

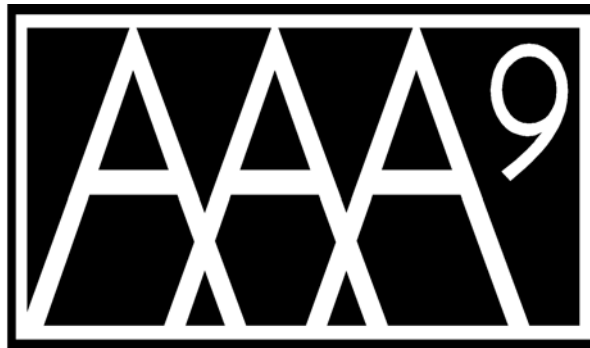
# *“Triple Your Revenue”*

## **OHIO’S EXPERIENCE: SENIOR SERVICES LEVIES**

*a powerful source of vital funding*

As presented at NANASP National Conference – Washington DC

- June 28, 2005 -



*Prepared & presented by*

**Area Agency on Aging – Region 9, Cambridge/Byesville, OH**

Alan L. Burnett, Executive Director/CEO

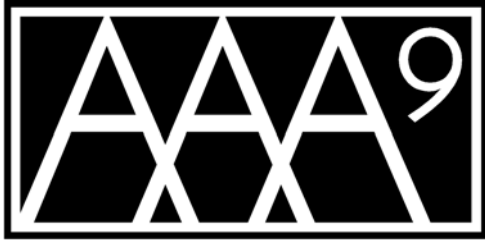
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*Serving Ohio's Belmont, Carroll, Coshocton, Guernsey, Harrison, Holmes,  
Jefferson, Muskingum, and Tuscarawas counties for over 25 years*

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Marc Molea, PDE Division Chief of the Ohio Department of Aging, who has accepted the responsibility for continuing the data collection and promoting the Ohio senior levy concept through that office.

and,

The Area Agency on Aging-Region 9, Inc. (AAA9) Board of Trustees, who continue to allow the devotion of time and energy to share this concept & materials both across the state and the nation.

*=Alan L. Burnett*

Executive Director/CEO, AAA9-Eastern Ohio

## **PURPOSE OF THIS PRESENTATION:**

To encourage you to consider implementing a senior services levy opportunity in your state and community. Under Ohio law, property tax levies are allowable for the provision of services to adults age 60 and over or for the construction or renovation of facilities to provide such services.

The road to a successful levy is not an easy one. Several resources have been developed over the past 13 years to help you avoid trying to plumb the depths of Ohio Revised Code or getting misled by elected officials, attorneys and the so-called "knowledgeable party", sometimes at great expense. There is much to know, including some legal points that can easily make or break your attempt to help older adults in your community. Developing model legislation would be a good starting point.

Further information, please contact either Jane Taylor, director of the Ohio Association of Area Agencies on Aging at (614) 481-3511, taylor@ohioaging.org or Alan Burnett, Executive Director/CEO of AAA9/Eastern Ohio at (800) 932-7277 ext 224, aburnett@aaa9.org. Print materials, telephone or on-site consultation and a variety of trainings may possibly be arranged for groups that demonstrate sincere interest and indications of community support, primarily with the cooperation and endorsement of your local Area Agency on Aging and financial support to recover costs.

The latest Ohio Dept. of Aging "Information on Aging Services Levies in Ohio" publication profiles each existing levy, campaign & advice from those who conducted each effort. Please use this as a guide to formulate your own plan and process, learning from the history & activities of others. Contact Marc Molea, Ohio Department of Aging, (614) 752-9167 voice, mmolea@age.state.oh.us.

## **WHY DO WE NEED LOCAL LEVIES?**

Obvious answer: we need the money to pursue our mission of helping older adults stay as active, healthy and independent as possible. We face the "double whammy" of declining federal & State funds and a rapidly increasing age 60+ population, particularly with an explosion of 75+ & 85+ age group (more likely to need assistance to maintain their independence).

