



GRETCHEN WHITMER
GOVERNOR

STATE OF MICHIGAN
DEPARTMENT OF LICENSING AND REGULATORY AFFAIRS
LANSING

MARLON I. BROWN, DPA
DIRECTOR

June 5, 2025

Jennifer Herald
Oliver Woods Retirement Village LLC
Suite 200
3196 Kraft Ave SE
Grand Rapids, MI 49512

RE: License #: AL780314126
Investigation #: 2025A1033031
Oliver Woods #4

Dear Ms. Herald:

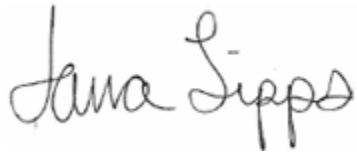
Attached is the Special Investigation Report for the above referenced facility. Due to the violations identified in the report, a written corrective action plan is required. The corrective action plan is due 15 days from the date of this letter and must include the following:

- How compliance with each rule will be achieved.
- Who is directly responsible for implementing the corrective action for each violation.
- Specific time frames for each violation as to when the correction will be completed or implemented.
- How continuing compliance will be maintained once compliance is achieved.
- The signature of the responsible party and a date.

If you desire technical assistance in addressing these issues, please feel free to contact me. In any event, the corrective action plan is due within 15 days. Failure to submit an acceptable corrective action plan will result in disciplinary action.

Please review the enclosed documentation for accuracy and contact me with any questions. In the event that I am not available and you need to speak to someone immediately, please contact the local office at (517) 335-5985.

Sincerely,

A handwritten signature in cursive script that reads "Jana Lipps". The signature is written in dark ink on a light background.

Jana Lipps, Licensing Consultant
Bureau of Community and Health Systems
611 W. Ottawa Street
P.O. Box 30664
Lansing, MI 48909

enclosure

**MICHIGAN DEPARTMENT OF LICENSING AND REGULATORY AFFAIRS
BUREAU OF COMMUNITY AND HEALTH SYSTEMS
SPECIAL INVESTIGATION REPORT**

I. IDENTIFYING INFORMATION

| | |
|---------------------------------------|--|
| License #: | AL780314126 |
| Investigation #: | 2025A1033031 |
| Complaint Receipt Date: | 04/29/2025 |
| Investigation Initiation Date: | 04/29/2025 |
| Report Due Date: | 06/28/2025 |
| Licensee Name: | Oliver Woods Retirement Village LLC |
| Licensee Address: | Suite 200 3196 Kraft Ave SE Grand Rapids, MI 49512 |
| Licensee Telephone #: | (810) 334-8809 |
| Administrator: | Kimberley Gaunt |
| Licensee Designee: | Jennifer Herald, Designee |
| Name of Facility: | Oliver Woods #4 |
| Facility Address: | 1340 W. Oliver Street Owosso, MI 48867 |
| Facility Telephone #: | (989) 729-6060 |
| Original Issuance Date: | 04/02/2012 |
| License Status: | REGULAR |
| Effective Date: | 10/02/2024 |
| Expiration Date: | 10/01/2026 |
| Capacity: | 20 |
| Program Type: | PHYSICALLY HANDICAPPED AGED |

II. ALLEGATION(S)

| | Violation Established? |
|--|------------------------|
| Direct care staff are not properly trained to provide for resident care. | Yes |
| The facility is not properly staffed to provide for the care of the current residents. | Yes |

III. METHODOLOGY

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|------------|---|
| 04/29/2025 | Special Investigation Intake 2025A1033031 |
| 04/29/2025 | Special Investigation Initiated - On Site Interviews conducted with licensee designee, Jennifer Herald, direct care staff/wellness director, Shelby Root. Review of Resident Register, direct care staff schedule, direct care staff trainings, resident assessment plans initiated. |
| 05/20/2025 | Contact - Telephone call made Attempt to interview direct care staff, Brianna Hunt. Voicemail message left, awaiting returned call. |
| 05/20/2025 | Contact - Telephone call made Attempt to interview direct care staff, Laurie, Reed. Voicemail message left, awaiting returned call. |
| 05/20/2025 | Contact - Telephone call made Attempt to interview direct care staff, Deborah Morris. Voicemail message left, awaiting response. |
| 05/20/2025 | Contact - Telephone call made Attempt to interview direct care staff, Kaylee Gamelin. Ms. Gamelin reported she could not be interviewed as she was driving her vehicle and would return the call at a more convenient time. |
| 05/20/2025 | Contact - Telephone call made Interview conducted with direct care staff, Tasha Call, via telephone. |
| 05/20/2025 | Contact - Document Sent Email correspondence sent to Wellness Director, Shelby Root. |
| 05/20/2025 | Contact - Document Received |

