

# Locally Funded Services for the Older Population: A Description of Senior-Service Property-Tax Levies in Ohio

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## TABLE OF CONTENTS

Acknowledgments.....	i
Executive Summary .....	ii
Background .....	1
Senior-Service Levies in Other States .....	1
Methods.....	2
Results.....	2
Funding .....	2
Levy Program Characteristics.....	7
Levy services .....	9
Levy participants.....	11
Service expenditures .....	12
Service providers .....	13
Consumer directed service options .....	14
Program Eligibility and Operations .....	14
Age.....	15
Functional ability .....	15
Wait list and PASSPORT .....	15
Quality assurance .....	15
Cost sharing and donations for services.....	15
Promotional Strategies For Senior-Service Levies .....	16
Crucial Challenges Facing Levy Campaigns .....	18
Conclusion .....	19
References.....	20



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Finally, we salute the late Lois Brown Dale, who paved the way for and initiated Ohio's first countywide senior-service property-tax levy in Clermont County in 1982. This report is dedicated to her memory and what she accomplished for older persons and those who care for them across the state and beyond. She reinforced the concept that one determined person can make a difference.

## EXECUTIVE SUMMARY

This report provides information from a second survey of Ohio's senior service levy programs: the first was conducted in 2005 (Payne & Applebaum, 2008).

In 2009, Ohio raised more than \$166 million in property tax funds with the goal of helping older Ohioans live in their own homes and communities. The money was generated via 69 county levies (\$140 million) and 14 township, city or village levies (\$1.6 million). Human service umbrella levies in Cuyahoga and Montgomery counties earmark about \$26 million for aging programs and services.

Major services most often purchased and delivered with levy funds were similar to those in 2005, headed by home-delivered meals, non-medical transportation; homemaker and personal care services. For all major services combined, the average countywide organization served 5475 unduplicated participants in 2009, and the average township/city/village organization served 794. Forty-eight percent of levy programs offer consumer-directed services, most often medical/non-medical transportation, home-delivered meals, personal care/homemaker services, and respite services.

All organizations use age as a criterion for service eligibility, most often age 60. Forty-six percent of responding countywide levy organizations used functional criteria for service eligibility, usually one or two limitations in activities of daily living.

Senior-service levies in Ohio continue to succeed well over 90% of the time at the polls, with an average in 2009 of 67% voting yes. Also, all 13 of Ohio's senior-service levies in 2010 were approved by voters with a minimum yes-vote rate of 64%. This success rate comes despite an increase in the average millage of the state's countywide senior-service levies, .78 mills in 2009 compared to .60 in 2005. The most commonly used levy campaign strategies were newspaper stories/ads, yard signs/flyers, and public speaking engagements. TV/radio ads, door-to-door volunteers, campaign mailers, yard signs/flyers and public speaking were deemed the most successful.

## BACKGROUND

As the Baby-Boom generation reaches age 65, funding for senior services grows even more crucial – especially given the growing pressure on federal and state budgets. Over the past three decades, Older Americans Act (OAA) dollars, the major federal funding source for social support programs for older people, (now at about \$2.3 billion, annually) have not kept pace with either inflation or the increased growth in the older population. While the older population of this country (those 65 and older) has grown by more than 45 percent, from roughly 25.7 million in 1980 to 40 million today, the Older Americans Act has actually grown at a rate well below inflation during this time period. Compounding the challenges are projections that the number of older people is expected to increase by 80 percent to 72 million by the year 2030, at which time older Americans will constitute 19 percent of the country's overall population, compared to 13 percent today. Ohio has increased funding for Medicaid home-and community-based services over the last decade, and in 2010 waiver programs for older people spent more than \$500 million. However, eligibility for these programs requires a nursing home level of impairment and very low income and assets, excluding the majority of older adults who need some assistance.

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***Today, 69 of Ohio's 88 counties currently operate countywide senior-service levies, with a few (Belmont, Brown and Guernsey) operating multiple levies within single counties.***

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Accordingly, state and local governments have been looking to alternative sources of raising money for senior services. In Ohio, since 1982, those alternative sources have been most often countywide - and, to a much lesser extent, township, city and village - senior-service property-tax levies. The countywide levies were initiated in Clermont County (Ohio), subsequent to an act of state legislation, allowing senior services to be funded via property-taxes, much like schools. Today, 69 of Ohio's 88 counties currently operate countywide senior-service levies, with a few (Belmont, Brown and Guernsey) operating multiple levies within single counties. Additionally, Ohio has 14 localized levies: nine within townships, four within cities and one within a village. Also, both Cuyahoga and Montgomery counties operate human service (umbrella) property-tax levies, of which county aging service organizations receive a portion of revenues. In total, these senior levies in Ohio almost triple the \$55.8 million in federal OAA dollars allocated to the state each year (AoA, 2010).

## SENIOR-SERVICE LEVIES IN OTHER STATES

In 2009, the Ohio Department of Aging surveyed 51 state units on aging, including the District of Columbia, to determine what other financing mechanisms like senior services property taxes are used to fund senior services and facilities. ODA learned that like Ohio, 14 other states – Georgia, Illinois, Kansas, Kentucky, Louisiana, Massachusetts, Michigan, Maine, Missouri, Montana, New Hampshire, North Dakota, West Virginia, and Wisconsin --operate property-tax levies exclusively for senior services. Additionally, Georgia, Kansas, Massachusetts, Michigan, Montana and Utah use an income tax for this

purpose, and Georgia, Kansas, Massachusetts, Missouri, Utah and Wyoming have a dedicated sales tax for this purpose. Michigan, New Jersey, Pennsylvania and West Virginia use casino and lottery proceeds, and, New Mexico uses government bonds. South Carolina uses a bingo card tax for the same purpose.

Senior-service levies in Ohio raise more in annual dollars than any other state in the nation. The states operate their levies under varying requirements. For example, Missouri – which operates such levies in 43 of the state’s 114 counties – caps the millage for its countywide senior-service levies at .5. Similarly, Illinois seals its senior-service levies even more tightly, at .25 mills. Kansas and North Dakota senior-service levy dollars both draw matching funds from their respective state general revenues. While Ohio’s senior-service property tax levies draw no match from state general revenue funds, neither does the state put a ceiling on the millage amount that can be proposed to voters.

## **METHODS**

This study is an update of one conducted in conjunction with the Ohio Department of Aging (ODA) in 2005, when 59 Ohio counties (compared to the present 69) operated countywide senior-service property-tax levies. It is more detailed in the information it seeks than the 2005 version. This survey was again developed by Scripps, with input from ODA and levy administrators in both urban and rural settings. It was finalized and distributed to 76 organizations operating countywide levies in 69 Ohio counties (again, some counties had multiple countywide levies), and to 14 township/city/village organizations through e-mail invitation in February of 2010. Respondents completed surveys via the internet. The survey invitation was also e-mailed to the organizations overseeing the

larger human service umbrella levies earmarking money for aging services in Cuyahoga and Montgomery counties. Those who did not respond to all the survey questions were encouraged to answer and submit at least the basic information (e.g., millage, approval rates, annual revenues), which is why the response rate to some questions was higher than others. Counting partial replies, this survey achieved a 90 percent response rate (81 of 90). Information on the amount of funds generated by levies was collected directly from the county auditor for organizations not responding to the survey, so the study includes basic data for every levy in the state.

