

## AGENDA

### WCESP Advisory Council Meeting

December 10, 2025 | 9:30 am – 11:00 am  
406 Justice Drive, Lebanon OH 45036 – Room 350

<https://zoom.us/j/99809557337?pwd=mhO23E2JxhOLROUiex7F9mwqOcrYGK.1>

Meeting ID: 998 0955 7337 | Passcode: 801643

<b>CALL TO ORDER   INTRODUCTIONS</b> <ul style="list-style-type: none"><li>❖ COA Leadership Changes</li></ul>	Dave Gully Ken Wilson
<b>APPROVAL OF MINUTES</b> <ul style="list-style-type: none"><li>❖ September 10, 2025, Minutes (Action Needed)</li></ul>	Dave Gully
<b>QUARTERLY REPORTS</b> <ul style="list-style-type: none"><li>❖ Adult Protective Services</li><li>❖ Program Dashboard &amp; Financial Report</li><li>❖ Program Update Report<ul style="list-style-type: none"><li>○ Draft 2026 RFP Plan &amp; Competitive Bidding Criteria</li><li>○ Provider Monitoring Review Schedule</li><li>○ 2025 Senior Farmers Market Program – Authorized Farmers List</li></ul></li></ul>	Kimberly Frick  Judy Eschmann & Ronnie Spears  Jennifer Heck
<b>OLD BUSINESS</b> <ul style="list-style-type: none"><li>❖ Fixed Cost Sharing Implementation Update</li></ul>	Ronnie Spears & Ken Wilson
<b>NEW BUSINESS</b> <ul style="list-style-type: none"><li>❖ Five-Year Levy Options &amp; Projections</li><li>❖ 2026 Meeting Schedule</li></ul>	Ken Wilson & Ronnie Spears  Dave Gully
<b>HEARING THE PUBLIC</b>	Dave Gully
<b>ADJOURNMENT</b> (Action Needed)	Dave Gully

### NEXT MEETING

March 11, 2026

**MINUTES**  
**WCESP ADVISORY COUNCIL MEETING**  
**WEDNESDAY, SEPTEMBER 10, 2025 @ 9:30 A.M.**

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**ATTENDANCE**

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<b><i>Members Present:</i></b>	<b><i>COA Staff:</i></b>	<b><i>Guests:</i></b>
Kendra Couch Dave Gully Jerry Harrod Don Juszczuk Jeff Moore Martin Russell Paul Bernard (for Matt Nolan)	Judy Eschmann Jennifer Lake Ronnie Spears Ken Wilson	Kim Frick Konnie Hansen
<b><i>Excused:</i></b>	<b><i>Facilitator:</i></b>	<b><i>Scribe:</i></b>
Matt Nolan	Dave Gully	Christina Adams
<b><i>Absent:</i></b>		

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**CALL TO ORDER**

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The September 10, 2025, meeting of the WCESP Advisory Council was called to order by Dave Gully at 9:32 a.m.

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**APPROVAL OF MINUTES**

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Dave Gully asked for approval of the minutes from the June 25, 2025 meeting of the WCESP Advisory Council.

**Motion:** Martin Russell made a motion to approve the minutes as presented.

**Second:** Jerry Harrod seconded the motion.

**Action:** The June 25, 2025, minutes were unanimously approved as presented.

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**QUARTERLY REPORTS**

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***Adult Protective Services***

Kim Frick shared the Adult Protective Services (APS) report.

June: 60 new referrals, 24 cases opened, 12 clients received information, 5 cases sent to Ombudsman.

July: 78 new referrals, 24 cases opened, 9 clients received information, 5 cases sent to Ombudsman.

August: 48 new referrals, 19 cases opened, 6 clients received information, 5 cases sent to Ombudsman.

APS has seen an increase in romance scams and mental health clients.

***Program Dashboard & Financial Report (April - June 2025)***

Ken provided an update on the 2nd quarter Program Dashboard (please see handout for full details). At the end of the second quarter, ESP had a census of 1,944 people which is an increase of 18 from the prior quarter. ESP is the payer of last resort so if individuals are eligible for Medicaid, we assist with enrollment into PASSPORT or Assisted Living. Dual eligible clients, those who are eligible for Medicare

and Medicaid, are enrolled in either Aetna or Molina. Between now and the end of the year, the state will be transitioning to Next Gen MyCare. Aetna lost their contract, so the 211 clients enrolled in Aetna will be receiving a letter in October 2025 regarding choosing another health plan. In addition to Molina, there will be two new health plans which are CareSource and Anthem (Buckeye is on hold).

The monthly cost per client increased to \$427.23, largely due to improved home care workforce capacity. The improvement in the number of clients matched with a home care assistance provider is great for the program but does have a cost implication which will be discussed with the draft 2026 budget. At the end of the second quarter, there were 93 clients that were not matched with a home care provider. Fast track home enrollments reached 53, with 60% transitioning to ESP for ongoing services. Clients who are on a Medicare Advantage Plan that offers benefits receive assistance in utilizing these benefits. There were 10 members assisted in the second quarter which was a savings of \$3,000 to the program.

Ronnie reviewed the quarter 2 (April – June 2025) financial data, noting that the organization is on target with the budget, within 0.3% of the projected revenue and operating expenses. Home Care services are over budget due to increased demand, but this is offset by savings in other areas.

Dave asked if the increase in the number of individuals receiving home care assistance is due to an increase in provider staffing. Ken noted that provider staffing has been gradually improving.

Konnie Hansen added that the waitlist for home care providers has decreased from 230 to 110 individuals over the past year, thanks to an increase in aides.

Jennifer noted that Provider Services brought on a new home care assistance provider, Answer Care.

### ***Program Update Report***

Jennifer Lake reviewed the Program Update report (please see handout for full details). A new pest control company, Go to Pros, is in the pre-certification process to become an additional provider of pest control and chore service. Janz Medical, a home medical equipment provider, remains on hold for new referrals due to a compliance issue with their structural compliance review. Janz recently provided necessary information, and the auditor is completing the structural compliance review. Once completed, Janz will be eligible to receive new referrals.