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| | Email correspondence received from Wellness Director, Shelby Root. |
| 05/22/2025 | Contact – Telephone call made Interview conducted with Wellness Director, Shelby Root. |
| 05/27/2025 | Contact – Document Received Email correspondence received from Ms. Root. |
| 06/05/2025 | Exit Conference Conducted via telephone with licensee designee, Jennifer Herald. |

ALLEGATION: Direct care staff are not properly trained to provide for resident care.

INVESTIGATION:

On 4/22/25 I received an online complaint regarding Oliver Woods 4, adult foster care facility (the facility). The complaint alleged that direct care staff are not being properly trained prior to assumption of their duties. This complaint was received under special investigation intake #205237 and was filed under another licensed adult foster care facility license number, on the same campus as the facility. The complaint reported allegations of improper direct care staff training for all four licensed adult foster care facilities on this campus. On 4/22/25 I had email correspondence with Complainant 1. Complainant 1 reported direct care staff are not properly trained, but did not provide specific information as to the lack of training being referenced.

On 4/29/25 I conducted an unannounced, on-site investigation at the facility. I interviewed licensee designee, Jennifer Herald, on this date. Ms. Herald reported that there are four licensed adult foster care facilities on the campus. She reported direct care staff employed by the licensee are all cross trained to work in any of the licensed buildings. Ms. Herald reported that each new direct care staff member completes an orientation which includes one-to-one training with a trained direct care staff member. She reported direct care staff complete several trainings in the Relias system which includes trainings for Resident Rights, HIPPA, Blood Borne Pathogens, Fire/Environmental Safety, and Corporate Compliance. She reported that not all the direct care staff are trained to administer medications. Ms. Herald reported that those direct care staff who are not trained to administer medications, do not administer medications. Ms. Herald reported that those direct care staff who are trained in medication administration must complete a medication class and be supervised and signed off as competent by the direct care staff/Wellness Director, Shelby Root.

During the on-site investigation on 4/29/25, I interviewed Ms. Root regarding the allegation. Ms. Root reported that the newly hired direct care staff complete a training orientation checklist. She reported that someone who is inexperienced in direct care receives a minimum of five days of training where they shadow a competent direct care staff member. She reported that individuals who are hired and have previous direct care experience shadow a trained direct care staff member for at a minimum of three days. Ms. Root reported that not all the direct care staff are trained to administer medications. She reported that these direct care staff are paired on the schedule with another direct care staff member who has been trained to administer medications.

During the on-site investigation on 4/29/25 I requested to view the direct care staff schedule for the month of April 2025. I inquired which direct care staff had been trained to administer resident medications. Ms. Root reported the following individuals have completed medication administration training:

- Sheloshah Abbott
- Destiny Brown

- Molly Carter
- Mikayla Dick
- Daniel Ford
- Kaylee Gamelin
- Kaylee Graham
- Brianna Hunt
- Mackenzie Lauback
- Ashley Longtine
- Zoie Martinez
- Deborah Morris
- Kelli Odonnell
- Jerrica Parker
- Laurie Reed
- Brooke Rhodes
- Marie Robinson
- Shelby Root
- Cassandra Russell
- Ernest Skorna
- Danielle Smith
- Bailey Sullivan
- Zoe Wolsfeld

I conducted a random review of direct care staff training records and made the following observations:

- Sheloshah Abbott
 - No documentation of completed CPR/First aid training
- Tasha Call
 - No documentation of completed CPR/First aid training
 - No documentation of completed personal care/supervision/protection training
 - No documentation of completed prevention and containment of communicable diseases training
- Daniel Ford
 - No documentation of completed CPR/First aid training
- Kaylee Graham
 - No documentation of completed CPR/First aid training
- Mackenzie Lauback
 - No documentation of completed CPR/First aid training
- Zoie Martinez
 - No documentation of completed CPR/First aid training
- Mikayla Dick
 - No documentation of completed CPR/First aid training
- Jerrica Parker
 - No documentation of completed CPR/First aid training
- Laurie Reed

- No documentation of completed CPR/First aid training
- Brooke Rhodes
 - No documentation of completed CPR/First aid training
 - No documentation of completed prevention and containment of communicable diseases training
 - No documentation of completed Reporting Requirements training
 - No documentation of completed Resident Rights training
 - No documentation of completed Medication Administration training
 - No documentation of completed Behavior Intervention Techniques training
- Zoe Wolsfeld
 - No documentation of completed CPR/First aid training

On 5/19/25 I sent email correspondence to Ms. Herald and Ms. Root requesting information on CPR/First aid training for the reviewed direct care staff files. I also inquired how training direct care staff in the area of personal care/supervision/protection occurs. I received a response from Ms. Root, reporting that she would obtain this information and respond with the requested information.

On 5/20/25 I interviewed direct care staff, Tasha Call, via telephone regarding the allegation. Ms. Call reported that she was hired to work at the facility in November 2024. She reported that she received about four days of training where she observed a trained direct care staff member. She reported that she had previous experience as a certified nurse aid and the training she received was regarding adult foster care rules, the facility rules and regulations, and resident needs. Ms. Call reported that she completed the required Relias trainings. She reported she has not yet completed medication administration training but is currently working on this.

On 5/20/25 I received email correspondence from Ms. Root. Ms. Root provided documentation of completed Cardiopulmonary Resuscitation trainings that were requested for direct care staff members. Ms. Root only provided documentation of completed CPR/First aid training for five of the eleven files requested.

On 5/22/25 I conducted a telephone interview with Ms. Root. Ms. Root reported that she was having difficulty obtaining all the completed trainings for the direct care staff that had been requested. She reported that some of the Cardiopulmonary Resuscitation training certificates were not currently available for review, and she was looking into this issue. She reported that the Relias system was not providing her with evidence of completed trainings for several direct care staff members who she was sure had completed the required trainings. Ms. Root reported that the direct care staff are trained in personal care/supervision/protection with a training titled, Elements of Connection Points – Direct Care. She further reported that there is an orientation check-off list that also highlights this type of training being provided to direct care staff. I requested Ms. Root provide evidence of completed trainings for the following direct care staff, in the following areas by 5/27/25:

- Zoie Martinez: CPR/First Aid

- Mikayla Dick: CPR/First Aid
- Laurie Reed: CPR/First Aid
- Brooke Rhodes: CPR/First Aid, Reporting Requirements, Resident Rights, Medication Administration, Prevention and containment of communicable diseases, Behavior Techniques
- Tasha Call: Personal Care/Supervision/Protection, Resident Rights, Prevention and containment of communicable diseases.
- Daniel Ford: CPR/First Aid
- Mackenzie Lauback: CPR/First Aid

On 5/27/25 I received email correspondence from Ms. Root. Ms. Root provided documentation of Mackenzie Lauback CPR/First Aid certification dated 7/27/23 and Laurie Reed CPR/First Aid certification dated 3/24/23 – 3/2025. She further provided a *Caregiver Competency Checklist* for Tasha Call dated 5/22/25, which highlighted training completed in Personal Care/Supervision/Protection. Ms. Root reported in this email correspondence that she did not have documentation of the other trainings requested on 5/22/25.

| APPLICABLE RULE | |
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| R 400.15204 | Direct care staff; qualifications and training. |
| | <p>(3) A licensee or administrator shall provide in-service training or make training available through other sources to direct care staff. Direct care staff shall be competent before performing assigned tasks, which shall include being competent in all of the following areas:</p> <ul style="list-style-type: none"> (a) Reporting requirements. (b) First aid. (c) Cardiopulmonary resuscitation. (d) Personal care, supervision, and protection. (e) Resident rights. (f) Safety and fire prevention. (g) Prevention and containment of communicable diseases. |