**Older Americans Act - Title III funds in 2003 are worth about 57 cents compared to a 1980 Title III dollar 'per-capita' of Title III dollars-to-persons age 60 & over, dropping 43% from \$15.82 per person/per year to \$9.02 – and the 'Baby Boomers' aren't even here yet ('til 2006...)!**

***AGE-FACTS:*** As the "Baby Boom" ages, the number of Americans over age 50 will increase by 75% from 1990 to 2020; the number under age 50 will increase by ***less than one percent***. By 2050, over **80 million** Americans will be over age 65, compared to about **34 million** in 1995.

## **BENEFITS OF A LOCAL LEVY**

- Additional revenue for sorely needed program expansion and development
- Local control, local pride, local accountability
- Flexibility, less regulation, can shift to meet changing needs
- Stability based on responsible use & direct communication to constituency (voters, local officials & participants)
- Ohio, Kansas, Louisiana, North Dakota & Michigan = only states known to have specific laws allowing senior services levies

## ECONOMIC VALUE HISTORY OF OLDER AMERICANS ACT APPROPRIATIONS

*Prepared June 12, 2003 by Alan L. Burnett, Executive Director/CEO, AAA9/Eastern Ohio*

*\*per USDHHS/AoA      \*\* based on Consumer Price Index calculator, US Dept of Labor-BLS at website <http://data.bls.gov/cgi-bin/cpicalc.pl>*

### Actual Nat'l Appropriations\*

-----EARMARKED FUNDS – SPECIAL PURPOSES-----

		(III-C Combined)		<u>Health</u>	<u>Caregiver</u>	<u>Ombudsman</u>
	<u>III-B/General</u>	<u>III-C1/Meals</u>	<u>III-C2/HDMeals</u>	<u>III-D/F</u>	<u>III E</u>	<u>VII</u>
<b>1980</b>	\$246,970,000	\$270,000,000	\$50,000,000	-----	-----	-----
		-[ \$320,000,000 ]-				
<b>1990</b>	272,960,765	351,849,415	78,981,410	5,756,409	-----	-----
		-[ 430,830,825 ]-				
<b>2000</b>	310,020,000	374,336,000	146,970,000	16,120,000	-----	13,179,000
2001	325,075,000	378,412,000	152,000,000	21,120,000	125,000,000	14,181,000
2002	356,994,000	390,000,000	176,500,000	21,123,000	141,500,000	17,681,000
<b>2003</b>	355,673,000	384,592,000	180,985,000	21,919,000	155,234,000	18,559,000
		-[ 565,577,000 ]-				

### “Purchasing Power” of the 2003 allocations compared to 1980 levels\*\*

	(III-C Combined)	
	<u>III-B/General</u>	<u>III-C1/Meals</u>
In Real Dollars**:	\$159,465,000	\$172,421,000
		-[ \$253,566,000 ]-
Real Cents/\$ vs 1980:	\$ .64	\$ .79
<b>Title III-B + C:</b>	-----	<b>\$0.73</b> -----
Percent +(-):	(-36%)	(-21%)

### US Census- Age 60+ Population:

1980.....	35,852,000
1990.....	41,831,037
2000.....	45,797,200
<b>= +28% increase in target population</b>	

### Title III-B + C per capita:

<u>Actual</u>	<u>Real\$/1980**</u>
\$ 15.82	\$15.82
\$ 14.94	\$ 9.42
\$ 20.11	\$ 9.02
<b>= -43% decrease per capita</b>	

### 1980-2003 NATIONAL SUMMARY:

III-B+C @ \$568M in 1980 was equal to **\$1.24B** ‘real dollars’ purchasing power in 2003

Total III in 2003 = **\$1.12B**, including earmarks for Health, Caregiver and Ombudsman

The core III-B & III-C programs lost nearly **\$154M** in purchasing power (**-27% = 73 cents /1980 dollar**) while the target population age 60+ grew by **+28%**.

