

HAMILTON COUNTY TAX LEVY REVIEW COMMITTEE
138 East Court Street
Room #603
Cincinnati, Ohio 45202

July 23, 2007

Hamilton County Board of Commissioners
Hon. Todd Portune –President
Hon. David Pepper - Vice President
Hon.. Pat DeWine
138 East Court Street
Room #603
Cincinnati, Ohio 45202

RE: Senior Services Tax Levy Review

Honorable Board,

Following the direction of Mr. Tim Molony, chairperson of the Hamilton County Tax Levy Review Committee, a subcommittee was formed in February 2007 for the purpose of the five year review of the Hamilton County Senior Services Levy, which is considered for placement on the ballot for the November 2007 general election.

I would like to thank Mr. Tim Molony and the Board of County Commissioners for my appointment as chairperson of Senior Services Tax Levy Review Subcommittee. I am also very appreciative of the time and efforts of fellow subcommittee members Mr. John Smith, Mr. Dale Van Vyven and Mrs. Virginia Wojtowicz. Together, we have been provided excellent support by county staff and by our hired consultant.

Through the course of our review, we have been presented with information on the funded programs, including Adult Protective Services, Ohio State University Extension, SORTA Access Services, Council on Aging of Southwestern Ohio, and Veteran's Services. We have also been able to visit clients in their homes and meet other persons who benefit from the array of services funded by Senior Services levy dollars. We have attended numerous meetings of the TLRC and have conducted a public hearing on June 11, 2007 for additional citizen input.

The TLRC subcommittee recommends a total of \$108,217,730 for the next five-year period for the Senior Services Levy. Included in this recommendation is the usage of \$4,900,000 of the current Levy fund balance. This results in a net recommendation for placement on the November, 2007 ballot of a five-year levy projection of \$103,317,730 as follows:

Council on Aging	\$102,334,029
JFS/Adult Protective	2,750,000
Veteran's Services	1,025,000
SORTA	476,102
Contracts	306,705
Auditor and Treasurer Fees	<u>1,325,894</u>
 Total	 <u>\$108,217,730</u>

(Note: The \$306,705 amount for the contracts line-item includes the annual amounts for indirect cost, the mid-point review in 2010 and the performance review in 2012 for the Senior Services levy.)

It has been our mandate to follow the direction of the mission statement adopted by the BOCC at their regular meeting on January 24, 2007. We concur with the commissioners on their requirement to balance the public need for services and the ability of Hamilton County citizens to bear the tax burden to fund these services. It is our desire that any and all dollars raised by a "senior services" levy go to *directly* benefit elderly citizens that are legal residents of Hamilton County. Indeed, it is the confidence of our voters who have historically approved Senior Services levy requests that these monies are in fact for the benefit of that demographic group only. This 2007 levy cycle presents a great opportunity for the BOCC to realign some expenditures while devoting proper funding to help continue the excellent programs which help maintain quality of life for our senior citizens.

Department of Job and Family Services - Adult Protective Services

Since 1981, Ohio law mandates the reporting, investigation and provision of protective services to those sixty years and older who are victims of abuse, neglect, self-neglect or exploitation.

In our interaction with staff members, we have found a team effort that seems dedicated to the core mission of APS. Performance expectations are high and the client satisfaction rate is reported as good.

The Senior Services levy currently provides \$550,000 annually for the Adult Protective Services program. It is the recommendation of the TLRC Senior Services subcommittee that \$550,000 is provided each year for the next five years for APS. Since funding for this program is supplemented with Title XX dollars and we have been informed of an above average increase in Title XX for Hamilton County, we recommend that any inflationary or other increases deemed appropriate for APS for years 2008-2012 be funded with the anticipated increase in Title XX dollars. (ref Maximus Report page 19, May 14, 2007)

Ohio State University Extension Program

The mission of Ohio State University Extension is "Engaging people to strengthen their lives and communities through research-based educational programming".

There is no identified mandate for the services funded directly through senior services funding or funded indirectly through the leveraging of additional funds using levy funds as a local match.

We have met dedicated professionals from OSU Extension and thank them for the services and education that they have provided to Hamilton County residents of all ages.

According to financial information provided with the Maximus report, OSU Extension receives \$300,000 annually from the Hamilton County general fund and sources other than the Senior Services levy.

Due to other demands on future levy resources and the lack of a mandate for this service, it is the recommendation of the 2007 Senior Services levy subcommittee that Senior Service levy funding for this program be discontinued at the end of the current levy cycle. Elimination of this expense will result in savings to the Senior Services levy of \$134,480 during the 2008 -2012 budget cycle. (Maximus Report, May 14, 2007 page 19) If approved by the BOCC, we do ask that the County notify OSU Extension immediately of this recommendation in order to provide a smoother transition and allow OSU Extension the remainder of 2007 to research alternative funding.

Southwest Ohio Regional Transit Authority Non-ADA Access Services

ACCESS is a shared ride public transportation service that provides curb-to-curb transportation for people whose disabilities prevent them from riding Metro Buses. The Americans with Disabilities Act of 1990 (ADA) requires that the Southwest Ohio Regional Transit Authority provide ACCESS service to disabled persons that live within three –quarters of a mile of an established Metro bus stop. ACCESS is a worthwhile service that allows many disabled members of our community the opportunity to live better lives.

