49507. Procare provides snow and ice removal services for the Mental Health Center at 376 E. Apple Avenue and the HealthWest Clubhouse located at 1470 Peck Street.

Procare requested a rate adjustment due to significant increases in the cost of road salt caused by ongoing supply shortages and limited vendor availability. These market conditions have resulted in higher material costs and reduced sourcing options for contractors and municipalities nationwide.

HealthWest is currently in the second year of a three-year contract with Procare. The proposed rates adjustment would be effective from December 1, 2026 through March 2028. Under the current contract, rates remain fixed for the duration of the agreement. If approved, the revised rates below would apply for the remainder of the contract term.

During the previous contract year, HealthWest paid $126,913.00 to Procare for snow and ice removal services. Because services are weather-dependent and provided on an as needed basis, the total financial impact of the proposed rate increase cannot be projected with certainty. The amendment increases rates for the salt application and snow removal services by $66.00 per occurrence, while rates for loader services ($225.00 per hour) and city sidewalk plowing ($362 per occurrence) will remain unchanged.

Service	Current Rates	Proposed Rates	Dollar Increase	Percent Increase
Salt Only	$699.00	$765.00	$66.00	9.4%
Snow Removal/Full Service under 6”	$1,654.00	$1,720.00	$66.00	4%
Snow Removal/Full Service over 6”	$2,390.00	$2,456.00	$66.00	2.8%

SUGGESTED MOTION (STATE EXACTLY AS IT SHOULD APPEAR IN THE MINUTES)

I move to authorize the HealthWest Executive Director to sign an amendment to the contract with Procare Landscape Management Inc. to adjust snow and ice removal service rates as outlined above for the remainder of the contract term ending March 2028.

COMMITTEE DATE	COMMITTEE APPROVAL
November 13, 2026	_____ Yes _____ No _____ Other
BOARD DATE	**BOARD APPROVAL**
November 20, 2026	_____ Yes _____ No _____ Other

HWB 16-F

REQUEST FOR HEALTHWEST BOARD CONSIDERATION AND AUTHORIZATION

COMMITTEE	BUDGETED	NON-BUDGETED	PARTIALLY BUDGETED
Finance Committee	X		
REQUESTING DIVISION	**REQUEST DATE**		**REQUESTOR SIGNATURE**
Finance	November 13, 2026		Brandy Carlson, Chief Financial Officer

SUMMARY OF REQUEST (GENERAL DESCRIPTION, FINANCING, OTHER OPERATIONAL IMPACT, POSSIBLE ALTERNATIVES)

HealthWest authorization is requested to procure and install a barrier-free access ramp and complete necessary home modifications to make the client's residence accessible and safe. The work is to be completed by Lakeshore Barrier Free LLC at a cost not to exceed $49,000.

This home modification project has been approved by the Lakeshore Regional Entity and will be fully funded through HSW dollars. The modifications are medically necessary to ensure the individual can safely enter and exit their residence and access essential areas of the home.

The home currently presents significant accessibility barriers. While one entrance, where the ramp is proposed to be placed, allows access to a breezeway without stairs, the individual must then navigate two stairs to a landing, followed by an additional two stairs to reach the main living area. The alternative path leads to the basement and does not provide accessible entry to the residence.

In addition, the existing bathroom is not wheelchair accessible. The individual must leave their wheelchair at the doorway and take several steps to reach the sink and toilet. The layout includes a narrow passage between the vanity and wall, limiting access to the toilet and bathtub, with inadequate floor space to safely maneuver a wheelchair.

The proposed modifications will eliminate these barriers and improve the individual's ability to safely access and utilize their home environment.

All potential alternative funding sources have been explored, and no other funding is available for these modifications.

Seven vendors were solicited for proposals; however, only two vendors submitted responsive quotes. Based on the proposals received, Lakeshore Barrier Free LLC was selected to complete the project.

SUGGESTED MOTION (STATE EXACTLY AS IT SHOULD APPEAR IN THE MINUTES)

I move to approve funding for the proposed home modifications and ramp installation by Lakeshore Barrier Free LLC in an amount not to exceed $49,000, utilizing approved HSW funds.

COMMITTEE DATE November 13, 2026	**COMMITTEE APPROVAL** _____ Yes _____ No _____ Other
BOARD DATE November 20, 2026	**BOARD APPROVAL** _____ Yes _____ No _____ Other

HWB 17-F



Aluminum Modular Ramp

Purchase Agreement

Prepared By
Brandon sawyer
Lakeshore Barrier Free LLC
(616) 477-2685
Brandon@lakeshorebarrierfree.com
307 Northern Dr NW UNIT C, Grand Rapids, MI 49534, USA
License number: 2102214660 Tax ID 81-5391364

Prepared For
Sara Zwart
[redacted]

LAKESHORE
BARRIER FREE LLC
Home Accessibility Professionals

Ramp — Modular Purchase (Residential) 8413-1
Issue Date September 15, 2026
Expires October 15, 2026

DESCRIPTION	QTY	UNIT PRICE	TOTAL
❖Ramp System			$11,604.67
Modular Aluminum Ramp System (Purchase) Modular aluminum wheelchair ramp system, purchased and installed. Includes all ramp sections, landings, adjustable support legs, handrails, transition plate at the threshold and end loop at grade, plus the hardware required for a safe, stable, ADA-style accessible pathway. Slip-resistant punched aluminum decking; non-corroding, maintenance-free construction. The system is fully modular and may be reconfigured or relocated if accessibility needs change. Ownership transfers to the customer at completion and the manufacturer warranty transfers with the system.			$11,413.00
Threshold Mat: 1-1/2" Rubber Ramp (CRBR1.5) 1-1/2" high rubber threshold ramp. Bridges the doorway threshold to the ramp surface.	1 Each	$191.67	$191.67
Sales Tax Exemption Sales tax is not included in this proposal. Proper documentation is required to qualify for the exemption, such as a physician's letter of medical necessity or the organization's tax exemption certificate.	1	$0.00	$0.00
Ramp Delivery & Installation			$1,096.38
		TOTAL	**$12,701.05**

PAYMENTS STARTING FROM **$159**/month on HFS **Learn More→**

Modular Ramp Purchase Agreement

This Agreement ("Agreement") is entered into on the effective date stamped on this document, between Lakeshore Barrier Free LLC, hereinafter referred to as the "Provider," and the customer identified on this document, hereinafter referred to as the "Customer."

1. Scope of Purchase

1.1 The Provider agrees to sell, and the Customer agrees to purchase, a modular ramp system as shown in the attached rendering and proposal, hereinafter referred to as the "Ramp", including delivery and installation at the property identified on this document.

1.2 By signing this Agreement, the Customer approves the layout, specifications, and ramp placement as represented in the rendering attached to the proposal. Any adjustments requested after signing may result in additional charges.

1.3 Upon full payment, ownership of the Ramp transfers to the Customer. The Provider makes no claim to the Ramp following installation and payment.

2. Payment Terms

2.1 The total purchase price, including materials, delivery, installation, and applicable taxes, is detailed in the attached proposal.

2.2 A 50% deposit is required at the time of contract acceptance to secure materials and scheduling.

2.3 The remaining 50% balance is due immediately upon installation. Payment must be made in full on the day the installation is completed unless otherwise agreed to in writing.

2.4 Failure to make full payment as outlined may result in legal remedies, including but not limited to a lien on the property or recovery of the installed equipment.

2.5 Right to Cancel.
You, the Customer, may cancel this Agreement without penalty or obligation within three (3) business days from the date you sign this Agreement. Notice of cancellation must be in writing. Please email your notice to Info@LakeshoreBarrierFree.com so that we receive it immediately. You may also deliver or mail written notice to Lakeshore Barrier Free LLC, 307 Northern Dr. NW,

Grand Rapids, MI 49534; if mailed, it must be postmarked before midnight of the third business day after you sign. Any payments you have made will be returned within ten (10) days after we receive your notice of cancellation.
After the three-business-day period, the Customer remains responsible for all costs incurred by the Provider through the date of cancellation, including materials purchased, restocking charges, and labor performed.

2.6 Payment Methods. Cash, check, or ACH bank transfer may be used at no additional cost. Credit card payments are accepted through the Provider's third-party payment platform. A processing fee applies to credit card transactions. The fee is added and collected by the payment platform at the time of payment and is disclosed to the Customer before the payment is completed.