Over \$4,000 has been redeemed by individuals participating in the Warren County Senior Farmers Market program (up from \$2,000 noted in the report). A reminder will be sent to participants who have not spent their money to let them know that they have until November 30<sup>th</sup> to utilize the benefit. The redemption rate is only at 35% of the \$12,000 issued. This is similar to last year's redemption rate. 2024 was the first year that ODA implemented the electronic benefit. Jennifer and the nutrition business relations partner met with ODA to ask why the redemption rate is low. There is some concern that participants did not receive their benefit or received the benefit and did not know how to redeem. There are learning points for ODA to consider for next year along with a push for education on receiving and utilizing the benefit. Jennifer also noted that Ohio Farmers Market Network, which operates and organizes all of the farmers markets, struggled to get Warren County farmers markets to participate. Martin asked Jennifer to provide a list of the Warren County farmers markets, and he will try to make a push for participation next year.

**Action:** Jennifer to provide Martin with the list of Warren County farmers markets.

Independent Living Assistance has been identified as a service in Warren County with a capacity issue. Per section 4 (A) of the contract, COA is requesting a waiver of competitive bidding requirements to bring on an additional provider outside the RFP process.

Dave Gully requested a motion to approve a waiver of competitive bidding requirements to recruit new Independent Living Assistance providers.

**Motion:** Martin Russell made a motion to approve a waiver of competitive bidding requirements to recruit new Independent Living Assistance providers.

**Second:** Jerry Harrod seconded the motion.

**Action:** A waiver of competitive bidding requirements to recruit new Independent Living Assistance providers was unanimously approved.

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## OLD BUSINESS

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No old business to report.

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## NEW BUSINESS

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### *Draft 2026 Budget*

Ronnie shared the draft 2026 budget (see handout for details). We are requesting an increase in levy appropriations from \$9.7M to \$10.7M. This is a 10.2% increase mainly driven by the increase in individuals receiving home care assistance services along with the increase in individuals coming onto the program. The revenue section shows a 22% increase from projection to the budget in client cost share in 2026. The new cost share program becomes effective in October 2025. The expense categories, particularly provider services, show a 9.9% increase, reflecting a 1% increase in census and additional older adults receiving services. The budget includes a 2% contingency.

Dr. Juszczuk asked for clarification on the client donations line in the budget. Ronnie shared that clients who receive home delivered meals are not required to pay a cost share. These clients can provide a donation toward the cost of meals if they would like to do so. Donations received are used to offset the cost of home delivered meals.

Dave Gully requested a motion to approve the draft 2026 budget.

**Motion:** Dr. Juszczuk made a motion to approve the draft 2026 budget.

**Second:** Jerry Harrod seconded the motion.

**Action:** The draft 2026 budget was unanimously approved.

### *2027-2031 Levy Cycle*

Ronnie reviewed the 2027-2031 levy cycle (see handout for details). The current levy cycle ending in 2026 will maintain a 4-month program balance. In 2025, we have seen a significant increase in collections which has increased the projected fund balance at the end of 2026. Ken noted that the increase in collections is from new construction. If collections continue to grow at projected rates (~3%), we may need to implement managed enrollment in 2027. The forecast indicates a gap of approximately 7.5 million dollars that would require either managed enrollment or other cost control measures. Dave asked for clarification on managed enrollment. Ken shared that the eligibility criteria to get on to the program would be increased. Under managed enrollment, individuals coming on to the program would be higher need but there would be fewer individuals enrolled, allowing us to control cost and stay within budget. There are other cost-saving options that can be explored for the next levy cycle that may allow us to avoid managed enrollment and/or an increase in the levy. We will be going on the ballot in 2026. Ken noted that we can bring some 2026 levy options to the December meeting. The Advisory

Council would like to review options at the next meeting. Ronnie added that if the collection rate continues to trend higher than 3%, this could resolve the need for managed enrollment and/or requesting an increase on the 2026 ballot.

**Action:** Ronnie & Ken to bring 2026 levy options to the December meeting.

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## HEARING FROM THE PUBLIC

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Konnie Hansen asked if a plan is in place for transportation for Aetna SRSP clients once the program is sunset. Ken shared that a plan for transportation is not in place at this time. Additionally, Konnie shared a story that was recently sent to COA's Communications Department about a client who is turning 106 years old in two weeks. WCCS received a release of information and is collecting birthday cards to present to the client. Cards can be dropped off at WCCS (645 Oak St, Lebanon 45036).

Dave noted that Family Promise (formerly Interfaith Hospitality Network) is seeking new board members.

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## ADJOURNMENT

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With no further business, Dave requested a motion to adjourn the meeting at 10:30 a.m.

**Motion:** Dr. Juszczuk made a motion to adjourn.

**Second:** Martin Russell seconded the motion.

**Action:** The meeting was adjourned at 10:30 a.m.

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## NEXT MEETING

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December 10, 2025



**Warren County ESP  
Program and Financial Report  
Quarter 3, 2025 (July - September 2025)**

## Highlighted Findings

### 1. Census Trends

- A. Compared to last year (Quarter 3, 2024), census decreased by -30 clients (from 2,011 to 1,981) or -1.49%.
- B. Compared to last Quarter (Quarter 2, 2025), census increased by 37 clients (from 1,944 to 1,981) or 1.90%.

### 2. Fast Track Home Census Trends

- A. Average Length of Stay had no change when compared to Quarter 2, 2025 (remaining at 53).
- B. New Enrollments decreased by -20 from Quarter 2, 2025 to Quarter 3, 2025 (from 53 to 33).
- C. Total clients who transferred to ESP from FTH decreased by -12 clients in Quarter 2, 2025 (from 31 to 19).

### 3. Financial

- A. Total Revenue: The amount projected to be drawn down from the levy is \$9.7 million in the third quarter of 2025, and equivalent to the budgeted amount of \$9.7 million with no variance.
- B. Total Expenses: The total expenses projected in the third quarter of 2025 are \$10.3 million as compared to \$10.3 million in the budget. The variance as compared to budget is under by \$17,567 or 0.2%.
- C. Purchase Services: The expenses for in home services are higher by \$2,325 or 0.0% as compared to budget.

