

MCS
CONSULTING SERVICE



**Lake County, Ohio Senior Citizens:
Today, Tomorrow and in the Future**

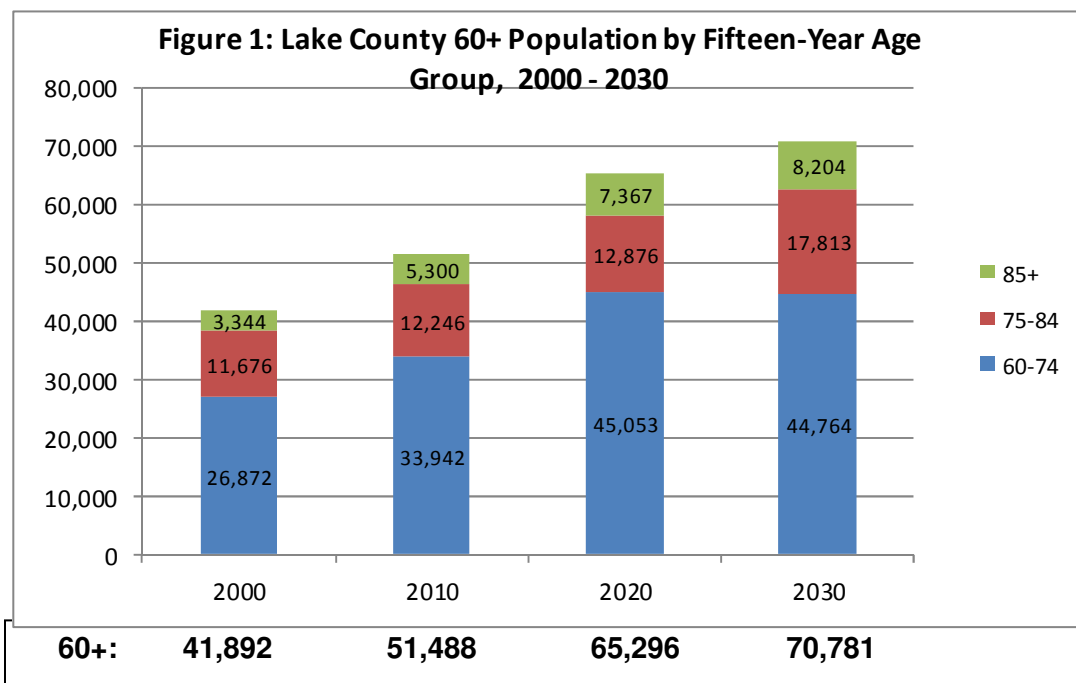
Recommended Operational Plan for
the Lake County Board of Commissioners &
Senior Citizens Advisory Panel

October 16, 2015

I. Major Research Findings

The four major findings from the research gathered for Lake County are¹:

1. **By 2030, one of three residents of Lake County will be 60 years and older, with most of the growth after 2020 in the cohort 75 years and older.**



¹ Some selected figures and tables are inserted to highlight major research findings.

Table 1			
Profile of 60+ Population, 2000; 2010, LAKE COUNTY			
	2000	2010	Change 2000 to 2010
POPULATION			
Total Population	227,511	230,041	1.1%
Total Population, 60+	41,892	51,488	22.9%
Percent of County Population, Age 60+	18.4%	22.4%	4.0%
INCOME/EDUCATION			
Median Income, 60+	\$17,500	\$22,158	26.6%
At or Below Poverty	7.8%	6.5%	-1.3%
High School Diploma or Higher Education	71.8%	82.7%	10.9%
GENDER			
Female		56.2%	
Male		43.8%	
RACE/ETHNICITY			
White Non-Hispanic	97.5%	95.7%	-1.8%
Black Non-Hispanic	1.2%	2.1%	0.9%
Hispanic	0.4%	0.6%	0.2%
Other Races, Non-Hispanic	0.9%	1.6%	0.7%
MARITAL STATUS			
Married	61.4%	57.2%	-4.2%
Widowed/Divorced/Separated	35.5%	38.4%	2.9%
Never Married	3.1%	4.4%	1.3%
LIVING STATUS			
60+ Living Alone	27.2%	27.4%	0.2%
Having Grandchildren Living at Home	4.0%	3.5%	-0.6%
Data Source: Scripps Gerontology Center.(2013) <i>Projections and Characteristics of the 60+ Population - Lake County</i> . Scripps Gerontology Center; Miami University, Oxford, OH. Available at www.ohio-population.org			