3. Installation Terms

3.1 The Provider will install the Ramp according to the approved layout and within a mutually agreed-upon timeframe.

3.2 The Customer shall provide clear and unobstructed access to the installation area.

3.3 Any unforeseen site conditions not disclosed at the time of proposal (e.g., soft ground, concrete work, obstructions) may require additional work and charges, subject to written Customer approval.

4. Site Conditions and Existing Improvements

4.1 Vegetation and Landscaping. Bushes, shrubs, tree limbs, branches, roots, and other landscaping that interfere with the installation or safe use of the Ramp may be trimmed, cut back, or removed by the Provider as necessary. Trimming is performed for clearance and access, not appearance, and the Provider is not responsible for the survival, regrowth, symmetry, or appearance of affected plant material. The Customer is responsible for relocating any plantings, ornaments, or other items they wish to preserve prior to the installation date. Cuttings and debris will be hauled from the site unless the Customer requests otherwise.

4.2 Railings — Removal. Where an existing handrail, porch rail, or deck rail obstructs the Ramp, the Provider may remove it in order to install the Ramp. Because the Ramp is a permanent installation occupying that location, removed railing components will not be reinstalled. Salvageable components will be returned to the Customer or disposed of at the Customer's direction.

4.3 Railings — Permanent or Non-Salvageable. Where a railing is welded, embedded, structurally integral, or otherwise cannot be removed intact, the Provider may cut and remove the obstructing portion. The Customer acknowledges this alteration is permanent, authorizes it by signing this Agreement, and agrees the Provider has no obligation to restore or replace the cut railing. Restoration is the Customer's responsibility and may be performed by the Customer or a contractor of the Customer's choosing.

4.4 Cut Ends. Any cut railing ends remaining within reach of the ramp path will be capped, deburred, or otherwise made safe by the Provider.

4.5 Railings Required by Code — 30-Inch Rule. The Customer may elect not to have a removed railing replaced, and the Provider will honor that election, subject to the following. Building code requires a railing along the open sides of any porch, stoop, deck, or landing where the walking surface is more than thirty (30) inches above the floor or grade below. Where the porch or stoop serving the doorway exceeds that height, a code-compliant railing is required regardless of whether the Ramp is present, and declining a replacement does not waive that requirement. Responsibility for providing a code-compliant railing rests with the Customer as owner of the property. The Provider is not the code authority and makes no representation as to what a local building official will require on a given property; the Customer is encouraged to confirm requirements with the local building department.

4.6 Replacement Railing Option. At the Customer's request, the Provider will quote a new code-compliant railing and its installation as a separate change order.

4.7 Authorization. The work described in this Section is authorized under this Agreement and does not require a separate change order under Section 3.3 unless it results in additional cost, in which case written Customer approval will be obtained.

5. Warranty and Disclaimer

5.1 Manufacturer's Warranty. The Ramp is a National Ramp Liberty Series solid-surface aluminum modular ramp system, covered by the manufacturer's limited lifetime warranty against manufacturing defects in the aluminum ramp system.

5.2 Provider's Installation Warranty. The Provider warrants its installation workmanship for two (2) years from the date of installation. Where a defect in the Provider's installation appears within that period, the Provider will correct it at no charge to the Customer.

5.3 What Is Covered. Manufacturing defects in the Ramp components are covered by the manufacturer for the term stated in Section 5.1. Errors in the Provider's installation are covered by the Provider for the term stated in Section 5.2.

5.4 What Is Not Covered. Neither warranty covers damage arising from causes outside the product and its installation, including storm damage, falling trees or limbs, vehicle impact, vandalism, abuse, neglect, normal wear, or modification of the Ramp after installation. The Customer is encouraged to contact their homeowner's insurance agent regarding adding the Ramp to their policy.

5.5 Timely Reporting. The Customer shall notify the Provider promptly upon discovering any damage to the Ramp, or any handrail, connector, platform, or other component that has become loose, shifted, or is not functioning as intended. Where a delay in reporting allows a condition to worsen, warranty coverage for the affected portion may be voided.

5.6 Not Transferable. Warranty coverage applies to the original installation and the original Customer only. It does not transfer if the Ramp is sold, donated, relocated, or reinstalled at another property or by another party.

5.7 Provider's Role. Warranty claims on Ramp components are submitted through the Provider as the installing dealer. The Provider is not liable for any indirect, incidental, or consequential damages arising from use of the Ramp beyond the scope of the installation.

6. Ownership and Responsibility

6.1 Once installation is complete and paid in full, the Ramp becomes the property and responsibility of the Customer.

6.2 The Customer assumes all responsibility for proper use, ongoing maintenance, and safety of the Ramp from the date of installation.

6.3 The Customer agrees to indemnify and hold harmless the Provider from any claims or damages related to use or misuse of the Ramp following installation, except in cases of proven gross negligence during installation.

7. Governing Law

This Agreement shall be governed by and interpreted in accordance with the laws of the State of Michigan.

8. Entire Agreement

This Agreement, including the attached rendering and proposal, constitutes the entire agreement between the parties and supersedes all prior discussions or understandings related to this purchase.

Railing Alteration Acknowledgment

By initialing below, the Customer authorizes the railing work described in Section 4 and confirms understanding of the following: ***If an existing handrail or porch rail obstructs the Ramp, it will be REMOVED, and if it cannot be detached intact it will be CUT. This alteration is PERMANENT. Removed railings will not be reinstalled and the Provider will not restore or replace them. The Customer may decline a replacement — but where the porch or stoop sits more than 30 inches above the grade below, code requires a railing there and providing one is the Customer's responsibility as the property owner.*** A new code-compliant railing can be quoted separately upon request.

SARA ZWART

Acknowledgment and Approval

Acknowledgment and Approval

By signing below, the Customer acknowledges that they have reviewed and approve the attached ramp layout and specifications and agree to the terms outlined above.

The above specifications, costs, and terms are hereby accepted.

SARA ZWART	**DATE**

LAKESHORE
BARRIER FREE LLC
Home Accessibility Professionals

Build — Construction Service Agreement 8412-1

Issue Date September 16, 2026
Expires October 16, 2026

PREPARED BY

Brandon sawyer
Lakeshore Barrier Free LLC
(616) 477-2685
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307 Northern Dr NW UNIT C,
Grand Rapids, MI 49534, USA
License number: 2102214660
Tax ID 81-5391364

PREPARED FOR

Sara Zwart
Health West
(231) 760-9211
Sara.Zwart@healthwest.net
376 E Apple Ave, Muskegon, MI 49442

BUILD — CONSTRUCTION SERVICE AGREEMENT DETAILS

[redacted]

DESCRIPTION	QTY	UNIT PRICE	TOTAL
Project-Wide Shared project costs not attributable to a single room.			$8,878.30
Planning & Preparation			$1,909.38
Estimating Fee	3 Hours	$68.66	$205.97
Building Plans / Drawings	2 Hours	$91.04	$182.09
Municipal Permit Building permit fee, billed at cost.	1 Each	$633.33	$633.33
Jobsite Tools & Equipment for Project Mobilization	1 Lump Sum	$523.81	$523.81
Material Preparation & Staging	4 Hours	$91.04	$364.18
Site Logistics & Temporary Facilities			$650.76
Dumpster Rental & Solid Waste Disposal	1 Each	$650.76	$650.76
Cleaning & Closeout			$970.15
Daily Site Maintenance & Clean-Up Daily debris removal, sweep and containment reset through the course of the project.	1 Lump Sum	$298.51	$298.51
Final Site Cleaning & Detailing	1 Lump Sum	$671.64	$671.64
Project Management, Permits & Overhead			$5,348.01
Project Management Office project management, including scheduling, material ordering, permits, communication with you and your insurance carrier, billing, and project documentation.	2 Lump Sum	$1,050.00	$2,100.00
Project Overhead General project overhead.	1 Lump Sum	$3,248.01	$3,248.01
Bathroom All scope inside the bathroom footprint.			$20,454.03
Site Protection & Containment			$883.67