**Quarter-End Census by Program**

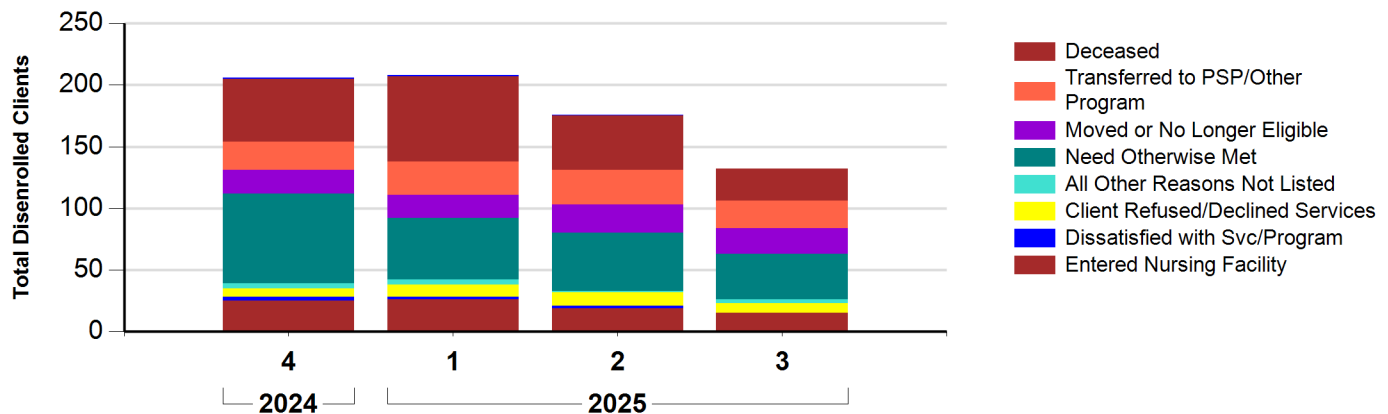
Year	2024	2025		
Quarter	4	1	2	3
<b>ESP</b>	<b>1,981</b>	<b>1,926</b>	<b>1,944</b>	<b>1,981</b>
<b>FTH</b>	<b>20</b>	<b>25</b>	<b>26</b>	<b>21</b>
<b>Medicaid Programs</b>	<b>487</b>	<b>458</b>	<b>474</b>	<b>480</b>
Passport	71	62	69	80
Assisted Living	70	50	45	56
Molina	148	168	149	137
Aetna	198	178	211	207

**Quarter-End Census, New Enrollments, and Disenrollments**

Year	2024	2025		
Quarter	4	1	2	3
Quarter-End Census	1,981	1,926	1,944	1,981
New Enrollments	170	158	194	167
Disenrollments	205	207	175	132

**Disenrollment Outcomes**

Year	2024	2025		
Quarter	4	1	2	3
Client Refused/Declined Services	7	10	11	8
Deceased	51	69	44	26
Dissatisfied with Svc/Program	3	2	2	0
Entered Nursing Facility	25	26	19	15
Moved or No Longer Eligible	19	19	23	21
Need Otherwise Met	73	50	47	37
Transferred to PSP/Other Program	23	27	28	22
All Other Reasons Not Listed	4	4	1	3
<b>Total</b>	<b>205</b>	<b>207</b>	<b>175</b>	<b>132</b>



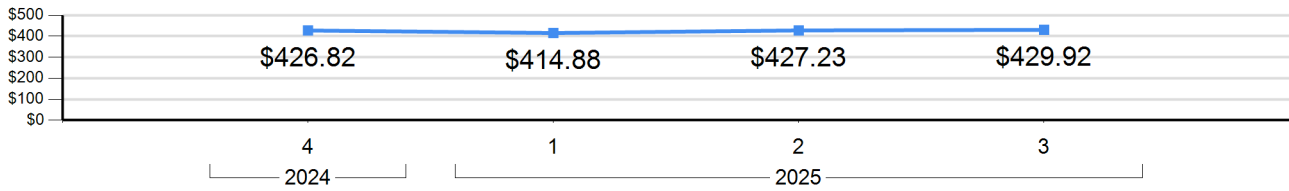


# Warren County ESP

## Quarter 3, 2025 (July - September 2025)

### TRADITIONAL ESP SERVICE TRENDS

#### Average Monthly Cost per Client



#### Distinct Clients Served by Service Group<sup>1</sup>

Year	2024	2025		
Quarter	4	1	2	3
Adult Day Service	21	19	25	19
Consumer Directed Care	108	99	91	85
Electronic Monitoring	1,028	1,013	1,023	1,041
Home Care Assistance	601	625	667	768
Home Delivered Meals	1,103	1,075	1,084	1,059
Home Medical Equipment	17	15	34	39
Home Modification	34	31	39	41
Laundry Service	95	99	100	100
Other Services	38	40	34	32
Transportation	177	185	185	188
<b>All Services (Unduplicated)</b>	<b>2,187</b>	<b>2,137</b>	<b>2,124</b>	<b>2,114</b>

#### Units Billed by Service Group *Please see the notes page for unit of measure descriptions by service.*

Year	2024	2025		
Quarter	4	1	2	3
Adult Day Service	439	352	490	398
Consumer Directed Care	8,240	7,220	7,626	7,662
Electronic Monitoring	2,916	2,773	2,985	3,018
Home Care Assistance	17,040	17,358	18,831	20,239
Home Delivered Meals	74,818	67,729	69,056	67,978
Home Medical Equipment	34	26	54	55
Home Modification	34	32	40	44
Laundry Service	755	794	974	945
Other Services	192	149	119	70
Transportation	1,653	1,693	1,702	1,808

#### Dollars Paid by Service Group (Purchased Services)

Year	2024	2025		
Quarter	4	1	2	3
Adult Day Service	\$50,555	\$21,813	\$42,105	\$33,895
Consumer Directed Care	\$183,912	\$150,231	\$143,549	\$148,509
Electronic Monitoring	\$55,842	\$54,376	\$59,063	\$61,198
Home Care Assistance	\$503,248	\$510,839	\$554,389	\$596,546
Home Delivered Meals	\$872,673	\$785,632	\$800,333	\$788,502
Home Medical Equipment	\$5,972	\$7,509	\$11,838	\$11,730
Home Modification	\$49,094	\$44,951	\$46,271	\$68,203
Laundry Service	\$32,088	\$35,680	\$39,394	\$39,358
Other Services	\$19,138	\$15,177	\$25,820	\$15,605
Transportation	\$138,645	\$138,606	\$144,489	\$152,076
<b>All Services</b>	<b>\$1,911,166</b>	<b>\$1,764,813</b>	<b>\$1,867,252</b>	<b>\$1,915,620</b>