## **RESULTS**

### **FUNDING**

Millage is a term used in taxing property, wherein one mill is equal to 1/1,000 of every dollar of assessed property value, which county auditors then tax at 31.5%. So, a one mill levy would cost the owner of a \$100,000 home \$31.50 each year in property taxes. Levy millage rates are relatively low compared to that of school and other types of property-tax levies. The average millage for senior-service property-tax levies in Ohio is .78 mills, with a median of .75. The average millage is up from the .60 reported in the 2005 survey. The lowest millage is .1 in Vinton County, and the highest for a single levy is 2 mills in Butler County. Belmont County operates three separate countywide levies at 1 mill each. Four in ten programs (38%) indicated they had increased their millage, while 62% stated their millage amounts had remained the same. While no programs reported a decrease in actual millage, several organizations experienced lower revenues because of declining property values.



An overview of the 69 counties operating countywide senior-service property-tax levies in 2010 is shown in Table 1. In total, Ohio's 69 countywide senior-service property-tax levies brought in \$139.6 million in 2009, more than a 50 percent increase over the \$94 million total in 2005. The average annual levy amount was \$1.84 million with a median amount of \$530,000. The average is much higher because of the largest three county levies, Franklin (\$21.6 million), Hamilton (\$21.5 million) and Butler (\$14.3 million). On the other end of the spectrum, three rural levies (Monroe, Morgan and Noble counties) brought in less than \$55,000, annually, and another (Vinton County) \$9,000. Two counties, Montgomery and Cuyahoga, have umbrella human services levies that allocate \$12 million and \$13.7 million respectively to aging services.

The current \$1.84 million average represents an increase from the \$1.6 million average of five years ago, but the median \$530,000, is down from \$580,000 in the 2005 time period. Of the organizations responding, 29% indicated that their latest levy revenues increased from the previous year, 15% noted a decrease, and 56% reported no change. Among those reporting an increase, the median rise was \$70,000, and among those reporting a decrease, the median drop was \$10,000. As noted, there is a considerable variation in the size of levy programs across the state. Fourteen county levy programs receive \$200,000 or less annually, compared to 11 programs receiving more than 3 million dollars each year. A summary distribution is shown in Figure 1.

***...Ohio's 69 countywide senior-service property-tax levies brought in \$139.6 million in 2009... The average annual levy amount was \$1.84 million with a median amount of \$530,000.***

Figure 1. Distribution of Countywide Levy Amounts

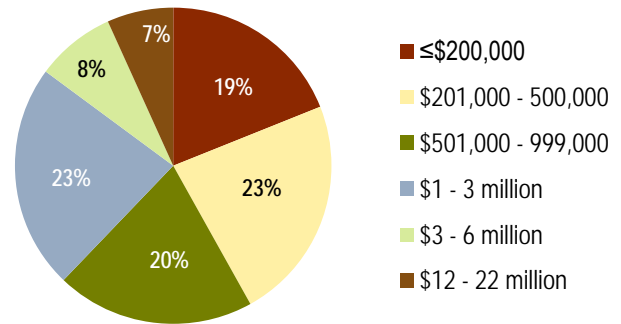


Table 1. Countywide Senior Service Levies in Ohio

County	First Levy	Most Recent Levy	Votes for Levy (%)	Millage	Revenue 2009	60+ Population	Per Capita
Adams	2007	2007	55.0	0.50	\$ 268,000	5934	\$ 45
Allen*	2001	2008	65.0	0.80	\$ 1,451,126	21,792	\$ 67
Ashland	2008	2008	75.0	0.50	\$ 500,000	11,537	\$ 43
Ashtabula	2000	2009	75.0	1.00	\$ 1,600,000	22,130	\$ 72
Athens*	1987	2006	69.0	0.75	\$ 493,286	9457	\$ 52
Athens	2009	2009	70.0	0.25	\$ 174,521	9457	\$ 18
Auglaize	1986	2006	90.0	1.00	\$ 864,000	9636	\$ 90
Belmont**	1994	2006	66.0	1.00	\$ 1,018,645	17,170	\$ 59
Belmont**	1997	2008	53.0	1.50	\$ 1,528,232	17,170	\$ 89
Brown	2008	2008	63.0	0.80	\$ 540,000	9228	\$ 59
Butler	1996	2010	53.0	2.00	\$ 14,300,000	61,947	\$ 231
Carroll	1994	2008	63.0	0.50	\$ 165,000	6777	\$ 24
Champaign	1986	2010	85.0	0.20	\$ 112,000	8210	\$ 14
Clark	1989	2004	54.0	1.00	\$ 2,351,300	31,375	\$ 75
Clermont	1982	2006	55.0	1.30	\$ 5,900,000	34,518	\$ 171
Clinton	1998	2007	67.1	1.50	\$ 1,320,000	8159	\$ 162
Coshocton	1999	2008	69.0	0.75	\$ 493,027	8291	\$ 59
Crawford	1995	2005	76.0	0.60	\$ 420,000	10,539	\$ 40
Defiance	1997	2005	80.0	1.20	\$ 700,000	8169	\$ 86
Delaware	1994	2008	75.5	0.90	\$ 5,700,000	25,442	\$ 224
Erie	1996	2005	76.0	0.50	\$ 1,000,000	18,748	\$ 53
Fairfield	2004	2008	74.0	0.50	\$ 1,300,000	26,276	\$ 49
Franklin	1992	2007	78.0	0.90	\$ 21,632,119	170,456	\$ 127
Fulton	1986	2009	67.8	1.10	\$ 894,740	8420	\$ 106
Gallia	2005	2009	63.0	0.50	\$ 175,000	6761	\$ 26
Geauga	1995	2005	60.0	1.00	\$ 1,800,000	20,683	\$ 87
Greene	1999	2009	65.8	1.00	\$ 2,748,000	31,524	\$ 87
Guernsey	1995	2009	69.0	1.00	\$ 670,196	9011	\$ 74
Hamilton	1992	2007	70.5	1.29	\$ 21,500,000	149,302	\$ 144
Hancock	2002	2008	57.0	0.60	\$ 935,000	15,025	\$ 62
Hardin	1987	2009	52.1	1.50	\$ 626,748	6009	\$ 104
Harrison	2008	2008	62.0	0.75	\$ 125,000	3931	\$ 32
Henry	2008	2008	58.0	0.80	\$ 361,409	5905	\$ 61
Hocking	1989	2009	85.0	0.50	\$ 200,000	6486	\$ 31
Huron	1994	2008	69.0	0.50	\$ 425,000	11,505	\$ 37
Jackson	1988	2007	75.0	0.50	\$ 219,000	6750	\$ 32
Jefferson	2004	2009	72.0	1.00	\$ 1,200,000	17,567	\$ 68
Knox	2002	2007	55.0	0.79	\$ 801,298	12,494	\$ 64
Lake	1992	2006	56.0	0.40	\$ 1,544,000	51,488	\$ 30
Licking	1985	2009	54.5	1.20	\$ 4,569,820	31,887	\$ 143
Lucas	1991	2009	70.0	0.45	\$ 3,880,000	84,433	\$ 46
Madison	1995	2005	55.0	0.80	\$ 560,000	7715	\$ 73
Marion	2006	2006	60.0	0.80	\$ 730,000	13,543	\$ 54
Meigs	1993	2008	66.2	1.10	\$ 332,326	5237	\$ 63
Mercer	1989	2008	70.0	0.55	\$ 401,000	8537	\$ 47
Monroe	2000	2009	75.0	0.40	\$ 52,000	3911	\$ 13
Morgan	1990	2009	65.0	0.30	\$ 51,000	3664	\$ 14
Morrow	2002	2005	53.5	0.50	\$ 263,219	6697	\$ 39
Muskingum	1997	2007	64.5	0.50	\$ 680,000	18,272	\$ 37
Noble	1992	2006	70.0	0.40	\$ 52,000	4666	\$ 11
Ottawa	2004	2007	80.0	0.30	\$ 476,283	11,066	\$ 43

