AGENDA
BCESP Advisory Council Meeting
September 8, 2022, at 3:00 pm – 5:00 pm
LifeSpan, Inc. – 1900 Fairgrove Avenue, Hamilton, OH 45014 – Bever Room

https://councilonaging.webex.com/councilonaging/j.php?MTID=m68fa54cad464c4fff8eac697caa015df
Meeting number: 2345 629 8894
Password: xPS39gpeDP2

Join by phone
1-844-621-3956 United States Toll Free
+1-415-655-0001 US Toll
Access code: 234 562 98894

CALL TO ORDER / WELCOME ❖ Mission Moment- FastTrack Home	Katy Abbott Shelby Stout
APPROVAL OF MINUTES ❖ June 9, 2022, Minutes (Action Needed)	Katy Abbott
QUARTERLY REPORTS ❖ Program Dashboard & Financial Report	Ken Wilson & Carl McCullough

COMMITTEE REPORTS
❖ Services Committee
  - Program Update Report
  - Eligibility Changes (Action Needed)
❖ Governance Committee
	Katy Abbott
	
	Julie Gilbert

OLD BUSINESS	Katy Abbott
NEW BUSINESS ❖ FY 2023 Budget Review (Action Needed)	Carl McCullough
HEARING THE PUBLIC	Katy Abbott
ADJOURNMENT	Katy Abbott

NEXT MEETING
December 8, 2022

ATTENDANCE

Members Present:	*COA Staff:*	*Guests:*
Katy Abbott, President Randy Allman John Centers Victoria Cheng Shawn Cowan Julie Gilbert Jennifer Heston-Mullins Sabrina Jewell Christine Matacic Jennifer Roth	Suzanne Burke Carl McCullough Stephanie Seyfried Paula Smith Ken Wilson	Joyce Kachelries, LifeSpan Kevin Kurpieski, APS
Excused:	*Facilitator:*	*Scribe:*
Sherrill Swann	Katy Abbott, President	Heather Junker
Absent:		
Mindy Wendling		

CALL TO ORDER

The June 9, 2022, Butler County Elderly Services Program (ESP) Advisory Council was called to order at 3:02 p.m. by Katy Abbott. Vicki Cheng was welcomed to the Advisory Council and introductions were made.

APPROVAL OF MINUTES

Katy Abbott called for a motion to approve the March 10, 2022, Butler County ESP Advisory Council meeting minutes.

Motion: Randy Allman made a motion to approve the March 10, 2022, minutes as presented.
Second: Christine Matacic seconded the motion.
Action: The March 10, 2022, minutes were unanimously approved as presented.

QUARTERLY REPORTS

Adult Protective Services

Kevin Kurpieski gave an update on Adult Protective Services (Heather emailed his presentation to the Advisory Council after the meeting- please reference the APS handouts). APS takes reports concerning older adults in the Butler County community who are at risk of mistreatment or some sort of self-neglect. One of the most important things that APS addressed once they started getting funds from the senior services levy, was maintaining the senior status by serving individuals ages 60 and over. If they get a report for someone who is under 60 but was reported as being 60, they try to end involvement

with the individual while recommending them for services they are appropriate for. The most common primary allegation they receive is for self-neglect. The most common multiple allegations they receive are for exploitation and neglect. Katy asked if the report on multiple allegations were confirmed. Kevin advised they are just allegations. The most common outcome was that the allegation was solved and there were no other needs by the time they closed the case. That doesn't necessarily mean they confirmed the allegation, but they did find there was enough of a problem there that needed to be worked on. The second common outcome was intervention complete. That means maybe there wasn't as much progress, but there was active discussion where the client was educated on some issues and concerns. A new service or support in their life wasn't necessarily implemented, but APS felt they had completed their intervention with the individual.

If someone has passed away either after contact or before contact, and APS has concerns or lack of comfort level with the manner in which they passed, APS has a good relationship with the coroner's office, and they communicate their concerns with them. Prior to COVID, APS would conduct an annual fatality review to discuss certain cases to try to learn from. They are hoping to get back to that this year to lessen the likelihood that future clients might have pain and suffering that could lead to death.

Katy asked about the length of time between when an allegation is received to when initial contact occurs. Kevin advised it is usually within three business days and 24 hours for emergency referrals. Sabrina asked who their main referral sources were. Kevin advised most of the referrals come from the ESP program and COA, but they receive some referrals from a lot of different sources. Ken asked if any referrals come from banks. Kevin stated they do as banks are now a mandated reporter. They receive a lot of scam reports. Vicki asked if APS is able to help families with guardianship proceedings. Kevin advised that he would try to give them basic information and provides links to their probate court site to back up the information. They also work with LifeSpan to refer individuals to their guardianship program. Sabrina asked if they have any resources they refer people to for credit counseling. Kevin advised he looked this up not too long ago and there are accredited places that do it, but he can't recall off the top of his head. Jen R. stated she thought the United Way had a program and Sabrina advised she would look into that.

Program Dashboard & Financial Report

Ken gave an overview of the Program Dashboard for January through March. We ended the quarter with 3,092 clients, which is a drop of 82 clients from the prior quarter and a drop of 47 from the prior year. The older adults in Butler County on Medicaid programs at the end of the quarter was 1,322. We have seen a drop in other counties as well attributable to the aide shortage and being in a different phase of the pandemic. There were 342 enrollments and 316 disenrollments with the number one reason being deceased followed by needs otherwise met and entering a skilled nursing facility. The skilled nursing facility placements were up in the first quarter. There was a decline in the number of people going into nursing facilities in 2020. We're starting to see that rise again although the numbers aren't back to where they were prior to the pandemic.

The average cost per client is very level at $291. There were rate increases that went into effect on October 1st so the fact the cost per client is stable shows the service delivery and some of the capacity problems providers are having. The number of older adults receiving home care assistance was 835 and in the second quarter of last year, it was 994. This decline is happening even with a larger number of providers. We have five new HCA providers in the network, and it didn't reverse the trend of staffing

shortages. Home delivered meals did drop a little bit. Most of that is because some individuals who were receiving meals for pandemic reasons are coming off.

The average number of days between the intake call and enrollment was at six. In the first quarter, there were 952 individuals who needed home care assistance with 203 of them on a waiting list. The average number of days for those who were matched was 35. The number of days for those on the list was 169. The reason for the big difference between those two numbers is that some people are finding home care services right away and in other areas, it's more difficult to find. Randy asked if individuals become disinterested if the wait is that long. Ken advised they do, and he thinks that's part of the reason why we've seen a drop in census on the program.

Satisfaction scores in home delivered meals and transportation are still strong overall. The aide dependability for home care assistance is lower than we'd like it to be.

Carl presented the Financial Report. If we look at the amount of spending from the levy through the 1st quarter, we will need $10.5 million dollars from tax levy appropriations. When you compare this to the budgeted amount of $11.9 million, we are $1.4 million under budget for the year. We are also receiving about $1.1 million from other funding sources such as Title III funding, ARPA funding, state, and client copays this program year.

The total amount of projected expenses at the end of the 1st quarter is $11.6 million. When you compare this to the budget, which is $12.7 million, the program is projected to be under budget by $1.1 million.

If we look only at purchase services, you will see that we are projecting to spend $8.1 million in the services listed above. If you compare this to the budgeted amount of $8.9 million, you will see that we are under budget by $814,975.

Starting in the month of May, we implemented a rate increase for both Home Care Assistance and Home Delivered Meals. The increase is due to inflation to help offset the increase cost in labor and the increase in the cost of food in our meal program. These increases are included in the projection report presented today. This increase is the cause for the variance that we are showing in Home Delivered Meals, however, even with this increase the lack of workers needed for home care assistance is still causing this service to be under budget.

Currently we are projecting that the census for the year will end at 3,092 clients, which is a decrease of 208 clients as compared the budget.

Katy asked if we were seeing an increase in Consumer Directed Care to which Carl advised that we are as we're actively growing the program to help offset the lack of workers in home care assistance. Ken added that with the switch to Palco for our Financial Management Service, we're expecting a higher level of service to make it easier for people to enroll going forward.

Market Penetration & Five-Year Levy Projections

Ken reviewed the Market Penetration report. This is sent out twice a year. Market penetration is the number of seniors with a disability in the community (based on census data) divided by the number of

older adults receiving ESP services. This is important because it helps project future demand on the program. This has been very consistent at around 40% between 2020 and 2021. We will be updating the denominator with the new census data once Scripp's applies the disability estimates.

We're in the second year of the levy and it's always good to look at the Five-Year Levy Projections periodically because we have to look at the broader scope of the five-year plan. We have about $9.8 million in the fund balance. The estimated new levy revenue from property taxes is at $10.5 million. At the end of the five-year levy cycle, we're projecting the fund balance to be spent down to $829,000. We have to stay really tuned into this because a big part of the reason we aren't projecting a waiting list is because of the home care staffing problem. If that starts to swing the other way, we'll start to see projections that are in the red very quickly. Katy asked when we'd need to be on the ballot again. Ken advised in 2025. Adult Protective Services is part of this plan too. Katy asked what settlement fees were. Ken explained those are expenses that the auditor's office has.