# Warren County ESP FTH

## Quarter 3, 2025 (July - September 2025)

### FAST TRACK HOME CENSUS TRENDS

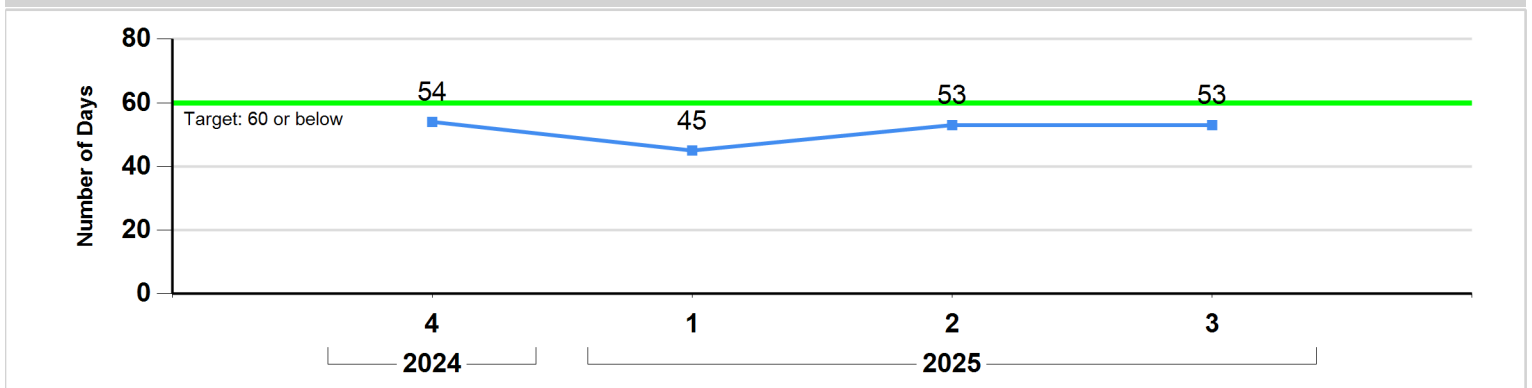
#### Total Clients Served, New Enrollments, Disenrollments

	2024	2025		
	Quarter 4	Quarter 1	Quarter 2	Quarter 3
New Enrollments	32	49	53	33
Disenrollments	50	41	53	40
Clients Transferred to ESP	23	23	31	19
	46.00%	56.10%	58.49%	47.50%

#### Enrollment by Setting

	2024	2025		
Enrollment Setting	Quarter 4	Quarter 1	Quarter 2	Quarter 3
Spousal Meals	1	2	4	2
Miami Valley Hospital	1	1	0	0
Community	1	1	1	4
Mercy Hospital Network	1	1	0	0
Premier Health Atrium	2	3	2	1
The Christ Hospital	3	1	0	0
TriHealth Hospital Network	7	11	17	11
University of Cincinnati Hospital Network	4	11	9	5
Other Hospital	7	12	6	5
Skilled Nursing Facilities	3	5	9	1
Rehabilitation Facilities	1	1	5	4
Not Captured	1	0	0	0
<b>Total</b>	<b>32</b>	<b>49</b>	<b>53</b>	<b>33</b>

#### Average Length of Stay



**Warren County ESP FTH**  
**Quarter 3, 2025 (July - September 2025)**  
**FAST TRACK HOME SERVICE TRENDS**

**Distinct Clients Served by Service Group**

Year	2024	2025		
Quarter	4	1	2	3
Electronic Monitoring Systems	13	13	15	16
Home Care Assistance	12	16	30	22
Home Delivered Meals	33	28	38	35
Home Medical Equipment	4	4	26	7
Home Modification	4	4	7	5
Transportation	3	3	5	4
<b>All Services (Unduplicated)</b>	<b>46</b>	<b>45</b>	<b>68</b>	<b>53</b>

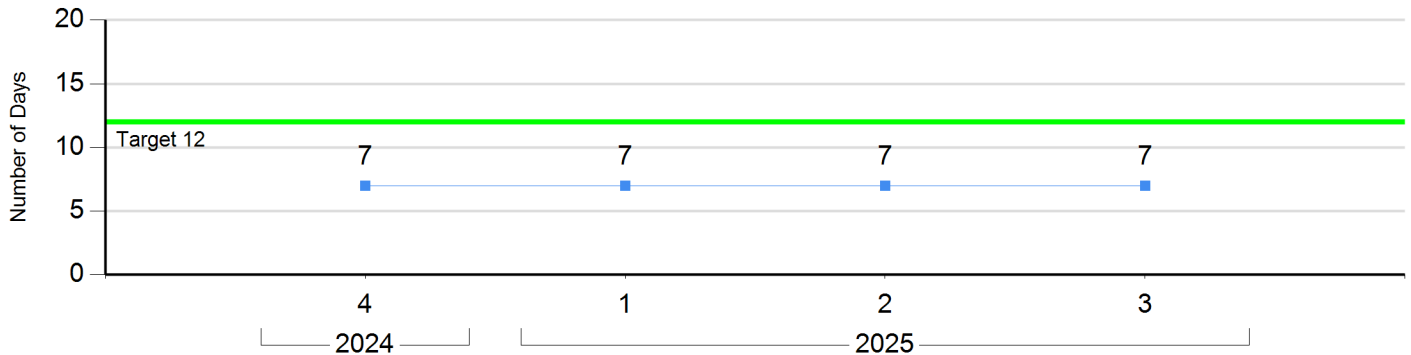
**Units Billed by Service Group** *Reference: Please see page 9 for unit of measure descriptions by service.*

Year	2024	2025		
Quarter	4	1	2	3
Electronic Monitoring Systems	21	16	19	24
Home Care Assistance	132	123	261	195
Home Delivered Meals	780	602	1,137	956
Home Medical Equipment	6	4	37	11
Home Modification	4	4	9	5
Transportation	24	9	54	85

**Dollars Paid by Service Group (Purchased Services)**

Year	2024	2025		
Quarter	4	1	2	3
Electronic Monitoring Systems	\$437	\$264	\$334	\$528
Home Care Assistance	\$3,836	\$3,600	\$7,689	\$5,716
Home Delivered Meals	\$8,942	\$6,835	\$12,733	\$10,965
Home Medical Equipment	\$467	\$569	\$2,922	\$607
Home Modification	\$2,200	\$2,210	\$5,392	\$5,534
Transportation	\$1,810	\$614	\$2,752	\$3,884
<b>All Services</b>	<b>\$17,692</b>	<b>\$14,092</b>	<b>\$31,822</b>	<b>\$27,234</b>