County	First Levy	Most Recent Levy	Votes for Levy (%)	Millage	Revenue 2009	60+ Population	Per Capita
Paulding	1990	2005	67.0	0.50	\$ 147,648	4093	\$ 36
Perry	1985	2008	67.0	0.50	\$ 150,000	6794	\$ 22
Pickaway	1991	2006	68.0	0.50	\$ 520,000	10,277	\$ 51
Pike	2008	2008	52.1	1.00	\$ 275,000	5920	\$ 46
Preble	1991	2006	60.6	1.00	\$ 825,000	9158	\$ 90
Putnam	1986	2007	70.0	0.60	\$ 354,000	6700	\$ 53
Richland	2009	2009	56.0	1.00	\$ 2,100,000	28,021	\$ 75
Ross	1984	2007	52.0	0.50	\$ 512,315	14,931	\$ 34
Sandusky	1987	2006	55.0	0.50	\$ 500,000	12,958	\$ 39
Scioto*	1986	2006	76.0	0.50	\$ 300,000	16,956	\$ 18
Seneca	1986	2007	84.0	0.30	\$ 270,000	11,746	\$ 23
Trumbull	2005	2005	52.0	0.75	\$ 2,009,000	50,901	\$ 39
Tuscarawas	1985	2006	52.0	0.70	\$ 1,214,616	20,925	\$ 58
Van Wert	1996	2006	52.0	0.40	\$ 192,410	6391	\$ 30
Vinton	1987	2009	80.0	0.10	\$ 9,000	2686	\$ 3
Warren	2002	2006	55.6	1.21	\$ 6,020,000	33,711	\$ 179
Washington	1986	2006	59.7	0.85	\$ 1,061,257	14,932	\$ 71
Williams*	2002	2009	79.4	1.30	\$ 959,221	8178	\$ 117
Wood	2001	2006	68.3	0.70	\$ 2,209,000	22,209	\$ 99
Wyandot	1988	2009	75.0	0.80	\$ 125,000	5027	\$ 25

\*Has two countywide senior levies

\*\*Has three countywide senior levies

In addition to the data collected from the survey, Table 2 provides information from available data on municipal levies.

Table 2. Municipal Senior Service Levies\*

County/Government	First Levy	Most Recent Levy	Votes for Levy (%)	Millage	Revenue 09 (dollars)
Ashtabula/City	2001	2010	65	0.3	65,000
Fairfield/Violet Twp	2008	2008	58	0.5	195,000
Greene/Springvalley Twsp	1996	2010	65	1.00	40,000
Hamilton/City of North College Hill	1984	2009	65	0.50	70,000
Hamilton/Village of Mariemont	1978	2008	72	1.00	66,972
Lake/City of Kirkland	1996	2010	65	0.85	140,000
Lucas/Sylvania Twp & City	2000	2005	73	0.32	435,000
Mahoning/Austintown Twp	2011	2011	52	0.50	309,202
Montgomery/Village of Germantown/German Twp	1997	2011	59	1.00	119,284
Richland/Jefferson Twp	1998	2007	64	0.60	48,983
Richland/Worthington Twp	1998	2007	75	0.60	32,402
Scioto/Jefferson Twp	1999	2009	64	0.50	7,800
Stark/Minerva Village	1991	2011	76	0.30	26,000
Trumbull/City of Girard	2007	2011	72	1.80	228,092
Warren/Franklin Twsp	2007	2011	62	0.25	130,000

\*Municipal levies are those for cities, townships and villages.

## LEVY PROGRAM CHARACTERISTICS

While Franklin and Hamilton counties are the largest levies in the state the county with the highest levy amount per capita is Butler, where \$14.3 million covers a population of 62,000 persons age 60 and older, for an average of \$231 per person. The next highest is Delaware County, with a per capita average of \$224, followed by Warren (\$179 per person), and Clermont (\$171) counties.

Ohio's countywide senior-service property-tax levies are most often administered by private, non-profit organizations. The remaining 18 (25%), were administered directly by county government and in one instance (Allen County) city government. The vast majority (96%) were responsible for operating their levies by virtue of language on the levy ballots that designated their organizations; others were appointed by their respective county commissioners. A small proportion of the programs (4%) used a

competitive bidding process. Ten (14%) of the levies were administered through area agencies on aging.

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***Since the first county levy passed in Clermont in 1982, senior-service levies in Ohio have passed at a rate higher than 90%, including 100% of 13 proposed senior-service levies in November of 2010, and 19 of 20 levies in November 2011.***

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Ohio's senior-service levies have had good success at the polls. Since the first county levy passed in Clermont in 1982, senior-service levies in Ohio have passed at a rate higher than 90%, including 100% of 13 proposed senior-service levies in November of 2010, and 19 of 20 levies in November 2011. The latest levies passed by an average vote of nearly 70%. (See Table 3.)

