

Franklin County Office on Aging Senior Options



Human Services Levy Review Committee Report May 2017



December 28, 2016

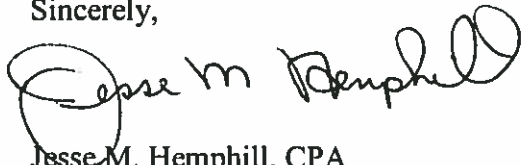
John O'Grady, President
Paula Brooks, Commissioner
Marilyn Brown, Commissioner
Franklin County Board of Commissioners
373 S. High St., 26th Floor
Columbus, Ohio 43215-6314

Dear Commissioners:

After a thorough analysis of the Senior Options levy requested by the Franklin County Office on Aging, it is the recommendation of the Human Services Levy Review Committee that the Board of Commissioners place a five-year 1.75 mill levy (1.3 mill renewal with a 0.45 mill increase) effective for tax collections beginning January 1, 2018. Enclosed is a detailed levy review report that supports our recommendation.

Thank you for the opportunity to serve Franklin County in such a meaningful way.

Sincerely,



Jesse M. Hemphill, CPA
Chair, Human Services Levy Review Committee

Cc: Kenneth Wilson, County Administrator

2016 Senior Options

Human Services Levy Review Committee

Report

On March 30, 1999, the Franklin County Board of Commissioners passed Resolution No. 311-99 (see Appendix A) creating the Human Services Levy Review Committee consisting of seven (7) members to fulfill the following charge:

- ☑ Review social service levy requests
- ☑ Evaluate potential levy impact on service population, other social service providers, and the community
- ☑ Evaluate agency program performance on voted levy objectives
- ☑ Conduct ongoing financial reviews of levy funded social service agencies
- ☑ Provide recommendations regarding proposed millage amounts and the timing of levy requests

Current Committee members appointed by the Franklin County Board of Commissioners are (see Appendices A-G for appointment resolutions):

1. James A. Bowman, President and CEO
National Affordable Housing Trust
2. Denise Bronson, Ph.D., Professor
The Ohio State University
3. Jerome E. Friedman
Franklin County Resident
4. Jesse M. Hemphill, CPA, President and CEO
Hemphill & Associates, Inc. – **Chairman, Human Service Levy Review Committee**
5. Jean Carter Ryan, President
Columbus-Franklin County Finance Authority
6. Zachary T. Talarek, CPA, Director
Franklin County Office of Management and Budget
7. Nathan P. Wymer, Associate Vice President
Nationwide

The Committee is staffed by:

Heidi B. Hallas, Sr. Performance Analyst 2

Garrett Crane, Sr. Performance Analyst

Franklin County Office of Management and Budget (OMB)

2016
Senior
Options

Human
Services
Levy
Review
Committee

Report

The Human Services Levy Review Committee evaluates levy requests from both a financial and programmatic perspective to assure that information provided by human services agencies that seek levy approved funding have demonstrated prudent program and financial planning.

Committee staff works with the various agencies to compile and analyze the data presented to Committee members. Committee staff also prepare issue-oriented analyses and presents their findings to Committee members.

Committee staff works with Franklin County Children Services (FCCS), Franklin County Board of Developmental Disabilities (FCBDD), Franklin County Alcohol, Drug and Mental Health (ADAMH) Board, and Franklin County Office on Aging (FCOA) to submit financial and program information for the Levy Review Committee's consideration, and to provide regular updates to the Levy Review Committee. This approach ensures the Levy Review Committee can knowledgeably evaluate each levy request, which facilitates its evaluation of future funding requests.

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EXECUTIVE SUMMARY

Background

The Franklin County Board of Commissioners, as the taxing authority for Franklin County, received a request from the Franklin County Office on Aging (FCOA) on July 28, 2016. The request was to place a county-wide property tax levy of 1.75 mills on the May 2, 2017 ballot. This request included a renewal of the existing 1.3 mill levy expiring December 31, 2017 plus a 0.45 mill increase. On behalf of the Board of Commissioners, Commissioner John O'Grady, President, forwarded FCOA's request to the Human Services Levy Review Committee (HSLRC). The Commissioners asked the Committee to review the request and advise them of the Committee's recommendations.

After reviewing the FCOA presentation and written levy proposal, the HSLRC and its staff formulated a series of follow-up questions for FCOA staff. FCOA was given the opportunity to address the Committee's questions in writing and during follow-up face-to-face meetings. In addition, Direct Effect Solutions presented the findings of a FCOA operational assessment to the HSLRC.

Agency Overview

Franklin County's first levy (0.75 mill) to provide a system of home and community-based services for seniors was passed in 1992. This system of services was called the Franklin County Senior Options (FCSO) program and was supported with levy funding for five years. The voters approved an increase to 0.85 mill in 1998, a replacement levy at 0.85 mill in 2002, and a 0.90 mill levy in 2007. The current levy (1.30 mills) was approved by voters in 2012, took effect in 2013, and expires at the end of 2017.

With the support of levy funding, FCSO has provided community-based services to Franklin County residents age 60 and older since 1993. Not only does FCSO allow clients to maintain their independence, it also supports caregivers with the often overwhelming task of caring for a family member or friend with limited abilities.

FCSO makes available home and community-based care services for Franklin County seniors who have a demonstrated need for services that FCSO can provide. FCSO's programs include the following:

- *Home and Community-Based Care* provides needed services on an ongoing basis to older adults and their families, so they can preserve their independence and experience an improved quality of life.
- *Customer Services Management* provides individualized customer services to older adults and their families so they can access a trained professional who can address their unmet needs.
- *Community Support, Outreach, and Specialized Services* provide supportive services so seniors improve their ability to live and function in the community.
- *Public Information* provides information, education, and consultation services to older adults and their families so they can learn about available resources.

- *Safe Housing* provides home modifications or repairs, safety products, and assistance to eligible residents so they can live in their homes free of barriers and unsafe conditions.

Human Services Levy Review Committee's Recommendation

Based on the HSLRC's review of FCOA's programmatic, operational, and financial information and additional research and analysis conducted by HSLRC staff, the Committee recommends a five-year 1.75 mill levy (1.3 mill renewal with a 0.45 mill increase) effective for tax collections beginning January 1, 2018. The HSLRC recommendation is based on the Recommended Fiscal Plan through 2022 for the 1.75 mill levy. The Committee also recommends that all requests for additional positions be included in the annual budget submission to the Board of Commissioners and the \$2.1 million in funds projected to remain in 2022 in addition to the 90 day ending cash balance requirement should be used for the implementation of the recommendations of the operational assessment during the next levy cycle.

The recommendation is supported by the following:

1. **Aging Population:** There is a growing demand for senior services as people are living longer. In addition, the post-World War II baby boom generation has begun to retire. According to the 2010 Census, Franklin County had 170,456 persons age 60 and older. This number reflects a 22.9% increase over the 2000 Census. The Scripps Gerontology Center at Miami University estimates an additional 36.6% increase in the 60 and older age group in this decade, with much of the increase taking place during the next levy cycle. During 2010, FCOA had 4.1% of Franklin County residents 60 or older enrolled in the FCSO program. Based on the requested levy amount, FCOA is projected to serve 10,757 participants in FCSO in 2020, representing 4.6% of the senior population.
2. **Demand for Senior Services:** During the current levy cycle, the demand for FCSO home and community-based care services is projected to increase 21.2% between 2013 and 2017. In consideration of the historical trends, FCOA was using conservative estimates with their projection of FCSO client enrollment during the next levy cycle. FCOA is projecting a 12.5% increase in FCSO participants between 2018 and 2022. This reflects FCOA's understanding the need to remain fiscally prudent while still providing services to the County's seniors.

Another important consideration is the finding from the Needs Assessment that the next group of seniors (residents 55-64 years old) is more receptive to using resources provided by the FCOA than the previous generation. According to OrangeBoy, Inc., overall demand for services is expected to increase as the receptivity to using senior services increases.

3. **Increasing Functional Limitations Among Seniors:** Scripps Gerontology Center at Miami University projects a 48% increase for those Franklin County residents age 60 years and over with a severe physical and/or cognitive disability and a 50% increase for those with a moderate disability between 2010 and 2025.

There were 18,444 disabled seniors in Franklin County in 2015 and 24,239 projected by 2025. Although FCSO is not limited to disabled seniors, serving those participants with functional limitations does constitute the largest part of the program's allocated resources.

- 4. Stagnant Levy Revenues:** The majority of revenue for FCSO comes from levy funding, which is based on the County's real estate tax collections. During the 2003-2007 levy cycle, property values increased from \$21.3 billion to \$26.4 billion, or 24.4%. This provided FCOA with increased revenues in order to address inflation and the increase in demand for service. Yet toward the end of 2008-2012 levy cycle, property values decreased due to the downturn in the economy. The assessment resulted in a 6.0% decrease in property values from tax year 2010. The Franklin County Auditor's Office set the assessed valuation for tax year 2011 at \$26.3 billion, therefore the property tax levy approved in 2012 was calculated upon this figure. The property valuation for tax year 2015, collection year 2016 that was used to project revenue for the current FCOA levy request was a stagnant \$26.6 billion. In addition, FCOA is projecting little net growth in property values based on the current trends over the 2018-2022 levy cycle. Therefore, this requires the increase in the requested levy millage to accommodate inflation and the aging population.

The recommendation also considers the effect of the complete phase out of the tangible personal property tax (TPPT) reimbursement for the levy agencies in Franklin County. The original impact on the 2013-2017 levy revenue was a \$1.9 million reduction over the life of the five-year cycle. However, FCOA lost an additional \$538,195 when the 2016-2017 state biennial budget (House Bill 64) passed including a provision for the complete phase out of TPPT as of July 1, 2015.

- 5. Enabling Seniors to Remain in Their Homes:** According to the Robert Wood Johnson Foundation, unmet social needs, such as adequate nutrition, transportation to medical appointments, and stable housing, are important elements for the support of good health. The services provided by FCOA keep seniors in their home, resulting in a cost effective intervention that maintains quality of life. For 2015, the average rate of a long-term care facility was \$6,758 per month. The average cost of home and community-based services and case management services provided by FCSO was \$260 per month. In addition, based on telephone interviews conducted with those FCSO participants and/or their caregivers who recently entered a long-term care facility, 93% of respondents indicated that services had helped their loved-one retain a good quality of life while in the program.

INTRODUCTION

Since 1993, the Franklin County Office on Aging (FCOA) has been providing community-based services through the levy supported Franklin County Senior Options (FCSO) program. The original senior levy was put before the voters in 1992 after the elimination of state funding for the Options for Elders program.

For almost 25 years, the Senior Options program has helped Franklin County residents over the age 60, who have a demonstrated need for FCSO services, maintain their independence and quality of life. FCOA provided Home and Community-Based Care services to 9,015 individuals in 2015.

The purpose of the FCSO program is to help older adults maintain their sense of independence, retain a good quality of life, and avoid or delay the need for institutional care. FCOA plays two major roles in the implementation of FCSO: service provider and service purchaser. FCSO is the "one-stop shopping" point for information and access to senior services. A single call to FCSO at (614) 525-6200 can link older adults and their families with a caring professional trained to help solve senior problems. Through a large provider network, FCSO provides services such as home delivered meals, homemaker, personal care, respite care, adult day care, transportation, emergency response systems, and minor home repair.

The Franklin County Board of Commissioners, as the taxing authority for the County, received a request from FCOA to place a countywide property tax levy of 1.75 mills on the May 2, 2017 ballot for FCSO. This request is a five-year renewal of the 1.30 mill levy expiring at the end of 2017, plus an increase of 0.45 mill (see Appendix H).

Commissioner John O'Grady, on behalf of the Board of Commissioners, forwarded the FCOA request to the Human Services Levy Review Committee Chairperson, Jesse Hemphill. In the request, the Commissioners asked the Committee to review FCOA's request and advise them of their recommendations (see Appendix I).

This report is the Human Services Levy Review Committee's response to the Board of Commissioners' request.

Franklin County Vision

The vision is to provide responsible, efficient, and effective government that delivers outstanding public services through innovative leadership and sound fiscal management, and improves the quality of life for the residents of Franklin County.