Containment & Floor Protection Materials Zip walls, poly sheeting, floor protection, tape.	1 Lump Sum	$103.17	$103.17
Dust Control & Surface Protection Labor	2 Hours	$91.04	$182.09
HEPA Air Scrubber / Air Filtration Rental	1 Week	$541.27	$541.27
Air Filters	3 Each	$19.05	$57.14
Demolition			$1,687.20
Demolition & Removal Complete demolition and removal per the project scope, including protection of adjacent areas and debris handling.			$1,687.20
Structural Prep & Framing			$2,105.00
Subfloor & Structural Prep			$744.66
3/4" Tongue & Groove OSB Subfloor — 4'x8' Sheet	2 Sheet	$91.89	$183.78
GREAT STUFF PRO Construction Polyurethane Foam Adhesive — 26.5 oz	1 Each	$196.70	$196.70
Structural Prep Labor	4 Hours	$91.04	$364.18
Wall Framing, Header & Blocking			$1,360.34
2x4 Blocking Stock — 8' 2x4 stock cut in as solid backing inside the wall cavity, so grab bars, a fold-down seat, the shower flange and future accessories all land on wood rather than drywall anchors.	3 Each	$6.59	$19.76
OSB 3/4in Blocking Band 3/4-inch OSB set between the studs to form a continuous solid mounting band, so grab bars, a seat and accessories can be anchored anywhere along the wall.	1 Each	$33.11	$33.11
Blocking Fasteners & Hardware Structural screws, nails and connectors for the in-wall blocking.	1 Each	$23.81	$23.81
Blocking Installation Labor Layout, cutting and fastening of solid backing at every grab bar, bench, shower flange and accessory location while the walls are open.	3 Hours	$91.04	$273.13
Wall Framing Material — Studs, Plates & Openings	17 Linear Feet	$9.27	$157.59
Wall Framing Labor — Setup, Layout, Cut & Stand	17 Linear Feet	$38.81	$659.70
Header OSB Spacer & Lamination Adhesive	1 Sheet	$49.17	$49.17
Install Header — Closet Opening Building and setting the header over the new closet opening.	1 Lump Sum	$125.00	$125.00
Header Lumber — Closet Opening Doubled framing lumber header over the new closet opening, sized to meet residential building code for the span.	13.2 Linear Feet	$1.44	$19.07
New Bathroom Doorway Cutting a new doorway into an existing bathroom wall, including framing the rough opening, patching drywall around the new door, and finish work.			$1,641.76
Cut New Opening — Drywall & Studs	50 Square Foot	$5.97	$298.51

Frame New Rough Opening	28 Square Foot	$5.97	$167.16
2x4 Studs — New Opening	8 Each	$6.67	$53.33
Framing Fasteners — New Opening	1 Each	$23.81	$23.81
Drywall Patch Material — New Opening	35.2 Square Foot	$0.79	$27.94
Hang Drywall — New Opening	32 Square Foot	$1.12	$35.82
Tape & Corner Bead — New Opening	1 Each	$9.52	$9.52
Joint Compound — New Opening	1 Each	$19.05	$19.05
Drywall Finish (3-Coat) — New Opening	32 Square Foot	$3.73	$119.40
Paint — Color Match, New Opening	1 Quart	$60.32	$60.32
Paint Walls — New Opening Paint the patched wall area around the new doorway.	32 Square Foot	$1.49	$47.76
Casing Trim — Bathroom Door	39.1 Linear Feet	$3.17	$124.13
Install Casing, Both Sides — Bathroom Door	34 Linear Feet	$5.97	$202.99
Close Old Bathroom Doorway Framing in the old bathroom doorway after the door moves, with drywall on both sides and paint to match.			$452.02
Frame In Old Doorway	24 Square Foot	$5.97	$143.28
2x4 Studs — Doorway Infill	5 Each	$6.67	$33.33
Drywall Patch Material — Doorway Infill	48 Square Foot	$0.79	$38.10
Drywall Finish (3-Coat) — Doorway Infill	30 Square Foot	$3.73	$111.94
Prime Walls — Doorway Infill	48 Square Foot	$1.12	$53.73
Paint Walls — Doorway Infill	48 Square Foot	$1.49	$71.64
Drywall			$1,765.35
Drywall Boards Drywall for the project. Mold-resistant board is used throughout the bathroom.			$121.90
Drywall, Mold Resistant — 1/2″ 4'x8' Mold-resistant drywall for the bathroom walls and ceiling.	4 Each	$30.48	$121.90
Drywall Materials			$369.61
SHEETROCK Plus 3 Premixed Lightweight All-Purpose Joint Compound — 4.5 Gal	2 Each	$30.24	$60.48
SHEETROCK Easy Sand 45 Setting-Type Joint Compound — 18 lb	1 Each	$28.57	$28.57
ADFORS FibaFuse MAX Reinforced Drywall Joint Tape — 2″ x 250'	1 Each	$17.14	$17.14

CertainTeed NO-COAT 90° Outside Corner Bead — 1-7/8″ x 8'	2 Each	$7.44	$14.89
SENCO #6 x 1-1/4″ Coarse Thread Collated Drywall Screws — 1,000 ct	1 Box	$42.03	$42.03
1-5/8″ Drywall Screws	1 Box	$20.17	$20.17
SHEETROCK Drywall & Ceiling Repair Clips — 6 Pack	3 Pack	$7.11	$21.33
Loctite PL 100 Drywall Construction Adhesive — 28 oz	3 Each	$23.25	$69.76
Incidental Consumables Sanding sponges, mud pans, mesh, misc.	1 Lump Sum	$95.24	$95.24
Drywall Labor			$1,110.46
Drywall Sheeting Labor	112 Square Foot	$2.24	$250.75
Drywall Finishing Labor — Tape, Coat & Sand	112 Square Foot	$2.24	$250.75
Skim Coat — Ceiling Two-coat skim of the full ceiling, sanded smooth and left paint-ready, so the new and existing areas finish as one surface with no visible seam.	51 Square Foot	$11.94	$608.96
Plaster-to-Drywall Transitions Additional drywall prep and finishing when existing walls are plaster and lath: bonding and blend-coat transitions where new drywall meets the remaining plaster, and furring strips so new drywall sits flush with the plaster surface.			$163.38
Plaster Transition — Washers, Bonding & Blend Coat Where new drywall meets retained original plaster, the seam is reinforced and blended so the finished wall reads as one continuous surface.	20 Linear Feet	$6.34	$126.87
Plaster Depth Furring — Blend Strips Furring applied where new board meets original plaster so the two surfaces finish in the same plane.	20 Linear Feet	$1.83	$36.51
Bathroom Door & Hardware New interior door and hardware for the bathroom entry.			$1,356.98
Prehung Interior Door — 36″ Solid Core ADA-preferred clear width for bathroom entry.	1 Each	$541.27	$541.27
Shims — Bundle	1 Pack	$9.92	$9.92
Install Prehung Door	1 Each	$119.40	$119.40
Door Prep Labor Hinge and strike mortising, bore, hang and adjust.	1 Hours	$91.04	$91.04
Door Finishing Labor Priming and finishing of the new doors.	5 Hours	$91.04	$455.22
Door Packaging & Delivery	1 Total	$31.75	$31.75
Lever Handle & Hardware Set ADA lever set — no grip or twist required.	1 Each	$66.67	$66.67
Door Stops	1 Each	$11.86	$11.86
Door Hardware Install Labor	1 Each	$29.85	$29.85

Trim & Finish Carpentry			$341.49
Base Molding — Paint Grade (Primed)	23 Linear Feet	$7.54	$173.41
Construction Adhesive & Fasteners	1 Each	$9.00	$9.00
Trim Delivery Charge	1 Lump Sum	$39.68	$39.68
Trim Installation Labor	20 Linear Feet	$5.97	$119.40
Door & Window Casing	0 Linear Feet	$3.17	$0.00
Painting			$1,629.08
Paint Materials & Preparation Paint and surface preparation materials.			$694.75
Sherwin Williams Wall & Wood Primer	1 Gallons	$58.73	$58.73
Sherwin Williams Wall Paint	2 Gallons	$120.63	$241.27
Sherwin Williams Ceiling Paint	2 Gallons	$57.14	$114.29
Sherwin Williams Semi-Gloss Trim Paint	1 Gallons	$99.33	$99.33
Painters Plastic	1 Each	$60.27	$60.27
Blue Tape	2 Each	$30.06	$60.13
Surface Protector — 3' x 100'	1 Each	$42.51	$42.51
Mineral Spirits — 1 Quart	1 Quart	$18.22	$18.22
Paint Labor			$734.33
Prime Walls & Ceiling	283 Square Foot	$0.75	$211.19
Paint Walls — Two Coats	232 Square Foot	$1.49	$346.27
Paint Ceiling — Two Coats	51 Square Foot	$1.49	$76.12
Paint Trim & Base	54 Linear Feet	$1.87	$100.75
Door Painting			$200.00
Paint Door & Jamb, Both Faces — Bathroom Paint both faces of the new bathroom door and the jamb to match the room.	1 Each	$200.00	$200.00
Flooring Non-tile floor finish, including the subfloor preparation needed for the new flooring to lie flat.			$993.05
Floor Patch / Leveling Compound	5 Each	$42.84	$214.21
Floor Patch / Leveling Labor	2 Hours	$91.04	$182.09
Resilient / Luxury Vinyl Plank Flooring Luxury vinyl plank flooring for the bathroom.	39.6 Square Foot	$8.25	$326.86
Floor Transition Strip	1 Each	$68.40	$68.40
Vinyl Plank Flooring Install Labor	36 Square Foot	$5.60	$201.49