COMMITTEE REPORTS

Services Committee

Katy gave the Services Committee report. Palco will be the new Financial Management Service provider for Consumer Directed Care. They will be fully ready to accept all clients by June 16th. We have updated Consumer Directed Care Service Specifications which will be reviewed in a moment.

There are four new Independent Living Assistance providers. Warming Hearts and Oxford Seniors are both new providers for this service. Both are on provisional contracts for provider oversight.

The Senior Farmers market program provides $50 vouchers for individuals to use at a variety of participating farmers markets. People do need to apply for these vouchers. Applications will be accepted until September 15th or until the vouchers run out.

The Electronic Monitoring System recently underwent a major upgrade from 3G to 5G. This was a very heavy lift with over 2,000 clients receiving this service.

There are provider monthly relief payments that started on May 1st through September 30th initially. This is because the cost of things are higher. For example, the cost of diced pear fruit cups are up 44%. Durable Medical Equipment received a 20% rate increase (some equipment they can't even get at this time), Independent Living Assistance received a 5% increase from the recent RFP, and Home Care Assistance received an 8% increase. These rate increases were reached through a cost analysis of the current inflation rate and income adjustments to entry level positions. Home Delivered Meals has the trifecta of hits because there are meal costs, transportation costs, and worker costs. This resulted in them receiving a 35% increase. Federally funded congregate meals received a 15% increase and that's retroactive to October 1st, 2021. Adult Day Services will get a 20% increase and Adult Day Transportation will get a 15% increase.

In the March meeting, Scripp's Gerontology Center provided an evaluation of the ESP program. COA put together a nine point implementation plan of recommendations based on the evaluation. COA updated us for accountability on progress and follow up on the recommendations. If anyone wants additional details about that, she would be happy to share that. It all looked good to the Services Committee.

There were three providers that terminated services: two for home medical equipment and one for transportation. There were also nine providers added. As Ken mentioned, several home care assistance providers and three transportation providers. Ken added that the Provider Quality Report is unique to our area, and we use it to benchmark providers to each other on how they're doing. This is a very important quality tool because it's where the customer has a voice in the whole process. Katy informed that COA keeps close tabs on the scores and if a provider drops below a set threshold, they have conversations with those providers. Providers can also be placed on a quality action plan where they have to remediate. Sabrina asked if the report is available to the providers. Ken advised it is all available online.

Due to the shortage of home care aides, COA wants to carve out laundry and created the Laundry Delivery Specifications (refer to handouts in packet). There are companies that will pick up, launder, and then deliver clothes back to the clients next day. New service specifications had to be created even though this is not a new service. It's a new way to deliver an existing service. The Service Committee reviewed and suggested a couple of minor modifications such as adding "folding" to section 4.1.

Sabrina asked what happens if a bag of laundry comes back full of bed bugs. Ken advised we don't have enough experience yet to answer that question. We've been piloting this with five clients who needed the service coming home from the hospital. It's received rave reviews. Ken added that in general, putting clothes in the hot dryer kills bed bugs. Katy asked if they will be doing satisfaction surveys with the clients and Ken advised that we will be. Sabrina asked if this service is happening all over. Ken stated it is brand new and an innovative solution. Katy added that it's not available in all zip codes and they are working to find other providers for the areas that Happy Nest doesn't service. Sabrina asked if we knew what zip codes weren't serviced. Ken advised we do but he didn't have that information with him. A lot of Butler County is covered but not the entire county. They do take service requests so if we can show there is enough need in a certain area, they will consider expanding their territory.

With no further questions, Katy asked for a motion to approve the Laundry Delivery Service Specifications.

Motion: Christine Matacic made a motion to approve the Laundry Delivery Service Specifications.
Second: Julie Gilbert seconded the motion.
Action: The Laundry Delivery Service Specifications were unanimously approved.

Consumer Directed Care Service Specifications were updated due to moving to Palco for the Financial Management Services as well as the new AddnAide home health aide app (refer to handouts in packet). The client (or auth rep) is the employer, and these specifications are written for them and outlines what their responsibility is as the employer.

Sabrina asked why the aide has to be 18 years of age and why can't they be 16. She stated a lot of times there are teenagers at home doing the work. Ken advised he needed to go back and look as to the reason why.

With no further questions, Katy asked for a motion to approve the Consumer Directed Care Service Specification changes.

Motion: Jennifer Heston-Mullins made a motion to approve the Consumer Directed Care Service Specification Changes.

Second: Sabrina Jewell seconded the motion.
Action: The Consumer Directed Care Specification Changes were unanimously approved.

The Fast Track Home Program is where we meet people in the hospital and set them up with certain services as they are transitioning home (refer to handout in packet). There is a huge chance of someone getting readmitted to the hospital after discharge for a variety of reasons. This is very costly to the individual in terms of their own well-being and to the healthcare system. There is a big emphasis to reduce hospitalization and the Fast Track Home Program is an attempt to do that within the ESP program. The major difference is that we're not asking them for their financial information at that point because it's a barrier to get them set up with services right away. Individuals can only be on the program for 60 days. The program is currently operating in Clinton, Hamilton, and Warren County. The contract language that allows this program has not yet been approved for COA to do this program in Butler County.

The pilot presented today will be utilizing Federal ARPA funds to provide a limited Fast Track Home service. This will not require any changes to the current contract eligibility. Clients will receive home delivered meals and coaching with this pilot starting in July and running through September of 2024. Data collected during this time will be shared to show the impact this program is to individuals and to the community.   Sabrina asked what the coaching was. Ken explained it's an evidence based transitions program model. We use the Coleman Model. There are five pillars that have shown through evidence to reduce the chance of going back to the hospital. It includes things such as making sure the older adult knows what red flags to look for that landed them in the hospital as well as an action plan if they see those red flags again. Vicki asked if this was only for patients that lived in Butler County and for ages above 60. Ken stated yes to both. Vicki then asked if we would be coming to McCullough Hyde. Ken stated we would like to, and that a good relationship already exists with TriHealth in several of their hospitals. Ken will follow up by having Stephanie Seyfried reach out to her about coming to McCullough Hyde.

With no further questions, Katy asked for a motion to approve the Fast Track Home Pilot.

Motion: Randy Allman made a motion to approve the Fast Track Home Pilot
Second: Shawn Cowan seconded the motion.
Action: The Fast Track Home Pilot was unanimously approved.

Governance Committee

Julie gave the Government Committee report. We still have three vacancies: the nursing facility representative and two community representatives. Julie stated she is concerned as to what will happen at the end of this year as there are quite a few people terming off the Advisory Council: Katy, Randy, and Julie. Katy informed the new members that they can only serve two consecutive three year terms before they have to rotate off.

OLD BUSINESS

Ideas for Potential Board Members

Katy asked the Advisory Council if they had any ideas for potential members and if anyone knew of someone who's family member is receiving services from the ESP program. Ken advised that there are

several older adults in West Chester involved in the meal program at the library that have shown leadership who may be an option. Sabrina expressed she may have someone who would be a good fit that she will reach out to. Katy asked what the process was. Do Advisory Council members identify individuals and Katy reaches out to them? Julie explained that usually if someone knows of someone, they will reach out to them themselves and then connect with her. Sabrina asked if anyone has reached out to The Knolls for a nursing facility rep. Katy advised that they can and asked if Sabrina knew someone there. Sabrina advised of an individual who is on the Aging Friendly Oxford Committee that she can reach out to. Randy added that he may also have someone from Butler Behavioral that would be interested in joining. Katy asked that everyone reach out to these individuals within the next two to three weeks to get the process started.

Ken asked Julie if the county still has the background check process in place. Julie explained that if the position is commissioner appointed, there is more of a lengthy process which includes a background check, resume, and a letter of recommendation from Julie. The individual will then have to be voted in by the commissioners for a resolution. Sabrina asked if the individual needed to live in Butler County to which Ken advised they need to live or work in the county. Jennifer H. asked what the difference is between a commissioner appointed position and a Council appointed position. Ken advised there are so many slots and out of those, the commissioners appoint a certain number which is outlined in the Bylaws. Shawn asked if there was a limit to how many people can serve. Heather advised there are 15 slots with eight of those being commissioner appointed. Katy added that they are usually the ones who recommend individuals to the commissioners. Sabrina then asked if there was anyone that's come off the Advisory Council who may want to come back on. Katy advised that she did reach out to one person who was not interested.

NEW BUSINESS

Annual Report

Paula gave an overview of the Annual Report (please see handout in packet). This is your report to the community to show how the tax dollars are being spent. There was a great amount of content to share again this year. We included a QR code and link to access full stories and additional content. The report elements are the same as they have been the last couple of years. The report gives people highlights from the past year as well as a glimpse into the future.

Area Plan

Ken gave a quick update on the Area Plan. As the Area Agency on Aging for Southwestern Ohio, one of our jobs is to do a community needs assessment and come up with an area plan on how we'll address the needs of older adults. We are currently in the process of developing that. This past spring, we gathered input from the community in a number of ways: provider surveys, person on the street interviews, randomized surveys that went out to older adults, and surveys from individuals receiving ESP services. We also worked with LiveWell who took a look at the ESP program, national models, and identified gaps. From all of that, we're in the process of developing our strategies for next few years.