Agency Mission

The mission of the Franklin County Office on Aging is to provide centralized access to diverse programs and individualized services for older adults and their families so they can preserve their independence and quality of life.

Franklin County Office on Aging

Franklin County was the first urban county in Ohio to pass a senior levy and was the first to use the levy for the development of a system of home and community-based care. As of 2016, 73 of Ohio's 88 counties had some form of senior levy supporting home and community-based care. Franklin County residents have been supportive of the levy since the initial campaign. FCSO is funded by the five-year Senior Services Levy passed by Franklin County voters in 1992, 1997, 2002, 2007, and 2012.

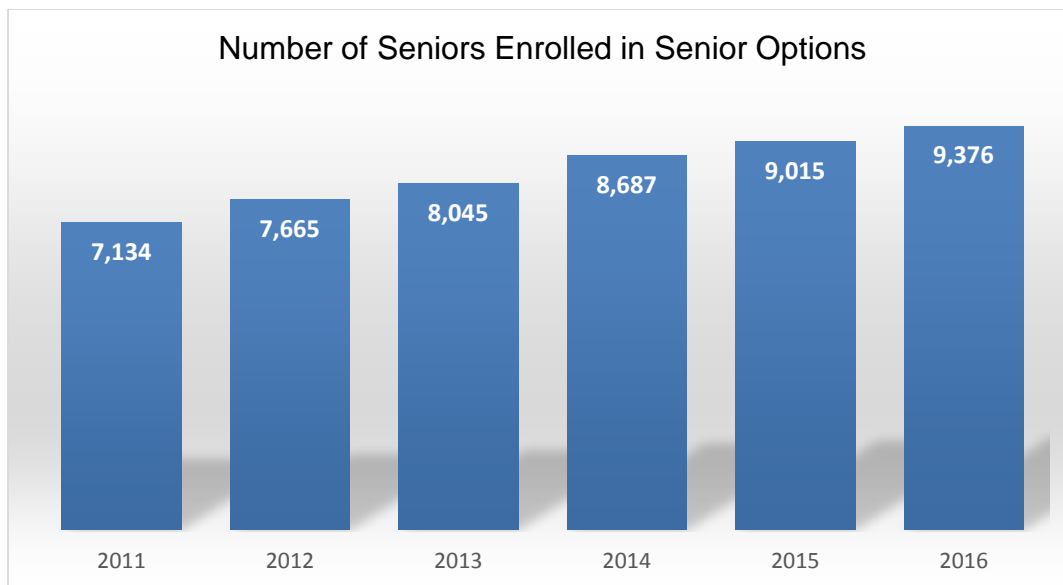
Implementing the first levy, FCOA developed a program that would provide the following:

- A central entry point or “one-stop shop” approach would be retained;
- A person would not be required to spend down to poverty in order to receive services (a cost sharing mechanism would remain part of the program);
- A person would not have to decline to a nursing-home level of frailty to get services; and
- A diverse set of services and programs would be made available.

These elements continue to be incorporated in FCSO and have remained the focus of the program.

Senior Options Participants

FCOA serves Franklin County residents age 60 and older who have a demonstrated need for services that FCSO can provide. The purpose of the FCSO program is to help older adults maintain their sense of independence, retain a good quality of life, and avoid or delay the need for institutional care. As shown in the chart on the following page, FCOA provided home and community-based care services to over 9,015 individuals in 2015, a 20.9% increase from 2011. FCOA estimates that over 9,376 residents will receive services in 2016, an additional 4.0% increase over the previous year.



Individuals must meet the following criteria in order to be enrolled for FCSO community-based services:

- Be at least 60 years of age;
- Reside in Franklin County in an independent living setting;
- Have an unmet or underserved need for service that FCSO provides or have a functional impairment in at least one functional limitation in Activities of Daily Living (ADL) or Instrumental Activities of Daily Living (IADL);
- Agree to contribute to the cost of their services at the level deemed appropriate on the FCSO sliding fee scale; and
- Not currently enrolled in Ohio's PASSPORT program.

FCOA provided a demographic snapshot of the seniors enrolled in FCSO in December 2015. Of the enrollees at that time, 73% were female, 65% lived alone, and 36% were between the ages of 70-79. Forty-eight percent had a co-payment based on the FCSO sliding fee scale. The financial eligibility criteria includes those who would pay 100% of the cost of their services; however, those seniors only represented 2% of enrollees in July 2016. More than half, or 52%, of the FCSO participants pay no co-pay due to their low income and asset status.

Scripps Gerontology Center at Miami University projects a 48% increase for those Franklin County residents age 60 years and over with a severe physical and/or cognitive disability and a 50% increase for those with a moderate disability between 2010 and 2025. Scripps defines a moderate disability as a limitation in at least one activity of ADL, such as eating, dressing, or bathing, while a severe disability is a limitation in at least two ADLs or having cognitive impairment. There were 18,444 disabled seniors in Franklin County in 2015 and 24,239 projected by 2025. The table on the following page shows the percentage of 2015 FCSO participants reporting a functional limitation. According to FCOA, most FCSO participants had more than one functional limitation.

Functional Limitation of FCSO Participants in 2015

Cannot drive or take the bus	56%
Cannot easily summons help in the event of a fall or medical emergency	55%
Cannot perform house cleaning tasks or do laundry	40%
Cannot prepare meals	40%
Cannot be left alone for periods longer than one hour	8%
Cannot bathe or dress unassisted	4%
Cognitive of health status require constant supervision	2%

FCOA Services

FCOA partners with over 90 organizations to provide the community-based services that have been identified as crucial to meeting the needs of those wishing to remain as independent as long as possible at home. Based on the FCOA organization structure, the services available to FCSO enrolled participants and Franklin County residents are divided into three lines of business:

I. Senior Services

Home and Community-Based Care – The purpose of the Home and Community-Based Care program is to provide needed services to Franklin County older adults and their families, so they can preserve their independence and experience an improved quality of life. In 2015, a total of \$20.1 million was expended to provide the following services to 9,015 seniors:

- Home delivered meals;
- Homemaker services;
- Adult day services;
- Emergency response systems (installed/monitored);
- Personal care services;
- Respite services;
- Health maintenance supplies; and
- Transportation services.

Community Support, Outreach, and Specialized Services – The purpose of the Community Support, Outreach, and Specialized Services program is to provide specialized services to older adults so they can improve their ability to live and function in the community. In 2015, FCOA awarded grants in the amount of \$3.4 million to government and non-profit agencies for the provision of the following services to 27,596 seniors¹:

¹ The number of seniors provided services may include duplicate counts as seniors were able to access more than one service.

- Congregate meals;
- Employment and volunteer services;
- Caregiver consultation;
- Prescription support;
- Health/clinic screenings;
- Older adult refugee services;
- Legal aid services; and
- Senior fitness programs.

Customer Services Management – The purpose of the Customer Services Management program is to provide individualized customer service to older adults and their families so they can access a trained professional who can address their unmet needs. In addition to assisting seniors enrolled in the Senior Options program, FCOA case managers are responsible for answering telephone calls for information and referral as well as providing one-time advocate services on behalf of seniors and their families. In 2015, a total of 13,797 inquiries² for information and referral were made on the FCOA central phone line. Also in 2015, case managers provided advocacy on behalf of 1,628 seniors, a 31.4% increase from 2011. Types of services provided in the Customer Services Management program include:

- Information and referral;
- Client needs assessments;
- Case management services;
- Advocacy;
- Service coordination;
- Crisis intervention; and
- Caregiver consultation and support.

II. Community Awareness

Public Information – The purpose of the Public Information program is to provide information, education, and consultation services to older adults and their families so they can gain knowledge about access to resources and services. Types of services provided in the Public Information program include:

- Senior Citizens Information Handbook;
- Conferences and trainings;
- Information and resource materials;
- Public engagements and outings;
- Health fairs; and
- Advertising and media relations.

² Information and referral numbers may reflect more than one inquiry per senior.

III. Adult Safety

Safe Housing – The purpose of the Safe Housing program is to provide home modifications and/or repair, safety products, and assistance to eligible Franklin County residents so they can live in their homes free of barriers and unsafe conditions. The number of seniors receiving services increased 42.1% since 2011. In 2015, 2,233 seniors were served by the Safe Housing program, receiving a total of almost \$1.6 million in home repairs and modifications. Types of services provided in the Safe Housing program include:

- Home inspections;
- Minor home repairs or modifications;
- Wheelchair ramps;
- Moving assistance;
- Sanitation and pest control; and
- Smoke detector installation.

Protective Interventions³ – The purpose of the Protective Interventions program is to provide advocacy for client rights, investigations, court intervention, and other assistance to abused, neglected, and exploited adults so they can be protected from individuals or environments that endanger their physical or emotional well-being. Types of services provided in the Protective Intervention program include:

- Adult Protective Services (APS);
- Intake assessment;
- Advocacy;
- Guardianships;
- Conservatorships; and
- Protective court orders.

FCOA Roles

FCOA maintains a staff of 79 positions that support the two major roles in the provision of FCSO: service provider and service purchaser. The service provider role involves case management and the service purchaser role involves purchasing needed services for clients through third party arrangements.

Service Provider Role

FCOA provides direct case management services for participants in the Senior Options program through the case management staff. FCOA currently has 43 case managers, seven case manager supervisors, and one program manager working in the program. FCOA has a diverse staff that is multi-lingual and multi-cultural, that enables the agency to work with immigrant populations as well as English speaking seniors. FCSO provides

³ Not supported by property tax levy funds.

flyers in nine languages other than English: Russian, Khmer, Amharic, Somali, Spanish, Chinese, Laotian, Vietnamese, and Korean. Flyers are also available in Braille.

Case management services are also provided through a contract with the Central Ohio Area Agency on Aging (COAAA). For more than 30 years, the COAAA has been a resource for older adults and their families. COAAA provides information, resources, and education to the community, as well as provides services for elderly residents to continue independent living in their own homes. COAAA is operated under the Recreation and Parks Department of the City of Columbus. The COAAA serves an eight-county area and administers the 2176 waiver program and the PASSPORT program, which serves low income seniors who meet a nursing home level of care standard. Under the contract with Franklin County for FCSO, COAAA has 37 case managers, five case manager supervisors, one clinical manager, one quality improvement coordinator, one clerical support staff member, and a part-time client services director.

The combined case management staff's experience and training allow them to serve as resources for community information, advocacy, assessment, and case management. All case managers have at least a four-year degree in either social work or a related field. At both agencies, most case managers are licensed social workers and have experience working with older adults prior to coming to FCSO. The current staff has experience in the following areas: hospital discharge planning, mental health case management, crisis management, corrections, adult protection services, nursing homes, and community organizations serving older adults.

FCOA and COAAA staff case managers are trained to recognize a set of eligible standards for each level of case management. However, COAAA case managers handle cases with extensive needs due to a weak support system and a moderate to high impairment level that require home visits. According to FCOA, the current standards for maximum caseloads in FCSO are 115 clients per each case manager at FCOA and 40 per each case manager at COAAA.

Over two-thirds of FCSO participants receive Ongoing Case Management that includes long-term services that are the least intrusive of the long-term case management levels. Participants appropriate for Ongoing Case Management are either able to advocate for themselves or have a good support system in place so communication can be maintained with the case manager over the telephone. Participants receiving Ongoing Case Management have an initial home visit and then all other interactions are through telephone conversations. Participants who are confirmed appropriate for this level of case management are assigned to a case manager who orders services and maintains at least quarterly telephone contact with the participant or family.

Seniors with more extensive needs who require assistance for longer than three months are assigned to one of three case management levels. Approximately three in 10 FCSO participants are assigned to Case Management Tiers I-III. Case Management Tier I participants require regular home visits and social work intervention. They are likely to have absent or weak support systems in addition to advanced age, declining health, or impaired cognitive status. They may also have acute or chronic mental health problems, and may be involved with Adult Protective Services (APS). Case Management Tier II is

recognized as effective in situations where staff is unable to communicate adequately over the telephone. This can occur when the senior is without a telephone, is deaf or hard of hearing, has difficulty speaking, or has English as their second language. FCSO participants are assigned to Tier III when their needs don't warrant Case Management Tier II but are also not appropriate for the Ongoing Case Management level of care. FCOA partners with other agencies to meet the needs of these clients.