Jurisdiction	CENSUS	PROJECTED		CHANGE #		CHANGE %	
	2010	2020	2030	2010 to 2020	2010 to 2030	2010 to 2020	2010 to 2030
	60+	60+	60+	60+	60+	60+	60+
Mentor	11,071	14,325	14,780	3,254	3,709	29.4%	33.5%
Concord Twp.	4,467	6,493	7,828	2,026	3,361	45.3%	75.2%
Painesville Twp.	3,603	5,028	5,886	1,425	2,283	39.6%	63.4%
Willoughby	5,576	6,783	7,398	1,207	1,822	21.7%	32.7%
Madison Twp.	3,311	4,314	4,893	1,003	1,582	30.3%	47.8%
Painesville	2,493	3,242	3,712	749	1,219	30.0%	48.9%
Perry Twp.	1,230	1,781	2,023	551	793	44.8%	64.5%
Eastlake	4,144	4,861	4,848	717	704	17.3%	17.0%
Willoughby Hills	2,380	2,986	3,065	606	685	25.5%	28.8%
Kirtland	1,810	2,242	2,381	432	571	23.9%	31.5%
Perry Village	262	522	785	260	523	99.4%	199.7%
Madison Village	656	901	1,098	245	442	37.3%	67.5%
Mentor-on-the-Lake	1,510	1,878	1,940	368	430	24.4%	28.5%
Leroy Twp.	653	916	1,065	263	412	40.3%	63.1%
Willowick	3,383	3,654	3,696	271	313	8.0%	9.3%
Fairport Harbor Village	657	869	965	212	308	32.3%	46.9%
Grand River Village	82	143	179	61	97	74.8%	118.0%
Lakeline Village	45	82	123	37	78	81.4%	173.8%
North Perry Village	188	233	265	45	77	23.7%	40.8%
Kirtland Hills Village	162	214	235	52	73	31.9%	45.3%
Waite Hill Village	181	179	173	-2	-8	-1.0%	-4.2%
Timberlake Village	203	208	182	5	-21	2.4%	-10.3%
Wickliffe	3,421	3,444	3,260	23	-161	0.7%	-4.7%
Lake County	51,488	65,296	70,781	13,808	19,293	26.8%	37.5%

Data Source: U.S. Census 2010; projections by Northern Ohio Data Information Services, Cleveland State University

Jurisdiction	CENSUS			PROJECTED			CHANGE #		CHANGE %	
	2010	2020	2030	2010 to 2020	2010 to 2030	2010 to 2020	2010 to 2030			
	85+	85+	85+	85+	85+	85+	85+			
Mentor	1,124	1,582	1,903	458	779	40.8%	69.3%			
Concord Twp.	392	575	970	183	578	46.6%	147.4%			
Madison Twp.	310	455	570	145	260	46.8%	84.0%			
Painesville Twp.	310	482	570	172	260	55.5%	83.8%			
Eastlake	287	472	524	185	237	64.3%	82.7%			
Kirtland	192	228	332	36	140	18.7%	72.9%			
Willoughby Hills	223	348	341	125	118	56.3%	53.1%			
Perry Twp.	75	154	192	79	117	105.8%	156.1%			
Mentor-on-the-Lake	103	192	210	89	107	86.2%	103.7%			
Willoughby	923	966	992	43	69	4.7%	7.5%			
Madison Village	49	87	102	38	53	77.8%	107.2%			
Leroy Twp.	30	54	82	24	52	81.1%	171.9%			
Perry Village	19	31	56	12	37	60.8%	196.4%			
Willowick	391	649	420	258	29	65.9%	7.5%			
Painesville	243	257	271	14	28	5.6%	11.5%			
Kirtland Hills Village	15	22	36	7	21	44.9%	138.4%			
Fairport Harbor Village	71	88	85	17	14	24.6%	20.2%			
Timberlake Village	13	23	27	10	14	73.2%	107.2%			
North Perry Village	13	22	27	9	14	66.1%	106.4%			
Lakeline Village	5	9	16	4	11	72.4%	223.5%			
Waite Hill Village	15	18	23	3	8	18.1%	55.2%			
Grand River Village	4	14	11	10	7	241.7%	175.3%			
Wickliffe	493	642	443	149	-50	30.1%	-10.0%			
Lake County	5,300	7,367	8,204	2,067	2,904	39.0%	54.8%			