At a high level, there are going to be some things on that plan as needs of older adults that we already knew about and are on the current plan and will carry over to the new plan. Those include the home care staffing crisis, the need for transportation, and the need for affordable housing. One area that isn't new but will be getting a lot of attention is identifying opportunities to provide our existing services in

new ways as a result of learning from the pandemic. A good example of that is the Laundry Delivery Service that was just discussed. We will also be looking at the home delivered meal and congregate meal programs and how to modernize them for current and future older adults. Two areas that are brand new are mental/behavioral health and social isolation which are both connected. In all the years we've been doing these surveys, social isolation has never come up. Mental and behavioral health has, but not the level that it did this time. We'll be investing and exploring new programming for older adults and how we can meet those gaps. There's an opportunity with some of the federal ARPA dollars to be innovative in how we'll go about doing that. Some of that will have impact down the road on ESP services as we look to close those gaps. Fortunately, in Butler County, we have the Uplift Program but that doesn't exist in the other four counties in our region. Ken thinks there's more we can be doing in addition to Uplift. We're going to be having a Public Hearing in July and submitting our Area Plan to the state in August. Ken will continue to share through meetings the evolution of that and how it impacts service delivery in Butler County.

Advisory Council Meeting Feedback Survey Results

Katy reviewed the Advisory Council Meeting Feedback Survey Results. Katy asked everyone how the hybrid option worked today since most stated they preferred a hybrid option. Feedback was that the meeting went well. People virtually and in person could hear each other.

HEARING THE PUBLIC

There was no one from the public present that wanted to speak.

ADJOURNMENT

With there being no further business to discuss Katy asked for a motion to adjourn.

Motion: Sabrina Jewell made a motion to adjourn the meeting.
Second: Christine Matacic seconded the motion.
Action: It was unanimously agreed to adjourn at 4:55 p.m.

NEXT MEETING

September 8, 2022

Butler County ESP
Program and Financial Report
Quarter 2, 2022 (April - June 2022)

Highlighted Findings

1. Census Trends

A. Compared to last year (Quarter 2, 2021), census decreased by -63 clients (from 3,161 to 3,098) or 1.99%.

B. Compared to last Quarter (Quarter 1, 2022), census increased by 6 clients (from 3,092 to 3,098) or 0.19%.

C. Quarter-end census, new enrollments, and disenrollements include clients aged 60 and over who are receiving short-term services as a result of the pandemic.

Year	2021	2022	2022	2022
Quarter	Q3	Q4	Q1	Q2
Short-term Clients Added to Census	1	0	0	0
New Short-term Client Enrollments	1	0	0	0
Disenrolled Short-term Clients	0	1	0	0

2. Financials

A. Total Revenue: The amount needed to be drawn down from the levy is $10.8 million through the second quarter, as compared to the budgeted amount of $11.9 million. The variance is under budget by $1.1 million or 9.5%.

B. Total Expenses: The projected expenses incurred through the second quarter is $12.1 million as compared to $12.7 million in the budget. The variance is under budget by $575,198 million or 4.5%.

C. Purchase Services: The projected expenses were lower by $377,447 or 4.2% as compared to budget.

Butler County ESP
Quarter 2, 2022 (April - June 2022)
TRADITIONAL ESP CENSUS TRENDS

Quarter-End Census by Program

Year	2021		2022	
Quarter	3	4	1	2
ESP	**3,261**	**3,174**	**3,092**	**3,098**
Medicaid Programs	**1,270**	**1,277**	**1,322**	**1,333**
Passport	265	272	281	280
Assisted Living	97	117	112	94
Molina	332	332	340	351
Aetna	576	556	589	608

Quarter-End Census, New Enrollments, and Disenrollments[1]

Year	2021		2022	
Quarter	3	4	1	2
Quarter-End Census	3,261	3,174	3,092	3,098
New Enrollments	366	232	242	259
Disenrollments	268	312	316	261

Disenrollment Outcomes

Year	2021		2022	
Quarter	3	4	1	2
Deceased	70	111	106	81
Transferred to PSP/Other Program	34	34	38	34
Moved or No Longer Eligible	29	40	28	28
Need Otherwise Met	73	61	63	62
All Other Reasons Not Listed	4	3	3	2
Client Refused/Declined Services	20	20	19	19
Dissatisfied with Svc/Program	4	3	1	2
Entered Nursing Facility	34	40	58	33
Total	**268**	**312**	**316**	**261**

---
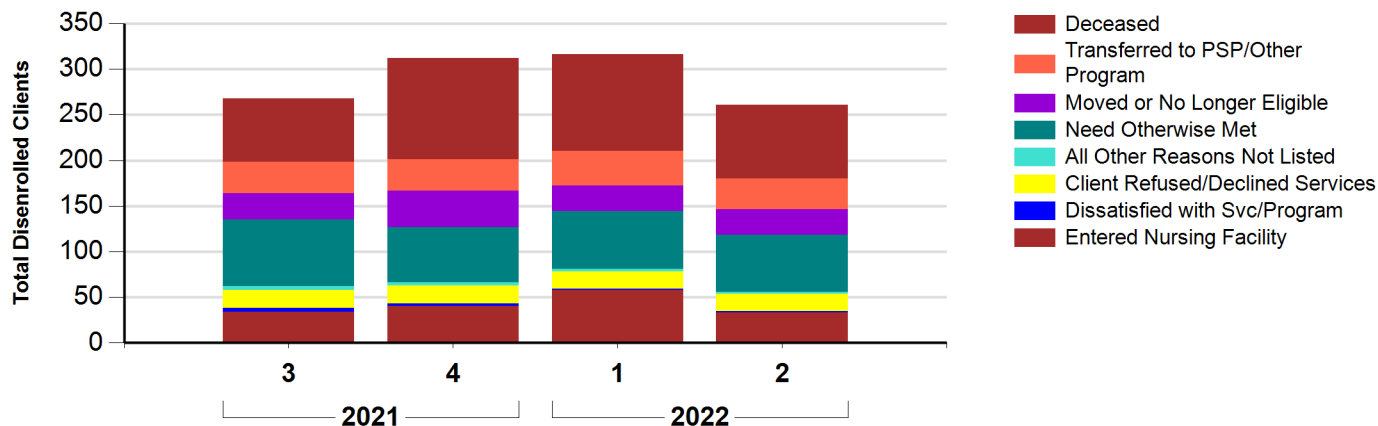
[1] Q4 '20 - Q3 '21 quarter-end census, new enrollments, and disenrollments include the number of short-term clients served as a result of the pandemic.

Average Monthly Cost per Client[1]

$285.16 $303.21 $291.10 $321.87

| | 3 | 4 | 1 | 2 |
| | --- 2021 --- | | --- 2022 --- | |

Distinct Clients Served by Service Group[12]

Year	2021		2022	
Quarter	3	4	1	2
Consumer Directed Care	144	150	144	148
Electronic Monitoring	2,231	2,205	2,132	2,093
Home Care Assistance	991	910	835	784
Home Delivered Meals	1,555	1,518	1,495	1,509
Home Medical Equipment	156	116	125	130
Medical Transportation	283	263	239	259
Non-Medical Transportation	55	72	56	41
Other Services	389	377	332	353
All Services (Unduplicated)	**3,524**	**3,485**	**3,402**	**3,360**

Units Billed by Service Group[12]   *Please see the notes page for unit of measure descriptions by service.*

Year	2021		2022	
Quarter	3	4	1	2
Consumer Directed Care	10,719	12,381	12,173	11,070
Electronic Monitoring	7,215	6,936	7,022	6,871
Home Care Assistance	24,977	23,850	21,026	21,157
Home Delivered Meals	99,999	98,358	93,630	96,154
Home Medical Equipment	235	208	209	207
Medical Transportation	2,588	2,165	2,103	2,503
Non-Medical Transportation	207	314	257	131
Other Services	1,617	1,473	1,355	1,404

Dollars Paid by Service Group (Purchased Services)[12]

Year	2021		2022	
Quarter	3	4	1	2
Consumer Directed Care	$153,380	$177,418	$169,776	$174,237
Electronic Monitoring	$125,694	$120,243	$121,737	$119,151
Home Care Assistance	$603,140	$574,020	$503,082	$531,777
Home Delivered Meals	$746,998	$811,520	$739,947	$938,838
Home Medical Equipment	$29,086	$26,366	$26,565	$28,255
Medical Transportation	$91,280	$95,579	$98,571	$116,839
Other Services	$188,254	$206,858	$149,478	$172,556
All Services	**$1,937,833**	**$2,012,004**	**$1,809,156**	**$2,081,652**

[1] Other Services includes adult day facilities, many of which are still closed, while others began limited openings in May of Quarter 2, 2021.