Participants who receive long-term case management are reassessed to determine their need for services at six and twelve-month intervals. Income and asset levels are verified every other year at the annual reassessment. Reassessment for Ongoing Case Management participants are completed by telephone. The Case Management Tier I and II participants receive home visits. During this visit, the case manager also reviews the appropriateness of the current case management level. Participants can and do move to other levels whenever circumstances warrant a shift in need.

Service Purchaser Role

FCOA purchases services to be provided directly to seniors utilizing the following three methods:

1. Grants to Non-Profit Agencies
Approximately \$3.4 million was disbursed in 2015 through grant agreements with government agencies and non-profit community organizations. These grants were issued upon a Request for Proposal (RFP) process managed by FCOA. The purpose of the grants was to expand the range of services available to the senior community. The funding assists in filling service gaps, such as nursing clinics, care giver support, group transportation, and hearing assessments.
2. Competitively Bid Purchase of Service (POS) Agreements
Most services provided are the result of a POS agreement entered into between the Franklin County Board of Commissioners and over 90 agencies that provide home and community-based services. The agencies include private for-profit and non-profit entities. Unit rates for the services are competitively bid through the Franklin County Purchasing Department.
3. Purchases on a Case-by-Case Basis
The purchase of minor home repairs, emergency needs, and certain caregiver support is provided on a case-by-case basis. The services may include rent assistance, utility assistance, and moving services.

Collaborations

In addition to the COAAA, FCOA partners with various agencies to advocate for senior services and provide services that meet their needs. The following are highlights of community collaborations that occurred during the current levy cycle.

What began as a small group of stakeholders discussing the potential for Columbus to seek an "Age-Friendly" city designation in 2015 evolved into the Age-Friendly Columbus initiative with the Mid-Ohio Regional Planning Commission (MORPC) taking the lead in administering the project. Working within the World Health Organization and AARP Livable Communities guidelines, Age-Friendly Columbus will work toward improvements in 8 focus areas: transportation, housing, social participation, respect and inclusion, civic participation and employment, community support and health services, and safety/emergency preparedness. There are currently no cities in Ohio that have completed the designation process. The Osteopathic Heritage Foundation, Columbus Foundation, FCOA, and COAAA were early funding partners for this effort.

FCOA participated in the Adult Immunization Coalition of Central Ohio (AICCO) each year during this levy cycle. The coalition is a collaborative effort of concerned partners who are committed to reducing the burden of vaccine preventable diseases by educating healthcare providers and the public, and encouraging the implementation of programs to increase adult immunization rates. The AICCO has grown to include healthcare providers, social service agencies, vaccine manufacturers, Medicare associated agencies, and the Ohio Department of Health. FCOA provides funding to the Coalition to purchase influenza vaccine that is dispensed to thousands of low income older adults in Franklin County. Other funders include the Osteopathic Heritage Foundation. In the future, AICCO hopes to expand vaccine availability for pneumonia and tetanus/diphtheria/pertussis vaccine.

In 2015, the Franklin County Coroner convened a group of social service and mental health agency representatives to share her concerns about the rising number of older adult suicides in Franklin County. The largest number of those age sixty and over are white males who commit suicide using a gun. The task force is working to create avenues to increase community education around this issue by targeting key groups, such as clergy, physicians, and caregiver support groups. Many of the services and programs made available through FCOA's Community Support and Outreach activities focus directly on the social connectedness component of suicide prevention in older adults, such as congregate dining centers, caregiver support, small group transportation, and friendly visiting.

FCOA participates as a member of Central Ohio Transit Authority's (COTA) Mobility Advisory Board (MAB). The mission of the MAB is to assist COTA in developing innovative, viable transportation solutions for underserved individuals and businesses. This group is comprised of a diverse population of business and social service entities whose constituents are riders of COTA Mainstream paratransit or COTA's regular fixed-route bus service. The MAB was involved with COTA's re-structuring of the Mobility Services division several years ago and assisted COTA in developing best practices for determining assessment and eligibility standards for paratransit services. According to

FCOA, helping COTA develop an assessment tool to distinguish those who can use paratransit from those who need other transportation resources ensures that seniors can be transported appropriately. Enrollment into FCOA transportation services increased 18% between 2011 and 2015.

FCOA continues to participate on the Central Ohio Bed Bug Task Force, which assists with extermination for bed bugs. The presence of bed bugs in the community presents an ongoing challenge for FCSO staff, provider agency staff, and the clients who are dealing with an infestation. The task force offers a way to maintain an up-to-date knowledge of current trends regarding bed bug populations, effective and non-effective treatment practices, and other educational resources. Each year, the task force hosts an educational summit for the community at large in order to share information on how to avoid an infestation of bed bugs in home or community settings and best practices to effectively exterminate.

The Central Ohio Aging and Disability Resource Network (ADRN) involves Franklin and the other counties that are a part of the COAAA network. Members of this partnership are working to streamline access to long-term care services and supports. In addition, all counties strive to help create a collaborative network that consists of those agencies providing services and supports, either primary or ancillary, to the target populations, both seniors and the disabled, with the shared goal of having those individuals living as independently as possible for as long as possible.

Since 2011, FCOA has worked closely with the Franklin County Veterans Service Commission (VSC) to address service needs of veterans who qualify for both VSC and FCSO. VSC has utilized existing FCOA service specifications, eligibility criteria, and rates for emergency response systems and minor home repair rather than creating duplicate structures. The collaboration for the provision of minor home repair services has resulted in quicker completion of home repairs for veterans. In addition, the VSC provides reimbursement funding to FCSO for home repairs for qualified veterans, widows/widowers, and spouses up to a total of \$250,000 per year. In 2016, there has been consideration of a similar arrangement with veterans who need home delivered meals. The rapid growth in the numbers of veterans who need meals may necessitate an annual senior levy commitment of \$100,000 per year from 2018 through 2022, as the VSC is becoming financially burdened with this unanticipated obligation.

Noteworthy Accomplishments

FCOA has achieved a number of noteworthy accomplishments during the current levy cycle (2013-2017). As recommended by the HSLRC during the previous levy request review process, the following items were addressed:

1. *Identify, Document, and Implement Outcomes for Measuring Success:*

FCOA worked with OMB to refine the agency's outcome measures as part of the County's 2013 budget process. The outcome data are reported quarterly to OMB and the measures themselves are reviewed annually to determine if they require further refinement. FCOA also reviews the data being collected internally to determine if additional information should be collected in order to effectively track agency progress towards the intended outcomes.

FCOA staff also initiated a project to conduct interviews by telephone with participants and/or caregivers to gather more information about the FCSO participants who enter nursing facilities. Of the respondents, 79% indicated that FCSO services had delayed the need for nursing home care and 93% responded that FCSO services had helped their loved-one retain a good quality of life. Service recommendations included 24-hour care, more hours of service, and better transition between a hospital stay and the return home.

2. *Conduct a Community Needs Assessment for Aging Services:*

In 2014, FCOA and COAAA engaged in a multi-county needs assessment. With OrangeBoy, Inc. as the study facilitator, each agency sought information about the level of awareness of services in Franklin and surrounding counties. In addition, there was interest in the likelihood seniors would be seeking services from formal systems. Among the key findings in Franklin County was a high degree of awareness of how to access the services that might be needed. Barriers to staying at home included failing health, burden of house maintenance, financial concerns, and issues around transportation needs. Another important finding was the increased receptiveness of the next group of seniors (residents 55-64 years old) to using resources provided by the agencies. Overall demands are expected to increase as the receptiveness to using services increases.

In addition to the work done by OrangeBoy, FCOA conducted a focus group for non-English speaking seniors. The focus group sessions involved interpreters for the Cambodian and Ethiopian communities. Issues around transportation, language, finances, family caregiving responsibilities, and health issues were identified as barriers to socialization with others.

3. *Complete an FCOA Operational and Programmatic Review:*

An operational review of FCOA was conducted by Direct Effect Solutions in 2016. The goal of the operational review was to identify recommendations that will help the agency further the effective and efficient use of its available resources. The review included four categories of focus: organizational structure, workforce,

business management, and technology. The results were presented to the HSLRC at their October 13, 2016 FCOA Levy Review meeting.

4. *Present a Mid-Levy Review in 2015 to the HSLRC:*

FCOA provided a mid-levy review to the HSLRC at a presentation held on November 5, 2015 at LifeCare Alliance. The staff provided an update on the levy as well as the findings from the Community Needs Assessment conducted by OrangeBoy, Inc.

In addition to working on the HSLRC Recommendations, FCOA achieved several other important accomplishments in the current levy cycle. In 2014, the FCSO program was awarded re-accreditation with the national Alliance of Information and Referral Systems (AIRS), which is the professional membership association for community Information and Referral (I&R) providers. Accreditation is the primary quality assurance mechanism for affirming I&R excellence and consists of a multi-phase process to assess more than 200 distinct operational components and concludes with a detailed onsite review. Through FCOA's collaboration with Hands On Central Ohio, the FCSO program has a robust and up to date database of resources for older adults. Hands On is responsible for the back-end data management for the database, such as managing taxonomy codes and data tables, and performing required annual updates for each entity listed. The FCSO program remains the only accredited I&R program in Ohio with an aging specialty. In addition, more than 60% of FCSO case managers are certified as I&R Specialists in Aging/Disabilities.

Also in 2014, FCOA and COAAA were funding partners in the development of the "village-to-village" concept in Franklin County. The villages are membership-driven grass-roots organizations that use some paid staff and volunteers to help seniors access services that help them remain in the community. Village Connections, which involved German Village and surrounding Southside neighborhoods, was the pilot project. In 2016, the Clintonville neighborhood initiated its Village in the Ville. Each of these projects is designed to link residents with social service agencies or volunteers who can help with the maintenance of independent living. Fostering this type of neighborhood support may delay the need for formal services. These projects also provide access to services that FCSO does not offer, such as lawn care and snow removal.

SENIOR OPTIONS LEVY REQUEST

Levy History

Franklin County's first five-year 0.75 mill Senior Options levy passed with 67% of voters' support in June 1992. In 1997, a replacement plus a 0.10 mill increase (0.85 mill) passed by 72%. In 2002, FCOA requested a Senior Options replacement levy (0.85 mill) and it passed at 81%. In 2007, a 0.85 mill replacement plus 0.05 increase was passed by Franklin County voters at 78% for a total millage rate of 0.90 mill.

Current Millage

Voted Millage	Effective Millage*	Year Collections Began	Duration (Years)	2016 Collection Estimates^
1.30	1.296436	2013	5	\$34,570,870.35

*Effective Residential Rate

^FCOA levy collection estimates above are for tax year 2015, collected in 2016.

The primary source of funding for FCOA is the Senior Options property tax levy. FCOA is currently operating with a 5-year, 1.30 mill replacement levy that began collections in 2013. The levy was passed in 2012 by a 62% margin and is estimated to generate \$34.6 million in revenue for tax year 2015, collection year 2016. The Senior Options levy currently has an effective residential/agricultural rate of 1.296436 mill and an effective commercial/industrial rate of 1.3 mill. The current levy collections end in December 2017.

Requested Millage

The Franklin County Board of Commissioners received a request from FCOA to place a countywide property tax levy of 1.75 mills on the May 2, 2017 ballot for FCSO. This request is a five-year renewal of the current 1.30 mill levy, plus an increase of 0.45 mill. Commissioner John O'Grady, President, forwarded the FCOA request to the HSLRC Chairperson on behalf of the Board of Commissioners. In the request, the Commissioners asked the Committee to review the request and advise them of their recommendations.

The Franklin County Auditor's Office estimates that FCOA's levy request of a renewal of the existing 1.30 mill, 5-year levy expiring December 31, 2017 plus a 0.45 mill increase would generate \$46.6 million annually. This would cost the owner of a \$100,000 home \$55.45 per year and be an increase of \$15.75 per year over the current 1.30 mill levy.

According to FCOA, passage of this levy will allow the agency to maintain the availability of a range of home and community-based services for an increasing number of seniors, such as customer services management, minor home repair, community awareness efforts, and specialized services designed to fill gaps for those in need. The requested millage will also support an increase in enrollment of 4.0% in 2018 and a 3.0% annual

increase between 2019 and 2022 in Home and Community-Based Care, which is the largest component of FCSO. In order to meet the growing demand, FCOA proposes over the course of the cycle to add seven full-time case managers and a case manager supervisor, as well as four case managers and a case manager supervisor to the contract with COAAA.