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| ANALYSIS: | Based upon the direct care staff training records reviewed during this investigation and interviews conducted with Ms. Herald and Ms. Root, it can be determined that there are direct care staff members providing resident care who are missing documentation of completed trainings. Ms. Martinez, Ms. Dick, Ms. Rhodes, Mr. Ford, and Ms. Reed are all found to be missing documentation of current cardiopulmonary resuscitation certifications. Ms. Rhodes did not have documentation of completed trainings in reporting requirements, resident rights, prevention and containment of communicable diseases, and behavior techniques. Ms. Call was missing documentation of resident rights and prevention and containment of communicable diseases. Based upon these observations, a violation has been established at this time. |
| CONCLUSION: | VIOLATION ESTABLISHED |

| APPLICABLE RULE | |
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| R 400.15312 | Resident medications. |
| | (4) When a licensee, administrator, or direct care staff member supervises the taking of medication by a resident, he or she shall comply with all of the following provisions: (a) Be trained in the proper handling and administration of medication. |
| ANALYSIS: | Based upon documentation reviewed during this investigation it can be determined that Ms. Root was not able to produce documentation of completed medication administration training for direct care staff, Brooke Rhodes, despite identifying that Ms. Rhodes is scheduled as a direct care staff member who administers medications at the facility. Therefore, a violation has been established at this time. |
| CONCLUSION: | VIOLATION ESTABLISHED |

ALLEGATION: The facility is not properly staffed to provide for the care of the current residents.

INVESTIGATION:

On 4/22/28 I received an online complaint regarding the facility. This complaint was received under special investigation intake #205237 and was filed under another licensed adult foster care facility license number, on the same campus as the facility. The complaint alleged that the facility is not being adequately staffed to provide for

the care of the current residents. On 4/22/25 I interviewed Complainant 1 who reported that the facility is on a campus with three other licensed adult foster care facilities. Complainant 1 reported that the four licensed facilities are being staffed with direct care staff who float between the four buildings. Complainant 1 reported that there are times when the facility is left with only one direct care staff member providing care to the residents if the other direct care staff member has been asked to assist with resident care at one of the other licensed facilities on this campus. Complainant 1 stated that the facility has residents who require a two-person assist with mobility, transfers, and personal care and one direct care staff member is not adequate to meet the needs of the current residents.

On 4/29/25 I conducted an unannounced on-site investigation at the facility. I interviewed licensee designee, Jennifer Herald, on this date. Ms. Herald reported direct care staff are cross trained to be able to work in any of the four licensed adult foster care facilities on this campus. She reported that there are times when direct care staff are scheduled in this facility and requested to float to another licensed building on this campus to assist with resident care in another building. Ms. Herald reported that there are eight direct care staff members scheduled to cover the four licensed buildings on this campus between the hours of 6am and 10pm. She reported that after 10pm the staffing on the campus is reduced to seven direct care staff members. Ms. Herald reported that this facility is always staffed with two direct care staff members 24/7, but there are times when a third direct care staff is scheduled and asked to float between two different licensed facilities on the campus to administer medications. She reported that when this occurs, this facility is not left with less than two direct care staff members to provide for resident care.

During the on-site investigation on 4/29/25, I interviewed Ms. Root. Ms. Root reported that the facility currently cares for one resident who requires a two-person assist with mobility, transfers, and/or personal care. She identified this resident as Resident A. Ms. Root reported that Resident A requires two direct care staff members to assist her with transfers as she requires the use of a Hoyer lift. She reported that among the four licensed adult foster care facilities on this campus, there are always two direct care staff who are trained in medication administration duties who float between the four buildings to provide for medication administration. Ms. Root reported that one direct care staff trained in medication administration can be assigned to two of the licensed facilities on the campus at a time but never is one direct care staff assigned to float between all four buildings for medication administration duties. Ms. Root reported that direct care staff who administer medications may be assigned to a specific building on the schedule as a part of the staffing ratio and when they float to another building to administer medications, one of the direct care staff in that building may have to float to the facility to ensure adequate staffing patterns are kept for resident care. Ms. Root reported that the facility is staffed with two direct care staff members at all hours of the day. Ms. Root reported that from 6am to 10pm there are a total of eight direct care staff members scheduled to cover all four facilities on this campus, but after 10pm until 6am there are only seven direct care staff members scheduled to cover all four facilities.