Average Number of Days from Intake Call to the Enrollment Assessment
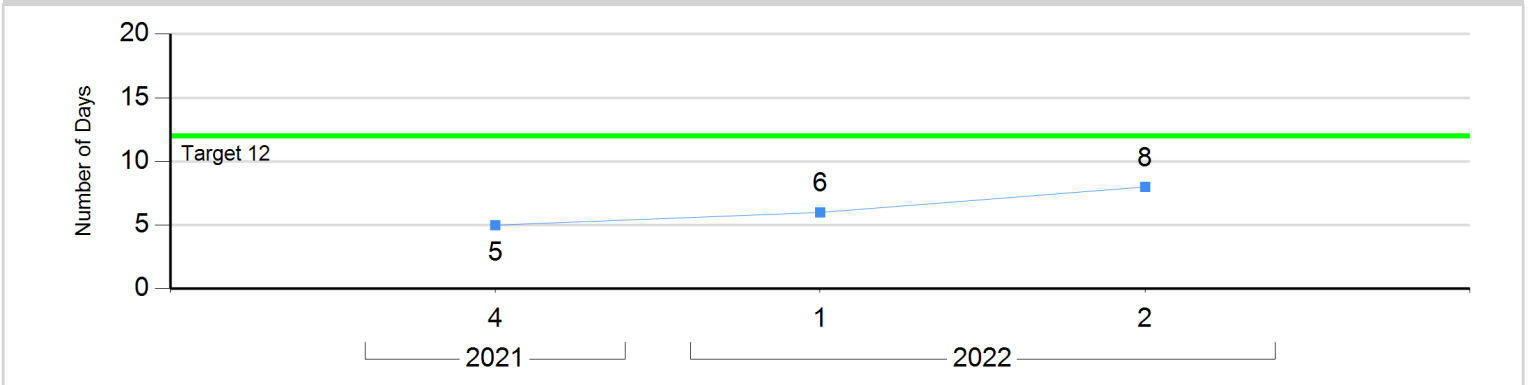
Home Care Provider Network Referrals and Capacity

Year	Quarter	# Clients in Need of HCA	# ClientsNot Matched witha Provider	%of CltsNotMatched with a Provider	Avg. #DaysTo AuthorizeRequest	Avg. #Days Not Matched with Provider
2021	4	976	261	27%	47	104
2022	1	952	368	39%	42	169
2022	2	999	477	48%	39	183

Home Delivered Meals - Client Satisfaction Survey Results

Year	2021		2022	
Quarter	3	4	1	2
Overall Satisfaction	97.99%	97.24%	97.85%	97.96%
Good Choice of Meals Available	94.24%	91.46%	94.60%	94.55%

Medical Transportation - Client Satisfaction Survey Results

Year	2021		2022	
Quarter	3	4	1	2
Overall Satisfaction	92.68%	94.99%	96.85%	95.79%
Service Returns Client Home Promptly	85.63%	88.61%	90.45%	94.96%

Home Care Assistance - Client Satisfaction Survey Results

Year	2021		2022	
Quarter	3	4	1	2
Overall Satisfaction	90.61%	90.72%	92.12%	92.01%
Aide is Dependable	88.05%	86.54%	89.94%	92.09%

	Annual Projected	Annual Budget	Budget Variance	% Budget Variance
Revenue				
Tax Levy Appropriations	$10,794,701	$11,924,142	($1,129,441)	-9.5%
Federal & State Funding				
Title III C2 - Home Delivered Meals	470,421	137,450	332,971	242.2%
Title III E - Caregiver Support	127,500	110,662	16,838	15.2%
Alzheimer's	0	5,517	(5,517)	-100.0%
Nutrition Services Incentive Program (NSIP)	182,838	270,556	(87,718)	-32.4%
Senior Community Services (SCS)	0	24,072	(24,072)	0.0%
Other Federal (Title C2 Supplemental, Title III D, ARPA)	355,098	0	355,098	0.0%
Other Revenue Sources (Interest)	$1,234	$278	$956	344.0%
Client Contributions				
Client Donations	18,719	12,450	6,269	50.4%
Co-Pays Received	203,979	244,561	(40,582)	-16.6%
Total Revenue	**$12,154,490**	**$12,729,688**	**($575,198)**	**-4.5%**
Expenses				
Operating Expenses				
COA Administrative	$795,154	$832,783	$37,630	4.5%
Intake & Assessment	289,319	314,915	25,596	8.1%
Case Management	2,510,339	2,644,864	134,525	5.1%
Total Operating Expenses	**$3,594,811**	**$3,792,562**	**$197,751**	**5.2%**
Purchased Services				
Home Care Assistance	$2,171,674	$3,292,364	$1,120,691	34.0%
Independent Living	246,122	307,555	61,432	20.0%
Home Medical Equipment	108,886	85,856	(23,030)	-26.8%
Electronic Monitoring	480,205	513,913	33,707	6.6%
Minor Home Modifications	264,786	414,199	149,413	36.1%
Major Housecleaning	24,735	24,097	(638)	-2.6%
Pest Control	40,357	39,316	(1,041)	-2.6%
Home Delivered Meals	3,850,000	2,986,014	(863,986)	-28.9%
Adult Day Service	20,696	69,855	49,159	70.4%
Adult Day Transportation	6,824	11,204	4,380	39.1%
Medical Transportation	418,935	417,527	(1,408)	-0.3%
Non Medical Transportation	43,054	24,839	(18,215)	-73.3%
Consumer Directed Care	758,406	619,136	(139,269)	-22.5%
Behavior Health	125,000	131,250	6,250	4.8%
Gross Purchased Services	**$8,559,679**	**$8,937,126**	**$377,447**	**4.2%**
Gross Program Expenses	**$12,154,490**	**$12,729,688**	**$575,198**	**4.5%**
Client Census	**3,113***	**3,300**	**187**	**5.7%**
Cost of Services per Client	**226.74**	**212.81**	**(13.92)**	**-6.5%**

* 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, Eviction, 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 discrepency due to the timing of census reporting and back dating client enrollments and disenrollments.
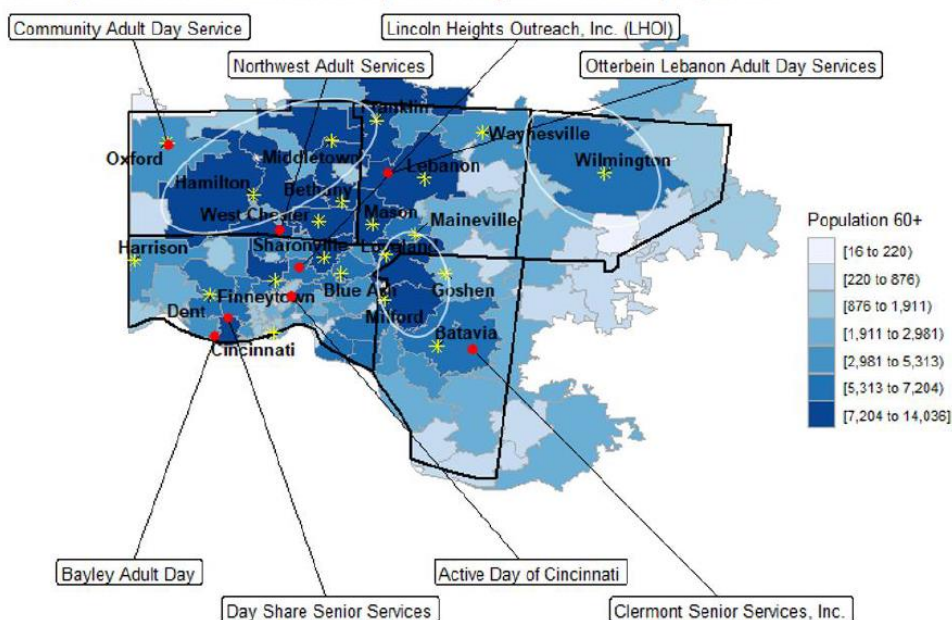
2. Service Trends

    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, Adult Day, Adult Day Transportation, Non-Medical Transportation, and Independent Living Assistance.

    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. 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

4. 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.

Home Care Assistance (HCA)

July 2022: Helping Hands Private Duty submitted their termination for Home Care Assistance. Their reason for termination was closing their business because they didn't have enough staff to operate. We are actively transitioning the clients previously served by Helping Hands to other contracted providers. This transition is nearly complete. Many Helping Hands office staff and aides were hired by existing HCA providers. Clients wishing to keep their current Helping Hands aide were given the opportunity to move with the aide to the new provider. While the official date of termination is September 2022, they currently do not have any aides employed and are not providing any services.

Financial Management Service (FMS) for Consumer Directed Care (CDC)

June 2022: All CDC services have been transitioned to Palco. Palco is actively enrolling clients to the CDC service. Acumen's contract ended June 2022.

Adult Day Services

Here is a map of existing adult day centers overlayed with older adult population data. The circles indicate gaps in care. COA has engaged the state associations in a state-wide conversation about restoring the availability of Adult Day services following the pandemic's negative impact on these service settings.

The state is also considering expanding PACE into our region which is another funding model for Adult Day Settings combined with wrap around services and medical care.

Adult Day Service Providers Overlayed on Population 60+ by Zip Code

Transportation

Partners in Prime requested to be placed on hold for Medical and Non-Medical Transportation effective 11/21/21 due to staffing shortages. The provider has requested to have this hold removed and was able to begin accepting new referrals effective 5/1/22.

Independent Living Assistance (ILA)

Warming Hearts has completed their pre-certification review and has started accepting referrals for ILA. They are in all four zones for Butler County.

