AGENDA
CCESP Advisory Council Meeting
January 11, 2021 at 11:00 am – 12:00 pm
GoTo Meeting

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<table>
<thead>
<tr>
<th>CALL TO ORDER / WELCOME</th>
<th>Nicole Rodman</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEW BUSINESS</td>
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<tr>
<td>❖ Levy Options</td>
<td>Ken Wilson</td>
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<tr>
<td>HEARING THE PUBLIC</td>
<td>Nicole Rodman</td>
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<td>ADJOURNMENT</td>
<td>Nicole Rodman</td>
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NEXT MEETING
March 16, 2021
CLINTON COUNTY ELDERLY SERVICES PROGRAM
HELPING OLDER ADULTS MAINTAIN INDEPENDENCE IN THEIR HOMES
(937) 449-0642
THE ELDERLY SERVICES PROGRAM MEETS THE COMMUNITY NEED

The goal of the Clinton County Elderly Services Program is to help older adults remain independent in their homes for as long as possible.

- Enables older adults to stay safely in their homes, preserving independence and dignity.
- Keeps seniors connected to the communities they call home; helps long-married spouses stay together.
- Prevents costly and unnecessary nursing home placements which is unaffordable to families, and ultimately taxpayers.
- Is a safety net for people who are not eligible for other community programs (payer of last resort) but who also cannot afford private care.
- Helps families – sons and daughters juggling jobs, childrearing and elder care.
- Helps businesses who need workers to be productive, not sidelined by caregiving worries.
ESP’S TYPICAL CLIENT

- 80-year-old woman with disabilities
- needs help with bathing, cooking, cleaning, dressing, shopping
- lives on a fixed income
- family and friends pitch in to help out, but it’s not enough
- family is concerned it’s not safe for her to live at home by herself
- With a call to ESP, she can get the help she needs, usually in her own home.

Total Seniors Served in 2019: 663

“I’m OK here. I like it. I’ve got all kinds of help...and real good neighbors.”
Gladys
WHAT KIND OF CARE IS AVAILABLE THROUGH THE ELDERLY SERVICES PROGRAM

Eligibility for each service is determined by a care manager during a home visit. Client’s care plans are tailored to meet their unique needs. Plans are flexible and change as needed.

- Adult day services
- Care management
- Consumer-directed Care
- Electronic monitoring systems – LifeLine and medication dispensers/alerts
- Environmental Services – pest control; major waste removal
- Home-delivered meals
- Medical equipment
- Mental health services/in-home counseling
- Transportation
- Home Care Assistance: housekeeping; personal care; errand; caregiver respite
- Minor home safety modifications and repairs
MANY FACTORS CONTRIBUTE TO THE NEED IN CLINTON COUNTY

- 13.5 percent of the population is age 65 or older
- More than 1 in 4 households includes someone age 65 or older
- More than 11 percent of people age 65 and older have incomes less than 125 percent of the Federal Poverty Level
- Caregivers are in short supply – families are smaller and more spread out. Adult children have many responsibilities to juggle, including work and child-rearing
- 7 out of 10 people will need some form of long-term care during their life
- Most people – 9 out of 10 – prefer to stay in their homes as they age (AARP)
ESP IS COMPASSIONATE & COST EFFECTIVE

CCESP compared to other Ohio long-term care options (Medicaid)

- Clinton County ESP: $317
- PASSPORT: $1,460
- Assisted Living Waiver: $1,688
- Nursing Home: $4,340
ELIGIBILITY & ENROLLMENT

“I really like this program because people need help. Not necessarily financial. It’s a job (caregiving). And I’m going to need more help. She’s not going to get better.”

PAUL, CAREGIVER
Eligibility for the Elderly Services Program starts with a quick phone screening and must be confirmed with an in-home assessment.

- 65 years or older
- Resident of Clinton County
- Need hands-on help with 2 or more everyday activities such as bathing, cooking and housekeeping
- Unable to receive services from another source
- There is no income qualification for the Elderly Services Program, however some people are required to pay a co-payment based on their income (less out of pocket medical costs)

Exceptions:
- Home-delivered meals are available starting at age 60
- Adult Day Care and Adult Day Care Transportation are available at any age for an individual with an Alzheimer’s or related dementia diagnosis
WHO DOES ESP HELP?

Of the 663 clients served in 2019:

- 55% live alone
- 88% over the age of 70
- 71% were female
- Average annual income is: $23,028
- Average annual out of pocket medical costs: $5,028
- 23% of clients share in the cost of their care.
CLINTON COUNTY FASTTRACK HOME

- Innovative model that addresses short term needs to serve more seniors at a lower overall per person cost.

- During 2019, FastTrack Home represented 11.2% of the clients served, and only 4.8% of the cost!

- Utilizes a region-wide infrastructure at a lower cost. This enables Clinton County Residents to receive support when transitioning home from over 6 regional hospitals including Clinton Memorial.