With the successful passage the 1.75 mill senior services levy, FCOA has made the following commitments to the community:

- Serve as many seniors as possible with existing resources;
- Every effort will be made to avoid closing FCSO enrollment throughout the course of the 2018-2022 levy cycle;
- Maintain the central entry point, one-stop shop, for FCSO;
- Continue the strong focus on service quality; and
- Focus on serving participants who represent the diversity of Franklin County's older adult population.

HSLRC REVIEW AND RECOMMENDATIONS

Review Process

The goal of the HSLRC was to review the levy proposal submitted by FCOA and to fully understand the request, confirm the needs expressed by the FCOA staff, and validate the financial, consumer, and community impact of the proposed service levels. Committee staff began this levy review with the formation of a Levy Review Plan that identified the initial scope of the review through objectives. Each objective also included sub-objectives. The main objectives were as follows:

- What circumstances have led to FCOA's current levy request?
- What are the levy options?
- Does FCOA's five-year forecast reasonably and logically project future revenues to provide reasonable assurance of accuracy?
- Does FCOA's five-year forecast reasonably and logically project expenditures to provide a reasonable assurance of accuracy?
- Will resources be sufficient to support FCOA's services through the life of the levy?
- What will the passing of the levy accomplish?

After reviewing the FCOA presentation and written levy proposal, the HSLRC and its staff formulated a series of follow-up questions for FCOA staff. FCOA was given the opportunity to address the Committee's questions in writing and during follow-up face-to-face meetings. In addition, Direct Effect Solutions presented the findings of a FCOA operational assessment to the HSLRC.

As a result of this process, the levy review involved significant information sharing between the HSLRC, Committee staff, County Administration, and FCOA. Individuals were involved in periodic meetings throughout the process to discuss key issues impacting selected areas and proposed recommendations.

Recommendations

In evaluating the FCOA request, the HSLRC spent a significant amount of time reviewing the operational and programmatic aspects of the agency, availability of services, and demand for services in the future, as well as performing an in-depth financial analysis.

Based on the HSLRC review of FCOA Senior Options programmatic, operational, and financial areas, the Committee concurs with the request of a five-year 1.75 mill levy (1.3 mill renewal with a 0.45 mill increase). The HSLRC recommendation is based on the Estimated Revenue and Expenditures Schedule for Calendar Years 2018-2022 scenario as submitted by FCOA (see page 32 for the Recommended Fiscal Plan Through 2022). The increase will maintain adequate funding for services in response to the increasing number of seniors, rapidly growing demand for FCOA services, and stagnant levy revenues.

It is the recommendation of the HSLRC that the Franklin County Board of Commissioners place a five-year levy of 1.75 mills (1.3 mill renewal with a 0.45 mill increase) on the May 2, 2017 ballot. The proposed levy would be effective for tax collections beginning January 1, 2018.

The recommendation is supported by the following:

1. **Aging Population:** There is a growing demand for senior services as people are living longer. In addition, the post-World War II baby boom generation has begun to retire. According to the 2010 Census, Franklin County had 170,456 persons age 60 and older. This number reflects a 22.9% increase over the 2000 Census. The Scripps Gerontology Center at Miami University estimates an additional 36.6% increase in the 60 and older age group in this decade, with much of the increase taking place during this next levy cycle.

Franklin County Population 60 and Older

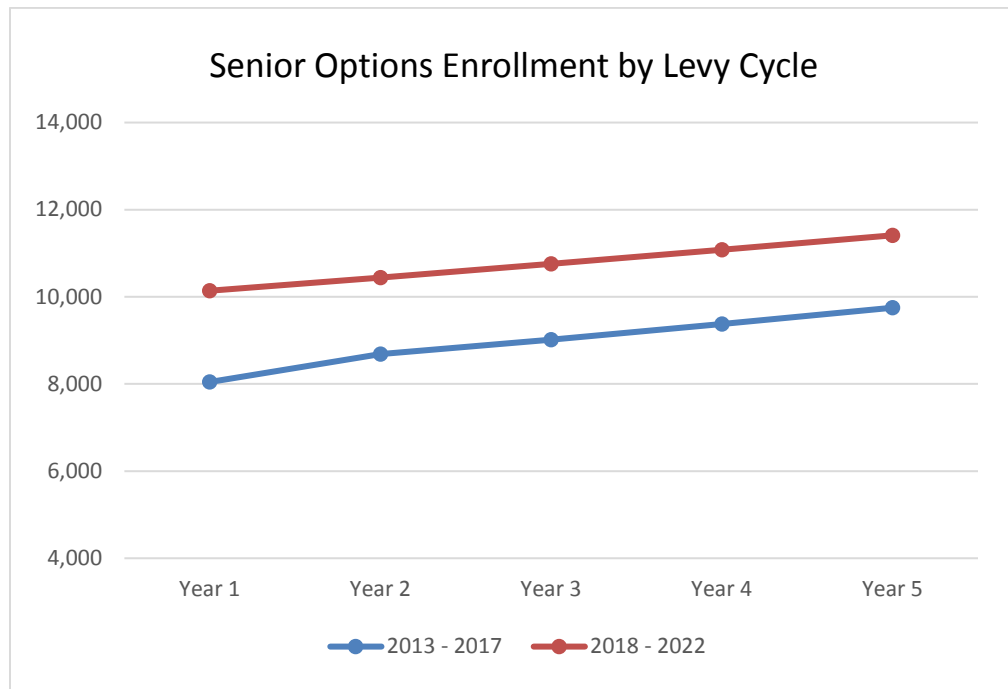
	1990	2000	2010	2020*
Persons 60 or Older	129,006	138,651	170,456	232,827
Percent of Total Population	13.4%	13.0%	14.7%	18.1%
Percent Change from Previous Census	-	7.5%	22.9%	36.6%
<hr/>				
Annual FCSO Enrollment	-	5,223	7,041	10,757
Percent of Persons 60 or older	-	3.8%	4.1%	4.6%
Percent Change from Previous Census	-	-	34.8%	52.8%

Italicized numbers are projected

*2020 Total Franklin County Population as estimated by the Ohio Department of Development and Persons 60 or older as estimated by the Gerontology Center at Miami University.

During 2010, FCOA had 4.1% of Franklin County residents 60 or older enrolled in the FCSO program. Based on the requested levy amount, FCOA is projected to serve 10,757 participants in FCSO in 2020, representing 4.6% of the senior population. The Committee took the projected senior population increase into account when making the recommendation since the current levy request is through 2022.

2. **Demand for Senior Services:** During the current levy cycle, the demand for FCSO home and community-based care services is projected to increase 21.2% between 2013 and 2017. In consideration of the historical trends, FCOA was using conservative estimates with their projection of FCSO client enrollment during the next levy cycle. The chart on the following page compares the number of participants in the current levy cycle to the projections for the next one. FCOA is projecting a 12.5% increase in FCSO participants between 2018 and 2022. This reflects FCOA's understanding the need to remain fiscally prudent while still providing services to the County's seniors.



Another important consideration is the finding from the Needs Assessment that the next group of seniors (residents 55-64 years old) is more receptive to using resources provided by the FCOA than the previous generation. According to OrangeBoy, Inc., overall demand for services is expected to increase as the receptivity to using senior services increases.

3. **Increasing Functional Limitations Among Seniors:** Scripps Gerontology Center at Miami University projects a 48% increase for those Franklin County residents age 60 years and over with a severe physical and/or cognitive disability and a 50% increase for those with a moderate disability between 2010 and 2025. Scripps defines a moderate disability as a limitation in at least one activity of daily living, such as eating, dressing, or bathing, while a severe disability is a limitation in at least two activities of daily living or having cognitive impairment. There were 18,444 disabled seniors in Franklin County in 2015 and 24,239 projected by 2025. Although FCSO is not limited to disabled seniors, serving those participants with functional limitations does constitute the largest part of the program's allocated resources.
4. **Stagnant Levy Revenues:** The majority of revenue for FCSO comes from levy funding, which is based on the County's real estate tax collections. During the 2003-2007 levy cycle, property values increased from \$21.3 billion to \$26.4 billion, or 24.4%. This provided FCOA with increased revenues in order to address inflation and the increase in demand for service. Yet toward the end of 2008-2012 levy cycle, property values decreased due to the downturn in the economy. The Franklin County Auditor's Office completed the sexennial reappraisal in 2011. The assessment resulted in a 6.0% decrease in property values from tax year 2010.

The Franklin County Auditor's Office set the assessed valuation for tax year 2011 at \$26.3 billion, therefore the property tax levy approved in 2012 was calculated upon this figure. The property valuation for tax year 2015, collection year 2016 that was used to project revenue for the current FCOA levy request was a stagnant \$26.6 billion. This results in limited growth to capture by requesting a replacement levy of the existing 1.30 mill levy. In addition, FCOA is projecting little net growth in property values based on the current trends over the 2018-2022 levy cycle. Therefore, this requires the increase in the requested levy millage to accommodate inflation and the aging population.

The recommendation also considers the effect of the complete phase out of the tangible personal property tax (TPPT) reimbursement for the levy agencies in Franklin County. This was a change from the accelerated phase-out that was planned to impact the 2013-2017 levy cycle planned revenues. The original impact on the 2013-2017 levy revenue was a \$1.9 million reduction over the life of the five-year cycle. However, FCOA lost an additional \$538,195 when the 2016-2017 state biennial budget (House Bill 64) passed including a provision for the complete phase out of TPPT as of July 1, 2015. The last TPPT reimbursement for the Office on Aging in the amount of \$107,639 was received in July 2015.

5. **Enabling Seniors to Remain in Their Home:** According to the Robert Wood Johnson Foundation, unmet social needs, such as adequate nutrition, transportation to medical appointments, and stable housing, are important elements for the support of good health. The purpose of the FCSO program is to help older adults maintain their sense of independence, retain a good quality of life, and avoid or delay the need for institutional care. The services provided by FCOA keep seniors in their home, resulting in a cost effective intervention that maintains quality of life. For 2015, the average rate of a long-term care facility was \$6,758 per month. The average cost of home and-community based services and case management services provided by FCSO was \$260 per month. In addition, based on telephone interviews conducted with those FCSO participants and/or their caregivers who recently entered a long-term care facility, 93% of respondents indicated that services had helped their loved-one retain a good quality of life while in the program.

OPERATIONAL AND PROGRAMMATIC RECOMMENDATIONS

Issue 1: Identified Operational Opportunities

An operational review of FCOA was conducted by Direct Effect Solutions in 2016 and the findings were presented to the HSLRC during the FCOA Levy Review Process. The goal of the operational review was to identify recommendations that will help the agency further the effective and efficient use of its available resources. The review included four categories of focus: organizational structure, workforce, business management, and technology. The results included identification of practices to retain, identification of opportunities for improvement, and development of a roadmap for action.

Human Services Levy Review Committee Recommendation 1: Implement the Recommendations of the Operational Review

The Committee appreciates FCOA's effort to complete the HSLRC recommendation for the operational review as well as the staff's cooperation and facilitation of the process with Direct Effect Solutions. The HSLRC recommends that FCOA implement the recommendations of the operational review during the next levy cycle. Implementing the recommendations will assist the agency in achieving increased service delivery with the recommended level of funding during the current levy cycle and guide the preparation of the next levy request.

As indicated in the results of the combined FCOA/COAAA needs assessment, process improvements can assist FCOA in managing human and financial resources that are not likely to grow at the same rate as the increasing demand for services. According to OrangeBoy, Inc., "Automation, technology, performance metrics, and database management are a few of the ways the agencies can manage its resources efficiently and serve growing rosters of older adults." Reviewing FCSO program data and reports on an ongoing basis, such as average length of stay in the program and enrollment patterns, can help the agency better manage program expenditures and allow client enrollment throughout the entire life of the levy cycle.