Per capita appropriation of III-B & C in adjusted ‘real dollars’ versus age 60+ population dropped **-43% (= 57 cents/1980 dollar)** from 1980 to 2003, **from \$15.82 to \$9.02** per older person.

## **CURRENT OHIO MODELS FOR LEVY-SUPPORTED PROGRAMS**

*allowable cost grants - purchase-of-service/unit rate - open-ended or limited*

### **1. Single/several recipient multi-purpose senior center**

Sole beneficiaries named in ballot language; typically major aging-specific service provider with meals, transportation, home repair and outreach/supportive services, information & referral provided in-house; typically very little outside purchase of service nor formal case management by credentialed (LSW, RN) staff; most often also primary provider of recreation & socialization.

### **2. County government distribution to numerous recipients**

Ala Licking County, service providing organizations (largely non-profit) apply annually to a committee established by the county commissioners; opportunity to apply a “United Way” and/or Area Agency on Aging type proposal review system; could use grants or purchase of service contracts. Numerous agencies receive funds, questionable accountability without more intense committee or staff monitoring.

### **3. Independent council on aging**

As in Delaware & Franklin counties, agencies are established to focus solely on development, coordination and/or operation of services for older adults; provide case management services with funds buying services from numerous vendors based on care plan, client choice & service protocols; buy services under open-ended purchase of service contracts with non- & for-profit groups; high-profile community focal point for information & assistance, both outgoing & incoming; may provide some services directly; use some funds for special purpose grants; assist with start-up & operating local senior clubs & interest groups like caregivers, support programs & education. Franklin County Office on Aging has a similar approach via a county government unit, purchasing case management services from the Central Ohio Area Agency on Aging.

### **4. AAA managed system**

*In 2005, unique to Southwestern Ohio/Cincinnati area (4 of 5 PSA 1 counties).* Similar to the ‘council on aging’ model, this uses the Area Agency on Aging’s long established experience, skills and processes to administer overall program with local agencies and businesses as service providers; provides seamless access to Title III & PASSPORT programs and economy of scale in service management, case management, “care coordination” service planning & delivery, and quality assurance/quality improvement activities; can include local office(s) and designated staff from local area for day-to-day operations; may provide more impartial viewpoint for long-term development; opportunity for direct funds-pooling with Title III & State funds; can easily duplicate the Medicaid-standard quality assurance & contract compliance systems already developed for the PASSPORT ‘nursing home without walls’ in-home case-managed, care plan-driven service program, professionally tailored to the needs of each individual participant.

# **“THREE REASONS TO PURSUE SENIOR LEVIES”**

## **1. PROVEN AS A SOUND METHOD & MEANS**

Local property tax levies to support senior citizen services & facilities are a well-established vehicle for funding throughout Ohio; over fifty counties, townships, cities and villages have senior levies in place (2003); senior levies have existed in Ohio since 1978 with no legal challenges of methods or uses

## **2. LOW COST TO AVERAGE HOMEOWNER**

The private individual homeowners or renters are the people who cast votes in an election. The average ¾ mil property tax levy cost the owner of a \$100,000 market value home about \$25 - \$30 dollars a year; only “pennies a day” to support ‘meals-on-wheels’, senior vans, homemakers for the homebound, etc. Compare this to the 4 to 8 mill school levies, MR/DD, mental health, etc levies.

## **3. HIGH VOTER ACCEPTANCE & APPROVAL**

Ohio experiences very high success rate for sr. levies, nearly 96% success rate (passages vs failures) & high margins of passage, usually 60% approval or higher.