Oxford Senior Citizens has completed their pre-certification review and has started accepting referrals. They are contracted in the west zone.

Senior Farmers Market Nutrition Program

Applications will be available through Sept 15th. We welcome Peggy's Produce Market in Middletown to the program, in addition to our current list of participating markets: Browns Family Farm Market, Garver's Family Farm Market, Fairfield Farmers Market, Oxford Farmers Market, and West Chester Farmers Market. Participants are also able to visit any of the markets in our five-county area that are approved to accept coupons.   The last day for the participants to use the coupon vouchers is 10/31/2022.

Modernization of Home Delivered Meals and Congregate Meal Programs

COA worked with the Livewell Collaborative over the summer to develop a roadmap for modernizing our Congregate and Home Delivered Meal (HDM) programs. The objectives include evaluation of the existing HDM and Congregate meal programs, identifying new opportunities to improve the program and/or create new services, create, and refine service specifications, and to develop implementation strategies. Staff from COA, Meal Providers, and Clients receiving meal services, are some of the groups that will participate in the project. The Livewell Collaborative is made up of students and faculty from UC. Multidisciplinary teams utilize a design thinking approach in their research, translating into desired solutions that meet the complexities of living well across the lifespan. We are now getting prepared to share our findings with our current providers along with other entities that were identified as potential partnerships in our community. We are currently planning a provider summit on 9/30/22 with our current providers, along with a larger summit on 10/13/22 to bring current providers, potential community partners, as well as other stakeholders together to discuss how we can utilize what we have learned from working with Livewell Collaborative to improve the Home Delivered Meals and Congregate Meal programs.

Grocery Delivery Service

Provider Services is preparing to release an RFQ to provide grocery ordering and delivery service to our clients. We will be requesting qualifications, and a cost quote, from our current Title III providers. This will allow an agency to add this service to assist a client with ordering groceries, picking them up to safely deliver to the client's residence, and assist the client in putting them away, if needed. This service would be available in our five-county region.

Electronic Monitoring Systems

Guardian Medical Monitoring, Inc. entered into a sale of ownership with VRI Intermediate Holdings, LLC in May 2022. The ownership change will not impact the nature of the business operations, employees, or staff. Service to COA clients will not be impacted.

2022 Provider Monthly Relief Payments

Due to the downstream effects of the global pandemic on the economy it is necessary to readjust the provider rates. Each of the various services within the Elderly Services provider network has experienced unprecedented increases in expenditures. Rate increases are being provided as monthly relief payments to providers based on the number of clients served. To determine the percentage of rate increases, COA performed detailed cost analysis for each service. It is unclear if these increases will be temporary or will become the new contracted rates, but at this time, these increases will be in effect until 9/30/22.

2022 BCESP SCR Schedule (a highlight indicates a change)

BUTTLER COUNTY ESP STRUCTURAL COMPLIANCE REVIEW SCHEDULE – 2022 (Please find below the list of Butler County Providers of ESP Services and the Tentative dates for annual review for 2022)		
Butler County ESP Providers	**Review Type**	**Review Tentative Date**
A Best Home Care, Inc.	Annual	Nov-22
A Miracle Home Care	Annual	Sept-22
Active Day of Cincinnati	Annual	Jun-22
Always There Homecare	Annual	May-22
Bayley Adult Day Program	Annual	Oct-22
Central Connections	Annual	Jan-22
Comfort and Care Home Health Agency	Annual	Jun-22
Helping Hands Private Duty Homecare	Annual	Oct-22
Home Care by Black Stone	Annual	Apr-22
Home Care Network, Inc.	Annual	Aug-22
Home First Non-Medical	Annual	Jun-22
Interim HomeStyles of Greater Cincinnati	Annual	Sept-22
LCD Home Health Agency	Annual	Aug-22
LifeSpan (BCESP Care Management subcontractor)	Annual	Dec-22
Maple Knoll Outreach Services for Seniors	Annual	Dec-22
Meda-Care Transportation, Inc.	Annual	Aug-22
Northwest Adult Day Services	Annual	Nov-22
Nova Home Care Co.	Annual	Nov-22
Oxford Senior Citizens, Inc.	Annual	
Oxford Seniors Community Adult Day Service	Annual	
Partners in Prime	Annual	
Prime Home Care, LLC	Annual	Feb-22
People Working Cooperatively (PWC)	Biennial	Apr-22
Senior Deserved Day	Annual	CLOSED
Senior Helpers of Greater Cincinnati	Annual	Oct-22
Warren County Community Services, Inc.	Annual	Mar-22
Wesley/Meals on Wheels of Southwest OH & Northern KY	Annual	Apr-22

2022 Draft Request for Proposal (RFP) Schedule

COA has revised the proposed 2022 Request for Proposals (RFPs) schedule. Our intent is to issue the following RFPs during 2022:

- Catering
- Homemaking and Personal Care/Respite (Clinton County only)
- Minor Home Modification & Repair
- Independent Living Assistance – (Butler, Hamilton, & Warren Counties only) – completed in Quarter Two.

The RFP evaluations will have 4 categories:

• **Financial Analysis and Stability:** This will be a Go/No-Go criteria. Proposals that do not demonstrate financial stability will not move forward in the evaluation process.

• **The Organization and Capabilities Overview:** Has the Proposal demonstrated the company's ability to provide and sustain these services? Has the Proposal demonstrated the company's previous commitment to serving the aging population? Does the provider have a county presence in our county/counties? Proposals demonstrating a county presence will receive additional scoring.

• **Personnel, Staffing and Training:** Has the Proposal demonstrated the company's ability to recruit, hire, train, and retain staff to insure delivery of services? Does the provider demonstrate retention and tenure in leadership positions?

• **Pricing:** Does the Proposal demonstrate competitive pricing with respect to other proposals received?

Laundry Delivery Service Update

To address the home care assistance workforce shortage, COA began to utilize laundry delivery service.

In Butler County we trained Butler County ESP staff on the laundry delivery service in August. COA issued a credit card assigned to Butler County for laundry delivery service use.

COA is also in initial discussion with The Laundry Spot located in Butler County to pilot laundry delivery services to senior buildings in Butler County and potential expansion to individual homes.

Next Steps:

- Further financial and quality analysis will be completed with more experience and data on enrollments
- Continue to explore other similar companies to onboard as a laundry delivery service provider

Fast Track Home Pilot Update

FastTrack Home began August 1st utilizing Federal ARPA funding. The program is currently providing Care Transition Support using the evidenced based Coleman Model and Home Delivered Meals. We have had six referrals and four enrollments as of 8/15/2022.

Presentation given at McCullough Hyde. Education given to McCullough Hyde and Butler Bethesda discharge planners on Care Transition Supports and FastTrack Home in late July. We are anticipating full implementation of FastTrack Home in Butler County in the near future with contractual negotiations as a permanent program for Butler County older adults.

Next Steps:

- FastTrack Home will be added to the quarterly dashboard reports
- Continue marketing with hospital and skilled nursing facilities on FastTrack Home
- Goal is to have COA staff in the hospital and SNF as a liaison to discharge planners and social workers
- Outcome and reporting measures will be shared as we grow this pilot