Data Source: U.S. Census 2010; projections by Northern Ohio Data Information Services, Cleveland State University

2. Lake County is an elder friendly community - with most needs met in the Basic Needs domain and least met in the Social and Civic Engagement domain.

Table 13		
SURVEY: Lake County Aggregate Elder-Friendly Mean Scores and Domain-Specific Mean Scores		
	Total (n)¹	Mean²
ELDER-FRIENDLY (Mean across all four Domains)	51,488	1.7
Basic Needs	51,068	1.87
Physical and Mental Health and Well-being	51,279	1.68
Social and Civic Engagement	51,343	1.58
Independence for Frail and Disabled	51,471	1.69

Note:¹ – The ‘n’ reported here is weighted to reflect the county's 60+ population. See Appendix A-2 for the weighting formula.

Note:² – Mean score has a possible range of 0 to 2. The higher the value, the more Elder-friendly Lake County is on the aggregate and on each domain.

3. Lake County has a strong community-based senior service delivery system that can be positioned to accommodate larger numbers of older seniors by 2030.
4. Lake County's senior levy funding is a tremendous asset that can be used to strengthen Lake County as an elder friendly community and position the community-based senior service delivery system for the future.

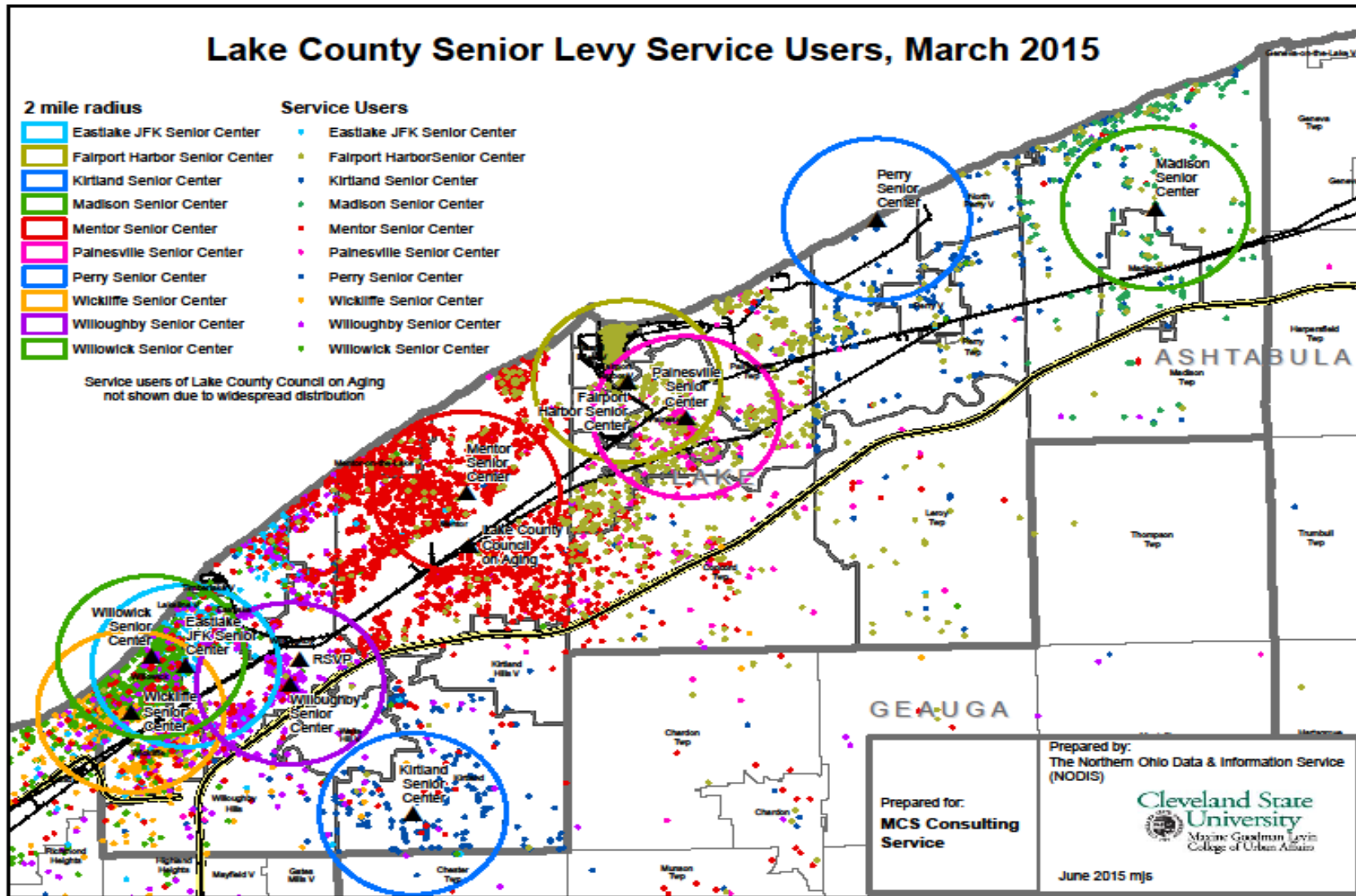
FUNDING SOURCES - 2014	TOTAL	PERCENT
Sr. Levy	\$2,725,298	52.2%
Older Americans Act	\$347,581	6.7%
PASSPORT/MyCare Ohio	\$76,558	1.5%
National Senior Service Corps Funds	\$47,839	0.9%
United Way	\$144,108	2.8%
Fees/Donations	\$760,967	14.6%
City/Village/Township Monies	\$867,532	16.6%