**Ohio Counties with Senior Levies – November 2003 – 57 of 88**



# #1. Well-Established, Proven Method & Means

Compiled by Area Agency on Aging, Region 9, Inc. – Eastern Ohio

*Summary of Known Data on Aging Services Levies in Ohio - @ April 2004 - Alan Burnett, AAA9*

<u>Tax District</u>	<u>Millage</u>	<u>Length</u>	<u>1st Passed</u>	<u>Latest Known</u>	<u>Approx \$/Yr</u>
1. Ross Co.	0.3	5 years	1978	'89,'94,'98,'03	230,000
2. Hamilton Co.-Mariemont	1.0	5 years	1978	'83,'88,'93,'98	66,900
3. -N. College Hill	0.5	5 years	1979	'90,'94,'96,'99	50,000
4. Clermont Co.	1.1	5 years	1982	'87,'91,'96,'00	3,900,000
5. Belmont Co.	0.5/1.0/7.55 years		1984	'95,'96,'97,'99,'03	1,600,000
6. Perry Co.	0.5	5 years	1984	'89,'95,'99,'04	144,000
7. Licking Co.	0.7	3 years	1985	'88,'91,'94,'97,'00	1,570,000
8. Seneca Co.	0.3	3 years	1985	'88,'91,'94,'96,'99,'03	210,000
9. Champaign Co.	0.2	5 years	1986	'91,'95,'00	114,000
10. Fulton Co.	0.9	5 years	1986	'90,'96,'00	695,214
11. Noble Co.	0.4	5 years	1986	'92,'96, ?	52,000
12. Putnam Co.	0.5	5 years	1986	'88,'93,'97,'02	265,000
13. Scioto Co.	0.2, 0.3	5 years	1986	'91,'95,'96,'99	268,000
14. Wood Co.	0.4	5 years	1986	'91,'94,'98,'02	1,665,000
15. Athens Co.	0.75	5 years	1987	'92,'96,'02	400,000
16. Hardin Co.	1.0	5 years	1987	'93,'98,'03	349,000
17. Madison Co.	0.8	5 years	1987	'96,'01	494,651
18. Sandusky Co.	0.2	5 years	1987	'92,'97,'02	170,000
19. Auglaize Co.	0.5	5 years	1988	'92,'97,'01	400,000
20. Jackson Co.	0.5	5 years	1988	'93,'02	170,000
21. Lawrence Co.	0.5	5 years	1988	'93, vacated '95	(was 250,000)
22. Vinton Co.	0.1	3 years	1988	'91,'94,'96,'98,'02	9,000
23. Williams Co.	0.3/1.0	5 years	1988	'93,'97,'02/'99	528,288
24. Allen Co.	0.3, 0.5	5 years	1989	'95,'99,'01/'96,'03	1,197,621
25. Clark Co.	0.6	5 years	1989	'94,'99	1,155,000
26. Hocking Co.	0.5	5 years	1989	'94,'98,'03	185,000
27. Mercer Co.	0.35	5 years	1989	'93,'98,'03	208,000
28. Morgan Co.	0.3	5 years	1989	'94,'00	60,000
29. Paulding Co.(AAA levy training began)	0.5	5 years	1989	'94,'99	97,000
30. Lucas Co.	0.45	5 years	1991	'94,'99	2,900,000
31. Pickaway Co.	0.5	5 years	1991	'96,'01	375,000
32. Preble Co.	0.5, 1.0	5 years	1991	'96,'97,'01	651,000
33. Hamilton Co.-all	1.02ren+.14	5 years	1992	'97,'02	18,200,000
34. Lake Co.	0.3	5 years	1992	'96, ?	1,335,000
35. Franklin Co.	0.85	5 years	1993	'97,'02	19,600,000
36. Meigs Co.	1.0	5 years	1993	'93,'98,'03	220,000
37. Carroll Co.	0.5	5 years	1994	'98,'03	128,000
38. Delaware Co.	0.7	5 years	1994	'99,'03	3,500,000
39. Huron Co.	0.4	5 years	1994	'98,'03	328,500
40. Crawford Co.	0.6	5 years	1995	'00	340,000
41. Geauga Co.	1.0	5 years	1995	'00	1,700,000
42. Guernsey Co.	1.0	5 years	1995	'00	427,777
43. Butler Co.	1.3	5 years	1996	'01	8,300,000
44. Defiance Co.	1.2	5 years	1996	'00	700,000
45. Erie Co.	0.5	5 years	1996	'00	850,000
46. Tuscarawas Co.	0.6	5 years	1996	'00	860,000
47. Wyandot Co.	0.4	5 years	1996	'00	124,000
48. Muskingum Co.	0.5	5 years	1997	'02	613,674
49. Van Wert Co.	0.2/0.2	5 years	1997	'02	105,376
50. Clinton Co.	1.0	5 years	1998	'03	772,000
51. Monroe Co.	0.02	5 years	1998	N/A	50,000
52. Coshocton Co.	.25	5 years	1999	N/A	136,000
53. Greene Co.	0.8	5 years	1999	'04	2,000,000
54. Ashtabula Co.	1.0	5 years	1999	N/A	1,400,000
55. Ashtabula/City	0.3	5 years	2001	N/A	No report
56. Richland Co./Jefferson Twp	Unknown			Unknown	29,000
57. Richland Co./Worthington Twp	Unknown			Unknown	19,000
58. Cuyahoga Co./Berea	0.1	5 years	(? renewal @2001...)		No report
59. Cuyahoga Co./Brook Park	0.5	5 years	(? renewal @2001...)		No report
60. Montgomery Co./German Twp	1.0	5 years	(? renewal @2001...)		No report
61. Portage Co./Streetsboro	No report	Unknown	2001?	'01?	No report
62. Stark Co./Village of Minerva	0.3ren	2 years	Unknown	Unknown	No report
63. Washington	0.85	5 years	2001	'01	818,000
64. Morrow	0.5	5 years	2002	N/A	200,000
65. Warren	0.96	5 years	2002	N/A	3,700,000
66. Knox Co.	1.0	5 years	2002	N/A	759,000
67. Hancock Co.	0.4	5 years	2002	N/A	550,000
68. Fairfield Co.	0.5	5 years	2004	N/A	1,000,000
69. Jefferson Co.	1.0	5 years	2004	N/A	1,100,000