**Average Number of Days from Intake Call to the Enrollment Assessment<sup>1</sup>**



**Home Care Provider Network Referrals and Capacity**

Year	Quarter	#Clients in Need of HCA & CDC or AddnAide	#Clients Not Matched with a Provider	% of Clients Not Matched with a Provider	% of Clts Receiving Traditional HCA	% of Clts Receiving CDC or AddnAide
2024	4	994	208	21%	66%	13%
2025	1	1,014	148	15%	66%	19%
2025	2	1,077	93	9%	77%	14%
2025	3	1,124	77	7%	79%	14%

**Home Delivered Meals - Client Satisfaction Survey Results**

Year	2024		2025		
Quarter	4		1	2	3
Overall Satisfaction	99.70%		99.28%	99.40%	99.18%
Good Choice of Meals Available	99.14%		97.36%	98.32%	97.69%

**Medical Transportation - Client Satisfaction Survey Results**

Year	2024		2025		
Quarter	4		1	2	3
Overall Satisfaction	100.00%		99.36%	99.20%	97.23%
Service Returns Client Home Promptly	100.00%		99.29%	99.00%	96.39%

**Home Care Assistance - Client Satisfaction Survey Results**

Year	2024		2025		
Quarter	4		1	2	3
Overall Satisfaction	97.13%		97.51%	97.52%	97.57%
Aide is Dependable	96.03%		97.52%	96.53%	97.13%

Referrals				
Year	2024	2025	2025	2025
Quarter	Q4	Q1	Q2	Q3
Number of Clients Assisted	7	7	10	2
Over the Counter (OTC)	7	7	9	2

Services Awarded				
Year	2024	2025	2025	2025
Quarter	Q4	Q1	Q2	Q3
Emergency Response Service	1	4	5	0
Medical Transportation (Estimated Average)	6	3	5	2

Total Cost Savings				
Quarter _ Year	Q4_2024	Q1_2025	Q2_2025	Q3_2025
Total Cost Savings(as of qtr. end date)	\$2,100	\$2,100	\$3,000	\$600

Total Annual Cost Savings	2024	2025
	\$9,600	\$5,700

# Warren County ESP

Quarter 3, 2025 (July - September 2025)

**FINANCIALS: Based on Actual Revenue & Expenses as of September 30, 2025**

	Annual Projected	Annual Budget	Budget Variance	Percent Budget Variance
<b>Revenue</b>				
Tax Levy Appropriations	\$9,748,448	\$9,748,448	(\$0)	0.0%
<b>Federal Funding</b>				
Title III C2 - Home Delivered Meals	198,755	130,607	68,148	52.2%
Title III E - Caregiver Support	73,779	56,258	17,521	31.1%
Title III B - I&R	12,576	12,574	2	0.0%
Nutrition Services Incentive Program (NSIP)	21,338	132,522	(111,184)	-83.9%
Other Federal (ARPA)	0	0	0	0.0%
<b>State Funding</b>				
Alzheimer's	5,828	2,927	2,901	99.1%
Senior Community Services	31,289	35,359	(4,070)	-11.5%
<b>Interest</b>				
Earned	20,048	16,523	3,525	21.3%
<b>Client Contributions</b>				
Client Donations	26,100	26,500	(400)	-1.5%
Co-Pays Received	186,447	180,456	5,990	3.3%
<b>Total Revenue</b>	<b>\$10,324,609</b>	<b>\$10,342,176</b>	<b>(\$17,567)</b>	<b>-0.2%</b>
<b>Expenses</b>				
<b>Operating Expenses</b>				
COA Administrative	\$630,140	\$631,213	\$1,072	0.2%
Intake & Assessment	115,604	120,081	4,477	3.7%
Care Management	1,808,887	1,854,240	45,353	2.4%
Fast Track Case Mgmt	145,264	114,254	(31,010)	-27.1%
<b>Total Operational Expenses</b>	<b>\$2,699,896</b>	<b>\$2,719,788</b>	<b>\$19,892</b>	<b>0.7%</b>
<b>Purchased Services</b>				
Home Care Services	\$2,333,428	\$1,817,345	(\$516,083)	-28.4%
Respite Services	12,332	12,000	(332)	-2.8%
Consumer Directed Care	581,095	821,230	240,135	29.2%
Laundry Service	154,069	152,871	(1,199)	-0.8%
Independent Living	28,366	28,480	114	0.4%
Electronic Monitoring	239,375	206,043	(33,332)	-16.2%
Minor Home Modifications	233,799	271,533	37,734	13.9%
Major Housecleaning	14,500	21,072	6,573	31.2%
Pest Control	14,654	19,452	4,797	24.7%
Home Medical Equipment	47,101	58,051	10,951	18.9%
Home Delivered Meals	3,250,490	3,426,294	175,804	5.1%
Adult Day Service	127,403	122,373	(5,030)	-4.1%
Adult Day Transportation	1,301	6,765	5,465	80.8%
Medical Transportation	586,801	658,879	72,078	10.9%
<b>Gross Purchased Services</b>	<b>\$7,624,713</b>	<b>\$7,622,388</b>	<b>(\$2,325)</b>	<b>0.0%</b>
<b>Gross Program Expenses</b>	<b>\$10,324,609</b>	<b>\$10,342,176</b>	<b>\$17,567</b>	<b>0.2%</b>
<b>Client Census</b>	<b>2,008 *</b>	<b>2,040</b>	<b>32</b>	<b>1.6%</b>
<b>Cost of Services per Client</b>	<b>316.02</b>	<b>308.55</b>	<b>(7.47)</b>	<b>-2.4%</b>

\* projected year end census

## 1. Census Trends

- A. Quarter-End Census by Program is a client count based on a one-day snapshot of clients with a status of 'Enrolled' or 'Suspended' on the last day of the quarter. It is used as an approximation of how many clients are being served on any given day.
1. The Service Trends section shows the client count based on billing data. This shows the number of clients whom services were delivered and invoiced. Given these differences, the quarter-end census and the client count for all services will not match.
- B. New Enrollments are calculated by taking the total number of clients who have an enrollment date during the quarter and an approved care plan.
- C. Disenrollment Outcomes
1. All Other Reasons Not Listed includes: Dissatisfied with Service/Program, Refused Cost, Share/Verification, Health/Safety, and Unable to Meet Client Need.
2. Client Non-Compliant includes: Declined Call/Visit, Delinquent Balance, Refused, Transfer to Passport/Other Program and Unable to Contact.
3. Adding the difference between *New Enrollments* and *Disenrollments* in a given quarter to the previous *Quarter-end Census* may result in a discrepancy due to the timing of census reporting and back dating client enrollments and disenrollments.