Foundations	\$0	0.0%
Fundraising	\$44,592	0.9%
<i>OTHER:</i>		
HEAP	\$5,867	
MIPPA	\$3,156	
Lake Hospital for Geriatric Assessment Program Pilot	\$37,500	
Advertising Sales for Bridge Newspaper	\$45,888	
Grants	\$54,625	
Events fees [Annual Meeting/Holiday Concert]	\$4,784	
CDBG	\$6,140	
Tenant income	\$7,200	
Thrift Store	\$16,000	
Beauty Salon	\$13,000	
WRAAA - Ohio Senior Service Corps Funds	\$3,773	
Fundraising [Monthly 50/50/50 Raffle]	\$4,676	
TOTAL OTHER	\$202,609	3.9%
TOTAL	\$5,217,084	100.0%

Data Source: Senior Levy Recipient Agencies, March 2015 [unaudited]

Amount of 2014 Levy Funds per Participant [Excluding RSVP]				
Agency Recipient	2014 Award	Number of Participants Served with Senior Levy	Levy Funds per Consumer	
Madison Senior Center	\$89,700	252	\$356	ABOVE Average
Council on Aging	\$1,453,906	5,850	\$249	
Kirtland Senior Center	\$89,700	371	\$242	
Perry Senior Center	\$89,700	471	\$190	
Painesville Senior Center	\$89,700	534	\$168	
Eastlake Senior Center	\$99,700	774	\$129	
Willoughby Senior Center	\$168,000	1,351	\$124	
Fairport Senior Center	\$115,700	1,275	\$91	
Wickliffe Senior Center	\$95,900	1,291	\$74	
Willowick Senior Center	\$86,500	1,232	\$70	
Mentor Senior Center	\$228,020	3,869	\$59	
TOTAL [Exlcude RSVP]	\$2,606,526	17,270	\$151	
Address Not Geo-coded		1,402		
Total Addresses Provided		18,672		

Data Sources: Levy dollars and addresses provided by Senior Levy Recipient Agencies , March 2015; addresses geocoded by Northern Ohio Data Information Services (NODIS), Cleveland State University, June 2015