Issue 2: Discussing Best Practices

The Committee is charged with evaluating the potential levy impact on the service population, other social service providers, and the community. FCOA is in the unique position of providing the Senior Options program without any state or federal mandates. While other County levy agencies are bound to state oversight agencies that ensure the services rendered are based on the latest research and best practices, FCOA has a high degree of discretion over the provision of senior services to the community. This difference leads to difficulty identifying comparison agencies with similar practices to assist in the HSLRC review process.

Human Services Levy Review Committee Recommendation 2: Identify and Share Best Practices with the Committee

The Committee acknowledges that FCSO is unlike other senior services programs being delivered in Ohio. However, there are programs across the country and even globally that are providing similar services that have been reviewed in aging and gerontology literature. Therefore, the Committee requests that FCOA clearly identify and share the senior services best practices being utilized in the delivery of service and achievement of outcomes determined by the agency with the HSLRC at the mid-levy review meeting and when submitting subsequent levy request fact books.

Issue 3: Assessing Need

A substantial function of the HSLRC is providing recommendations regarding proposed millage amounts. Since FCOA is a direct service provider and service purchaser, a major indicator of the amount of funding required to adequately provide services to the County's aging population is to assess the need. As indicated in the needs assessment conducted by OrangeBoy, Inc. during the current levy cycle, the perception of senior services is changing when comparing the baby boom generation to earlier generations. Their willingness to utilize services is a good indicator that the County's next group of seniors will seek assistance to have their needs met which will also increase demand for FCSO services.

Human Services Levy Review Committee Recommendation 3: Conduct a Community Needs Assessment for Aging Services

Conducting needs assessments should become a regular process for FCOA in order to stay ahead of emerging trends in the aging population. Therefore, the HSLRC recommends FCOA complete another needs assessment for Franklin County seniors during the 2018-2022 levy cycle. FCOA should explore the potential for leveraging and collaboration with local health systems and the public sector when conducting the needs assessment. FCOA should also identify and use existing data sets to support their analysis. For example, the Central Ohio Hospital Council (COHC) issued the Franklin County Health Map in 2016. While seniors were addressed in the community health needs assessment, FCOA was not a member of the steering committee. Connections should be made with groups such as the COHC to ensure needs are identified and met with a collaborative approach. In addition to determining the current need and projecting future need, consideration should be given to the prioritizing of services by seniors and their caregivers as well as a census of the available service providers and their capacity while conducting the assessment.

While the Committee recognizes that the population of Franklin County residents age 60 and older is increasing as are the number of functional limitations experienced by this population, consideration must also be given to methods to control growth and contain costs in order to meet the demands for service while remaining fiscally prudent. The needs assessment should include a ranking of the services currently being purchased with levy funds so that the community can provide their feedback on the services that are

most important to them. Once the assessment is complete, FCOA can use this data as part of a cost-benefit analysis regarding which services meet the community's need and provide the greatest value to the population served. A priority ranking can be created regarding efficiency and effectiveness of services in achieving mission directed outcomes.

The community needs assessment should be completed before the start of the third year of the levy cycle. The data collected would then be utilized for future client projections and levy requests. The assessment will be helpful to the Committee and FCOA management by confirming currently needed services and identifying future resource needs. The results should be presented to the HSLRC at the mid-levy review meeting.

Issue 4: Increasing Costs for Contracted Services

During the current HSLRC levy review process, the Committee was provided a list of FCSO home and community-based care providers and their unit costs for the contracted services. As indicated by the list of providers, home and community-based services are provided by a large number of agencies at varying costs. During a follow-up face-to-face meeting with the HSLRC, FCOA indicated that they historically needed a large number of providers in order to have the capacity they need to get clients served. FCOA indicated that FCSO case managers make referrals to contract providers based on cost, quality, and capacity. Unless a FCSO client has a concern with a certain provider, they are referred to the lowest cost provider until that provider's capacity is reached. Then referrals are made to the next lowest cost provider and so on.

Human Services Levy Review Committee Recommendation 4: Explore Alternative Purchasing Methods

Contracted services for home and community-based care are a part of the Social Services budget category, which represent three-fourths of FCOA's budget. Therefore, a major opportunity for cost containment exists in the agency's largest cost driver. The HSLRC recommends that FCOA explore alternative methods to the current service purchasing practices. Opportunities may exist for the agency to make "bulk purchases" through fewer providers at a reduced price per unit. Consideration should also be given to purchasing agreements with other county senior service agencies and the various Area Agencies on Aging across the state to leverage larger purchases at better rates. This should assist in serving more seniors in the increasing aging population with less of an impact on the bottom line.

Issue 5: Reliance on Property Tax Levy Revenues

Historically, the large majority of FCOA funding is based on the passage of the senior services property tax levy. In 2015, levy revenue represented 94.4% of the total available agency resources. This funding strategy places a heavy burden on the local tax payers. As the number of seniors continues to increase, the agency may find it difficult to pass levies at larger millage amounts.

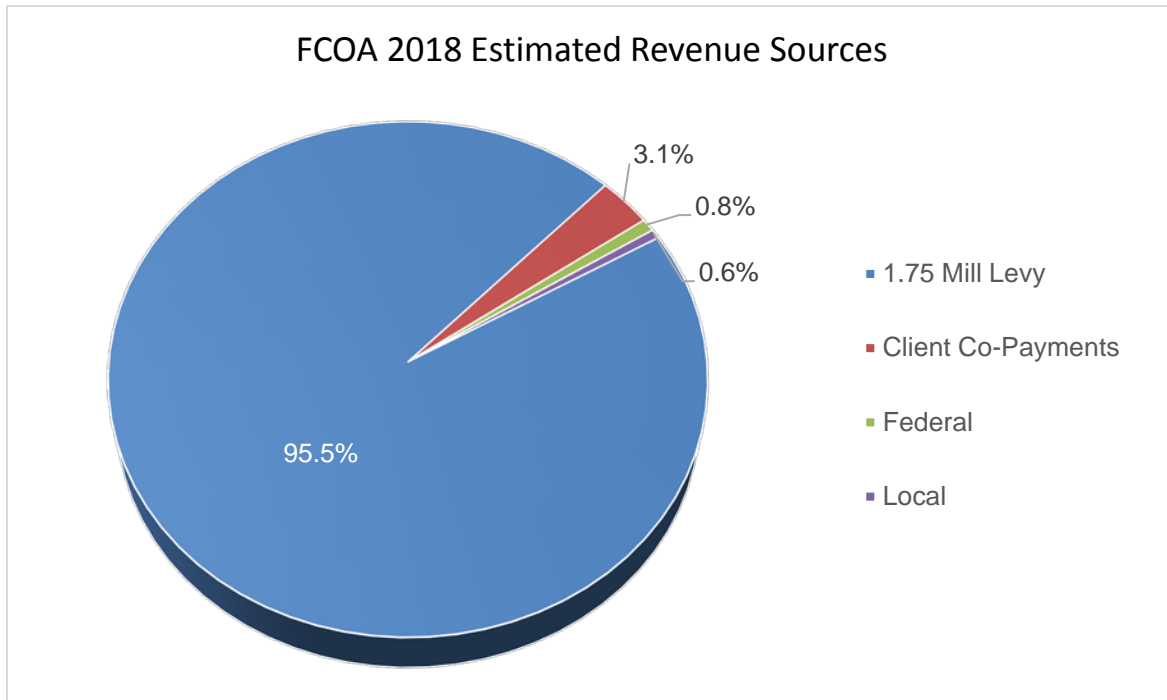
Human Services Levy Review Committee Recommendation 5: Fully Leverage Collaborative and Grant Funding Opportunities

The HSLRC recommends FCOA fully leverage collaborative and grant funding opportunities in order to reduce reliance on the property tax levy for the provision of services. Seniors are not the only ones who receive a benefit from the available FCSO services. Major beneficiaries of the cost savings are the state and federal governments through seniors' reduced usage of the Medicaid and Medicare programs and health insurance companies. FCOA should conduct a cost benefit analysis based on the costs to Medicaid and Medicare for FCSO participants versus similar non-enrolled seniors in Franklin County. The results could be used to facilitate funding discussions with state and federal officials. This data could also be leveraged for discussions with the three local hospital systems and health insurance companies regarding improving patient outcomes and savings related to the anticipated reduction in hospital readmission rates for FCSO participants. As discussed in the FCOA Levy Fact Book, "the future of improving quality of care for the elderly will depend in part on developing new relationships between the medical health systems and the community based social services system." FCOA resources for population health management should be leveraged to effectively and efficiently impact the social determinants of health.

Local businesses also benefit from FCSO services as it may improve attendance and productivity rates for employees who are also the primary caregivers to seniors. FCOA should meet with the local business community to discuss collaborative opportunities for meeting the needs of Franklin County seniors and their families.

As the number of seniors grows nationwide, funding opportunities from government agencies, non-profits, and foundations may also increase. FCOA's partnership with other community organizations on the Accountable Health Communities (AHC) Model Grant application is a good example of the recommended collaboration. FCOA should assign staff and/or partner with the newly hired Community Partnership Coordinator with the Board of Commissioners to proactively search and apply for grants. Collaborative funding opportunities may also exist among Age Friendly Columbus partners, the National Association of Counties (NACo), Smart Columbus related to transportation options, and other county senior services agencies.

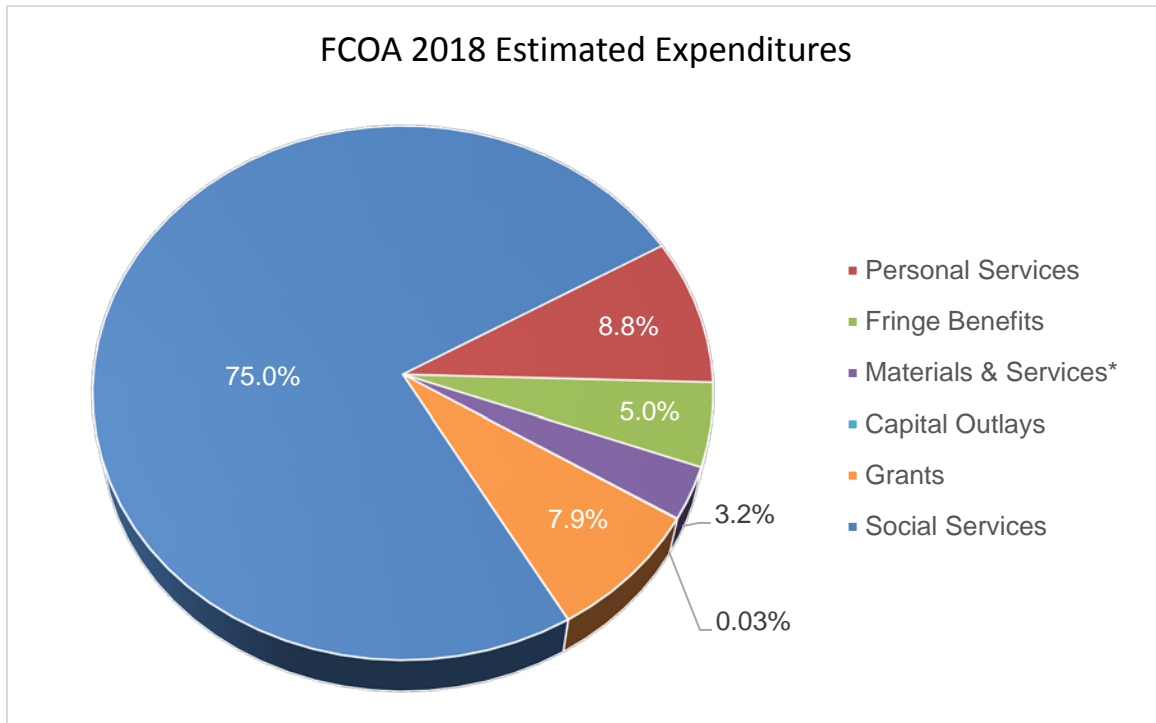
OVERVIEW OF REVENUE



FCOA has four primary sources of revenue: Levy Funds, Client Co-payments, Federal Grants, and other Local funds. As presented in the FCOA 2018 Estimated Revenue Sources chart above, the primary source of revenue for FCOA is from the 1.75 mill levy at \$46.6 million, or 95.5%, of the total resources. The next largest source of revenue is client co-payments at \$1.5 million, or 3.1%. FCOA also receives a small amount of funding from the Federal Title III-E of the Older Americans Act for caregiver services and Title III-C of the Older Americans Act through the Nutritional Services Incentive Program. Finally, FCOA received Local funds from the Franklin County Veterans Service Commission to provide qualified veterans with emergency response devices and minor home repairs. Each of these sources was considered in the Committee's review of FCOA revenue estimates.