Vanity & Countertop Vanity cabinet and countertop.			$2,173.89
Cabinet Hardware Pulls and knobs for the vanity doors and drawers.	4 Each	$8.35	$33.40
Cabinet Hardware Install Labor	4 Each	$11.94	$47.76
Vanity Base Cabinet Painted vanity base cabinet with two working drawers, sized to your bathroom layout.	1 Each	$956.46	$956.46
Cabinet Installation Labor	1 Each	$128.36	$128.36
Vanity Top — Quartz w/ Sink(s), Template & Install Quartz vanity top with undermount porcelain sink, including templating, fabrication, sink cutout, faucet drilling, edge profile and installation.	1 Square Foot	$1,007.91	$1,007.91
Ventilation & Lighting Bathroom exhaust fan, lighting and related electrical work.			$531.86
Exhaust Fan — Broan AER110L 110 CFM w/ LED Broan Roomside Series 110 CFM ceiling exhaust fan with LED light (model AER110L). Quiet 1.0-sone operation, sized for a full bathroom.	1 Each	$258.73	$258.73
New Fan — Cut-In & Install Labor Cut in, mount and trim a new fan where none existed.	3 Hours	$91.04	$273.13
Licensed Trade Subcontractors			$5,344.70
Plumbing Subcontractor Licensed plumber to supply and set the toilet, shower valve with trim, shower head and handheld shower with holder, and lavatory faucet, plus all plumbing trim-out. Sink bowls are included with the vanity top.	1 Lump Sum	$2,117.65	$2,117.65
Electrical Subcontractor GFCI circuits, vanity and shower lighting, exhaust fan wiring, device trim-out.	1 Lump Sum	$1,882.35	$1,882.35
Mechanical / HVAC Subcontractor Exhaust fan, ducting, register relocation.	1 Lump Sum	$858.82	$858.82
General Contractor Fee General contractor fee for coordinating and managing the subcontracted trades.	1 Lump Sum	$485.88	$485.88
Adjacent Bedroom Restoration work in the adjoining room where a closet or wall was removed to enlarge the bathroom.			$6,325.20
Bedroom Drywall Patch, finish and blend the bedroom side back to existing.			$982.77
Drywall — 1/2″ 4'x8', Bedroom Side	6 Each	$21.90	$131.43
Drywall Materials & Consumables — Bedroom Side Compound, tape, corner bead, screws and consumables.	1 Lump Sum	$134.92	$134.92
Drywall Sheeting Labor — Bedroom Side	160 Square Foot	$2.24	$358.21
Drywall Finishing Labor — Bedroom Side	160 Square Foot	$2.24	$358.21
Bedroom Painting Painting on the bedroom side, including walls, ceiling, the new doors and trim.			$1,694.71

Primer — Bedroom Side	1 Gallons	$58.73	$58.73
Wall Paint — Bedroom Side Paint color-matched to the existing bedroom walls.	1 Gallons	$120.63	$120.63
Ceiling Paint — Bedroom Side	1 Gallons	$57.14	$57.14
Prime Walls & Ceiling — Bedroom Side	250 Square Foot	$0.75	$186.57
Paint Walls — Bedroom Side	300 Square Foot	$1.49	$447.76
Paint Ceiling — Bedroom Side	150 Square Foot	$1.49	$223.88
Paint Bifold Closet Doors & Jamb Paint both faces of the two new bifold closet doors and the closet jamb liner.	2 Each	$200.00	$400.00
Paint Door & Jamb, Both Faces — Bedroom	1 Each	$200.00	$200.00

Bedroom Trim $640.68

Base trim and trim painting on the bedroom side. Carpet work is by others.

Base Molding — Bedroom Side Match existing bedroom profile.	48.3 Linear Feet	$4.37	$210.83
Trim Install Labor — Bedroom Side	42 Linear Feet	$5.97	$250.75
Paint Trim — Bedroom Side Paint bedroom-side base trim, the casing on both sides of the new bedroom door, and the closet opening casing.	96 Linear Feet	$1.87	$179.10
Carpet Patch, Re-Stretch & Doorway Transitions — By Others (Not Included) Carpet patching, re-stretching, and floor transitions at the new doorways will be performed by the homeowner's own carpet installer and are not included in this scope.	1 Lump Sum	$0.00	$0.00

New Bedroom Closet $1,193.18

Bifold doors, casing and shelving for the new bedroom closet.

Wire Shelf & Rod — Ventilated Ventilated wire shelf with integrated hanging rod.	6 Linear Feet	$5.29	$31.71
Wire Shelf Hardware — Brackets & Clips Support brackets, end brackets and wall clips for the wire shelf.	6 Linear Feet	$9.00	$54.00
Shelf Install Labor — Per Run Installing each shelf run: layout, leveling, wall clips and brackets.	1 Each	$104.48	$104.48
Closet Bifold Door — 30″ Two 30-inch bifold doors for the new 60-inch closet opening.	2 Each	$230.16	$460.32
Closet Jamb Liner — Bifold / Bypass Finished jamb liner for the closet opening. Bifold and bypass doors do not include a jamb.	1 Each	$66.67	$66.67
Closet Door Install Labor Installing and adjusting the closet door and track.	2 Each	$141.79	$283.58
Casing Trim — Closet Opening	23 Linear Feet	$3.17	$73.02
Install Casing — Closet Opening	20 Linear Feet	$5.97	$119.40

New Bedroom Doorway $1,813.86

Cutting a new doorway into an existing bedroom wall, including framing the rough opening, a new 32-inch door with hardware, drywall patch, casing and paint.

Cut New Opening — Drywall & Studs	21 Square Foot	$5.97	$125.37
Frame New Rough Opening	21 Square Foot	$5.97	$125.37
2x4 Studs — New Opening	8 Each	$6.67	$53.33
Framing Fasteners — New Opening	1 Each	$23.81	$23.81
Drywall Patch Material — New Opening	35.2 Square Foot	$0.79	$27.94
Hang Drywall — New Opening	60 Square Foot	$1.12	$67.16
Tape & Corner Bead — New Opening	1 Each	$9.52	$9.52
Joint Compound — New Opening	1 Each	$19.05	$19.05
Drywall Finish (3-Coat) — New Opening	32 Square Foot	$3.73	$119.40
Primer — New Opening	1 Gallons	$57.14	$57.14
Prime Walls — New Opening	32 Square Foot	$1.12	$35.82
Paint — Color Match, New Opening	1 Quart	$60.32	$60.32
Paint Walls — New Opening Paint the patched wall area around the new doorway.	32 Square Foot	$1.49	$47.76
Prehung Interior Door — 32″ Solid Core	1 Each	$419.83	$419.83
Install Prehung Door — Bedroom	1 Each	$119.40	$119.40
Shims — Bedroom Door	1 Pack	$9.92	$9.92
Lever Handle & Hardware Set — Bedroom Lever set — no grip or twist required.	1 Each	$66.67	$66.67
Door Stop — Bedroom	1 Each	$11.86	$11.86
Door Hardware Install — Bedroom	1 Each	$29.85	$29.85
Casing Trim — Bedroom Door	39.1 Linear Feet	$3.17	$124.13
Install Casing, Both Sides — Bedroom Door	34 Linear Feet	$5.97	$202.99
Close Old Bedroom Doorway Framing in the old bedroom doorway after the door moves, with drywall on both sides and paint to match.			$57.22
Remove Door, Jamb & Casing — Old Bedroom Doorway	1 Each	$57.22	$57.22
Frame In Old Doorway	0 Square Foot	$5.97	$0.00
2x4 Studs — Doorway Infill	0 Each	$6.67	$0.00
Drywall Patch Material — Doorway Infill	0 Square Foot	$0.79	$0.00
Hang Drywall — Doorway Infill	0 Square Foot	$1.12	$0.00
Drywall Finish (3-Coat) — Doorway Infill	0 Square Foot	$3.73	$0.00

Prime Walls — Doorway Infill	0 Square Foot	$1.12	$0.00
Paint Walls — Doorway Infill	0 Square Foot	$1.49	$0.00
		TOTAL	**$35,657.53**

PAYMENTS STARTING FROM **$306**/month on HFS Learn More→

CONTRACT FOR SERVICES

This Agreement ("Agreement") is entered into on the effective date stamped on this document between Lakeshore Barrier Free LLC (hereinafter referred to as the "Contractor") and the Customer (hereinafter referred to as the "Customer," "Insured," or "Purchaser").