Table 28					
Collective 2013 Expenses of Senior Levy Recipient Agencies					
	Council on Aging	RSVP	Senior Centers	TOTAL	PERCENT
2013 Levy Fund Distribution	\$1,329,470	\$125,422	\$1,049,500	\$2,504,392	
PERSONNEL EXPENSE					
Employee Benefits	\$100,281	\$31,658	\$70,277	\$202,217	
Employee Salaries	\$869,283	\$42,294	\$333,223	\$1,244,800	
Contract Employees (ie PT Instructors)	\$13,347	\$7,942	\$57,476	\$78,766	
Sub-Total Personnel	\$982,911	\$81,894	\$460,977	\$1,525,782	58%
FACILITY EXPENSES					
Mortgage/Lease Payment		\$7,129	\$61,030	\$68,159	
Misc. Repairs			\$19,750	\$19,750	
Utitlites			\$117,504	\$117,504	
Sub-Total Facility	\$0	\$7,129	\$198,285	\$205,414	8%
PROGRAM EXPENSES					
Materials/Supplies		\$3,200	\$99,825	\$103,025	
Programs(Including Marketing/Advert)	\$346,559	\$9,488	\$36,484	\$392,531	
Other: Bus Passes			\$2,500	\$2,500	
Other: Wellness Center			\$50,000	\$50,000	
Travel		\$830	\$1,876	\$2,706	
Transportation		\$3,818	\$9,370	\$13,188	
Sub-Total Program Expenses	\$346,559	\$17,336	\$200,055	\$563,950	22%
OTHER OPERATING EXPENSES					
Insurance		\$3,813	\$20,018	\$23,831	
Other:		\$5,847	\$35,594	\$41,441	
Sub-Total Other Operating Expenses	\$0	\$9,660	\$55,612	\$65,272	2%
CAPITAL & MAJOR EQUIPMENT					
Equipment Purchases			\$46,297	\$46,297	
Equipment Maintenance/Repairs			\$69,692	\$69,692	
Capital Building Reno/Construction			\$139,173	\$139,173	
Sub-Total Capital & Major Equipment	\$0	\$0	\$255,163	\$255,163	10%
GRAND TOTAL EXPENSES	\$1,329,470	\$116,019	\$1,170,092	\$2,615,581	100%
DIFFERENCE: LEVY DOLLARS & EXPENSES (+/-)	\$0	\$9,403	-\$120,591	-\$111,189	
<i>Data Source</i> : Lake County Records (unaudited)					



II. Vision & Goals

Lake County will be prepared for the increase in the oldest cohort of seniors by 2030 with increased capacity to serve more older persons at each stage of the aging process - the healthy active phase, the slowing down phase, and the service need phase - as inexpensively as possible.

Goal 1: Implement the current funding system with additional reporting requirements.

Goal 2: Initiate a service-based, rather than provider based, funding system with more accountable processes for administration of senior levy funds.

Goal 3: Redefine the role of senior centers based on changing demographics and funding patterns.

Goal 4: Enhance capacity of Lake County to improve protective services for persons 60+ through use of senior levy funds.

Goal 5: Develop an Options for Elders Program to enable seniors who meet protective level of care and have incomes/assets above Medicaid eligibility to age in place in their homes/communities.

III. Recommended Operational Plan

Senior Levy Funding Period	CURRENT			NEW &/OR RENEWAL		
Operating Year	2015	2016	2017	2018	2019	2020
Goal 1: Implement the current funding system with additional reporting requirements						
PLAN						
Collect data from recipient agencies: # participants served with levy funds, # service units provided with levy funds; participant profile; budget for use of levy funds; customer satisfaction surveys						
Require sub-recipient agreements that include description of scope of services, time line and budget						
Require a performance report based on scope of service prior to disbursement of funds for next funding period						
Require capital and major equipment purchases from Contingency Fund, not operating funds						
IMPLEMENT						