Table 3. Countywide & Municipal Levies Passed in 2010 & 2011

County/Government	First Levy	Last Passed	Type	Votes for Levy	Millage	Revenue
Adams	2007	2011	Renewal	57%	57%	\$ 289,000
Allen	1989	2011	Renewal	74%	0.50	\$ 1,000,000
Ashland	2007	2011	Renewal	72%	72%	\$ 500,000
Ashtabula/City	2001	2010	Renewal	65%	0.30	\$ 65,000
Athens	1987	2011	Renewal	71%	71%	\$ 476,000
Auglaize	1988	2010	Renewal	76%	1.00	\$ 812,000
Belmont	1986	2010	Renewal	71%	0.50	\$ 450,000
Butler	1996	2010	Renewal/Decrease	66%	1.30	\$ 10,200,000
Champaign	1986	2010	Renewal	64%	0.20	\$ 110,700
Clark	1989	2010	Renewal	72%	1.00	\$ 2,300,000
Clermont	1982	2011	Renewal	75%	75%	\$ 5,500,000
Crawford*	1999	2011	Replacement/Increase	64%	0.60	\$ 580,000
Defiance	1996	2010	Replacement	76%	1.20	\$ 800,000
Erie	1996	2010	Replacement	82%	0.50	\$ 1,134,000
Greene, Spring Valley Twp & Village	1996	2010	Renewal	65%	1.00	\$ 40,000
Hancock	2002	2010	Replacement	73%	73%	\$ 950,000
Lake/City of Kirkland	1996	2010	Renewal	65%	0.85	\$ 140,000
Lucas/Sylvania Twp & City	2000	2010	Renewal	78%	0.32	\$ 430,000
Madison	1987	2010	Renewal	66%	0.80	\$ 624,329
Mahoning/Austintown Twp	2011	2011	Additional	52%	52%	\$ 309,202
Marion	2006	2010	Renewal	65%	0.80	\$ 750,900
Montgomery/German Twp	1997	2011	Renewal	59%	59%	\$ 119,284
Morrow	2002	2010	Renewal	68%	68%	\$ 265,000
Noble	1986	2011	Renewal	69%	69%	\$ 50,000
Ottawa	2005	2010	Renewal	77%	0.30	\$ 443,900
Paulding	1989	2010	Renewal	66%	0.50	\$ 153,000
Pickaway	1991	2011	Replacement/Increase	64%	0.75	\$ 851,795
Preble	1991	2011	Renewal	69%	69%	\$ 841,000
Sandusky	1987	2011	Replacement	59%	0.50	\$ 580,000
Scioto	1986	2011	Renewal	70%	70%	\$ 100,000
Stark/Minerva Village	1991	2011	Renewal	76%	76%	\$ 26,000
Trumbull	2005	2010	Renewal	73%	0.75	\$ 2,300,000
Trumbull/City of Girard	1996	2011	Renewal	72%	72%	\$ 228,092
Tuscarawas	2001	2010	Renewal	70%	0.70	\$ 1,200,000
Van Wert	1987	2011	Replacement	75%	75%	\$ 113,690
Van Wert	1997	2011	Replacement	76%	76%	\$ 78,720
Warren	2002	2011	Renewal	72%	72%	\$ 6,510,000
Warren/Franklin Twp	2007	2011	Renewal	62%	62%	\$ 130,000
Washington	2000	2011	Replacement	66%	66%	\$ 1,056,164
Wood	1986	2011	Renewal	69%	69%	\$ 2,000,000

## LEVY SERVICES

Levy programs serve about 200,000 persons annually – about one of every ten of the state’s 2.1 million citizens age 60 and older. The majority of levy funds are used to provide an array of long-term services that are designed to assist older people with disability in remaining in the community. Programs typically offer two categories of services, long-term support services and supplemental services. A review of the long-term care services offered by levy agencies found that home-delivered meals (provided by 89% of responding organizations), non-medical trans-

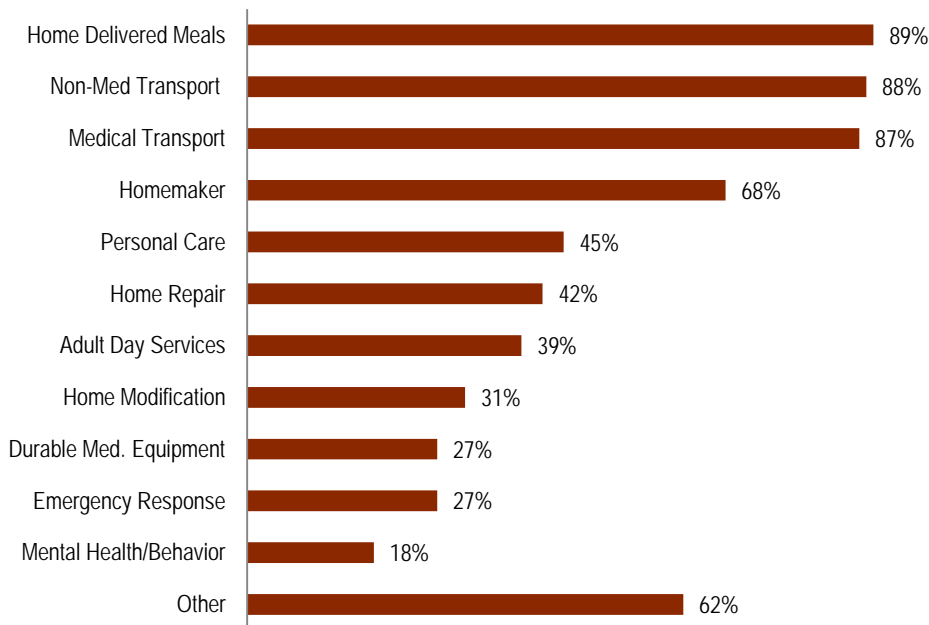
portation (88%), medical transportation (87%) and homemaker (68%) were most often provided (see Figure 2). Other services frequently mentioned included respite, congregate meals, outreach, and wellness and health promotion.

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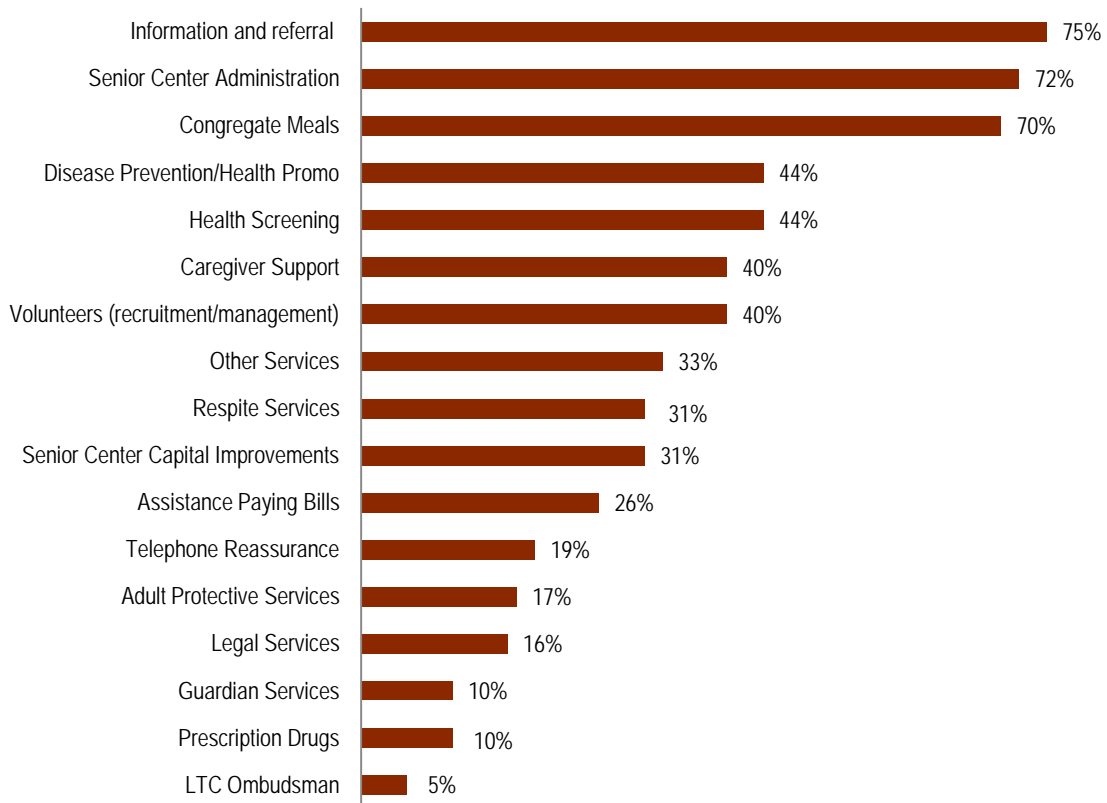
Figure 2. Proportion of Levy Programs Providing Long-Term Supportive Services