1. TERMS AND CONDITIONS

In addition to the specific provisions outlined in this contract, the parties agree that the terms and conditions herein encompass all aspects of the agreement between them. Any matters not explicitly addressed in the sections below shall be governed by these terms and conditions.

2. ACCEPTANCE OF PROPOSAL, PARTIES, AND AUTHORITY

2.1 Effective Date & Binding Nature

By accepting this proposal, the undersigned parties agree to be bound by the terms and conditions herein.

You, the Customer, may cancel this Agreement without penalty or obligation within three (3) business days from the date you sign this Agreement. Notice of cancellation must be in writing. Please email your notice to Info@LakeshoreBarrierFree.com so that we receive it immediately. You may also deliver or mail written notice to Lakeshore Barrier Free LLC, 307 Northern Dr. NW, Grand Rapids, MI 49534; if mailed, it must be postmarked before midnight of the third business day after you sign. Any payments you have made will be returned within ten (10) days after we receive your notice of cancellation.

After the three-business-day period, the Agreement becomes legally binding, obligating the Customer to fulfill the terms herein, including full payment upon satisfactory completion of services.

2.2 Parties

Each person who signs this Agreement is a "Customer" under this Agreement, and all Customers are jointly and severally liable for every obligation herein, including payment. Any person who signs represents that they hold an ownership interest in the property where the Work is to be performed and that they are authorized to contract for the Work on behalf of all owners. The Contractor may require all persons named on the deed to sign this Agreement, and may decline to begin or to continue the Work until those signatures are obtained. Where the property is held in a trust or by an entity, the trustee or an authorized representative signs on behalf of that owner and also signs individually as a Responsible Party. The Contractor may request documentation confirming authority to contract for improvements to the property.

2.3 Capacity and Responsible Party

a. Each person signing this Agreement represents that they have the legal capacity and authority to enter into it and are not subject to any condition that prevents them from understanding its terms.

b. Where the person for whose benefit the Work is performed is hospitalized, residing in a rehabilitation or care facility, recovering from a significant injury or medical procedure, receiving medication or treatment that may affect judgment, or otherwise not in a position to independently make binding decisions, a Responsible Party must also sign this Agreement.

c. The Responsible Party signs individually and in their own name, and not solely as an agent, attorney-in-fact, guardian, conservator, or representative of another. The Responsible Party is a Customer under this Agreement and is jointly and severally liable for every obligation herein, including payment, regardless of any question later raised concerning the capacity or authority of any other signer.

d. Where any person signs under a power of attorney, guardianship, or conservatorship, a copy of the governing document shall be provided to the Contractor, and that person shall also sign individually as a Responsible Party.

e. These requirements exist to protect all parties, including the person receiving the Work, and are a condition of the Contractor's performance.

2.4 Authorized Representative and Direction of the Work

a. The Customers shall designate one individual as the Authorized Representative for day-to-day direction of the Work, including selections, approval of Change Orders, scheduling, and site access. Where no designation is made, any Customer may act in that capacity.

b. The Contractor is entitled to rely upon the direction of the Authorized Representative without confirming it with the other Customers, and all Customers are bound by that direction.

c. Direction, instruction, or requests from persons who are not Customers — including family members, caregivers, occupational therapists, case managers, insurance adjusters, and other third parties — are informational only. Such persons may not authorize additional work, approve a Change Order, or modify the scope, schedule, or price, and their direction does not bind the Contractor.

d. Any change to the Authorized Representative must be provided to the Contractor in writing.

2.5 Entire Agreement

This Agreement constitutes the entire contract between the parties and supersedes all prior agreements and understandings, whether written or oral, relating to the subject matter herein. It may only be amended or modified by a written agreement signed by both parties. All attached documents or proposals are incorporated herein by reference.

3. SCOPE OF WORK

The Contractor shall undertake the provision of services detailed within this Agreement, inclusive of any attachments. The estimated cost encompasses all requisite materials, labor, tools, overhead, and equipment essential for the project's completion.

3.1 Appliance Disconnection

Appliances may be disconnected to complete the work but will not be reconnected if they require specialized trades (e.g., plumbing, HVAC, electrical). The Customer may request coordination with licensed trades for an additional fee.

3.2 Customer or Third Parties Performing Contract Work

If the Customer or a third party performs any portion of the work outlined in this contract, the Customer may still be charged for that portion of the scope. Any warranty related to work performed by others will be voided.

3.3 Limitation of Scope and Additional Work

This Agreement strictly covers only the work described in the attached proposal, the Scope of Work, and any Change Orders that pertain to that original scope. Any additional or alternative work not included in these documents is not covered by this Agreement and will require a separate contract or Change Order, subject to scheduling on a first-come, first-served basis.

3.4 Permit Ownership

Any permits obtained by Lakeshore Barrier Free LLC for the project shall remain the sole property of the Contractor and may not be transferred, assigned, or used by any other individual or entity. These permits are specific to the scope of work outlined in this Agreement and are not transferrable for use by other contractors or for other projects.

4. CUSTOMER SELECTION

The Customer shall finalize all design and material selections (e.g., fixtures, finishes) at least ten (10) days before the scheduled commencement of work. The Contractor will promptly initiate material procurement after these selections are confirmed. Any alterations to the initial selections may result in additional costs, which will be documented via a Change Order (see Section 9).

5. CONTRACT PRICE VALIDITY

5.1 30-Day Price Validity

The contract price is valid for thirty (30) days from the date of this Agreement. If work has not commenced within this period due to Customer delays or other reasons outside the Contractor's control, the Contractor reserves the right to adjust the contract price to reflect changes in material costs, labor rates, or market conditions.

5.2 Material Cost Fluctuation

If the price of any essential material increases by more than ten percent (10%) from the time this Agreement is signed until the Contractor purchases the material, the Customer agrees to cover the difference. The contract amount will be adjusted accordingly.

5.3 Fixed Price Contract

This Agreement is a fixed-price contract. The total contract price, as stated in the attached proposal and Scope of Work, is firm and shall not be increased except as provided through duly executed Change Orders. All work under this Agreement will be completed for the fixed price specified, and any adjustments to the price will occur solely through the Change Order process.

6. DELAYS

6.1 Potential Delays

The Customer acknowledges that project delays may occur due to factors beyond the Contractor's control, including, but not limited to, inclement weather, labor disputes, supply chain disruptions, or Acts of God.

6.2 Extensions of Time

If the Contractor is delayed in commencing or progressing with the work due to causes beyond its control, the Contractor shall be entitled to a reasonable extension of time and adjustments to the Contract Price for any additional costs incurred.

6.3 Customer-Caused Delays

Delays attributable to the Customer (e.g., indecisiveness, inaccessibility, or withheld approvals) may result in additional fees. The Contractor reserves the right to charge up to $1000 per day for delays that significantly impede efficiency or labor mapping. The Contractor may, at its discretion, waive or reduce this fee if the delay is unavoidable or justified.

7. PROJECT COST EVALUATION

7.1 Initial Estimate

The initially estimated project cost is based on current pricing and the Scope of Work. Any necessary adjustments due to unforeseen conditions, changes in scope, or price fluctuations will be discussed with the Customer prior to implementation. A Change Order will be signed by both parties to document these changes.

7.2 Final Billing Statement

The final invoice will reflect all approved adjustments, including any additional labor, materials, or fees incurred throughout the project.