## 2. Service Trends

- A. Average Monthly Cost per Client is based on the average monthly cost of Intake and Assessment, Administration, Care Management and Provider Services divided by the quarter-end census.
- B. Clients Served by Service Group is based on billing data. These numbers represent the unduplicated client counts within each service group and overall. The All Services client count will not equal the sum of the service group subtotals because many clients receive more than one service.
- C. Home Care includes homemaking, personal care, companion, and respite services.
- D. Other Services includes Environmental Services, Independent Living Assistance, Adult Day Transportation and Caregiver Support Services-Respite Care.
- E. Dollars Paid by Service Group represents the total from the financial system. Clients Served and Units Billed represent when service was provided, dollars paid represents when services were paid.

## 3. FTH Census Trends

- A. Clients Enrolled in ESP is calculated by taking the clients who disenrolled from Fast Track Home within the quarter then determining the clients who have an active registration with the traditional ESP.
- B. Community Enrollment may include emergency referrals to ESP FastTrack service such as: Community Paramedicine, APS referral or other agency referral for FTH specific services.

## 4. FTH Service Trends

- A. Other Services includes Pest Control.

## 5. Unit of Measure Descriptions by Service

- A. Adult Day - Number of Days  
B. Consumer Directed Care - Number of Hours  
C. Electronic Monitoring - Number of Months  
D. Home Care - Number of Hours  
E. Home Delivered Meals - Number of Meals  
F. Medical Transportation - Number of Trips

6. **N/A:** This is displayed on a case-by-case basis, but is most frequently related to a rate or unit change. The metric should display data in subsequent quarters after the change has taken effect.

## 7. Benefit Cost Savings:

OTC Medicare cards help cover the cost of over-the-counter drugs for seniors enrolled in certain Medicare Advantage plans. Not every Medicare Advantage plan offers this benefit, and limitations vary between the plans that do.

## Warren County Program Update Report December 2025

### Adult Day Services (ADS)

No changes since last report.

### Electronic Monitoring Systems

On August 20<sup>th</sup>, Modivcare (parent company of Guardian Medical Monitoring) filed for voluntary, court-supervised restructuring which provides the opportunity to reduce debt, improve stability and to continue delivering consistent, uninterrupted care to all service lines including ESP. There have been no issues with ESP clients receiving new equipment installations, repairs, or more importantly assistance with medical/non-emergency responses from the call center.

Guardian Medical Monitoring sponsored equipment training on November 3<sup>rd</sup> and 4<sup>th</sup> with 79 staff across the four counties in attendance. Guardian allowed staff to test equipment, presented the differences between the in-home and mobile devices and gave suggestions on how clients can better utilize the medication dispenser. Staff satisfaction with the event was high as reflected by survey question below:

3. Overall, how satisfied are you with the event?



### Environmental Services

The precertification review for pest control and chore services continues with Go2-Pros Pest Control. The remaining portion of the review pertains to the employee background check and orienting field staff to ESP.

### Independent Living Assistance (ILA)

MOW of SW Ohio is no longer on hold and actively accepting new referrals.



### Home Care Assistance (HCA)

No changes since the last report

### Home Delivered Meals (HDM)

No changes since the last report.

### Home Medical Equipment (HME)

As of October 8, 2025, the hold on referrals for Janz's Medical Supply was lifted, and they are now actively accepting referrals for Home Medical Equipment (HME).

Additionally, staff have been retrained on CareDirector to ensure accuracy and efficiency in processes. Janz's Medical Supply has also added new billing staff, who have received comprehensive training on billing procedures within CareDirector.

### Minor Home Modification and Repair (MHM)

No changes since the last report.

### Senior Farmers Market Nutrition Program (SFMNP)

The 2025 Senior Farmers' Market Nutrition Program (SFMNP) concluded on November 30<sup>th</sup>. Warren County was issued \$17,120 in benefits for the year. However, redemption rates were significantly lower than expected, with only \$7,832 in benefits utilized. Strategy for improvement for next year has been discussed with the Ohio Department of Aging.

### Maximum Reimbursement Rates for Warren County 10/1/25 – 9/30/26

Service	Max Rate	Unit of Measure
Adult Day Service - Transportation	\$ 31.71	One Way Trip
Adult Day Service	\$ 43.41	Per 1/2 Day
Consumer Directed Care	\$ 3.75	Per 15 Min
Electronic Monitoring System (Med Dispenser)	\$ 20.00	Per 1/2 Month
Home Delivered Meals (Mechanically Altered)	\$ 12.38	Per Meal
Home Medical Equipment (Electric Hospital Bed)	\$ 2,495.00	Per Unit
Home Care Assistance	\$ 7.58	Per 15 Min
Independent Living Assistance	\$ 23.80	Per 15 Min

## 2025 Provider Monitoring Schedule

WARREN COUNTY ESP PROVIDER MONITORING SCHEDULE (Please find below the list of Warren County Providers of ESP Services and the tentative dates for annual review for 2025.)		
Warren County ESP Providers	Review Type	Tentative Review Date
A Miracle Home Care	Annual	August-25
Active Day Cincinnati	Annual	December-25
Amaramedical Health Care Services	Annual	January-25
American Ramp Systems	Biennial	November-25
Arrow Heating Cooling and Home Maintenance, LLC	Annual	November-25
Bayley Adult Day	Annual	August-25
Bernens Medical Pharmacy	Biennial	December-25
Custom Home Elevator	Biennial	August-25
Gabriel's Angels Homecare	Annual	August -25
Guardian Medical Monitoring	Biennial	November-25
Help at Home (Prime Home Care)	Annual	February-25
Home Care by Blackstone - Assisted Care by Blackstone	Annual	March-25
Home First Non-Medical	Biennial	December-25
Interim HomeStyles of Greater Cincinnati	Annual	September-25
Janz Medical Supply (formerly Mullaney's)	Annual	Jun-25 ongoing
Kemper Shuttle	Biennial	January-25
LCD Home Health Agency	Annual	July-25
Mayerson Jewish Community Center	Annual	April-25
MedAdapt Ltd.	Biennial	May-25
Milt's Termite & Pest Control	Biennial	July-25
Northwest Adult Day Service	Annual	October-25
Nova Home Care Company	Annual	October-25
Otterbein Lebanon Adult Day Service	Annual	June-25
Partners In Prime	Annual	June-25
PWC - People Working Cooperatively, Inc.	Biennial	May-25