**59 counties, 7+ cities, 3+ townships ; 2005 values – comparison only EST'D MINIMUM TOTAL=\$90,500,000**

(vs. total Ohio FFY '03 Title III-B & -C allocation= \$38,036,002)

## #2. Low Cost to Average Homeowner

### *1998 Local Property Tax Summary* City of Columbus, OH - Franklin County

#### Millage Calculations

Original Passed Millage Tax Rates	80.83 mils
Composite Reduction Factor (rollbacks, adjustments)	-33.0403 %
<b><i>Effective Tax Rate</i></b>	<b>= 54.123076 mils</b>

#### Property Tax Calculation Data:

12/98 House & Land Property Market Appraisal	= <b>\$110,000</b>
House & Land Property Value for Tax Calculation	= \$ 88,715
<b><i>Tax Valuation @ 35%</i></b>	<b>= \$ 31,050</b>

#### Tax Value Calculations

Original Current Tax	= <b>\$2,509.78</b>
General Reduction Amount (from Comp. Reduct. Factor)	- \$ 829.26
Adjusted Current Tax	= \$1,680.52
10% Rollback (statewide/all properties, income tax offset*)	- \$ 168.06
2.5% Rollback (statewide/one owner's residence tax relief**)	- \$ 42.02
<b><i>Net Current Tax</i></b>	<b>= \$1,470.44</b>

#### Real Estate Tax Distribution for Full Year 1998:

Schools	= \$ 964.85
Mental Retardation & Developmentally Disabled (MR/DD)	= \$ 158.09
Franklin Co. Children Services (FCCS)	= \$ 86.24
City of Columbus	= \$ 85.31
Alcohol, Drug Addiction & Mental Health (ADAMH)	= \$ 54.18
County General Fund	= \$ 39.93
Columbus Metropolitan Library	= \$ 32.22
<b><i>Franklin Co. Senior Options (@ 3/4 or .75 mill)</i></b>	<b>= \$ 22.86 per year/6.3 cents per day</b>
Columbus Zoo	= \$ 18.35
Metro Parks	= \$ 8.41