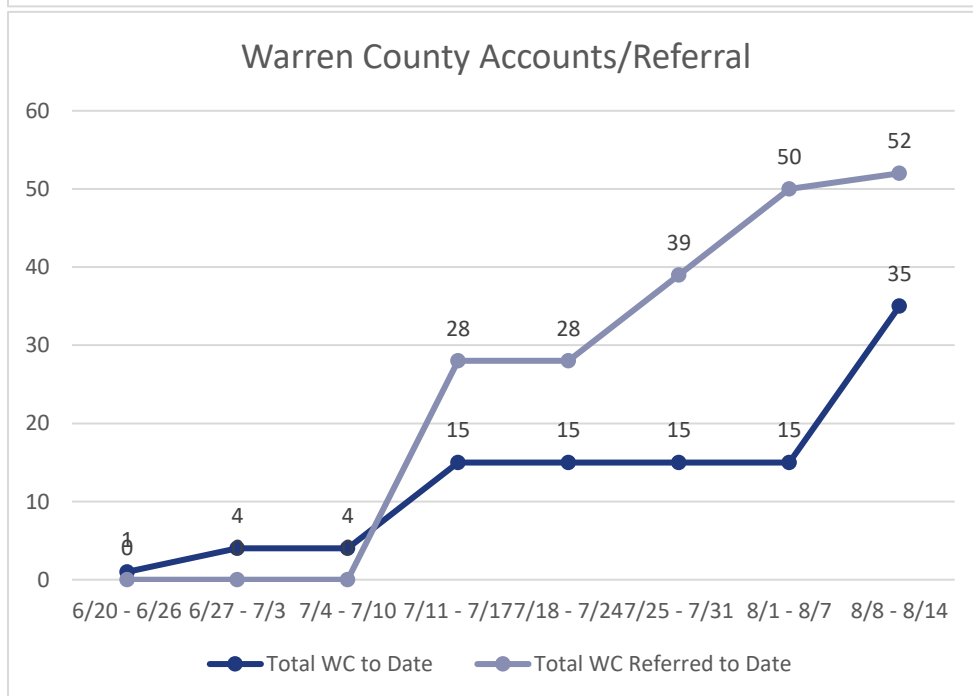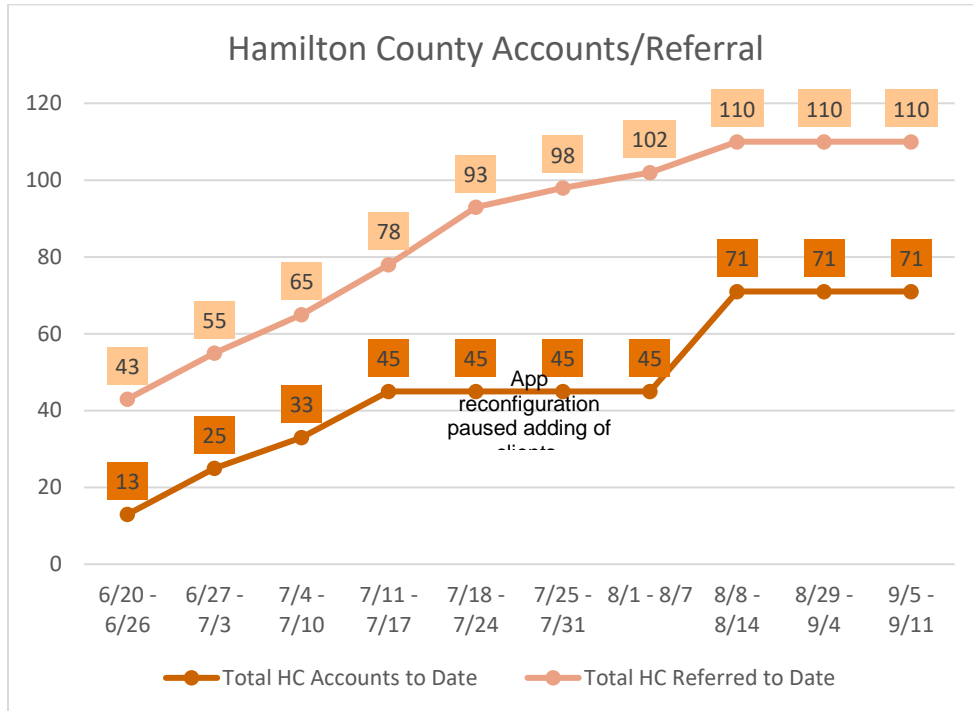## AddnAide Project Update – Hamilton and Warren County

Week of 8.8.2022
High-level Updates

- **Success Story:** The first hire in AddnAide was made this month! A Hamilton County ESP client matched with an aide that connected to AddnAide because of the Voice of Black Cincinnati (VOBC) promotion. Paperwork for the enrollment is complete and the aide is working on completing her background check.

- **Marketing Update:** Digital components of the marketing campaign, including a planned YouTube campaign were suspended on August 10 to allow time for client engagement that was delayed by critical development updates. Tentative restart date is August 29. Geotargeting campaign is performing well in Good Samaritan Hospital region and the VOBC story has nearly 1,050 reads to date.

- **User Engagement Update:** ESP staff have been calling all client/employer users to ensure they are actively engaging in the app and to identify barriers. Customer Support is following up with those identified as needing tech support. The team is exploring ways to facilitate in-person tech support for groups of clients.
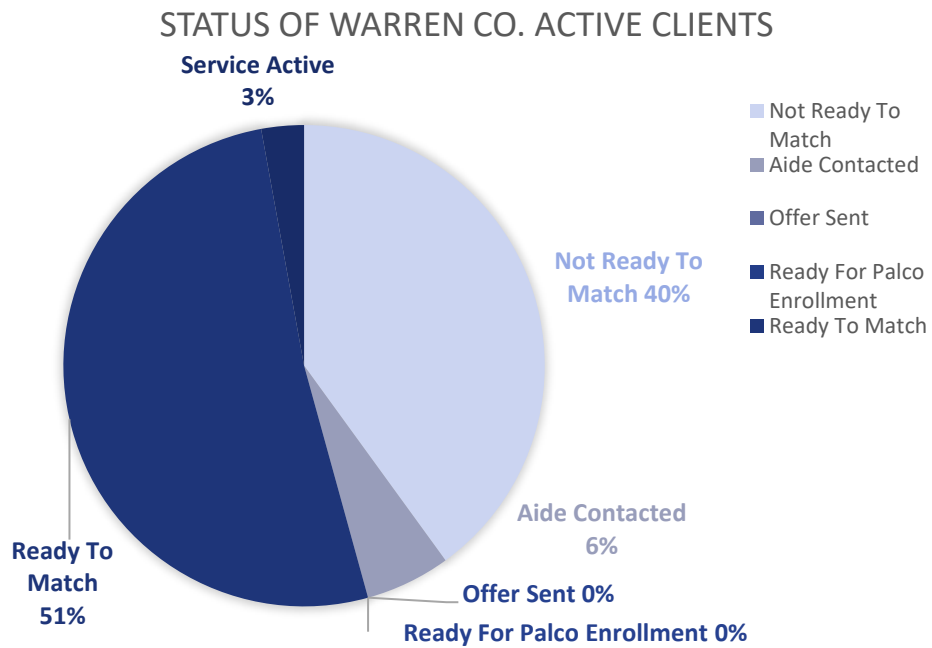
- **Development Update:** Launch Scout released an app update on 8/10 and 8/12. These updates allow staff to add multiple clients to one employer, delete "accidental" aide accounts, and corrected several "broken" features including data export. The next priority is bug cleanup and a review of data integrity in the database.

Client Engagement with AddnAide

Hamilton County Accounts/Referral

Total HC Accounts to Date — 13, 25, 33, 45, 45, 45, 45, 71, 71, 71
Total HC Referred to Date — 43, 55, 65, 78, 93, 98, 102, 110, 110, 110

App reconfiguration paused adding of clients

X-axis: 6/20 - 6/26, 6/27 - 7/3, 7/4 - 7/10, 7/11 - 7/17, 7/18 - 7/24, 7/25 - 7/31, 8/1 - 8/7, 8/8 - 8/14, 8/29 - 9/4, 9/5 - 9/11

Warren County Accounts/Referral

Total WC to Date — 1, 4, 4, 15, 15, 15, 15, 35
Total WC Referred to Date — 0, 0, 0, 28, 28, 39, 50, 52

X-axis: 6/20 - 6/26, 6/27 - 7/3, 7/4 - 7/10, 7/11 - 7/17, 7/18 - 7/24, 7/25 - 7/31, 8/1 - 8/7, 8/8 - 8/14

AddnAide Matches

- There are three Offers that Clients have sent to Aides they have matched with and one active enrollment.

STATUS OF HAMILTON CO. ACTIVE CLIENTS

Service Active
0%

Not Ready To
Match 23%

Aide Contacted
2%

Offer Sent 3%

Ready For Palco
Enrollment
1%

Ready To Match
71%

Legend:
- Not Ready To Match
- Aide Contacted
- Offer Sent
- Ready For Palco Enrollment

STATUS OF WARREN CO. ACTIVE CLIENTS

Service Active
3%

Not Ready To
Match 40%

Aide Contacted
6%

Offer Sent 0%

Ready For Palco Enrollment 0%

Ready To
Match
51%

Legend:
- Not Ready To Match
- Aide Contacted
- Offer Sent
- Ready For Palco Enrollment
- Ready To Match

How aides are learning about AddnAide

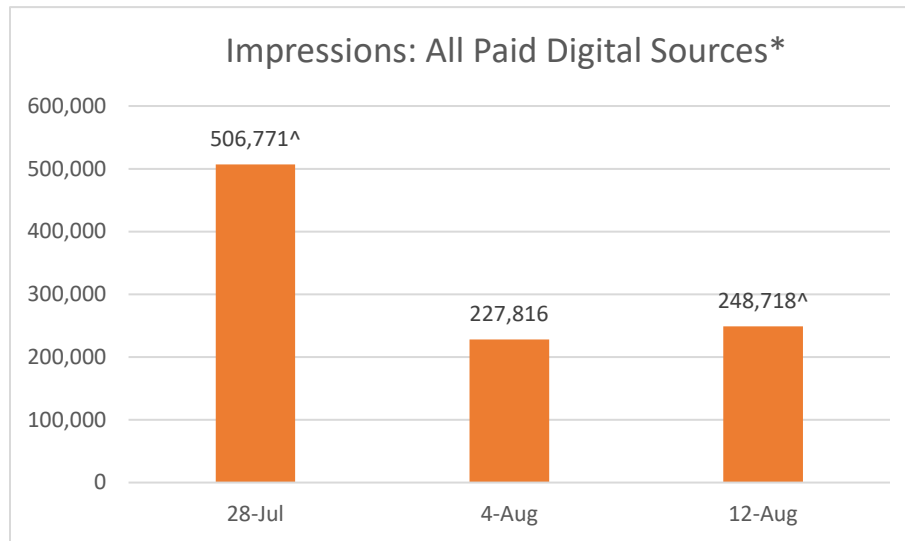- First match within app is with an aide who learned about AddnAide through VOBC promotion
- 35% of aides have come from Facebook marketing.