In addition to the major in-home services specified above, levy organizations also offer a wide range of supplemental services (see Figure 3). The most common of these services were information and referral (75%), senior-center administration (72%), and congregate meals (70%). Ten percent provided guardian services and prescription drug assistance; and 5% provided additional

funding to long-term care (LTC) ombudsman programs. Thirty-three percent of respondents provide other services, including outreach services, benefits counseling, nutrition and wellness education, exercise classes, social activities, incontinence supplies, chore services, Alzheimer’s escort, nutritional education, visiting and supportive services and the foster grandparent program.

Figure 3. Proportion of Levy Programs Providing Supplemental Services



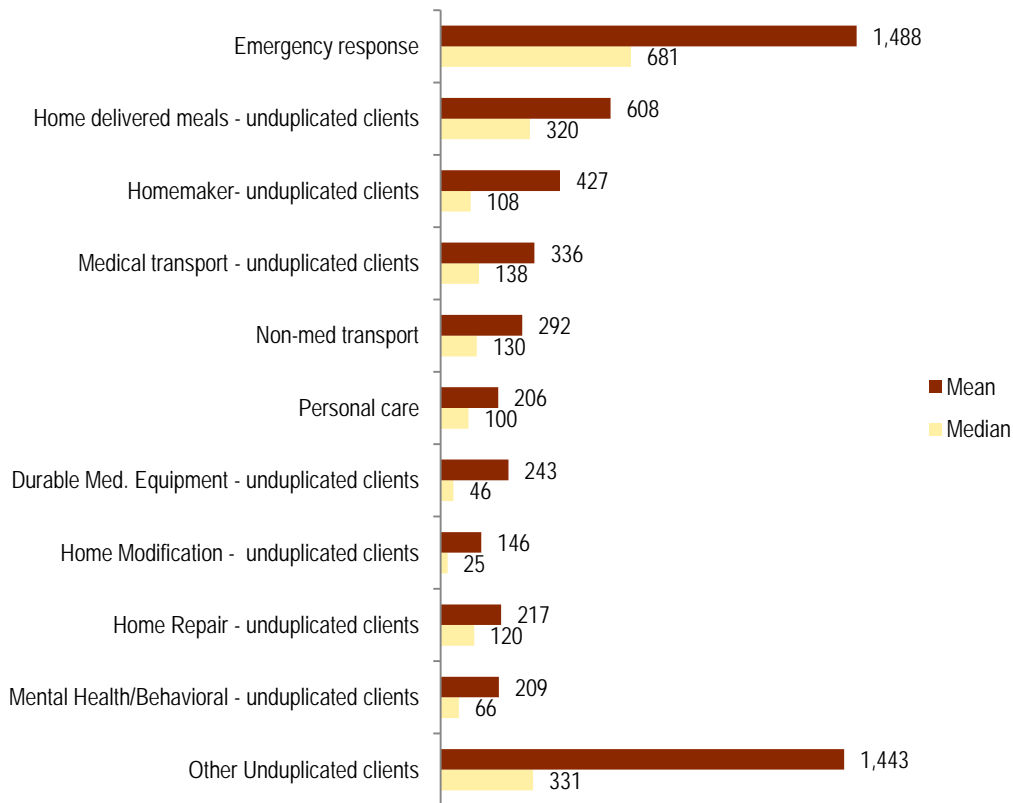


## LEVY PARTICIPANTS

For all services offered the county program average was 5475 unduplicated participants in the latest year (up from the 2005 survey's 5000), with a median of 1150. Survey findings show that the long-term services with the highest average number of users were emergency response (1488); homemaker/personal care (633); home-

delivered meals (608); medical transport (336); and non-medical transport (292) (see Figure 4). There are several very large levies making the median, also shown in Figure 4, an important indicator. For instance, home delivered meals varied from 52 participants in Monroe County to 3842 in Hamilton County and while the average number of participants per program was 608, the median was 320.

Figure 4. Average Unduplicated Number of Participants Using Long-Term Services



## SERVICE EXPENDITURES

In addition to service participation we also examined service expenditures (Figure 5 and 6). On average, programs allocate the highest amount of funds to homemaker/personal care, home delivered meals, transportation, and emergency response systems. Homemaker and personal care combined account for the highest expenditures (\$501,000 and \$244,000 respectively) with a combined per program median expenditure of \$208,000. Nine in ten programs (89%) reported funding home delivered meals and the average program expenditure was \$388,000, with a median of \$148,000. Emergency response systems are

covered in about one-quarter of the programs, with average expenditures at \$314,000 and median program expenditures of \$216,000. Several very large levies drive up average expenditures, making the median an important indicator as well.

***Homemaker and personal care combined account for the highest expenditures (\$501,000 and \$244,000 respectively) with a combined per program median expenditure of \$208,000.***