Senior Levy Funding Period Operating Year	CURRENT			NEW &/OR RENEWAL		
	2015	2016	2017	2018	2019	2020
Goal 2: Initiate a service-based, rather than provider based, funding system with more accountable processes for administration of senior levy funds						
PLAN						
Prioritize use of senior levy funds: Priority 1: To ensure basic needs are met; Priority 2: To support independent living for frail seniors; Priority 3: To promote physical and mental health; Priority 4: To promote social and civic engagement						
Eliminate the system of allocating levy funds to agency recipients based on historically agreed percentages						
Develop a system for performance-based reimbursement based on units served times negotiated unit rate						
Define services to be provided through senior levy funds & unit definitions: Examples - Congregate Meals; Meals on Wheels; Transportation for Shopping & Medical Appointments; Transportation for Field Trips; Information and Assistance; Information and Referrals; Case Management; Home Maintenance; Chore Services; Homemaker Service; Personal Care; Adult Day Care; Volunteer Services; Benefits Assistance; Adult Guardianships; Socialization/Recreation; Health/Wellness Services; Education; Arts & Crafts						
Consider opening funding to any non-profit or public agency within Lake County with a historic track record of providing the respective service(s) consistent with levy						
Change eligibility age to 60 years for consistency with Older Americans Act						
Consider a 2 year Request for Proposal (RFP) that includes a program narrative, estimated number of service units & persons served, budget, including unit cost by service						
Develop a monthly reporting structure for those 60 years and older that includes number of service units provided, number of participants by service, participant demographics (age, gender, race/ethnicity, live alone, place of residence)						
Develop an approach for helping levy recipients to minimize cash carryover						
Develop a monitoring system for annual site visits						
Conduct an orientation for applicants						
Continuously evaluate the effectiveness of the use of levy funds in meeting changing needs						
Assess the need for an increase in millage of the senior levy to implement this plan						
Assess how volunteer services are provided						
Develop staff capacity at the county to administer the levy on a full time basis						
IMPLEMENT						

Senior Levy Funding Period Operating Year	CURRENT			NEW &/OR RENEWAL		
	2015	2016	2017	2018	2019	2020
Goal 3: Redefine the role of senior centers based on changing demographics and funding patterns						
PLAN						
Collaborate with other funders to conduct innovations conference(s) to educate the county's aging network about changing demographics, promising and best practices for service delivery, and new administrative approaches for organizing delivery of services more efficiently						
Solidify the role of senior centers as anchors for the well elderly to prevent or delay premature aging and as points of entry into the community based senior service delivery system for frail seniors						
Allocate funding to senior centers based on proportion of 60+ population in eastern, central, and western sections of the county						
Provide incentive funding for senior centers to transition to new roles such as combining a socialization model for the well elderly and a social service model for the more frail elderly						
Provide incentive funding for senior centers that formalize collaborations across jurisdictions						
Issue a competitive RFP for senior centers to develop proposals reflective of the new direction for funding senior center services						
Implement this goal within or below the current funding allocations for senior centers						
IMPLEMENT						

Senior Levy Funding Period Operating Year	CURRENT			NEW &/OR RENEWAL		
	2015	2016	2017	2018	2019	2020
Goal 4: Enhance capacity of Lake County to improve protective services for persons 60+ through use of senior levy funds						
PLAN						
Issue an RFP for geriatric-specialized, adult protective services for those 60 years and older to be provided by a public or non-profit agency designee						
Issue an RFP for a volunteer guardianship for those 60 years and older to be developed and administered by a non-profit or public agency						
IMPLEMENT						

Senior Levy Funding Period Operating Year	CURRENT			NEW &/OR RENEWAL		
	2015	2016	2017	2018	2019	2020
Goal 5: Develop an Options for Elders Program to enable seniors who meet protective level of care and have incomes/assets above Medicaid eligibility to age in place in their homes/communities						
PLAN						
Determine eligibility: Examples - 60+ years of age and older; Lake County resident; living in a private home or apartment (excluding assisted living, adult care homes, nursing homes, group homes); eligible for support services based on assessment of need for assistance with daily living and finances/assets						
Determine services to be provided: Examples - Medical Transportation; Emergency Response System; Adult Day Services; Personal Care; Homemaker Services; Home Delivered Meals; Chore						
Issue an RFP for a non-profit or public agency to develop and administer an Options for Elders Program and hire case manager to conduct assessments, develop case plans, purchase services from contracted agencies on behalf of consumers, and monitor						
IMPLEMENT						