Non-ADA ACCESS service is provided to those areas that are in Hamilton County, that are beyond 3 / 4 mile from an established Metro stop and are basically within Interstate 275. Under a previous agreement, Non-ADA ACCESS service is offered only to persons who have lived within the described area prior to January 1, 2004. Due to the “grand fathering” of the group, there are no new senior citizen or other applicants for this service since the end of 2003 and the number of Non-ADA trips has fallen off by more than 50% from 2004 thru 2006, according to information provided in the Maximus report. July 2007 information provided by SORTA shows a continuing decrease in Non-ADA trips as expected The Maximus report has used a sampling method annually from 1998 thru 2006 to determine the number of Non-ADA trips. While probably not exact, the sampling has provided an apples-to-apples comparison for each year. Year 2008 ridership numbers, ratios and percentages are subject to change as representatives from SORTA have described a new software system that is scheduled for future implementation.

Local funding for Non-ADA ACCESS comes from three sources identified in the Maximus report including the county general fund, the MRDD levy and the Senior Services levy. Under the heading “Principal Observations” the report describes that the financial practices of the department do not necessarily promote the use of all other resources prior to levy fund resources. As a committee, our observation has been that funds are possibly co-mingled with other operating funds and not specifically set for

Non-ADA Access. At the same time, funding from the Hamilton County General Fund for Non-ADA ACCESS has increased from \$110,812 in 2002 to \$329,500 in 2005.

Considering the continuing annual decrease in Non-ADA rides, our recommendation is that Senior Services levy dollars allocated per ride remain constant with a 2.4% annual inflationary increase. The recommendation for Senior Services levy dollars for the 2008-2012 levy period is a total of \$ 476,102.

The Senior Services subcommittee recommends that at the formation of the 2010 TLRC that the Senior Services mid-point levy review committee request SORTA to provide all contracts pertaining to ACCESS operation and management. During the 2002-2007 levy cycle, SORTA utilized MV Transportation of Fairfield, California to operate the program. This contract information was not revealed to the Maximus consultant or to the 2007 TLRC at any point during the Maximus review or during the SORTA presentations. It is also recommended that any future contract with SORTA for Non-ADA Access services include a requirement for full disclosure of sub-contractors being used for this service.

Council on Aging of Southwestern Ohio

The Council on Aging has provided Hamilton County's Elderly Services Program through a contract that has been in place since 1992. Hamilton County Senior Services Levy funding is not mandated by the federal government, but is a policy decision of the BOCC and a vote of the electorate. The Council on Aging also provides and administers programs in Clermont, Butler, Warren and Clinton counties.

Members of the TLRC have visited the offices of the Council on Aging, visited service recipients at their homes and have met with COA leadership numerous times. Feedback from our TLRC members concerning their home visits has been very positive. There is certainly a group of elderly citizens whose lives have been improved because of services funded by the Senior Services Levy and administered by the COA. We were given the latitude to talk to case managers and field level persons and hear stories about how the COA has helped seniors stay in their homes and assisted caregivers with instruction and advice.

One of our concerns is the possible duplication of service in Hamilton County. Qualifying seniors might be able to obtain benefits or services from their local city or township, from the county and from the State or Federal government. While the Council on Aging does coordinate most of the governmental programs, benefits and other help are also available from other non-profit groups and faith based organizations. Our concern is not with seniors and the value of benefits that they receive but with agencies being able to accurately evaluate and fund the needs of the population when there are providers at many different levels. We recommend that the COA continue to refine its procedures to assure that all sources of services to elderly, including services from other non-profit groups and faith based organizations are identified and recommended for usage whenever possible.

During the COA presentation to the TLRC, there was a slide and discussion called "The Perfect Storm" which estimated that due to the "baby boom", there will only be four caregivers for each elderly person 40 years from now. In order to assure the long term

fiscal survival of senior programs, we must have a cautious approach to program spending expansion.

There is another encroaching concern about the economic viability of all of our county programs. During questioning at several of the forums with different agencies, there have been various answers about United States citizenship and Hamilton County residency requirements to receive program benefits. In addition to the requirement that all participants must be a resident of Hamilton County as defined in ORC 3503.01, we recommend that beginning with the next levy term and within applicable law, any persons receiving Hamilton County Senior Levy tax dollars must be a United States citizen or a United States legal resident.

The Senior Services subcommittee also recommends that the BOCC establish a definition of the term “Elderly Persons” as used in the current ballot language of the tax levy. It is our recommendation that any new participants in the program follow the direction of the United States Social Security Administration. (See attached chart)

The Council on Aging has requested that the BOCC continue their current budgeted percentage of 6% of their funds that are dedicated to administrative expenses. The TLRC Senior Services subcommittee recommends that the COA be allowed to continue the percentage of 6.00 %, which is the amount that COA has requested. Our concern, as stated in the beginning of this report, is that maximum dollars should always be directed to end-users.

It is the recommendation of the Senior Services subcommittee that the COA receive \$102,334,029 for the five year levy term 2008-2012.

Veteran’s Services

Veteran’s Services funding is a state legislative mandate that must be funded by the BOCC up to a maximum of .5 mills. It is our subcommittee recommendation that this expense continue to receive funding each year from the Senior Levy at the current level of \$205,000 annually. The remainder of the balance should continue to be paid from the county general fund as it will minimize the burden on Senior Services Levy funding and help to mitigate a future cash emergency should a Senior Services Levy not pass in the general election.

Please contact me with any questions or comments,

Sincerely,

Dan Unger
Hamilton County Tax Levy Review Committee
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513 532 9282

Senior Services Mental Health Subcommittee
John Smith
Dale Van Vyven
Virginia Wojtowicz

Dan Unger, Subcommittee Chair

Attachments:

Hamilton County Tax Levy Review Committee Mission Statement (adopted January 24, 2007)

Worksheet for Non-ADA Access Calculations

United States Social Security System chart “Calculating your Retirement”

Maximus – TATC Consulting Final Reports

Department of Job and Family Services – Adult Protective Services

Ohio State University Extension

Southwest Ohio Regional Transit Authority – Access Non-ADA Services

Council on Aging of Southwestern Ohio