Figure 5. Average Long-Term Support Service Expenditures Per Program

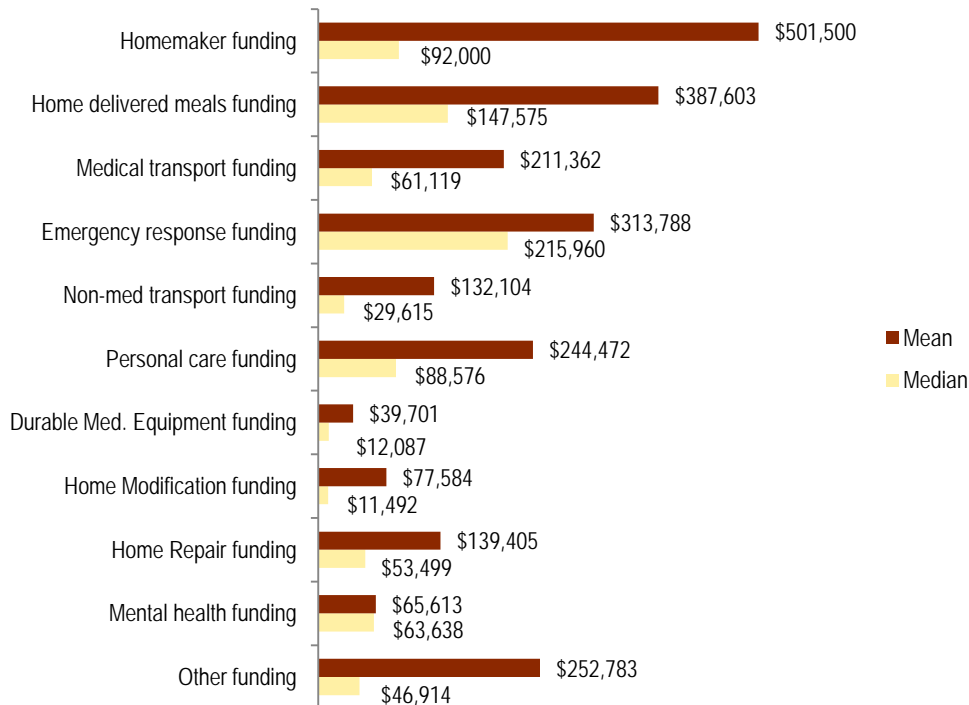
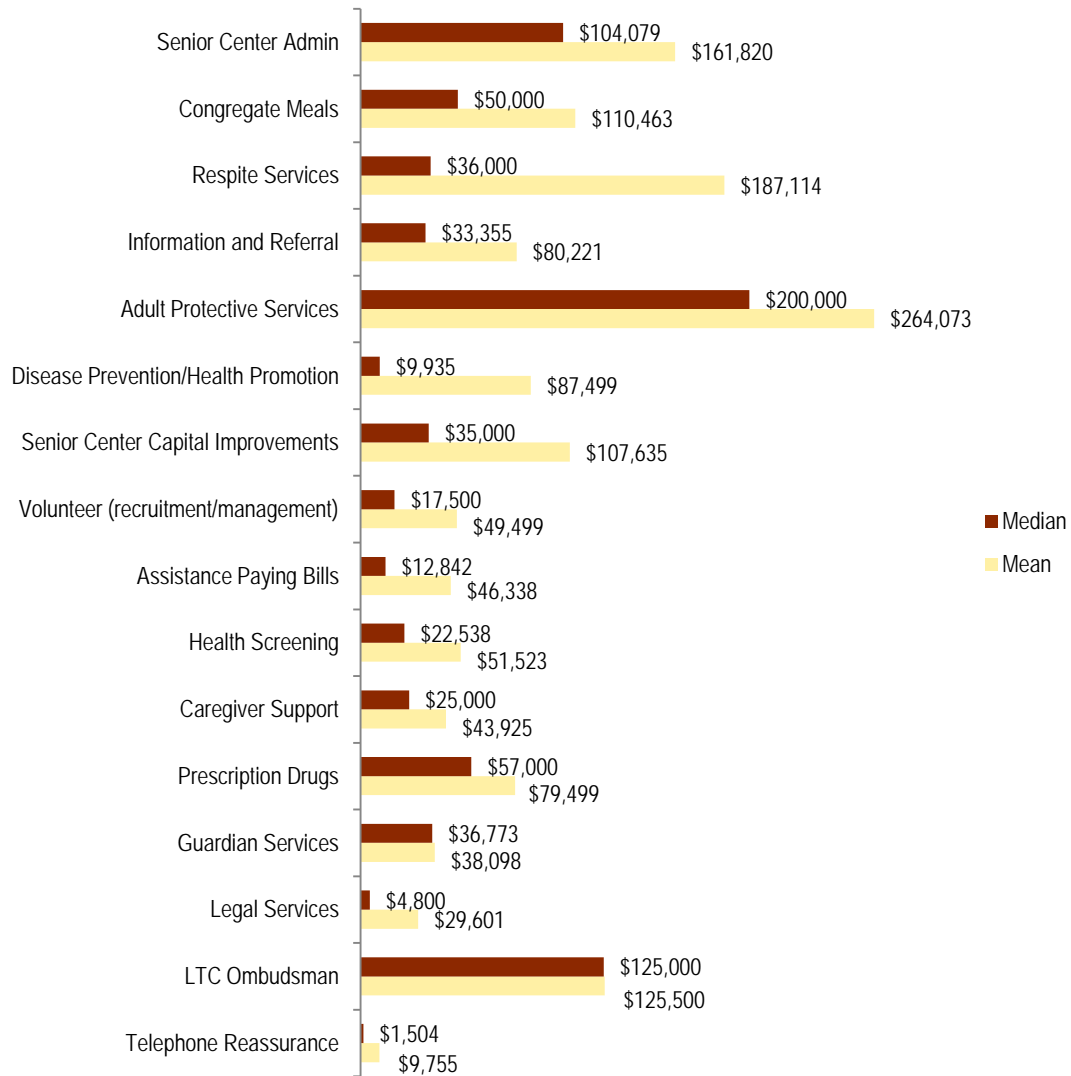


Figure 6. Average Supplemental Services Expenditures Per Program

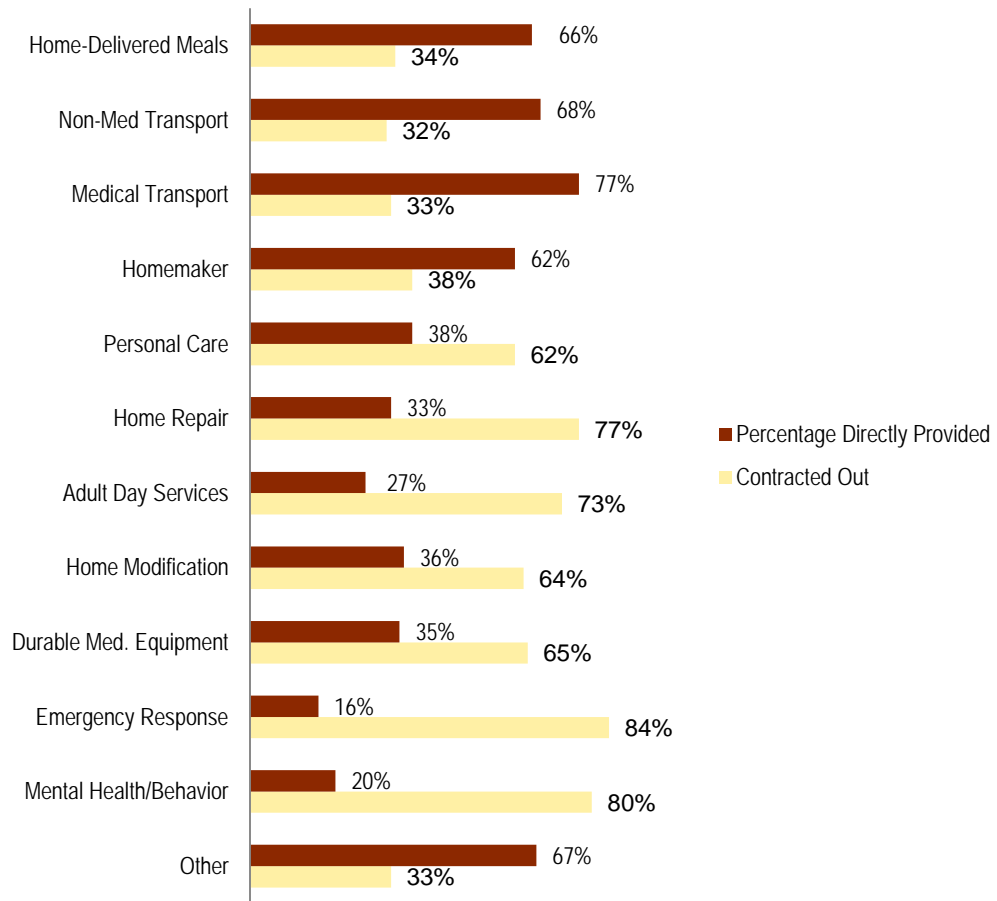


### SERVICE PROVIDERS

Of the supportive services provided, medical transport was most often directly provided by the organization administering the levy (77%), as opposed to contracting out for the service (see Figure 7). Non-medical transport (68%), home-delivered meals (66%)

and homemaker (62%) were the services next most likely to be directly provided by the levy organization. Emergency response (84%), mental health and behavioral services (80%), home repair (77%), and adult day services (73%) were the services most likely to be provided by an outside contract.