IV. Preliminary Budget & Narrative

Senior Levy Funding Period Operating Year **	CURRENT			NEW &/OR RENEWAL *		
	2015	2016	2017	2018	2019	2020
Goal 1: Implement the current funding system with additional reporting requirements						
<i>PLAN</i>						
<i>IMPLEMENT</i>						
SENIOR LEVY FUNDS	\$2,500,000	\$2,500,000	\$0	\$0	\$0	\$0
Goal 2: Initiate a service-based, rather than provider based, funding system with more accountable processes for administration of senior levy funds						
<i>PLAN</i>						
<i>IMPLEMENT</i>						
SENIOR LEVY FUNDS	\$0	\$0	\$2,600,000	\$2,639,000	\$2,679,000	\$2,719,000
Goal 3: Redefine the role of senior centers based on changing demographics and funding patterns						
<i>PLAN</i>						
<i>IMPLEMENT</i>						
SENIOR LEVY FUNDS	\$0	\$0	\$0	\$0	\$0	\$0
Goal 4: Enhance capacity of Lake County to improve protective services for persons 60+ through use of senior levy funds						
<i>PLAN</i>						
<i>IMPLEMENT</i>						
SENIOR LEVY FUNDS				\$104,500	\$107,363	\$110,309
Goal 5: Develop an Options for Elders Program to enable seniors who meet protective level of care and have incomes/assets above Medicaid eligibility to age in place in their homes/communities						
<i>PLAN</i>						
<i>IMPLEMENT</i>						
SENIOR LEVY FUNDS					\$217,250	\$368,931
TOTAL SENIOR LEVY FUNDS	\$2,500,000	\$2,500,000	\$2,600,000	\$2,743,500	\$3,003,613	\$3,198,240
* For financial planning purposes 0.1 mills of countywide property taxes will generate approximately \$500,000 - \$600,000.						
** See next page for budget narrative.						

	ASSUMPTIONS FOR LEVY \$							
Goal 1: Implement the current funding system with additional reporting requirements	Current level							
Goal 2: Initiate a service-based, rather than provider based, funding system with more accountable processes for administration of senior levy funds	\$100,000 above current level for planning & county administration (1 Full Time Equivalent); 1.5% annual inflation							
Goal 3: Redefine the role of senior centers based on changing demographics and funding patterns	No additional expenses or reduction							
Goal 4: Enhance capacity of Lake County to improve protective services for persons 60+ through use of senior levy funds	2 LSW Social Workers; 35% benefits; operating expenses; 2.5% salary increase	Social Wkr [2]	Benefits	Operating	Total			
		\$70,000	\$24,500	\$10,000	\$104,500	YR 1		
		71,750	\$25,113	10,500	\$107,363	YR 2		
		73,544	\$25,740	11,025	\$110,309	YR 3		
Goal 5: Develop an Options for Elders Program to enable seniors who meet protective level of care and have incomes/assets above Medicaid eligibility to age in place in their homes/communities	CASE MGT: 1 LSW Social Worker; 35% benefits; 2.5% salary increase; operating expenses; 1.5% inflation; PURCHASED SERVICE: 50 clients @ avg of \$500 per month = \$25,000 x 12 = \$300,000 [FULL OPERATING CAPACITY - 2020; 50% 2019]; marketing expense	Social Wkr [1]	Benefits	Operating	Purchased Services	Marketing	Total	
		\$35,000	\$12,250	\$10,000	\$150,000	\$10,000	\$217,250	YR 1
		\$35,875	\$12,556	\$10,500	\$300,000	\$10,000	\$368,931	YR 2

The MCS Team

Marlene Stoiber Burroughs, Ph.D., President, MCS Consulting Service

Associates:

Sue Biagianti, MSSA, LISW-S

Mark Salling, Ph.D., Cleveland State University

Kola Sunmonu, Ph.D.

Carole Tagg, BA, LSW