\*ORC319.302, \*\* ORC323.131      Total Annual Property Tax Assessed = \$1,470.44

***3/4 mill Sr. levy = actual % of market value = 2/100<sup>th</sup> of 1% (.0002078)***  
***or***  
***approximately \$2.08 cents per \$10,000 in market value***  
***after Franklin County adjustments***

**\$22.86 divided by 365 days = 6.3 cents per day**

#### EXAMPLES OF VALUE/REVENUE DIFFERENCES:

1.4 mill Fulton Co = \$560,000/.5 mills Licking Co = \$560,000.  
(rural/agricultural)                      (semi-urban/industrial, agricultural)

### #3. High Voter Acceptance and Approval

## *Ohio Senior Levy Election Results*

### 1978 to Fall 2004

Approximately 240 campaigns; 12 known failures, 95% successful

Passage margins 51% to 81%; vast majority with 60-75% margins

### November 2001

17 up, 2 passed & 3 failed new. Average % of passing was 65.5% approval. 53 countywide and 6 city/suburban/township.

<u>County</u>	<u>Millage</u>	<u>Type</u>	<u>Length</u>	<u>Passed (Failed) %/1<sup>st</sup> Tax Year</u>	
Ashtabula/City	0.3	Additional (New)	5 years	56%	+
Auglaize	0.5	Replace	5 years	77%	
Belmont (1 of 3)	1.0	Renewal	5 years	60%	
Butler	1.0 +0.3	Replacement + Add'l	5 years	57%	
Cuyahoga/ Berea	0.1	Renewal	5 years	78%	
<b>Holmes</b>	<b>.75</b>	<b>Additional (New)</b>	<b>5 year</b>	<b>(38)%</b>	<b>-</b>
Lake	0.3	Replace	5 years	63%	
<b>Morrow</b>	<b>0.5</b>	<b>Additional (New)</b>	<b>5 year</b>	<b>(49)%</b>	<b>- (+)</b>
Mont./ German Twp	1.0	Renewal	5 years	61%	
Noble	0.4	Replace	5 years	61%	
Pickaway	0.5	Replace	5 years	66%	
Portage/ Streetsboro	??	??	??	67%	
Preble	1.0	Replace	5 years	62%	
<b>Richland/ Shelby</b>	<b>2.0</b>	<b>Additional (New)</b>	<b>5 year</b>	<b>(45)%</b>	<b>-*</b>
Scioto	0.2	Renewal	5 years	71%	
Van Wert	0.2	Renewal	5 years	72%	
Washington	.85	Additional (New)	5 years	Passed	+

### May 2002

Eight (8) issues up, 1 (of 4 'new') failed, equaling an 89% overall passage rate. Average % of passing was 65.5% approval. Franklin county/Columbus metro set the new record at 81% passage rate, especially admirable in an urban area. 55 countywide, 6 city/suburban/township known.

<u>County</u>	<u>Millage</u>	<u>Type</u>	<u>Length</u>	<u>Passed (Failed) %/1<sup>st</sup> Tax Year</u>	
Athens Co	0.75	Renewal	5 years	61%	
<b>Franklin Co./Col.metro</b>	<b>0.85</b>	<b>Replacement</b>	<b>5 years</b>	<b>81% (record)</b>	
Morrow Co.	0.5	Additional (New)	5 years	58%	+
Muskingum	0.5	Replacement	5 years	64%	
<b>Richland/Shelby</b>	<b>1.0</b>	<b>Additional (New)</b>	<b>5 years</b>	<b>(44%)(failed)</b>	<b>-*</b>
Sandusky	0.2	Additional (??)	5 years	Passed	+
Van Wert	0.2	Renewal (1 of 2)	5 years	78%	
Warren	.96	Additional (New)	5 years	60%	+

### Fall 2002

12 of 12 successful; 8 countywide, 4 sub-county; passage rates ranged 59% - 79%. 57 counties, 10 sub-co.