WEEKLY AIDE ENROLLMENT OVER TIME

Legend: — — Total to Date   — — Weekly Total

Y-axis: Number of Aides Accounts

Total to Date: 1, 4, 6, 19, 34, 58, 94, 108
Weekly Total: 1, 3, 2, 13, 15, 24, 36, 14

X-axis: 6/20 - 6/26, 6/27 - 7/3, 7/4 - 7/10, 7/11 - 7/17, 7/18 - 7/24, 7/25 - 7/31, 8/1 - 8/7, 8/8 - 8/14

Marketing Data

Impressions: All Paid Digital Sources*

	28-Jul	4-Aug	12-Aug
	506,771^	227,816	248,718^

(Y-axis: 0 to 600,000)
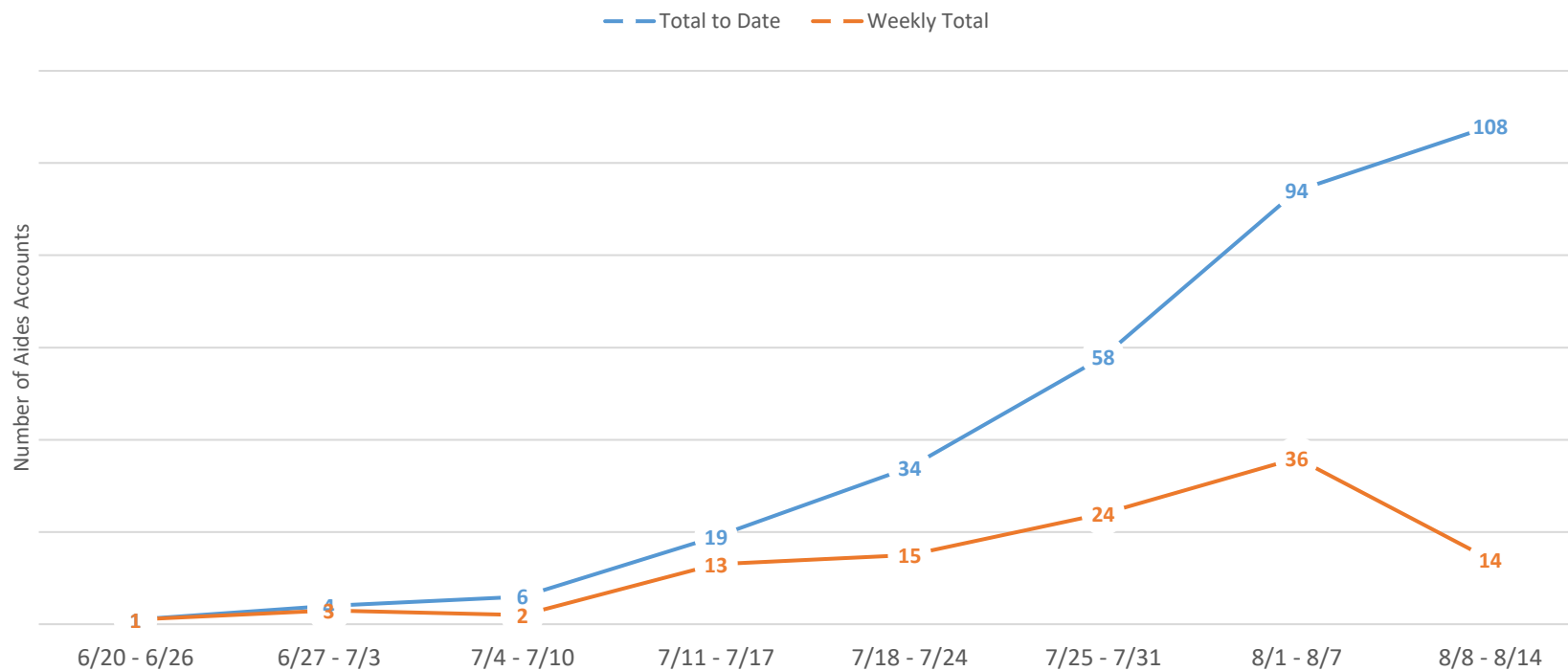
|	**28-Jul**	**4-Aug**	**12-Aug**
Clicks (all campaigns)	1,504	663	730
CTR Digital Average	0.75%	0.76%	0.60%
CTR Search	9.36%	9.15%	10.15%

Industry Benchmarks
Search: CTR Average 4% - 6%
Display: CTR .04% - .08 %

*Data do not include organic social media posts to COA's Facebook, Instagram and Twitter accounts
^Week-ending July 28 includes two weeks of data; week ending Aug 12 includes data through Aug 10 when campaigns were suspended

home52 Website Traffic 7/8 - 8/10

Legend: Users, New users
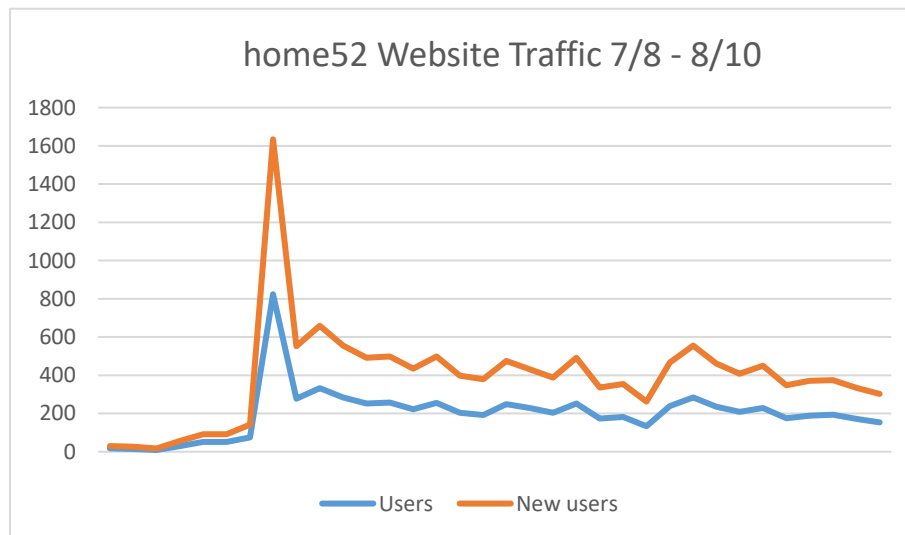
	22-Jul	**29-Jul**	**5-Aug**	**12-Aug**
New Users	2,600	1,600	1,600	1,300

BUTLER COUNTY ESP ELIGIBILITY OPTIONS

SEPTEMBER 2022

CURRENT ELIGIBILITY AND PROJECTIONS

- Home Delivered Meals: 60+ & criteria about inability to prepare own meals. Based on Federal and Ohio's Revised Code requirements.

- Adult Day and Respite Options for residents of any age with a cognitive impairment.

- All other ESP Services:

  - 65+

  - Must have mechanical deficit in at least 2 ADLs/IALDs

- Current projections show a waiting list in early 2025 with current eligibility requirements

- Scripps Gerontology recommended that COA evaluate eligibility changes including lowering the age to 60+ in their 2022 report.

CHALLENGES

- Growing older adult population in Butler County

- Inflation

- Labor shortages are having a significant impact on several services

- Goal
  - Deliver the highest quality services at the lowest possible cost to serve as many older adults as possible with the available tax dollars.
  - To maximize funds to provide the most benefit to the community
  - Delay the need for a waiting list

	2010 Number	2020 [1] Number	2030 [2] Number	2040 [2] Number	2010 Percent of population	2020 [1] Percent of population	2030 [2] Percent of population	2040 [2] Percent of population	2020-2030 Percent change	2020-2040 Percent change
All Ohio population	11,536,504	11,693,217	11,615,120	11,680,180	100.0	100.0	100.0	100.0	-0.7	-0.1
60 and over	2,277,424	2,894,207	3,050,200	2,924,320	19.7	24.8	26.3	25.0	5.4	1.0
65 and over	1,622,015	2,097,638	2,381,610	2,323,420	14.6	17.9	20.5	19.9	13.5	10.8
80 and over	474,262	500,856	596,880	754,000	4.1	4.3	5.1	6.5	19.2	**50.5**
85 and over	230,429	255,610	290,970	388,900	2.0	2.2	2.5	3.3	13.8	**52.1**
Butler County total	368,130	390,110	410,960	430,350	100.0	100.0	100.0	100.0	5.3	10.3
60 and over	61,947	82,020	94,930	96,030	16.8	21	23.1	22.3	15.7	17.1
65 and over	42,484	57,140	72,500	74,840	11.5	14.7	17.6	17.4	**26.8**	**31.0**
80 and over	11,295	12,370	16,210	21,450	3.1	3.2	3.9	5.0	**31.0**	**73.4**
85 and over	5,138	6,060	6,810	9,560	1.4	1.5	1.7	2.2	12.4	**57.8**

Table 1. Ohio and Butler County Aging Population (2010-2040)

HOW SCENARIOS WERE DEVELOPED

▪ This is a follow up report from the Scripps Gerontology study and requested by the advisory council.