8. PAYMENT TERMS

8.1 Payment Schedule

Unless otherwise stated in writing, payments shall be made as follows:

Payment	Percentage	Amount
Deposit	50%	$17828.77
Progress Payment	0%	$N/A
Final Payment	50%	$17828.76

- Deposit (50%): Due before work commences.
- Progress Payment (25%): Due upon reaching specified project milestones.
- Final Payment (25%): Due upon satisfactory completion of the project.

Payment Methods: Cash, check, or ACH bank transfer may be used at no additional cost. Credit card payments are accepted through the Contractor's third-party payment platform. A processing fee applies to credit card transactions. The fee is added and collected by the payment platform at the time of payment and is disclosed to the Customer before the payment is completed. Approved financing is also available.

8.2 Payment Upon Substantial Completion

• Definition: "Substantial completion" means the project is functional for its designated purpose.

• Withholding for Incomplete Items: If an item is back-ordered or delayed for a week or more, the Customer may withhold an amount no more than twice the market value of the incomplete item from the final payment until that item is completed.

• Special Orders: Must be paid for at the time orders are placed.

8.3 Late Charges and Restocking

• Late Fee & Work Suspension: If a required payment is not made when due, the Contractor may, after giving written notice, stop work within five (5) days of receipt of that notice by the Customer.

• Restocking Charges: The Customer is responsible for all restocking charges if items must be returned due to Customer-initiated changes or cancellations.

8.4 Final Payment and Completion

The Customer agrees that the final payment is due upon satisfactory completion of the project, defined as the completion of all work outlined in the Scope of Work and meeting the agreed-upon standards. Final payment shall be made on the final day of work, immediately following a successful final inspection and Customer acceptance. Additionally, the Customer shall provide a one-time punch list detailing any remaining deficiencies. The Contractor shall address the punch list items promptly, and once the punch list is signed off by the Customer, final payment will be due. Payment of the final invoice signifies the Customer's acceptance that the project is complete and that all contractual obligations have been met.

8.5 Non-Payment and Bad Payment Terms

1. Grace Period:

If the Customer fails to make any scheduled payment, the Contractor shall provide written notice specifying the outstanding amount and grant a 10-day grace period from the due date for payment without penalty.

2. Returned or Failed Payments:

Each returned check or failed electronic payment incurs a fee of one hundred dollars ($100) plus any applicable bank charges. The Customer must provide an alternative method of payment within five (5) business days.

3. Late Payment Penalties:

If payment is not received within the 10-day grace period, the Contractor reserves the right to impose late payment penalties, calculated monthly and compounded at a rate of twelve percent (12%) per annum on the outstanding balance, accruing until full payment is received.

4. Suspension of Work:

The Contractor may suspend all work if payment is not received within the specified time frames. Work will only resume upon receipt of full payment, including any late fees or penalties.

5. Collection and Legal Action:

If the balance remains unpaid beyond the grace period, the Contractor may pursue legal action, engage a collection agency, or place a lien on the Customer's property. The Customer shall be responsible for all associated legal fees, court costs, and enforcement expenses.

8.6 Collection of Payment in Case of Customer Incapacitation or Decease

1. Assessment and Communication:

In the event the Customer becomes incapacitated or passes away, the Contractor will assess the situation and promptly communicate with the Customer's designated representative, legal guardian, executor, or next of kin.

2. Documentation Verification:

The Contractor will work with the Customer's representatives and legal authorities to obtain the necessary documentation or court orders to address outstanding payment obligations.

3. Discussion and Agreement:

The Contractor will engage with relevant parties to determine the appropriate steps for completing the project and resolving any unpaid balances.

4. Completion of Project:

If feasible and legally permissible, the Contractor will proceed with completing the project under the terms of this Agreement.

5. Payment Arrangement:

The Contractor will collaborate with the Customer's representatives to establish a payment arrangement, which may include trusts, escrow accounts, or other legal mechanisms.

6. Legal Recourse and Payment from Estate:

Should non-payment or breach of contract persist, the Contractor reserves the right to seek payment from the Customer's estate. Any legal fees incurred in pursuing payment shall be the responsibility of the Customer's estate or its representatives.

9. CHANGE ORDERS

9.1 Definition

A Change Order is a written amendment to this Agreement that adds to, modifies, or removes any aspect of the originally agreed-upon scope of work, schedule, or cost. Both parties must review, approve, and sign the Change Order before any revised or additional work begins. A Change Order typically includes:

- Description of the Change: A clear explanation of the new, altered, or removed tasks.
- Cost Implications: An itemization of any additional charges, credits, or unchanged costs.
- Schedule Adjustments: Any revised deadlines or milestone dates.

9.2 Payment and Fees

1. Change Order Fee: Each Change Order shall incur a fee of two hundred dollars (USD 200). The Contractor reserves the right to waive or reduce this fee at its discretion, depending on the complexity of the requested change.
2. Timing of Payment: Payment for work outlined in a Change Order is due immediately upon acceptance of the Change Order, unless otherwise agreed in writing. Work under the Change Order will not commence until payment is received.
3. Documentation: All approved Change Orders and their corresponding payments shall be reflected in the final invoice.

9.3 Subcontractors

If additional or specialized work must be performed by subcontractors, the Contractor may apply a 15% general contracting fee to the added subcontractor costs.

10. TERMINATION AND UNFORESEEN CONDITIONS

10.1 Termination by Customer

1. Written Notice: The Customer may terminate this Agreement at any time by providing written notice to the Contractor.
2. Itemized Invoice & Costs: Upon termination, the Contractor will provide an itemized invoice for work completed up to the termination date, including administrative charges, accrued costs, and a 10% charge for indirect costs of the total contract price.
3. Reimbursement: The Customer agrees to reimburse the Contractor for all costs incurred up to the termination date, plus a 15% fee to cover lost overhead and profit.

10.2 Forfeiture of Project

If circumstances render the Customer unable to fulfill their contractual obligations, the Contractor may terminate the project without penalty or liability, although the Customer remains responsible for all costs incurred up to termination.

10.3 Payment for Work Completed

Payment for all completed work shall be based on the proportion of the project completed relative to the total scope. Payment is due within 30 days of project termination, using the methods outlined in Section 8.

10.4 Termination by Contractor

The Contractor may terminate this Agreement and cease work if the Customer fails to make payments as agreed, engages in abusive behavior (see Section 16), or breaches any material term of this Agreement. The Customer remains responsible for all incurred costs and applicable termination fees.

10.5 Suspension and Stop-Work Orders

1. Who May Stop the Work: A direction to suspend, halt, or terminate the Work is effective only when given to the Contractor in writing by the Authorized Representative or by all Customers jointly. A direction given by a single Customer where multiple Customers have signed, or by any person who is not a Customer, does not obligate the Contractor to stop the Work, and the Contractor may continue at the direction of the remaining Customers.
2. Conflicting Direction: Where the Contractor receives conflicting direction regarding continuation of the Work, the Contractor may suspend the Work until the Customers provide a single written direction. Any resulting delay is a Customer-caused delay under Section 6.3.
3. Amounts Due Upon Suspension: Upon any suspension or stop-work, the following become immediately due and payable: all costs incurred through the date of suspension, including labor performed; the full cost of custom, special-order, and non-returnable

materials, whether or not delivered; restocking and cancellation charges on returnable materials; and profit on the work performed to that date.

4. Extended Suspension: Where a suspension continues for more than thirty (30) days, the Contractor may treat the suspension as a termination by the Customer under Section 10.1.

11. LIEN WAIVERS

Upon project completion and receipt of final payment, the Contractor shall furnish the Customer with lien waivers from itself and any subcontractors or suppliers involved in the project, as required by law or upon the Customer's request.

12. LIABILITY

12.1 Undisclosed and Preexisting Conditions

The Contractor shall not be held accountable for undisclosed or preexisting conditions, including but not limited to structural deficiencies, environmental hazards, existing damage, faulty installations, or code violations not evident during initial inspections.

12.2 Unforeseen Conditions

If more extensive work or specialized engineering becomes necessary due to conditions not apparent at the time of contract signing, the Contractor reserves the right to adjust the project cost. Associated expenses shall be documented via a signed Change Order, which the Customer must approve before work proceeds. If such additional repairs or modifications are essential to continue with the original scope, the Customer agrees to bear these costs. Failure to approve or pay for these measures in a timely manner may result in suspension or termination of the project and constitute a breach of contract.