<u>County</u>	<u>Millage</u>	<u>Type</u>	<u>Length</u>	<u>Passed (Failed) %/1<sup>st</sup> Tax Year</u>	
Cuyahoga/Brook Park	0.5	Renewal	5 years;	??% (2002) Tri-City SC	
Hamilton Co.	1.02 + 0.14	Renewal+Additional	5 years	59% (2002)	
Hancock Co.	0.4	Additional (New)	5 years	??% (2002)	+
Jackson Co.	0.5	Replacement	5 years	69% (2003)	
Knox Co.	1.0	Additional (New)	5 years	53% (2002)	+
Putnam Co.	0.4 + 0.1	Replacement/Additional	5 years	67% (2003)	
Richland/Jefferson Twp	0.6	Replacement	5 years	51% (2003)	
“Worthington Twp	0.6	Replacement	5 years	67% (2003)	
Stark/Vil. of Minerva	0.3	Renewal	2 years	67% (2003)	
Vinton Co.	0.1	Renewal	3 years	62% (2003)	
Williams Co.	0.3	Replacement	5 years	73% (2003)	
Wood Co	0.7	“Replacement” (technical)	5 years	63% (2002)	

### Spring 2003

Two of two successful in rural/semi-urban counties. Cuyahoga county (Cleveland) passed a replacement with a millage increase for an existing human service levy, some of which benefits senior programs.

<u>County</u>	<u>Millage</u>	<u>Type</u>	<u>Length</u>	<u>Passed (Failed) %/1<sup>st</sup> Tax Year</u>
Clinton	1.19	Replacement	5 years	70% (2004)
Hardin	1.0	Replacement	5 years	66% (2004)

### Fall 2003

11 of 12 successful, incl 1 Cincinnati suburb specifically for 'recreation'; Montgomery & Ottawa county levies related to older adults but not 'sr levies' under 5705.19. Only 'new' levy (Gallia) failed, note listed by Ohio Secretary of State's website as of "Continuing Period of Time" (ie, continuous) duration, not known to be allowable under Ohio Revised Code section 5705.19. Still at 57 counties, 10 sub-co known.

<u>County</u>	<u>Millage</u>	<u>Type</u>	<u>Length</u>	<u>Passed (Failed) %/1<sup>st</sup> Tax Year</u>
Allen	0.3	Renewal	5 years	61% (2003)
Belmont (1 of 3)	0.5	Renewal	5 years	63% (2004)
Carroll	0.5	Renewal (3 <sup>rd</sup> ...)	5 years	62% (2004)
Delaware	0.7	Replacement	5 years	69% (2003)
Gallia	0.5	Additional (New) "Continuing Period of Time" (??)(44%) failed		-
Hamilton/Mariemont	1.0	Renewal (recreation)	5 years	57% (2004)
Hocking	0.5	Replacement	5 years	64% (2004)
Huron	0.4 + 0.1	Replacement/Additional	5 years	52% (2004)
Meigs	1.0	Renewal	5 years	73% (2003)
Mercer	0.35 + 0.2	Replacement/Additional	5 years	62% (2004)
Ross	0.3	Replacement	5 years	64% (2003)
Seneca	0.3	Replacement	5 years	70% (2003)

### Spring 2004 – March 2<sup>nd</sup> Presidential Primary

3 of 6 countywide campaigns successful, those failing were two new urban 1.0 mill and one rural replacement plus additional. Rural failure had late campaign start, small committee, no significant campaign fund. Urbans were being promoted by the Area Agency on Aging, key newspaper issue was lack of formal binding agreement on how the funds would be utilized. The successful new levy in Fairfield county specified beginning in tax year 2004, won't see any revenue until March 2005. Cuyahoga passed second part of general human services levy.