▪ This includes feedback from Butler County ESP staff

▪ Reviewed data and projections in Butler county and from other levy programs that COA administers

SERVICE GAP FOR THE 60-64 AGE GROUP

The chart to the right shows client distribution by age group compared to Hamilton County which does start at age 60.

The only service available to the 60-64 age group in Butler County is home delivered meals. Services such as home care, transportation, electronic monitoring systems for falls, etc. are not available.

	Butler County		Hamilton County	
Total Census	3119		5494	
60-64	115	4%	514	9%
65-69	353	11%	917	17%
70-74	530	17%	905	16%
75-79	543	17%	824	15%
80-84	588	19%	945	17%
85-89	548	18%	736	13%
90-94	334	11%	457	8%
95-99	91	3%	169	3%
100+	9	0%	14	0%

CARE PLAN COST BY AGE

Hamilton and Warren County eligibility is 60+.

This data shows that care plan cost and needs are higher with the youngest and the oldest age groups.

Average monthly care plan cost per person*	Butler County	%	Hamilton County	%	Warren County	%
Average Careplan	$252.73		$278.47		$277.55	
60-64	$243.62	96%	$293.47	105%	$304.14	110%
65-69	$284.23	112%	$290.44	104%	$332.44	120%
70-74	$283.26	112%	$299.47	108%	$283.98	102%
75-79	$271.38	107%	$290.10	104%	$268.48	97%
80-84	$226.24	90%	$270.36	97%	$269.81	97%
85-89	$249.33	99%	$256.74	92%	$263.53	95%
90-94	$221.17	88%	$257.47	92%	$264.68	95%
95-99	$229.78	91%	$246.85	89%	$285.43	103%
100+	$271.69	108%	$236.55	85%	$391.86	141%

DIAGNOSIS TRENDS ACROSS AGES

Younger age groups are more likely to have a behavioral health and diabetes diagnosis.

Age	Common diagnosis
60-65	COPD, Arthritis, Diabetes, Anxiety/Depression, Hypertension
65-69	Hypertension, Anxiety/ Depression, Diabetes, COPD, Arthritis
70-74	Arthritis, Hypertension, Diabetes, COPD
75-79	Arthritis, Hypertension, Diabetes, Backpain/ Limited Mobility
80-84	Arthritis, Hypertension, Diabetes, COPD, Backpain/ Limited Mobility
85-89	Arthritis, Hypertension, Diabetes, Pain/Unsteadiness/ Reduced Mobility
90-94	Arthritis, Hypertension, Heart Disease, Pain/ Unsteadiness/ Reduced Mobility
95-99	Arthritis, Hypertension, Heart Disease, Weakness/ Pain/ Unsteadiness/ Reduced Mobility
100+	Arthritis, Hypertension, Heart Diseases, Incontinence,

SCENARIOS EXPLORED

Scenario	Eligibility	Change from Existing Eligibility
Scenario 0:	Current eligibility (65, mechanical with 2 or more ADL/IADL)	n/a
Scenario 1:	60 years and older; 2 ADLs OR 1 ADL & 2 IADLs, OR 4 IADLs	• Decrease age from 65 to 60 • Increase ADL/IADL impairment to requiring supervision or hands on on rather than mechanical impairment • Increase number of impairment to qualify from 2 ADLs/IADLs to 2 ADL or 1ADL and 2 IADLs, or 4 IADLS
Scenario 2: (Recommendation)	60 years and older; 2+ impairments (excluding mechanical support)	• Decrease Age from 65 to 60 • Increase ADL/IADL impairment to requiring supervision or hands on rather than mechanical impairment • Continue to allow older adults to qualify with impairments in any 2 ADLs/IADLS
Scenario 3:	2+ impairments (excluding mechanical support for medication administration and telephoning); For ILA and transportation: 60 years and older ; For all other services: 65 years and older	• Allow clients to receive HDM, ILA,MT for clients aged 60 and older (all other services become available at age 65) • Internally change how medication administration and telephoning are scored • Retain mechanical scoring for all other ADLs/IADLs • Continue to only require 2 impairments in any ADL/IADL
Scenario 4:	65 years and older; 3+ impairments (using the same impairment scoring as current)	• No change from current 65 year age requirement • Continue to allow mechanical deficits to count as an impairment • Increase the number of ADLs/IADLs required to qualify from 2 to 3

ELIGIBILITY RECOMMENDATION

Scenario	Eligibility Changes	census % of Scenario 0	when waiting list goes into effect
Scenario 0:	current eligibility (65, mechanical with 2 or more ADL/IADL)		2025
Scenario 1:	60 years and older; 2 ADLs OR 1 ADL & 2 IADLs, OR 4 IADLs	57.60%	
Scenario 2:	60 years and older; 2+ impairments (excluding mechanical support)	84.03%	2027
Scenario 3:	2+ impairments (excluding mechanical support for medication administration and telephoning); For ILA and transportation: 60 years and older ; For all other services: 65 years and older	97.60%	2025
Scenario 4:	65 years and older; 3+ impairments (using the same impairment scoring as current)	72.95%	

Recommendation- to adopt eligibility scenario 2:
- Drop age from 65+ to 60+
- Drop mechanical assistance from counting toward eligibility. Only include supervision and hands-on assistance. Keep the same number (2) ADL/IADL deficits.

Council on Aging of Southwestern Ohio
4601 Malsbary Road
Blue Ash, Ohio 45242
(513) 721-1025
(800) 252-0155
www.help4seniors.org

Budget Highlights
For the Butler County Elderly Services Program
For the Program Year January 1, 2023 – December 31, 2023

Client Census:
- Program year 2022 – is projected to end the program year with 3,113 clients being served monthly. This represents a decline in census of 61 (or 2%) for the year.
- Program year 2023 – is projected to increase to 3125. This is an increase of 12 clients (or 0.4%). This Projection is based on population growth at 36.6% market penetration rate.

Tax Levy Revenue:
- The amount of Tax levy money needed in 2023 is $13 million, which is an increase of $2.2 million or 20% when compared to the 2022 projected spending. The increase is driven by inflation driving up service costs, and less Federal COVID funding to offset local levy funding.

Client Co-payment:
- Are projected to be $206,297, which is higher from our current amount of $203,979 for 2022.

Client Donations:
- Donations are collected for home delivered meals. Donations are projected to decrease by $102 from 2022 projected collections.
.

Title III and State Funding:
- Traditional Title III and Alzheimer's funding are expected to go back to original award amounts. We are expecting funding of $476,405 from ARPA in 2023, which will increase our total funding in this area to 1 million.

Provider Services:
- The budget for provider services includes a new laundry delivery service which started in 2022, and a new social isolation service which we plan on starting in 2023. It also includes inflationary rate increases. We are projecting a growth of 18% in this category when compared to current spending projections.

Intake & Assessment:
- Spending is projected to grow to $345,945 in 2023, which is an increase of $56,626 (or 19.6%) from 2022 projected spending. Budget amount is from the 2023 Budget submitted by LifeSpan.

Care Management:
- Budget amount is based on a per member per month rate (PMPM). The rate for 2023 will be $68.35. This is calculated by multiplying the rate times the client census times 1% for any half-month billing.

COA Administration:
- Budget amount is based on a 7% rate of the combined services of intake, care management, and provider services. COA's contract with Butler County expires on 9/30/2022. COA has applied to continue as the administrator for the next levy cycle.

Butler County Elderly Services Program
Draft Budget
January 1, 2023 - December 31, 2023

	2023 Proposed Budget	2022 Budget	2022 Projected	% Change 2023 Budget to 2022 Budget	% Change 2023 Budget to 2022 Projected
Revenue					
Butler County Levy					
Levy Appropriations	$ 12,998,253	$ 11,924,142	$ 10,794,703	9.0%	20.4%
Total County Levy Funding	12,998,253	11,924,142	10,794,703	9.0%	20.4%
Client Co-Payment	206,297	244,561	203,979	-15.6%	1.1%
Client Donations	18,617	12,450	18,719	49.5%	-0.5%
Title III and State Funding	1,024,662	548,257	1,135,856	86.9%	-9.8%
Interest Income	842	278	1,234	202.9%	-31.8%
Total Revenue	**$ 14,248,671**	**$ 12,729,688**	**$ 12,154,491**	11.9%	17.2%
Expenses					
Client Services					
Intake & Assessment	$ 345,945	$ 314,915	$ 289,319	9.9%	19.6%
Care Management	$ 2,841,997	$ 2,644,864	2,510,339	7.5%	13.2%
Provider Services	$ 10,128,573	$ 8,937,126	8,559,679	13.3%	18.3%
Total Client Services	13,316,515	11,896,905	11,359,337	11.9%	17.2%
COA Administration	932,156	832,783	795,154	11.9%	17.2%
Total Expenses	**$ 14,248,671**	**$ 12,729,688**	**$ 12,154,491**	11.9%	17.2%

Average Daily Census for 2023 is projected to increase by 0.4% from 2022 year end Projections

A 5% contingency is added to account for deviations in client enrollment and cost assumptions.

This budget assumes no eligibility changes to client enrollment requirements

Budget includes the Fast Track program to be piloted with Federal dollars funding the program.