Senior Helpers of Dayton	Annual	September-25
Senior Helpers of Southern Ohio (SH of Southern Ohio)	Annual	August-25
Warren County Care Management	Annual	October-25
Warren County Community Services	Annual	February-25
Wesley/Meals on Wheels of Southwest OH & Northern KY	Annual	March-25

### **Proposed 2025 Draft Request for Proposals (RFP) Schedule**

COA potentially may issue the following RFPs during 2026:

- Home Care Assistance
- Transportation Service

# 2025 Senior Farmers Market Program

Below is the list of authorized farmers markets in Warren County

Market Name	Address
Buddy's Garden at <b>Franklin Farmers Market</b>	1 Benjamin Franklin Way, Franklin, OH 45005
That Guy's Family Farm at <b>Deerfield Farmers Market</b>	4188 Irwin Simpson Rd, Mason, OH 45040

## Resources:

Ohio Farmers Market Network Directory – [https://ohiofarmersmarketnetwork.org/sfmnp-directory/?\\_directory\\_county=warren](https://ohiofarmersmarketnetwork.org/sfmnp-directory/?_directory_county=warren)

Senior Farmers Market Nutrition Program Resources – <https://ohiofarmersmarketnetwork.org/senior-farmers-market-nutrition-program/>

## New ESP Cost Share Process

### Updates

- Implemented October 1, 2025 – 3 months earlier than anticipated
- Established new processes and tool for calculating cost share amount for any **NEW** ESP clients
- Developed and provided training to all ESP staff & partner county colleagues
- Developed & Updated Materials
  - Client Agreement
  - ESP Financial Disclosures
  - Cost Sharing Policy, Over Cost Request
  - Cost Sharing Fact Sheet
  - Talking Points for ESP Staff and Accounting Staff
- Transitioned (“grandfathered in”) all **existing** ESP cost share clients with a pre-determined rate based upon payment and service history, reducing burden on staff and clients to complete a new tool.
  - 1207 total ESP clients transitioned
    - 447 Butler County
    - 359 Hamilton County
    - 330 Warren County
    - 71 Clinton County
  - Eliminated fees for existing clients owing \$5 or less – reducing burden on clients as well as an administrative burden on staff.
  - Clients received a letter the first week of October describing the change and a point of contact to call for questions:
    - Established a call in-line specifically for addressing cost share questions and concerns. Since October 9, 2025 we have received 104 calls (besides one not tied to a county):
      - 44 – Hamilton County; 30 – Butler County; 26 – Warren County; 3 – Clinton County
      - 50% of calls were addressed by staff responding to the call, other calls were transferred to Accounting or to a Care Coordinator
- Early Findings
  - Streamlined processes and reduced administrative burden
  - Established consistency across county programs
  - Established an equitable process (created an opportunity when individuals are facing a hardship)
  - Increase in the number of clients wishing to be on auto-pay
- Challenges
  - Unexpected issues and delays with Care Director and developing work-arounds until issues can be resolved
  - Anticipating and having a fix for every scenario – had several ‘one-off’ concerns which were quickly addressed

- Next Steps
  - Continue to monitor any questions/concerns from clients, staff and partners
  - Continue with a reconciliation process with accounting
  - Monitor program revenue generation – will provide a financial report in future
  - Modifications to Care Director in January 2026 to streamline reporting
  - Evaluation Report to be completed after one year of implementation to be shared with the advisory boards.

WCESP Levy Projection						
LATEST COA PROJECTION: Nov-2025						
	Year 1 2022 Actual	Year 2 2023 Actual	Year 3 2024 Actual	Year 4 2025 Proj.	Year 5 2026 Proj.	5-Year Total
Revenue						
Beginning Fund Balance	12,195,096	5,200,246	5,278,613	4,989,244	4,123,102	12,195,096
Levy Revenue (Cash Basis)	71,084	8,331,771	8,722,100	9,027,374	9,343,332	35,495,660
COA Levy Draw	6,939,681	8,088,921	8,870,540	9,748,448	10,337,979	43,985,569
Title III and State Funding (Accrual Basis)	706,942	755,153	483,189	343,566	361,767	2,650,617
Client Donations (Accrual Basis)	24,988	23,418	20,671	26,100	25,201	120,378
Client Co-Payments (Accrual Basis)	120,021	186,452	169,804	186,447	232,630	895,354
Interest and Other Income	1,510	23,365	19,778	20,048	16,039	80,740
Total Revenue to support ESP	7,793,143	9,077,308	9,563,982	10,324,609	10,973,617	47,732,659
Total Available Revenue (incl. previous year carryover)	13,119,642	14,520,403	14,694,155	14,592,778	14,102,071	51,437,845
COA Operational Expenses						
Provider Services (Accrual Basis)	5,556,303	6,610,216	7,225,770	7,624,713	8,179,430	35,196,432
Healthy Aging Grant	-	-	(288,032)	-	-	(288,032)
Information & Assistance (Accrual Basis)	92,946	95,196	108,316	115,604	123,684	535,746
Care Management (Accrual Basis)	1,573,589	1,693,370	1,824,818	1,808,887	1,886,345	8,787,009
COA Program Management (Accrual Basis)	475,638	554,014	583,717	630,140	669,751	2,913,261
FTH CareMgmt (Accrual Basis)	94,667	124,511	109,393	145,264	114,407	588,242
Total COA Operational Expenditures	7,793,143	9,077,308	9,563,982	10,324,609	10,973,617	47,732,659
APS, Auditor/Treasurer/State Fees	98,942	134,818	140,929	145,067	149,329	669,085
WCCS Senior Isolation Program	27,311	20,004	-	-	-	47,315
Total Levy Expenditures	7,919,396	9,232,130	9,704,911	10,469,676	11,122,946	48,449,059
					-	
Actual & Estimated Fund Balance	\$ 5,200,246	\$5,278,613	\$4,989,244	\$4,123,102	\$ 2,979,125	2,979,125
Year Ending Client Census	1,887	1,985	2,001	2,008	2,022	
Estimated Clients served during the year	2,655	2,816	2,862	2,851	2,858	

Assumptions:

- 1) Traditional ESP census is based on linear trend projections; current market penetration level is 38.6%; growth 1 clients/month through the end of 2026; FTH Census is projected to be 26/month on average, based on trailing 12 months average; previous projections was at 25/month
- 2) Title III and State Funding included additional funding due to ARPA in 2022-2024. In 2025 and 2026 TIII revenues also reflect reductions in NSIP funding.
- 3) 2024 Levy Revenue was updated to the amount provided by county auditor for 2024 collections: \$8,722,100 - 2025 and 2026 collections are estimated to increase by 3.5% each year
- 4) Case Management PMPM rate for 2025 used is \$77.42 PMPM; 2026 rate increase is 3%. Care Director usage for 22 licenses is included in Case Management in 2025 and 2026
- 5) Intake is projected based on actual costs, budgeted costs for 2025 and a yearly increase of 3%
- 6) HCA rates calculated based on CPC; each October RFP rate increase percentages are being applied to CPC; in 2026 we also included an increase factor of 4% to account for increased utilization of the service
- 7) HDM rates were calculated based on CPC; each October RFP rate increase percentages are being applied to CPC; in 2026 we applied an additional increase factor of 2% to account for increased utilization of the service
- 8) EMRS RFP in 2024 has successfully reduced rates by 20%, beginning with Oct 2024, which is reflected in lower cost actual and projected
- 9) WCCS Senior Isolation program funding of \$60,000 was removed from the 2024, 2025 and 2026 projection

In 2024, COA has received the Healthy Aging grant, in the amount of \$288,032, which is the amount allocated to Warren County. COA used this grant to reduce the Provider services cost to the county, and in effect have a lower Admin cost base, which reduced the Program Management cost to the county.

WCESP Levy Projection						
LATEST COA PROJECTION: Nov-2025						
	Year 1 2027 Proj.	Year 2 2028 Proj.	Year 3 2029 Proj.	Year 4 2030 Proj.	Year 5 2031 Proj.	5-Year Total
<b>Revenue</b>						
Beginning Fund Balance	2,979,125	1,987,586	1,360,058	1,274,578	1,750,791	2,979,125
Levy Revenue (Cash Basis)	9,670,348	10,008,811	10,359,119	10,721,688	11,096,947	51,856,913
<i>COA Levy Draw</i>	<i>10,528,223</i>	<i>10,514,483</i>	<i>10,315,785</i>	<i>10,115,028</i>	<i>9,914,537</i>	<i>51,388,055</i>
Title III and State Funding (Accrual Basis)	410,674	410,674	410,674	410,674	410,674	2,053,368
Client Donations (Accrual Basis)	24,429	23,336	22,281	21,231	20,181	111,459
Client Co-Payments (Accrual Basis)	229,059	219,314	209,448	199,576	189,705	1,047,101
Interest and Other Income	17,508	16,923	17,081	17,036	17,040	85,588
Total Revenue to support ESP	11,209,893	11,184,729	10,975,269	10,763,545	10,552,136	54,685,572
<b>Total Available Revenue (incl. previous year carryover)</b>	<b>13,331,144</b>	<b>12,666,643</b>	<b>12,378,660</b>	<b>12,644,783</b>	<b>13,485,337</b>	<b>58,133,555</b>
<b>COA Operational Expenses</b>						
Provider Services (Accrual Basis)	8,377,309	8,373,059	8,198,801	8,025,624	7,856,119	40,830,912
Information & Assistance (Accrual Basis)	127,394	131,216	135,153	139,207	143,383	676,354
Care Management (Accrual Basis)	1,903,375	1,876,843	1,847,055	1,813,841	1,777,021	9,218,134
COA Program Management (Accrual Basis)	684,172	682,636	669,852	656,930	644,027	3,337,617
FTH Provider Services and CareMgmt (Accrual Basis)	117,642	120,975	124,408	127,944	131,586	622,555
<b>Total COA Operational Expenditures</b>	<b>11,209,893</b>	<b>11,184,729</b>	<b>10,975,269</b>	<b>10,763,545</b>	<b>10,552,136</b>	<b>54,685,572</b>
APS, Auditor/Treasurer/State Fees	133,665	121,856	128,814	130,447	132,925	647,707
<b>Total Levy Expenditures</b>	<b>11,343,558</b>	<b>11,306,585</b>	<b>11,104,083</b>	<b>10,893,992</b>	<b>10,685,061</b>	<b>55,333,279</b>
					-	
<b>Actual &amp; Estimated Median Fund Balance</b>	<b>\$ 1,987,586</b>	<b>\$1,360,058</b>	<b>\$1,274,578</b>	<b>\$1,750,791</b>	<b>\$ 2,800,277</b>	<b>2,800,277</b>
<b>Year Ending Client Census</b>	<b>1,938</b>	<b>1,854</b>	<b>1,770</b>	<b>1,686</b>	<b>1,602</b>	
<b>Estimated Clients served during the year</b>	<b>2,872</b>	<b>2,788</b>	<b>2,704</b>	<b>2,620</b>	<b>2,536</b>	

Assumptions:

- 1) Traditional ESP census projection reflects the estimated need for managed enrollment in the 2027-2031 cycle. We are estimating 84 fewer clients served each year, for a total of 420 fewer clients served over this cycle
- 2) Case Management is projected based on contracted rates with a 3% yearly increases (2025 rate is \$74.42/client/month); CareDirector licenses are included in the projected cost.
- 3) Intake is projected based on actual costs with a yearly increase of 3% each January
- 4) Title III and State Funding is projected to revert to pre-pandemic levels
- 5) Levy revenues are projected to be increase by 3.5% yearly, based on historical data
- 6) HCA and HDM rates are updated each October: rate increase percentages are being applied to CPC based on quoted RFP rates;



**WARREN COUNTY  
ELDERLY SERVICES PROGRAM (ESP)  
ADVISORY COUNCIL**

**2026 MEETING SCHEDULE**

**2nd Wednesday in March, June, September, and December  
Unless otherwise noted with asterisk (\*)**

<b>March 11, 2026</b>	<b>September 9, 2026</b>
<b>June 10, 2026</b>	<b>December 9, 2026</b>

**Time & Location of meetings:**  
9:30 – 11:00 a.m.

Warren County Administration Building  
406 Justice Drive, Lebanon, OH 45036  
Room 350  
(12/9/26 meeting will be in Room 128)

Please contact Chris Adams via phone: 513-446-0799 (cell) / 513-746-2640 (desk) or  
email [cadams@help4seniors.org](mailto:cadams@help4seniors.org) if you are not able to attend a meeting.