Figure 7. Proportion of Levy Organizations Directly Providing and Contracting Services



**CONSUMER-DIRECTED SERVICE OPTIONS**

Four in ten (43%) levy programs indicated that they offer consumer-directed services (i.e., services allowing the consumer to hire, fire and direct other aspects of the services they receive) to their participants. The most common consumer-directed services offered were medical and non-medical transportation, provided by 75% of those offering consumer-directed services, and home-delivered meals, personal care/homemaker and respite services, provided by 60% of programs offering consumer direction. A handful also reported

providing consumer-directed options for adult day services, home repair and home modification.

**PROGRAM ELIGIBILITY AND OPERATIONS**

The organizations operating countywide levies reported using varying criteria (outside of county residency) for ascertaining an individual’s eligibility for levy-funded services, including age, income and functional ability.

## AGE

All programs reported using age as a criterion in determining eligibility for levy services. Taking a lead from the Older Americans Act, 86 percent of those employing age, use 60 as the minimum age for service eligibility. Four organizations use age 55 as the minimum; three set the minimum age at 65; and one uses age 62.

## FUNCTIONAL ABILITY

Forty-six percent of programs report having functional ability guidelines to determine eligibility for services. The most common requirements use a measure of Activity or Instrumental Activities of Daily Living (ADL or IADL). These range from requiring applicants to have two ADL impairments, such as bathing or dressing, to as few as one IADL, such as shopping or meal preparation. Other programs did not identify a specific functional requirement, but rather used such criterion as “demonstrated need for a service that the levy provides”; “requires a doctor’s orders”; “applicant has inadequate family or caregiver support to provide assistance”; “vision and mobility problems”; and “must have health problems.”

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## WAIT LIST AND PASSPORT

Four in ten programs noted that they have a waiting list for one or more services. The services most likely to have a waiting list were: personal care/homemaker, reported by about half of those with waiting lists, and home-delivered meals, reported by about one-

quarter of programs with waiting lists. The average time on the wait list for personal care/homemaker services was 30 days and for home-delivered meals, 26 days. One county indicated having a waiting list of 544 individuals for initial assessment. Another had a 70-person waiting list for case-managed services.

Three-fourths of the responding programs indicated that individuals who qualify for Ohio’s Medicaid home and community-based waiver program for older people, PASSPORT, may also enroll in levy services. Of these, 32% stipulated that enrollment in levy services was allowed only when PASSPORT applicants were being placed on a waiting list.

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***Four in ten programs noted that they have a waiting list for one or more services.***

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## QUALITY ASSURANCE

Nine in ten programs reported using consumer-satisfaction surveys to assure quality (the most commonly used quality assurance method in the 2005 survey, as well); 61% audited their service providers; 52% used provider certification; 25% used family satisfaction surveys; and 27% used “other” means of quality assurance.

## COST SHARING AND DONATIONS FOR SERVICES

About one-quarter of programs reported that a cost-share was required (down from 33 percent in 2005). The average and the median annual incomes at which a cost-share was required were very similar, at \$16,175 and \$16,245, respectively. The range stretched from \$7,920 to \$43,320. The services most often eliciting a cost-share

component were personal care/homemaker (73%); adult day services (66%); and medical/non-medical transport (60%).

Only seven percent stated that they have an asset limit above which a cost-share is required. The average cost-share revenues for each organization was \$119,055 (skewed upward by a couple of organizations bringing in over \$500,000), with a median of \$24,500.

A large majority of programs (88%) – roughly the same percentage as in the 2005 survey – indicated that they solicit donations for some of the services they provide. Home delivered meals was the service for which most organizations solicited donations (71%), followed by medical/non-medical transportation (68%) and personal care, homemaker and respite services (45%).

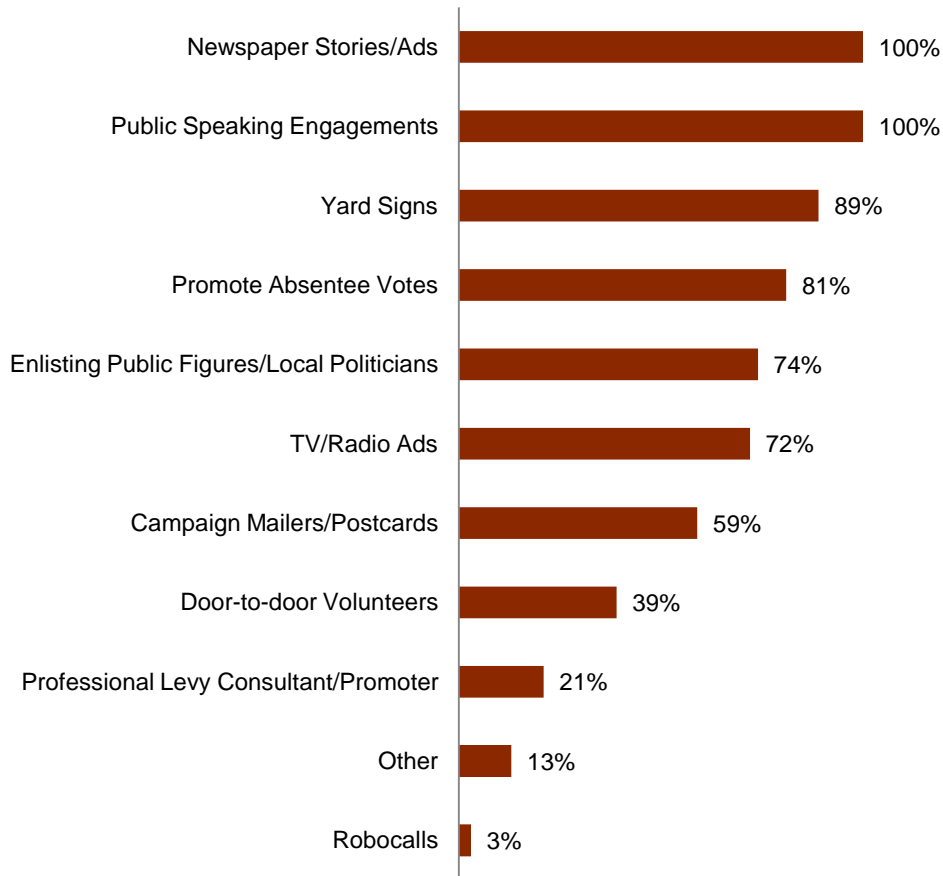
The average levy organization brought in \$80,961 annually (again, increased by a few organizations with totals greater than \$200,000) in donations for their services, with a median of \$28,050. That is up significantly from the 2005 levy survey's average donation of \$52,000 per organization.