- Provides care for seniors and families when they need it the most- upon transition from the hospital or nursing facility.
EXCELLENT COMMUNITY AWARENESS IN CLINTON COUNTY
MARKET PENETRATION

Stable at 43% from 2018-2020

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<tbody>
<tr>
<td>Projection Estimates</td>
<td>863</td>
<td>883</td>
<td>909</td>
<td>936</td>
<td>962</td>
<td>589</td>
<td>1,015</td>
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<tr>
<td>Total Clients Served</td>
<td>338</td>
<td>354</td>
<td>365</td>
<td>362</td>
<td>416</td>
<td>433</td>
<td>436</td>
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<tr>
<td>Market Penetration</td>
<td>39.2%</td>
<td>40.1%</td>
<td>40.1%</td>
<td>38.7%</td>
<td>43.2%</td>
<td>43.8%</td>
<td>43.0%</td>
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FUNDING

“This is our life support in more ways than you’ll ever dream of. We couldn’t make it without the Elderly Services Program.”

JOHN, CCESP CLIENT
Current Levy:
- 1.5-mill levy that generates $1.2 million annually
- Last increase was in 2008
- Costs homeowners about $37.67 a year per $100,000 of property tax valuation
- Is 92% of the program revenue
- Expires in 2022
ELDERLY SERVICES COST ANALYSIS APPROACH

- Reviewed each service area that is:
  - 10% or more of costs to the program or
  - Contributing to growth in expenses
- The reviewed areas represent 82% of the program costs
- Evaluated comparative costs relative to the region
- Made recommendations for changes and modifications to the program
DRIVER #1: DECLINING REVENUES AND GROWING SENIOR POPULATION

- 2008
  - Levy revenue: $1,320,000
  - Seniors served: 494
- 2019
  - Levy revenue: $1,241,561 (-6% less)
  - Seniors served: 663 (34% more)
- Population projection estimates: 15% increase from 2020-2027
COA RECOMMENDATIONS

1. Implement a waiting list in 2021 to ensure the program stays within budget
2. Place a levy renewal with an increase on the November 2021 ballot
3. Evaluate and recommend changes to program eligibility for long term sustainability of the program.
DRIVER #2: HOME CARE SERVICES

- 43% of the program expenditures
- Home care work force shortages created gaps in care and quality problems
- COA recruited new providers, improving service availability and quality
- Consumer Directed Care was added as an option for families who were able to recruit and hire their own care worker
- Clinton County’s performance and quality is now significantly better than every county in Southwestern Ohio. Over 98% of seniors needing home care are matched with a provider! Compared with 66% and 78% in other counties.
- The higher availability of this service has increased the number of seniors receiving the service, and cost to the program. Expenses increased 17% from 2018-2019 and is projected to be 16.5% higher in 2020

**COA Recommendation:** Keep the service improvements in place.
DRIVER #3: HOME DELIVERED MEALS

- 24% of the program expenditures
- The average cost per meal increased 15.3% after the 2019 RFP to $9.55 per meal.
- The cost per meal is 25% higher than Warren County and 20% higher than Butler County
- The quality scores/satisfaction ratings are very high (99.7% overall)
- Lower cost alternatives would eliminate daily delivery and the level of service with delivery

**COA Recommendation:** Work with CCCAP to identify ways to reduce meal delivery costs.
DRIVER #4: INTAKE AND CARE MANAGEMENT

- 15% of the program expenditures
- The cost per person, per month is $57.06
- The cost per person is 27% lower than Warren County and 24% lower than Butler County.

**COA Recommendation:** Continue leveraging regional infrastructure to keep costs down.
CLINTON COUNTY
SENIOR SERVICES
TAX LEVY OPTIONS
CLINTON COUNTY REVENUE PER CAPITA IS LOW

Senior Service Levy Funding Per Capita (60+ Population), 2020
Sources: 2019 Actual Tax Revenues and 2020 Census

Butler: $119 (1.3 Mills)
Clinton: $111 (1.5 Mills)
Hamilton: $144 (1.6 Mills)
Warren: $137 (1.21 Mills)
OPTIONS 1 & 2

1. Renewal (no increase): The current revenue of $1,241,561 is 8% less than the 2008 revenue
   - Annual property tax: No change
   - This would require an immediate waiting list of more than 300 seniors by the end of the next levy cycle (2027).