The amount of local millage needed to support FCOA service delivery priorities must be approached carefully, taking into consideration the loss of the Tangible Personal Property Tax (TPPT) Reimbursement and stagnant property values. Also, the Older Refugees Discretionary grant from the U.S. Department of Health and Human was eliminated in 2016. Estimates for future year levy revenues are calculated using the assessed property valuation as of January 1st of the year the levy is voted. Accordingly, voter approved levies do not gain the benefit of property revaluations until the levy is replaced. Currently, the Franklin County Auditor's Office has established the 2016 real and personal property valuation at \$26.6 billion. This translates into one mill generating approximately \$26.6 million in levy revenues. The actual amount collected is impacted by the collection rate, i.e., the number of residents who pay their taxes.

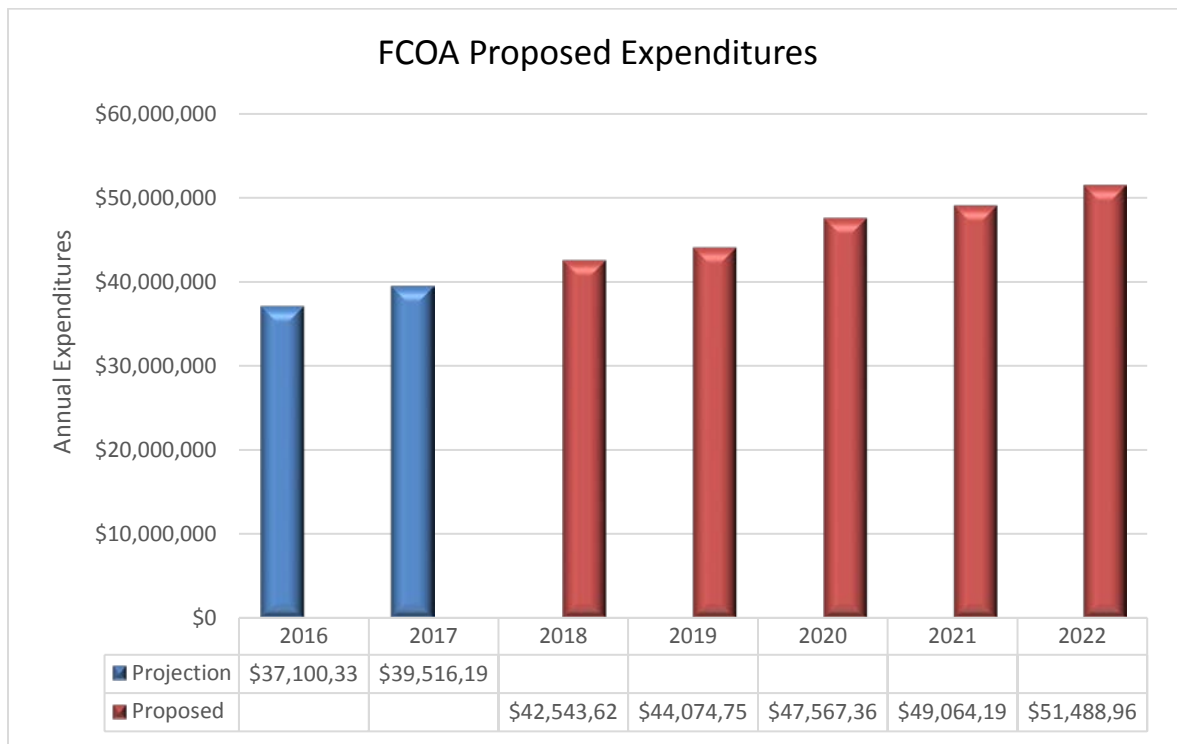
OVERVIEW OF EXPENDITURES



*Materials & Services does not include the one-time Board of Elections fee of \$800,000.

FCOA's budgeted expenditures are divided into six categories that drive the agency's annual budget: Personal Services, Fringe Benefits, Materials & Services, Capital Outlays, Grants, and Social Services. As presented in the FCOA 2018 Estimated Expenditures chart above, the largest category, Social Services, is \$31.3 million, or 75.0% of the 2018 Budget. A majority of these expenses are related to the provision of home and community-based services, such as home delivered meals, transportation, and homemaker services. Personal Services, the next largest category, is \$3.7 million, or 8.8% of the 2018 expenditures. These expenses include FCOA staff salaries and wages. Grants, used to purchase specialized services, such as congregate meals and health screenings, for older adults is \$3.3 million, or 7.9%. Fringe Benefits for FCOA employees is \$2.1 million, or 5.0%, and Materials & Services for the operations of FCSO is \$1.3 million, or 3.2% of the 2018 Budget. Finally, Capital Outlays for information technology purchases is \$14,220, or less than 1.0%.

Social Services and Grants are used to purchase "direct services" for Franklin County seniors and their families. In 2018, these expenditures represent 82.9% of the total Budget. However, this number would be much higher if the Personal Services and Fringe Benefits expenses for FCOA case managers who also provide "direct services" to seniors were included.



HSLRC members and staff performed a thorough analysis of the expenditures contained in FCOA's proposal. The proposal included an increase of expenditures every year from 2018 through 2022. The biggest change occurs in 2020 when annual expenditures go from \$44.1 million to \$47.6 million, a 7.9% increase, as a result of the 27th pay and the request for additional staff occurring in that year. The average year over year increase during the new levy cycle is 5.5%, mostly driven by anticipated demand for services and FCOA employee healthcare costs.

FCOA's Proposal Assumptions

The following assumptions were made in FCOA's levy proposal regarding expenditures:

- **Personal Services:** The levy request includes projected salary and wage increases for bargaining and non-bargaining staff based on the following Consumer Price Index for All Urban Consumers (CPI-U) forecasted by Moody's Analytics:
 - 2018 – 2.6%
 - 2019 – 2.4%
 - 2020 – 2.1%
 - 2021 – 2.0%
 - 2022 – 2.1%

Salaries and wages also includes projections for the 27th pay in 2020. If enrollment projections are met and adequate office space is made available by the County, an additional case management team of seven case managers and a case manager supervisor is projected to be added in 2020. This will bring the FCSO staffing level to 87 FTEs in the next levy cycle.

- **Fringe Benefits:** For 2018 through 2022, total employer paid fringe benefits, such as healthcare, OPERS, and Medicare, are projected to increase approximately 6.0% annually with the exception of the year 2020. In 2020, there is a 19.0% increase that is associated with the increased cost of healthcare, the addition of the new case management staff, and the inclusion of the 27th pay. Based on the current trends in healthcare costs, FCOA has projected an 8.0% annual increase for this next levy cycle.
- **Materials & Services:** In the next levy cycle, annual increases for materials and services are projected based on Moody's Analytics forecasted CPI-U index (see Personal Services). An increase of 78.8% is projected in 2018 and decrease of 43.6% is projected in 2019 due to one-time Board of Election fees that are incurred when placing the levy on the ballot in 2017. An additional 56.4% increase is projected in 2020 for the one-time expenses associated with the addition of the new case management staff.
- **Capital Outlays:** Capital outlays includes purchases of equipment with a cost of \$5,000 or more and a useful life of more than one year. FCOA has projected costs associated with information technology upgrades and equipment replacement, such as servers and document imaging equipment, as determined by the agency's long term IT plan.
- **Grants:** The FCOA grant program involves funding for 31 private non-profit agencies that provide 44 specialized service programs for older adults. In the next levy cycle, annual increases for grants are projected using Moody's Analytics forecasted CPI-U index (see Personal Services).
- **Social Services:** Social services is the largest category of expenses for FCOA, representing 75.8% of actual expenditures in 2015. Annual costs for FCSO Home and Community-Based Care services have been calculated using projected client enrollment and average care plan costs based on historical trends. In 2018, the annual number to be served in the Home and Community-Based Care program is estimated to be approximately 10,140 participants, reflecting a 4.0% increase from the 2017 enrollment projection. The table on the following page shows the actual unduplicated client enrollment in the FCSO Home and Community-Based Care program during the current levy cycle as well as projections for the new levy cycle. As shown in the table, the projected annual enrollment increases for 2019-2022 will be held to 3% annually.

Senior Options (FCSO) Annual Enrollment and Average Monthly Care Plan Cost			
Year	Annual Enrollment	Annual Percent Enrollment Change	Average Monthly Care Plan Cost
2012	7,665	7.4%	
2013	8,045	5.0%	\$176.42
2014	8,687	8.0%	\$184.64
2015	9,015	3.8%	\$185.74
2016	9,376	4.0%	\$191.26
2017	9,750	4.0%	\$197.83
2018	10,140	4.0%	\$204.03
2019	10,444	3.0%	\$209.62
2020	10,757	3.0%	\$214.77
2021	11,080	3.0%	\$222.37
2022	11,412	3.0%	\$226.99

**Projected years are in italics.*

The table also shows the actual average monthly care plan cost per client for home care services for the years 2013-2015 and projections for 2016-2022. In 2015, the average monthly care plan cost per client for FCSO Home and Community-Based Care program was \$185.74 compared to an estimated monthly cost of \$6,758 for institutional care. The monthly cost cap per participant for services is currently \$1,000 per month, with additional discretion given to case managers for clients who need 24-hour supervision. These plans of care can expand to \$1,500 per month for participants who require several days of adult day health service or extended hours of personal care.

In addition to the cost projections for FCSO Home and Community-Based Care Services being based on enrollment and anticipated plan costs, several adjustments were made for social services. Four case managers and a supervisor at the COAAA have been included in the 2019 social services projection to handle the in-home assessments for the anticipated increase in enrollment. There is also a 3.0% annual increase projected for the COAAA case management contract. Finally, due to the Franklin County Veterans Services Commission being faced with unanticipated financial obligations, FCOA is projecting a \$100,000 annual commitment starting in 2018 to support the rapid growth of veterans age 60 and older needing home delivered meals.

HSLRC Recommendation

The HSLRC recommendation concurs with the 1.75 mill levy assumptions used by FCOA for the projected revenues and expenditures in the levy request. The Committee agrees with the conservative projection in the collection of levy revenues. FCOA's levy revenue assumption is based on a 97.0% tax collection rate, which is consistent with rate in recent years. As the biggest cost driver in the budget, the increase in the number served in the FCSO Home and Community-Based Care program will need to be managed by FCOA staff to stay within budget over the life of the next levy cycle.

The HSLRC does not provide recommendations regarding the hiring of staff proposed in the levy plan. It is the Committee's recommendation that all requests for additional positions be included in the annual budget submission to the Franklin County Board of Commissioners and a justification for the requested positions should be provided at that time.

The \$2.1 million in funds projected to remain in 2022 in addition to the 90 day ending cash balance requirement should be used for the implementation of the recommendations of the operational assessment during the next levy cycle.

The HSLRC requests that FCOA provide a mid-levy review to the Committee in 2019. The review should include a complete analysis and discussion of the agency's financial and programmatic status to date compared to the levy plan in this report. Any concerns regarding the updated financial forecast and anticipated ending fund balance should be discussed at that time. As previously mentioned, the review should also include a presentation of the senior services best practices being utilized by FCOA in the delivery of service and the results of the latest needs assessment.

Ending Cash Balance Requirement

The ending cash balance requirement is for FCOA to have cash equal to three months of expenditures at the end of 2022. The HSLRC recommends that FCOA end the requested levy cycle with a three month cash reserve of at least \$12.9 million (as indicated in the following "Recommended Fiscal Plan through 2022"), which will enable FCOA to have some flexibility in meeting unexpected needs and maintain operations during transition to the new levy cycle in 2023. The disbursement of property tax revenues does not occur until March annually; therefore, it is necessary for levy agencies to carry forward a cash balance to fund operations until the levy funds for the new year are received.

In the event that the increase of any line item expenditure exceeds the recommended assumptions in this report, other expenditures should be managed so that total expenses do not result in the amount of the ending balance being lower than recommended.