## **PROMOTIONAL STRATEGIES FOR SENIOR-SERVICE LEVIES**

As stated earlier in this report, Ohio's senior-service property-tax levies have been very successful since their inception nearly 30 years ago, passing well over 90 percent of the time they are put before voters. In 2009, the average Ohio senior levy passed with two-thirds of the vote.

As shown in Figure 8, effective campaign strategies are crucial in achieving that kind of success at the polls. Virtually every program reported using newspaper stories and ads as well as public speaking engagements in the community as a strategy. Yard signs, used by nine in ten programs, comprised the third most popular strategy, followed by the promotion of absentee ballots (81%); enlisting public figures and local politicians (74%); TV and radio ads (72%); and campaign mailers and postcards (59%). Additional strategies involved door-to-door volunteers (39%); professional levy consultants (21%); and Robocalls (3%). An array of other strategies included campaign buttons, word-of-mouth, calendars, placemats, and special fundraisers.

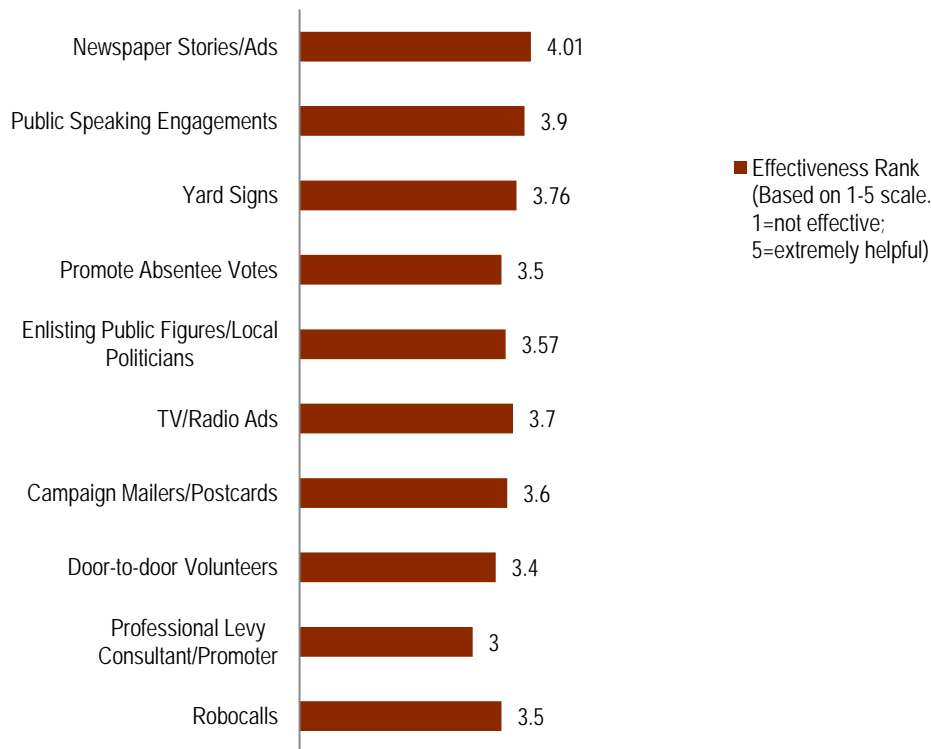
Figure 8. Proportion of Organizations Using Each Campaign Strategy



Levy organizations were asked to rate the perceived effectiveness of the strategies they used on a one-to-five scale, with one being “not at all effective” and five being “extremely effective” (see Figure 9). The two most commonly used strategies (newspaper stories & ads and public speaking engagements) were also deemed by respondents to be the most effective. Newspaper stories and ads received the highest average rating, 4.01, followed by public speaking engagements at 3.90. Similarly, the least employed of the itemized strategies, robocalls and professional levy consultants, were also seen as the least effective.

Early planning for levy campaigns was also an important aspect of success at the ballot box. The average organization began planning its levy campaign just over eight months before the next election. The median was six months, and the range reached from two to 24 months. As to the actual public kick-off of levy campaigns, organizations, on average, launched their public levy campaigns about three and one-half months (median 4 months) before election day, with a range of one to six months. The average organization spent \$14,725 on its most recent levy campaign, with a median of \$4,680.

Figure 9. Perceived Effectiveness of Levy Campaign Strategies



## CRUCIAL CHALLENGES FACING LEVY CAMPAIGNS

Levy administrators were asked what concerns they had regarding future levies. The current economy, competing tax levies (mainly from schools and other social services), and voter discontent were by far the most pressing concerns of 83% of levy organizations. This represents a very different perspective from 2005’s rosier economic outlook, when respondents’ most often-cited challenge was educating voters on the need for services.

Economic conditions, mentioned by three-quarters of respondents, constituted the largest area of concern. Competing tax issues, referenced by 22% and general voter discontent with government, noted by 16%, were also viewed as major levy challenges. Three organizations specified the increasing

number of older persons needing services (and, perhaps, increased millage) as crucial challenges, and other concerns expressed included: voter confusion as to where levy funds go; levy campaign costs; the need for continuous public relations; reaching levy voters in outlying areas; and convincing voters of the value of levy services.

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***The current economy, competing tax levies (mainly from schools and other social services), and voter discontent were by far the most pressing concerns of 83% of levy organizations.***

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## CONCLUSION

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***...despite a challenging economy, the average approval rate for the most recent levies in the 2009 survey (66.6%) was actually higher than the average approval rate tabulated in the 2005 levy survey (65%).***

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Senior-service levies are an increasing part of the aging services landscape across Ohio. Total yearly senior-service property-tax levy dollars in Ohio (\$169,744,509) – including township, city and village levies, as well as money raised via human-service umbrella levies earmarking funds for aging - now more than triple the state’s annual Older American’s Act (OAA) allotment of \$55.8 million Ohio’s senior-service property-tax levies continue to pass well over 90 percent of the time they are brought to the ballot. Additionally, despite a challenging economy,

the average approval rate for the most recent levies in the 2009 survey (66.6%) was actually higher than the average approval rate tabulated in the 2005 levy survey (65%).

The services most often provided by levy programs – home-delivered meals, medical and non-medical transportation, homemaker, personal care, and information and referral – are very much in line with the services emphasized and most often provided via the OAA since its inception in 1965. But it should be noted that while Ohio supplements its OAA funding more than three times over, 44 percent of Ohio’s levy counties still report waiting lists for one or more of their services. Ohio’s levies will continue to be a critical component of the service delivery system as the state’s older population continues to increase.

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