12.3 Hazardous Environmental Conditions

The Contractor makes no representation or warranty regarding the presence or absence of asbestos, lead paint, radon, fiberglass, mold, or any other hazardous materials on the property. If such conditions are discovered and require remediation, the cost shall be added via a Change Order.

12.4 Absolution of Liability for Certain Hazards

Upon project completion, the Contractor will remove new and used materials and conduct a final cleanup. However, the Contractor is not liable for any hidden hazards (e.g., sharp objects, leftover debris) that may remain undetected. The Customer must promptly notify the Contractor of any such hazards and take appropriate precautions.

12.5 Disclosure of Physical or Mental Conditions

The Customer must disclose any physical or mental condition that could affect the design, implementation, or health/well-being of on-site personnel. Failure to disclose such conditions releases and indemnifies the Contractor from any resulting claims or liabilities.

12.6 Failure to Disclose

Failure by any party to disclose conditions impacting the project—whether structural, environmental, or personal—may result in the release, indemnification, and hold harmless of Lakeshore Barrier Free LLC by the Customer for any claims arising from such undisclosed conditions.

13. INSURANCE AND RISK OF LOSS

13.1 Contractor Insurance

The Contractor maintains general liability insurance and workers' compensation coverage as required by law, and will furnish a certificate of insurance upon request. The Contractor is responsible for its own tools and equipment brought onto the property.

13.2 Customer Insurance

The Customer represents that the property is and will remain covered by a property insurance policy in force for the duration of the project. The Customer is not required to purchase additional coverage or to name the Contractor as an additional insured. The Customer is encouraged to notify their insurance carrier that construction or remodeling work is underway, as some policies limit or exclude coverage during renovation.

13.3 Risk of Loss

The Contractor is responsible for loss or damage caused by its own negligence or defective workmanship. The Customer bears the risk of loss for damage to the work, materials, or the property arising from causes outside the Contractor's control, including fire, storm, water intrusion, theft, vandalism, or Acts of God. Materials delivered to the site remain at the Customer's risk once delivered. If completed or in-progress work is damaged or destroyed by such a cause, the Contractor will provide an estimate to restore it and the restoration shall be handled as a Change Order under Section 9 at the Customer's expense.

14. DAMAGES

14.1 Reporting Damages

The Customer must notify Lakeshore Barrier Free LLC in writing within five (5) days of discovering any property damage believed to be caused by the Contractor's work. Notices should be directed to:

- Mail: Lakeshore Barrier Free LLC, 307 Northern Dr., Grand Rapids, MI 49534
- Email: Info@LakeshoreBarrierFree.com

14.2 Assessment and Resolution

1. Assess and Document: The Contractor will evaluate the damage, gather evidence (photos, notes), and determine responsibility.

2. Communicate Findings: The Contractor will share the assessment results with the Customer, outlining any contributing factors.
3. Resolution Plan: Based on the assessment, the Contractor will propose a plan (e.g., repair, replacement, or compensation) including a timeline and costs.
4. Agreement and Implementation: The Customer and Contractor will confirm the plan in writing. Once agreed, the Contractor will promptly execute the necessary repairs or remedies.
5. Final Inspection and Documentation: After completion, the Contractor will invite the Customer to inspect the work and provide relevant documentation (e.g., invoices, photos).
6. Follow-Up: The Contractor may follow up to ensure the Customer's satisfaction and address any further concerns.

15. WARRANTY

15.1 General Warranty

All workmanship provided by the Contractor is warranted for one (1) year from the date of project completion. Manufacturers' warranties apply to any materials used. This warranty is void if:

- The contract remains unpaid in full, or
- Unauthorized third parties alter the Contractor's work.

This warranty does not cover:

- Normal wear and tear
- Damage caused by misuse, neglect, or Acts of God
- Defects resulting from work performed by others

15.2 Warranty Service Calls

1. Non-Contractor Fault: If the Customer requests a warranty service call and the issue is not due to the Contractor's negligence, the Customer will be billed a flat rate of $250.00, plus any additional charges for time and materials if repairs are needed.
2. Contractor Fault: If the issue is due to the Contractor's negligence or defective workmanship, no service call fee will be charged and repairs will be made at no extra cost within the warranty period.

15.3 Timely Reporting Requirement

The warranty is contingent upon the Customer reporting any warranty-related issues promptly. If the Customer fails to report a problem in a timely manner and such delay results in further damage that could have been prevented, the warranty for the affected portion of the work will be voided.

15.4 Transfer of Warranty

All warranty work must be performed exclusively by the Contractor. If any outside party performs work on items covered by the Contractor's warranty, that warranty is void.

15.5 Non-Transferable

This warranty is non-transferable and applies only to the Customer named in this Agreement.

16. ABUSIVE BEHAVIOR

16.1 Definition

Abusive behavior includes verbal or physical harassment, threats, intimidation, or any conduct creating a hostile, unsafe, or disrespectful environment for the Contractor, its employees, or subcontractors.

16.2 Zero Tolerance Policy

If the Contractor or its representatives experience abusive behavior from the Customer or individuals on the Customer's property, the Contractor reserves the right to suspend work immediately, remove personnel from the job site, and/or terminate this Agreement.

16.3 Termination Due to Abusive Behavior

If termination occurs due to abusive behavior, the Customer shall be responsible for all costs incurred up to the termination date, plus 15% of the Contractor's incurred costs for lost overhead and profit. The Contractor may pursue additional legal or civil remedies.

16.4 Legal Action

The Contractor reserves the right to pursue legal action against those responsible for abusive behavior. The Customer will be responsible for all associated legal fees, court costs, and expenses.

16.5 Dispute Resolution

Any allegations of abusive behavior shall first be addressed through mediation before any other legal remedy is pursued, except where immediate legal intervention is required (e.g., restraining orders).

17. CUSTOMER RESPONSIBILITIES

- Site Access: The Customer shall maintain clear access to the worksite and ensure necessary utilities (water, electricity, etc.) are available.
- Protection of Personal Property: The Customer agrees to remove small, fragile, or valuable items from the work area and secure them elsewhere.
- Timely Responses: The Customer shall provide necessary approvals, decisions, or documentation promptly to avoid delays.
- Insurance Approvals: For insurance-paid projects, the Customer must furnish documentation from the insurer indicating approval and commitment to payment.
- Waste and Disposal: The Customer may not place items outside the job scope into the Contractor's waste trailers without prior

agreement. Additional fees may apply if unauthorized items are discovered.

• Client-Supplied Materials: If the Customer supplies any materials, products, or equipment for use in the Work, the Customer agrees to the terms of the "Client-Supplied Materials Agreement", which is hereby incorporated into this Agreement by reference.

18. YARD SIGNS AND MARKETING

18.1 Yard Signs

The Customer agrees to allow the Contractor to place a yard sign on the property for the duration of the project and for up to thirty (30) days after completion, solely for advertising purposes.

18.2 Photography and Marketing

The Customer grants the Contractor permission to take photographs and/or videos of the project during and after completion. These images may be used for marketing or promotional purposes (e.g., social media, websites, brochures), provided no personally identifying information about the Customer is disclosed without written consent.

18.3 Confidentiality

Both parties agree not to disclose any confidential information (designs, pricing, personal data) to third parties without written consent, unless required by law.

19. DISPUTE RESOLUTION AND GOVERNING LAW

19.1 Good-Faith Negotiations

The parties agree to attempt to resolve any disputes related to this Agreement amicably through good-faith negotiations.

19.2 Mediation

If negotiations fail, either party may request mediation by a mutually agreed-upon mediator. The cost of mediation shall be shared equally unless otherwise agreed.

19.3 Arbitration

If mediation does not resolve the dispute, the matter shall be submitted to binding arbitration under the rules of the American Arbitration Association (AAA) or a similar body. The arbitrator's decision shall be final, and judgment may be entered in any court having jurisdiction.

19.4 Governing Law and Venue

This Agreement shall be governed by and construed in accordance with the laws of the local jurisdiction (e.g., the State of Michigan). Any legal action shall be brought exclusively in the courts of that jurisdiction, and the parties consent to that venue.