Recommended Fiscal Plan Through 2022

	2015	2016	2017	2018	2019	2020	2021	2022
	<u>Actuals</u>	<u>Projection</u>	<u>Projection</u>	<u>Estimate</u>	<u>Estimate</u>	<u>Estimate</u>	<u>Estimate</u>	<u>Estimate</u>
Beginning Cash	\$14,067,984	\$15,156,174	\$13,800,014	\$10,241,360	\$15,039,938	\$18,579,370	\$18,898,621	\$17,997,047
Revenue:								
Levy Funds								
1.30 Mill Levy - Current through 2017	\$33,577,653	\$33,684,252	\$33,850,675					
1.75 Mill Levy - Proposed 2018 - 2022				\$45,213,672	\$45,441,488	\$45,668,433	\$45,897,512	\$46,126,732
Federal Funds	\$466,827	\$397,586	\$390,186	\$380,186	\$380,186	\$380,186	\$380,186	\$380,186
Local Funds	\$236,768	\$300,000	\$300,000	\$275,000	\$275,000	\$275,000	\$275,000	\$275,000
Client Co-payment Funds	\$1,292,534	\$1,362,333	\$1,416,675	\$1,473,342	\$1,517,513	\$1,562,992	\$1,609,924	\$1,658,164
Miscellaneous Funds	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Revenue	\$35,573,782	\$35,744,171	\$35,957,536	\$47,342,200	\$47,614,187	\$47,886,611	\$48,162,622	\$48,440,082
Expenditures:								
Personal Services	\$3,036,075	\$3,311,777	\$3,581,070	\$3,674,640	\$3,762,925	\$4,302,305	\$4,258,187	\$4,347,891
Fringe Benefits ¹	\$1,433,163	\$1,584,486	\$1,978,245	\$2,101,860	\$2,236,107	\$2,660,683	\$2,809,772	\$2,993,212
Materials & Services	\$885,428	\$1,289,160	\$1,194,741	\$2,136,052	\$1,205,452	\$1,885,765	\$1,334,265	\$1,401,437
Capital Outlays	\$0	\$49,500	\$14,220	\$14,220	\$26,465	\$15,800	\$0	\$15,800
Grants	\$2,984,792	\$3,141,965	\$3,211,089	\$3,294,577	\$3,373,647	\$3,444,493	\$3,513,383	\$3,587,164
Social Services	\$26,146,134	\$27,723,443	\$29,536,826	\$31,322,272	\$33,470,161	\$35,258,313	\$37,148,588	\$39,143,461
Total Expenditures	\$34,485,592	\$37,100,331	\$39,516,190	\$42,543,621	\$44,074,755	\$47,567,360	\$49,064,196	\$51,488,966
Ending Cash Balance	\$15,156,174	\$13,800,014	\$10,241,360	\$15,039,938	\$18,579,370	\$18,898,621	\$17,997,047	\$14,948,163

¹A projected increase of 31.7% is anticipated for 2017 due to the increased cost of healthcare, as well as the anticipated plan year changing from April through March to January through December and the additional class of case managers hired during 2016.

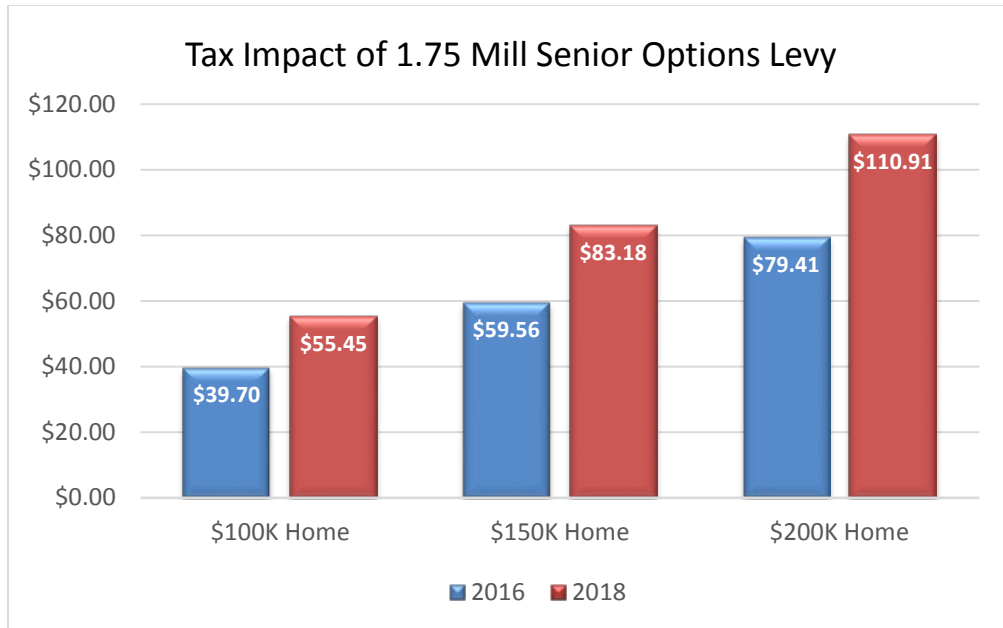
Tax Impact on Local Households

Cost to Franklin County Homeowner

	2016 Current Levy 1.30 Mill	Proposed 2018		
		1.30 Mill Renewal	0.45 Mill Increase	Total 1.75 Mill Levy
Market Value	\$100,000.00	\$100,000.00	\$100,000.00	\$100,000.00
% of Market	35%	35%	35%	35%
Assessed Value	\$35,000.00	\$35,000.00	\$35,000.00	\$35,000.00
Effective Millage	1.296436	1.296436	0.45	1.746436
Gross Tax	\$45.38	\$45.38	\$15.75	\$61.13
less 10% Rollback	(\$4.54)	(\$4.54)	N/A	(\$4.54)
less 2.5% Rollback	(\$1.13)	(\$1.13)	N/A	(\$1.13)
Net Tax (Annual Cost to Homeowner)	\$39.70	\$39.70	\$15.75	\$55.45
Increased Annual Cost to Homeowner				\$15.75

In evaluating this levy plan, the Committee considered the immediate impact of the 1.75 mill levy on the households in Franklin County and the total homeowner support that would be provided to FCOA if this levy is approved. As enacted in the State of Ohio 2014-2015 Biennial Budget (H.B. 59), the 2.5% and 10.0% real estate property tax rollbacks may not be applied to reduce the taxes due on new or replacement levies approved at the November 2013 election for tax year 2013, 2014, or any later tax year, or to levies approved at any later election. Due to the impact of H.B. 59, Franklin County homeowners now pay 100.0% of the gross tax on a new levy, a replacement levy, or the increased portion of a levy.

The table above breaks down the impact of the renewal of the existing 1.30 mill levy plus a 0.45 mill increase compared to the current 1.30 mill levy on Franklin County households. The 1.3 mill portion of the levy would retain the effective millage at the time of the passage of the levy as well as the rollback being paid by the state. Therefore, the cost of the 1.3 mill renewal would remain \$39.70. Including the loss of the state paying the rollback on the increase portion of the property tax levy, the homeowner of a \$100,000 house would pay an additional \$15.75 for the 0.45 mill increase. According to this analysis, the Levy Review Committee determined that in 2018, a homeowner of a \$100,000 house would make a total payment of \$55.45 each year for the recommended five year 1.75 mill levy for senior services.



The chart above shows the impact of the 1.75 mill Senior Options levy on various home prices in Franklin County compared to the current 1.30 mill levy, including the previously discussed impact on a homeowner of a \$100,000 house.

APPENDICES

- A - Resolution No. 311-99, authorizing creation of a Human Services Levy Review Committee and appointed member, Denise Bronson
- B - Resolution No. 1254-00, appointment of Jesse Hemphill
- C - Resolution No. 307-05, appointment of Nathan Wymer
- D - Resolution No. 728-06, appointment of James Bowman
- E - Resolution No. 88-07, appointment of Jerome Friedman
- F - Resolution No. 0239-10, appointment of Jean Carter Ryan
- G - Resolution No. 0242-15, appointment of Zachary Talarek
- H - FCOA – Senior Options Levy Request – Submitted by Director
- I - Letter from Board of Commissioners asking the Human Services Levy Review Committee to review the FCOA – Senior Options levy request and provide recommendations.

RESOLUTION NO. 311-99

MARCH 30, 1999

RESOLUTION AUTHORIZING THE
CREATION OF THE HUMAN SERVICES
LEVY REVIEW COMMITTEE, AND
APPOINTING ITS MEMBERS
(COMMISSIONERS)

WHEREAS, the Franklin County Board of Commissioners, as the taxing authority for the County, is responsible for certifying to the Board of Elections tax levies in excess of the ten mill limitation pursuant to ORC 5705.19; and

WHEREAS, the Franklin County Board of Commissioners desire to create a Human Services Levy Review Committee to conduct ongoing financial reviews of social service agencies, evaluate program performance to voted levy objectives, to review social service levy requests and provide recommendations regarding proposed millage amounts and the timing of levy requests, and to provide a holistic review of levy impacts on the community; and

WHEREAS, the Human Services Levy Review Committee will be comprised of seven (7) members appointed by the Franklin County Board of Commissioners; now, therefore, upon the motion of Commissioner Teater, seconded by Commissioner Shoemaker,

BE IT RESOLVED BY THE BOARD OF COMMISSIONERS, FRANKLIN COUNTY, OHIO:

- 1) That a Human Services Levy Review Committee is hereby created to conduct ongoing financial reviews of social service agencies and to provide recommendations to the Board of Commissioners regarding proposed millage amounts and the timing of levy requests for certification to the Board of Elections.
- 2) That the Human Services Levy Review Committee shall be comprised of seven (7) members appointed by the Board of Commissioners. Such membership shall be subject to change by resolution of the Board of Commissioners.
- 3) That the following persons are appointed to the Human Services Levy Review Committee:

William K. Willis, Jr., Chair
Franklin County Community Planning Council
1715 Franklin Park South
Columbus, Ohio 43205

Denise E. Bronson
Professor, College of Social Work
The Ohio State University
Stillman Hall
1947 College Road
Columbus, Ohio 43210

Chad Jester, Director of Public Affairs
Nationwide Insurance Company
One Nationwide Plaza
Columbus, Ohio 43215

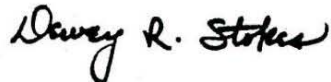
Linda J. Siefkas
Vice President and Manager – Columbus Office
Edward Howard & Company
50 West Broad Street, Suite 2200
Columbus, Ohio 43215

Matt Kallner, Director of Governmental Affairs
The Limited Company
Three Limited Parkway
Columbus, Ohio 43230

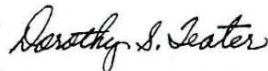
Charlene Powell, Finance Director
Franklin County Commissioners
373 S. High Street, 26th Floor
Columbus, Ohio 43215

Marvin G. Gutter, PhD., CPA
Vice President for Business and Administrative Services
Columbus State Community College
550 E. Spring Street
Columbus, Ohio 43215

Voting Aye thereon:



DEWEY R. STOKES, PRESIDENT



DOROTHY S. TEATER



ARLENE SHOEMAKER

BOARD OF COUNTY COMMISSIONERS
FRANKLIN COUNTY, OHIO

RESOLUTION NO 1254-00

December 5, 2000

RESOLUTION APPOINTING
 JESSE M HEMPHILL, CPA, TO THE
 HUMAN SERVICES LEVY REVIEW COMMITTEE
(COMMISSIONERS)


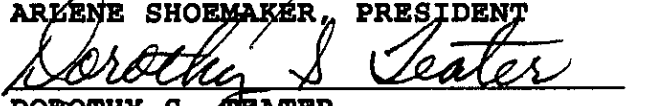
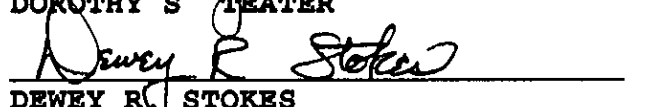
WHEREAS, a vacancy exists on the Human Services Levy Review Committee due to the resignation of William K Willis, Jr , now, therefore, upon motion of Commissioner Teater, seconded by Commissioner Stokes,