During the on-site investigation, I reviewed the following documents:

- *Oliver Woods Assisted Living Date Range Schedule*, for the dates 4/1/25 – 4/29/25. I reviewed this schedule which listed the direct care staff schedule for each of the four licensed adult foster care facilities on this campus. I made the following observations:
 - The schedule for this facility identified that there was only one direct care staff member scheduled to work from 6:30pm to 6am on 4/5/25 & 4/27/25.
 - The schedule identified that on 4/20/25 direct care staff, Aaron Perry, was scheduled to work from 6am to 6:30pm at this facility and another licensed facility on this campus.
- *SPG Wellness Evaluation – V4*, for Resident A, dated 3/26/25. I requested to review Resident A's assessment plan and was provided this document by Ms. Root and Ms. Herald. On page one under section, *II. Escort and Transfer*, subsection, *A. Escort and Transfer*, it states, "[Resident A] requires comprehensive service level due to cognitive or physical limitations. Resident may utilize a mechanical lift or require 2 person assistance." I inquired of Ms. Root what the "mechanical lift" referred to in this statement. Ms. Root reported that the mechanical lift would be a "sit-to-stand" device or a Hoyer lift. Ms. Root reported that Resident A utilizes two direct care staff members for transfers due to the need for a Hoyer lift for transfers. Ms. Root reported that a Hoyer lift requires the support of two direct care staff members to operate. Under subsection, *B. Service Plan*, the document identifies that Resident A utilizes a Hoyer lift for safety.

On 5/20/25 I interviewed Ms. Call, via telephone, regarding the allegation. Ms. Call reported that she works at all four of the licensed adult foster care facilities on this campus. She reported that this facility is where she is primarily scheduled to work. She reported that each of the licensed facilities is scheduled to have two direct care staff members per shift. She reported that she does not usually work the night shift, from 6pm to 6:30am, which makes it difficult for her to answer whether there are two direct care staff members at the facility during these hours. Ms. Call reported that she feels the facility has been adequately staffed on the dates and times she has been scheduled to work.

On 5/22/25 I interviewed Ms. Root, via telephone, regarding the findings from the direct care staff schedule reviewed during the on-site investigation. I explained to Ms. Root that I observed multiple days when direct care staff were scheduled to work 24 hours to 48 hours intervals at a time. I inquired whether this was common practice. Ms. Root reported that the longest shift a direct care staff has worked is 16 hours straight. She reported that when she views the schedule in a different format, other than the format provided during the on-site investigation, it is clear who is working at the facility and what hours they are scheduled. I requested she submit another format for my review as the one she provided while I was on-site

encompassed all four licensed facilities on the property, and it is difficult to follow. Ms. Root reported she would email the schedule for April 2025 in another format.

On 5/27/25 I received email correspondence from Ms. Root. Ms. Root provided a copy of the direct care staff schedule for the facility in another format as she had previously reported. I reviewed this schedule and made the following observations:

- On 4/2/25 there was one direct care staff scheduled at the facility from 12am to 6am.
- On 4/3/25 there was one direct care staff scheduled at the facility from 3am to 6am.
- On 4/4/25 there was one direct care staff scheduled at the facility from 4am to 6am.
- On 4/5/25 there was one direct care staff scheduled at the facility from 6:30pm to 6am.
- On 4/6/25 there was one direct care staff scheduled at the facility from 10pm to 6am.
- On 4/10/25 there was one direct care staff scheduled at the facility from 2pm to 6pm and 10pm to 6am.
- On 4/11/25 there was one direct care staff scheduled at the facility from 10pm to 6am.
- On 4/12/25 there was one direct care staff scheduled at the facility from 12am to 6am.
- On 4/17/25 there was one direct care staff scheduled at the facility from 10pm to 6am.
- On 4/19/25 there was one direct care staff scheduled at the facility from 6:30am to 10am.
- On 4/20/25 there was one direct care staff scheduled at the facility from 10am to 12pm, 2pm to 4pm, and 7pm to 10pm.
- On 4/23/25 there was one direct care staff scheduled at the facility from 4am to 6am.
- On 4/24/25 there was one direct care staff scheduled at the facility from 3pm to 4pm and 1am to 6am.
- On 4/26/25 there was one direct care staff scheduled at the facility from 2pm to 6pm.
- On 4/27/25 there was one direct care staff scheduled at the facility from 6:30pm to 6am.
- On 4/28/25 there was one direct care staff scheduled at the facility from 6:30am to 10am and 5pm to 6pm.

I reviewed all four of the schedules that Ms. Root provided for all four of the licensed adult foster care facilities on this campus and cross-matched them for the dates 4/1/25 through 4/5/25. I observed the following information:

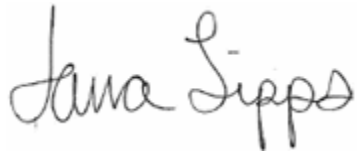
- 4/1/25: Between the hours of 6:30am to 8:45am there were only 7 direct care staff assigned to the entire campus. Between the hours of 10pm to 6am there were only 6 direct care staff scheduled for the entire campus.

- 4/2/25: Between the hours of 6:30am to 6pm there were 8 direct care staff assigned to the entire campus. Between the hours of 12am to 6am there were only 6 direct care staff scheduled for the entire campus.
- 4/3/25: Between the hours of 6:30am to 6pm there were 8 direct care staff scheduled for the entire campus. Between 3am to 6am there were 6 direct care staff scheduled for the entire campus.
- 4/4/25: Between the hours of 6:30am to 6pm there were 8 direct care staff scheduled for the entire campus. Between 4am to 6am there were six direct care staff scheduled for the entire campus.
- 4/5/25: Between the hours of 6:30am to 6pm there were 9 direct care staff scheduled for the entire campus. Between the hours of 6:30pm to 10pm there were five direct care staff scheduled for the entire campus. Between 10pm to 6am there were six direct care staff scheduled for the entire campus.

| APPLICABLE RULE | |
|------------------------|---|
| R 400.15206 | Staffing requirements. |
| | (2) A licensee shall have sufficient direct care staff on duty at all times for the supervision, personal care, and protection of residents and to provide the services specified in the resident's resident care agreement and assessment plan. |
| ANALYSIS: | Based upon interviews conducted with Ms. Herald & Ms. Root, review of resident assessment plans, and review of the direct care staff schedule in two different formats, it can be determined that there is conflicting information being provided between the verbal interviews and what the direct care staff schedule identifies. As a result, a violation has been established as there were numerous instances on both direct care staff schedules provided where there was only one direct care staff scheduled to be available to provide for resident care and there is one resident who requires the assistance of two direct care staff members with personal care/mobility/transfers as documented in Resident A's <i>SPG Wellness Evaluation – V4</i> . Furthermore, I reviewed and cross-matched the four direct care staff schedules for the four licensed facilities on this campus for the dates 4/1/25 to 4/5/25. I reviewed these schedules to determine whether adequate staffing was available on the campus for the four licensed facilities. On the dates 4/2/25, 4/3/25, 4/4/25, & 4/5/25, this facility was not adequately staffed to provide for the care needs of the current residents. Therefore, a violation has been established at this time. |
| CONCLUSION: | VIOLATION ESTABLISHED |

IV. RECOMMENDATION

Contingent upon receipt of an approved corrective action plan, no change to the status of the license recommended at this time.

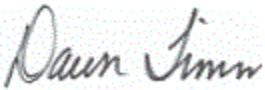


6/3/25

Jana Lipps
Licensing Consultant

Date

Approved By:



06/05/2025

Dawn N. Timm
Area Manager

Date