20. FORCE MAJEURE

The Contractor shall not be liable for any failure or delay in performing its obligations if such failure or delay is caused by circumstances beyond its reasonable control, including, but not limited to, acts of God, natural disasters, pandemics, labor disputes, wars, epidemics, or governmental actions affecting the supply of labor or materials. If pricing must be adjusted by more than ten percent (10%) due to such events, the Contractor may revise the contract price accordingly.

21. MISCELLANEOUS

21.1 Court Fees

If litigation arises, the prevailing party shall be entitled to recover court fees and reasonable attorney's fees from the non-prevailing party, as permitted by law.

21.2 Attorneys' Involvement

If the Customer involves attorneys during the project, the Contractor may halt work until the legal matter is resolved.

21.3 Breach of Contract

If this Agreement is canceled after signing (but before work commences), the Customer will be charged for administrative fees and any accrued costs.

21.4 Customer-Purchased Materials

If the Customer opts to purchase certain materials directly, any applicable margin or handling fee still applies. Credits for unused materials will be reflected in the final invoice, if feasible.

Additionally:

• The Contractor does not warrant customer-purchased materials, nor does it warrant any labor associated with such materials.

• If labor is required due to product quality issues or a mis order of customer-purchased materials, resulting in extensive engineering or additional work, a Change Order will be submitted to cover the extra work before proceeding.

• If customer-purchased materials are returned and reordered, causing a delay in the schedule or necessitating an additional site visit, the Customer will be charged a full day's rate of $700.00 per employee required to complete the task.

21.5 Unused Supplies and Labor

Any unused supplies purchased for the project shall be returned and credited to the Customer's account, if feasible. Unused labor or canceled work will be reflected in a subsequent bill or credit.

21.6 Severability

If any provision of this Agreement is held to be invalid or unenforceable, such invalidity or unenforceability shall not affect the

remaining provisions, which shall remain in full force and effect.

21.7 Amendments

No amendment or modification of this Agreement shall be valid unless in writing and signed by both parties.

21.8 Survival

Any provision of this Agreement that contemplates performance or observance after termination or expiration shall survive and continue in full force and effect.

21.9 Overage Material

Any materials purchased by the Contractor for the project that remain unused or are in excess of the quantities required ("overage material") shall remain the property of the Contractor unless otherwise agreed in writing. The Customer shall not be entitled to any credit, refund, or reimbursement for such overage material.

21.10 No Liquidated Damages for Delay

Notwithstanding any other provision of this Agreement, the Customer acknowledges that time for performance is not of the essence. The Contractor shall not be liable to pay any liquidated damages, penalty, or monetary compensation to the Customer for delays in completing the project, except where such delay is caused solely by the Contractor's gross negligence or willful misconduct.

21.11 Communication and Business Hours

The Contractor's business hours are from 8:30 AM to 4:30 PM, Monday through Friday. The Contractor utilizes project management software to facilitate communication with the Customer. The Customer is encouraged to use this portal to send messages and track project updates at their convenience. Messages received outside of business hours will be addressed on the following business day. Both parties agree to respect each other's personal time; the Contractor's team works diligently during business hours and is entitled to uninterrupted personal time outside these hours.

21.12 Standard Work Hours and Overtime

The Contractor's crew operates on a standard schedule of 40 hours per week, which is considered full time. Any hours worked beyond the standard 40 hours are considered overtime and are performed voluntarily by the crew as a demonstration of their commitment to the project. For example, if the crew leaves early on a Friday, it reflects that they have put in additional hours earlier in the week to ensure high performance and is not a sign of reduced commitment.

CAPACITY AND SIGNING AUTHORITY

By initialing below, each person signing confirms they have the legal capacity and authority to enter into this Agreement. ***Where the person for whose benefit the Work is performed is hospitalized, residing in a rehabilitation or care facility, recovering from a significant injury or procedure, or receiving treatment that may affect judgment, a Responsible Party must also sign this Agreement — individually and in their own name — and is jointly responsible for payment.*** Full terms appear in Section 2.3.

⚠ ACKNOWLEDGMENT AND SIGNATURE

By signing below, the Contractor and the Customer acknowledge that they have read, understood, and agreed to be bound by the terms and conditions of this Agreement. Each party further acknowledges that they have had the opportunity to seek independent legal advice regarding the terms of this Agreement if desired. Any Responsible Party required under Section 2.3, and any additional owners whose signatures the Contractor requires under Section 2.2, must also sign this Agreement. This Agreement constitutes the entire agreement between the parties and supersedes all prior discussions or agreements regarding the subject matter herein.

REQUEST FOR HEALTHWEST BOARD CONSIDERATION AND AUTHORIZATION

COMMITTEE	BUDGETED	NON BUDGETED	PARTIALLY BUDGETED
Finance Committee	X		

REQUESTING DIVISION	REQUEST DATE	REQUESTOR SIGNATURE
Provider Network	November 13, 2026	Brandy Carlson, Chief Financial Officer

SUMMARY OF REQUEST (GENERAL DESCRIPTION, FINANCING, OTHER OPERATIONAL IMPACT, POSSIBLE ALTERNATIVES)

Authorization is requested for the HealthWest Board to increase the five funding sources from $54,725,429 to $56,175,429 effective immediately for FY2026 services.

1. Specialized Residential - $26,000,000
2. Community Inpatient - $9,300,000
3. SUD Services - $7,750,000
4. Outpatient Services - $9,300,000
5. Autism Services - $3,825,429

While it is not possible to predict the exact amount of funds providers will require, we can estimate the needs for each funding category. Some services may need more funding, while others need less throughout the fiscal year. This Board motion will allow the HealthWest Chief Finance Officer to monitor expenses within each category and reallocate funds as necessary as required by the needs of the consumers we serve.

Funds will be reallocated throughout the FY2026 budget.

SUGGESTED MOTION (STATE EXACTLY AS IT SHOULD APPEAR IN THE MINUTES)

I move to authorize the HealthWest Board of Directors to approve the increase for the FY2026 contracted Vendors/Providers listed under the five funding sources. The total budget for the five funding services is $56,175,429 effective immediately for FY2026 services.

COMMITTEE DATE	COMMITTEE APPROVAL
November 13, 2026	_____ Yes _____ No _____ Other
BOARD DATE	**BOARD APPROVAL**
November 20, 2026	_____ Yes _____ No _____ Other

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REQUEST FOR HEALTHWEST BOARD CONSIDERATION AND AUTHORIZATION

COMMITTEE	BUDGETED	NON BUDGETED	PARTIALLY BUDGETED
Finance Committee	X		
REQUESTING DIVISION	**REQUEST DATE**		**REQUESTOR SIGNATURE**
Provider Network	November 13, 2026		Christy LaDronka, Chief Clinical Officer

SUMMARY OF REQUEST (GENERAL DESCRIPTION, FINANCING, OTHER OPERATIONAL IMPACT, POSSIBLE ALTERNATIVES)

Authorization is requested for the HealthWest Board to approve eliminating Registered Nurse Positions N65008 and N65010 and layoff employee E93034121 and employee E93034616, effective December 18, 2026.

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Summary of Request:

Over the past several months, HealthWest Clinical Leadership has conducted a comprehensive review of registered nurse staffing levels across clinical departments. This assessment included an evaluation of service demand, nursing responsibilities, caseload requirements, and HealthWest's Medicaid and regulatory obligations.

Based on this review, leadership determined that the current RN staffing level within the Youth Department exceeds the demonstrated clinical need. As a result, HealthWest is proposing to reduce Youth Department RN staffing from 3.0 FTEs to 1.0 FTE, resulting in the elimination of two RN positions effective December 18, 2026.

This recommendation is intended to align staffing resources with current service needs while maintaining the department's ability to meet clinical, operational, and regulatory requirements. HealthWest recognizes the significance of this decision and its impact on the affected employees. The organization will work closely with Human Resources to ensure the reduction process is conducted respectfully, thoughtfully, and in accordance with all applicable policies, labor agreements, and organizational requirements.

SUGGESTED MOTION (STATE EXACTLY AS IT SHOULD APPEAR IN THE MINUTES)

I move to authorize the HealthWest Board of Directors to approve eliminating Registered Nurse Positions N65008 and N65010 and layoff employee E93034121 and employee E93034616, effective December 18, 2026.

COMMITTEE DATE	COMMITTEE APPROVAL
November 13, 2026	_____ Yes _____ No _____ Other
BOARD DATE	**BOARD APPROVAL**
November 20, 2026	_____ Yes _____ No _____ Other

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