BE IT RESOLVED BY THE BOARD OF COMMISSIONERS, FRANKLIN COUNTY, OHIO

That the following person is hereby appointed to the Human Services Levy Review Committee, replacing William K Willis, Jr , to serve for an indefinite term

Jesse M Hemphill, CPA
 Hemphill & Associates, Inc
 471 East Broad Street, Suite 1306
 Columbus, Ohio 43215
 O - 461-6110

Voting Aye thereon


 ARLENE SHOEMAKER, PRESIDENT

 DOROTHY S TEATER

 DEWEY R STOKES
 BOARD OF COUNTY COMMISSIONERS
 FRANKLIN COUNTY, OHIO

Voting Nay thereon

ARLENE SHOEMAKER, PRESIDENT

DOROTHY S TEATER

DEWEY R STOKES
 BOARD OF COUNTY COMMISSIONERS
 FRANKLIN COUNTY, OHIO

GVW syb

cc Journal
 Board Member

RESOLUTION NO. 307-05

April 12, 2005

RESOLUTION APPOINTING
NATHAN WYMER TO THE
HUMAN SERVICES LEVY
REVIEW COMMITTEE
(COMMISSIONERS)

WHEREAS, pursuant to Resolution No. 311-99, adopted by the Board on March 30, 1999, the Human Services Levy Review Committee was created pursuant to ORC 5705.19 for the purpose of conducting ongoing financial reviews of social service agencies; and

WHEREAS, due to the resignation of Chad A. Jester, a vacancy exists on the Human Services Levy Review Committee; now, therefore, upon motion of Commissioner Stokes, seconded by Commissioner Brooks,

BE IT RESOLVED BY THE BOARD OF COMMISSIONERS, FRANKLIN COUNTY, OHIO:


That the following person is hereby appointed to the Human Services Levy Review Committee, replacing Chad A. Jester, to serve for an indefinite term:

Nathan Wymer
3835 Wedgwood Place Drive
Powell, OH 43065
614-249-7041

Voting Aye thereon:


MARY JO KILROY, PRESIDENT


DEWEY R. STOKES


PAULA L. BROOKS
BOARD OF COUNTY COMMISSIONERS
FRANKLIN COUNTY, OHIO

RESOLUTION NO. 728-06

September 19, 2006

RESOLUTION APPOINTING JAMES A. BOWMAN
AS A MEMBER OF THE HUMAN SERVICES LEVY
REVIEW COMMITTEE EFFECTIVE IMMEDIATELY
(COMMISSIONERS)

WHEREAS, Resolution No. 311-99 was adopted by the Franklin County Board of Commissioners on March 30, 1999, creating the Human Services Levy Review Committee pursuant to ORC 5705.19 for the purpose of conducting ongoing financial reviews of social services agencies; and

WHEREAS, the committee is comprised of seven (7) members who serve for an indefinite term; now, therefore, upon motion of Commissioner Kilroy, seconded by Commissioner Stokes,

BE IT RESOLVED BY THE BOARD OF COMMISSIONERS, FRANKLIN COUNTY, OHIO:


That the following person is hereby appointed to the Human Services Levy Review Committee to replace Wade Steen, effective immediately:

James A. Bowman
National Affordable Housing Trust
2335 North Bank Drive
Columbus, Ohio 43220
614-451-9929

Voting Aye thereon:


Mary Jo Kilroy


Dewey R. Stokes


Paula Brooks, President
Board of County Commissioners
Franklin County, Ohio

RESOLUTION NO. 88-07

January 30, 2007

RESOLUTION APPOINTING JEROME FRIEDMAN
AS A MEMBER OF THE HUMAN SERVICES LEVY
REVIEW COMMITTEE EFFECTIVE IMMEDIATELY
(COMMISSIONERS)

WHEREAS, Resolution No. 311-99 was adopted by the Franklin County Board of Commissioners on March 30, 1999, creating the Human Services Levy Review Committee pursuant to ORC 5705.19 for the purpose of conducting ongoing financial reviews of social services agencies; and

WHEREAS, the committee is comprised of seven (7) members who serve for an indefinite term; now, therefore, upon motion of Commissioner Brown, seconded by Commissioner Brooks,

BE IT RESOLVED BY THE BOARD OF COMMISSIONERS, FRANKLIN COUNTY, OHIO:

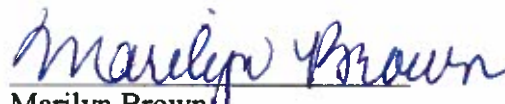
That the following person is hereby appointed to the Human Services Levy Review Committee to replace Amie Preston, effective immediately:

Jerome Edward Friedman
370 West Ninth Avenue
200G Meiling Hall
Columbus, Ohio 43210-1238
614-292-3856

Voting Aye thereon:


Mary Jo Kilroy, President


Paula Brooks


Marilyn Brown
Board of County Commissioners
Franklin County, Ohio

Resolution No. 0239-10

March 16, 2010

Resolution appointing Jean Carter Ryan to the Human Services Levy Review Committee effective immediately

(COMMISSIONERS)

WHEREAS, Resolution 311-99 was adopted by the Franklin County Board of Commissioners on March 30, 1999, creating the Human Services Levy Review Committee pursuant to ORC 5705.19 for the purpose of conducting ongoing financial reviews of social services agencies; and

WHEREAS, the Committee is comprised of seven (7) members who serve for an indefinite term; now, therefore

BE IT RESOLVED BY THE BOARD OF COMMISSIONERS, FRANKLIN COUNTY, OHIO:

That, effective immediately, the following individual is hereby appointed to the Human Services Levy Review Committee to replace Marvin G. Gutter, Ph.D. who has resigned:

Jean Carter Ryan
Executive Director
Columbus-Franklin County Finance Authority
150 South Front Street, Suite 200
Columbus, Ohio 43215
614-225-6068

DLB:skm

Resolution No. 0242-15

March 10, 2015

Resolution appointing Zachary T. Talarek as a member of the Human Services Levy Review Committee

(Board of Commissioners)

WHEREAS, Resolution No. 311-99 was adopted by the Franklin County Board of Commissioners on March 30, 1999, creating the Human Services Levy Review Committee pursuant to ORC 5705.19 for the purpose of conducting ongoing financial reviews of social service agencies; and

WHEREAS, the committee is comprised of seven (7) members who serve for an indefinite term; now, therefore

BE IT RESOLVED BY THE BOARD OF COMMISSIONERS, FRANKLIN COUNTY, OHIO:

That the following person is hereby appointed to the Human Services Levy Review Committee to fill the unexpired term of Kenneth Wilson:

Zachary T. Talarek
Director
Franklin County Office of Management & Budget
373 South High Street, 26th Floor
Columbus, Ohio 43215
(614) 525-2519

Prepared by: Erik Janas

Commissioner John O'Grady • **Commissioner** Paula Brooks • **Commissioner** Marilyn Brown
President

Office on Aging
Antonia Carroll, M.A., L.S.W., Director

July 28, 2016

Franklin County Board of Commissioners
John O'Grady, President
Paula Brooks
Marilyn Brown

Dear Commissioners,

The current senior services levy expires at the end of 2017. This levy funds Franklin County Senior Options (FCSO) which provides home and community based services for seniors in need of assistance to remain at home. As you know, many sectors of our community are working together to plan responses to the growing numbers of elderly in Franklin County. On July 13, 2015, the Columbus Dispatch captured the importance of these issues and included kind remarks about the success and value of our program. FCSO was referred to as an excellent and efficiently run resource but one that was stretched thin.

On behalf of the seniors currently enrolled in FCSO and those in large numbers who are expected to enroll during 2018-2022, I request that a 1.3 mill renewal and a .45 mill increase be placed on the May 2, 2017 primary ballot. This levy will cost the owner of a \$100,000 home an additional \$15.75 per year for a yearly total of \$55.45. While this represents an increase, the senior levy remains small relative to the task it undertakes for our seniors. The proposed levy would enable moderate growth to continue throughout the levy cycle without the need to close down enrollment.

The senior levy request book will be delivered to the Office of Management and Budget on July 29, 2016.

I look forward to working with the Human Services Levy Review committee as they review the performance of the 2013-2017 senior services levy and examine the projections of need for the period 2018-2022.

Sincerely,



Antonia M. Carroll, MA, LSW
Director, Franklin County Office on Aging

The Columbus Dispatch

EDITORIAL

Tsunami of seniors

Aging baby boomers will have a profound impact on Ohio

Monday July 13, 2015 6:11 AM

The baby-boom generation always has wielded outsized influence, and will continue to do so as its members — those born between 1946 and 1964 — age and have greater health-care needs.

A new report from the Scripps Gerontology Center at Miami University provides a reminder that Ohio must plan ahead about how to respond and adapt to the changing needs of a greatly increased population of older residents in the coming years.

The study says that Ohio's overall population is projected to grow by 2 percent from 2010 to 2030. But the proportion of older residents is expected to become vastly larger, with the number of people 60 and older expected to increase by 47 percent, and those 85 and older forecast to increase by 46 percent. People 65 or older are expected to account for nearly 22 percent of Ohio's residents by 2032. That's in line with national projections by the U.S. Census, which has projected that seniors will account for 1 in 5 U.S. residents by 2030.

Aging necessarily means dealing with health issues and how best to provide care for those who need help with everyday activities. Because long-term care is expensive, labor-intensive and often undesirable to the majority who prefer to live independently, the report urges preventive measures to stave off disability. About 163,000 Ohioans 60 or older had severe disabilities requiring long-term services in 2014; that number is projected to increase by 44 percent over the next 15 years, which will could put a strain on financial and workforce resources.

One concern is a simple shortage of workers to serve in home care and nursing homes.

Another is the increased demand for public funding of programs to subsidize care. Central Ohio has an excellent and efficiently run resource in the Franklin County Office on Aging's Senior Options program, but it already is stretched thin. Similar programs in other counties have to turn people away and maintain waiting lists.

The best way to address a shortage of care is to forestall the need for it. The report urges more focus on preventing disability through preventive care and early intervention, allowing people to continue living healthier, not just longer, lives.

Though the Miami University study focuses on health-related issues and care and not so much the macroeconomics of an aging population, it bears repeating that this coming demographic shift highlights the urgent need to address entitlement funding. Social Security was set up at a time when only half of men who reached the age of 65 could expect to live until 77.

Today, men reaching that traditional retirement age have an average life expectancy of 84. For women, the number has gone up from 79 to 86.

Greater life expectancy is the happy result of medical advances, but creates new realities of costs that haven't been addressed — in part because it's politically unpopular. Ideas such as means testing and raising retirement ages must continue to be explored in the face of hard data and the fact that there will be fewer working-age adults proportionately to support the system.

The aging of America is a demographic certainty. It will require continued study and planning to produce the best health and economic outcomes for all Americans.

Commissioner John O'Grady

August 1, 2016

Jesse M. Hemphill, CPA, Chairman
Hemphill & Associates, Inc.
471 East Broad Street, Suite 1306
Columbus, Ohio 43215

Dear Chairman:

The Franklin County Office on Aging (FCOA) has submitted to the Board of Commissioners a request to seek voter approval of a 1.75 mill, 5-year levy in May 2017. The request includes a renewal of the existing 1.3 mill, 5-year levy due to expire in 2017 and a 0.45 mill increase. The proposed 1.75 mill levy will support Franklin County Senior Options, which provides home and community based services for seniors in need of assistance to remain at home.

Pursuant to Resolution No. 311-99, the Board of Commissioners is submitting FCOA's levy request to the Human Services Levy Review Committee (HSLRC) for a thorough financial and policy analysis. Attached are materials prepared by FCOA staff for your review. The Board of Commissioners is requesting that the HSLRC provide final recommendations regarding FCOA's levy request by December 16, 2016.

Please review this request and advise the Board of Commissioners as to your committee recommendations. Thank you in advance for your assistance.

Sincerely,



John O'Grady, President
Franklin County Board of Commissioners

Enclosure

Cc: Commissioner Paula Brooks
Commissioner Marilyn Brown
Human Services Levy Review Committee members
Antonia M. Carroll, Director, FCOA
Kenneth Wilson, County Administrator
Erik Janas, Deputy County Administrator
Heidi Hallas, Sr. Performance Analyst 2, OMB