2. Renewal and an Increase: $1,800,000
   - Eligibility changes to control growth
   - No waiting list for 2021 or 2022
   - Waiting list starting in 2023

*Millage amounts need to calculated by auditor*
OPTIONS 3 & 4

3. Renewal and an Increase: $2,000,000 – COA Recommendation
   - Eligibility Changes to control growth to avoid a waiting list in 2025
   - Equivalent of a 2.4% annual increase since last increase in 2008

4. Renewal and an Increase: $2,200,000
   - Fully funded program without a waiting list.
   - No eligibility changes

*Millage amounts need to calculated by auditor*
## PROJECTION FOR LEVY CYCLE 2023-2027

<table>
<thead>
<tr>
<th></th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
<th>Levy Cycle Total</th>
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<tbody>
<tr>
<td></td>
<td>2023 Est.</td>
<td>2024 Est.</td>
<td>2025 Est.</td>
<td>2026 Est.</td>
<td>2027 Est.</td>
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<tr>
<td><strong>Revenue</strong></td>
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<tr>
<td>Beginning Fund Balance</td>
<td>267,356</td>
<td>375,484</td>
<td>403,394</td>
<td>354,596</td>
<td>217,439</td>
<td>267,356</td>
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<td>Levy Revenue (Cash Basis)</td>
<td>2,000,000</td>
<td>2,000,000</td>
<td>2,000,000</td>
<td>2,000,000</td>
<td>2,000,000</td>
<td>10,000,000</td>
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<td><strong>COA Levy Draw</strong></td>
<td>1,871,872</td>
<td>1,952,090</td>
<td>2,028,798</td>
<td>2,117,157</td>
<td>2,181,647</td>
<td>10,151,563</td>
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<td>Title III and State Funding (Accrual Basis)</td>
<td>127,231</td>
<td>127,231</td>
<td>127,231</td>
<td>127,231</td>
<td>127,231</td>
<td>536,155</td>
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<td>Client Donations (Accrual Basis)</td>
<td>222</td>
<td>225</td>
<td>223</td>
<td>222</td>
<td>221</td>
<td>1,112</td>
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<td>Client Co-Payments (Accrual Basis)</td>
<td>40,202</td>
<td>40,820</td>
<td>40,476</td>
<td>40,269</td>
<td>40,070</td>
<td>201,837</td>
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<tr>
<td>Total Revenue to support ESP</td>
<td>2,019,528</td>
<td>2,100,366</td>
<td>2,176,728</td>
<td>2,264,878</td>
<td>2,329,169</td>
<td>10,890,668</td>
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<tr>
<td><strong>Total Revenue (incl. previous year carryover)</strong></td>
<td>2,415,012</td>
<td>2,523,760</td>
<td>2,551,324</td>
<td>2,502,317</td>
<td>2,364,961</td>
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<tr>
<td><strong>COA Operational Expenses</strong></td>
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<td>Provider Services (Accrual Basis)</td>
<td>1,489,287</td>
<td>1,553,579</td>
<td>1,589,123</td>
<td>1,631,413</td>
<td>1,677,612</td>
<td>7,941,014</td>
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<td>FTH Provider Services</td>
<td>11,668</td>
<td>11,902</td>
<td>12,140</td>
<td>12,382</td>
<td>12,630</td>
<td>60,722</td>
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<td>Information &amp; Assistance (Accrual Basis)</td>
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<td>2,666</td>
<td>2,746</td>
<td>2,828</td>
<td>2,913</td>
<td>13,741</td>
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<td>Care Management (Accrual Basis)</td>
<td>335,726</td>
<td>345,798</td>
<td>380,396</td>
<td>419,265</td>
<td>431,843</td>
<td>1,913,028</td>
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<td>FTH Care Management</td>
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<td>59,195</td>
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<td>Program Management (Accrual Basis)</td>
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<td>128,388</td>
<td>133,128</td>
<td>138,612</td>
<td>142,585</td>
<td>666,075</td>
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<tr>
<td><strong>Total COA Operational Expenditures</strong></td>
<td>2,019,528</td>
<td>2,100,366</td>
<td>2,176,728</td>
<td>2,264,878</td>
<td>2,329,169</td>
<td>10,890,668</td>
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<tr>
<td><strong>Federal Transportation Match/Senior Center Expenses</strong></td>
<td>20,000</td>
<td>20,000</td>
<td>20,000</td>
<td>20,000</td>
<td>20,000</td>
<td>100,000</td>
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<tr>
<td>Estimated Minimum Fund Balance (-1 STD DEV)</td>
<td>63,287</td>
<td>36,902</td>
<td>63,303</td>
<td>256,668</td>
<td>515,965</td>
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<tr>
<td>Actual &amp; Estimated Median Fund Balance</td>
<td>375,484</td>
<td>403,394</td>
<td>354,596</td>
<td>217,439</td>
<td>15,792</td>
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<td>Estimated Maximum Fund Balance (+1 STD DEV)</td>
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<td>770,188</td>
<td>707,622</td>
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<td>Year Ending Client Census</td>
<td>483</td>
<td>485</td>
<td>481</td>
<td>478</td>
<td>476</td>
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</tbody>
</table>

+ Includes $20,000 annual expense for senior Center
++ Projects a waiting list in 2025.
+++ 3% annual increase in homemaking, 2% consumer directed care, and 2.5% increase in Electronic monitoring.