<u>County</u>	<u>Millage</u>	<u>Type</u>	<u>Length</u>	<u>Passed (Failed) %/1<sup>st</sup> Tax Year</u>
Coshocton	0.25 + 0.5	Replacement/Additional	5 years	(45%) (2005) -
Fairfield	0.5	Additional (New)	5 years	56% (2004) +
Greene	0.8	Replacement	5 years	67% (2004)
Mahoning	1.0	Additional (New)	5 years	(45%) (2005) -
Perry	0.5	Renewal	5 years	62% (2004)
Trumbull	1.0	Additional (New)	5 years	(49%) (2004) -

### Fall 2004 – Presidential General Election

(Molea email 11/3/04) Thirteen of fourteen countywide senior services levies passed on November 2, including new levies in Jefferson and Ottawa counties. Ohio will now have 59 countywide senior levies and 2 countywide general human services levies generating funds for senior services. A summary of the levies on yesterday's ballot by county are listed below:

<u>County</u>	<u>Millage</u>	<u>Type</u>	<u>Length</u>	<u>Passed (Failed) %/1<sup>st</sup> Tax Year</u>
Clark				54%
Coshocton				56%
Fulton				54%
Geauga				(50%) 216 of 58,000 votes
Guernsey	1.0	Renewal	5 years	75%
Jefferson	1.0	Additional (New)	5 years	53%
Licking				53%
Lucas				76%
Monroe				71%
Morgan				64%
Paulding				56%
Scioto				65%
Ottawa				64%
Williams				69%

Hamilton County/North College Hill (PASSED); Lorain County/Vermillion (FAILED); Scioto County/Jefferson Township/ (No DATA) Minerva Village/Carroll, Columbiana and Stark counties (NO DATA)

### SUMMARY 11/01 to 11/04:

73 campaigns, 63 passed, 86% passage; All Renewals & Replacements exc 1 + 9 New passed.  
 10 failures [9 Additional (New); 2 in the same township; 1 county subsequently passed]; 9 Additional (New) passed  
 23 known Replacements passed, 4 with Additional, 1 loss w. Additional; 17 Renewals passed, 1 with Additional.

# **Get Going! The Plan: #1 task for successful campaigns**

My studies show time & time again that the genesis of the most successful levies is from a small **core group of six to twelve well-organized, committed citizens** who have done their homework, bided their time, made incremental progress, AND listened to & responded to people in the community & leadership positions.

**Willingness to change your concept & approach = a key ingredient**

**What is best for our community? How will voters recognize it as a good thing?**

Planning (research & development, testing) can begin as much as 3-5 years in advance! It begins again on the day after the levy election and never really stops, like the ‘Wheel of Marketing’.

## **\*Possible Senior Levy Service/Facility Development Plan Features**

List & describe each feature in a sentence or two; communicate the benefit of each action to the programs and organizations & thus to the community. Lay-out a five year plan for development before “going public” with promotion of levy.

### **Phase I. Immediate Uses for New Levy Funds**

*(able to accomplish in short-term with a long-term benefit)*

Refine model for use of funds: establishment/expansion of a central office; centralized case management with service-buying ability; establishment of sliding fee scale & loan programs (cash, equipment, services); protocols for fund use (what’s allowable); set up advisory/governing bodies.

Purchase vans, mini-vans; upgrade telephone & computer equipment, systems & services; buy business equipment & furnishings; hire additional staff to meet current shortfalls; increased outreach through media buys, direct mail, senior newspaper/magazine, educational programs, special events; special grants for facility construction-rehab or program start-up; study of personnel policies and comparable wages by a "blue-ribbon" committee to help meet workforce shortage in homecare industry; training grant for worker skill development or improvement; etc.

### **Phase II. Meeting Increased Needs**

*(expanding ability to deliver currently available services or vital needs)*

Add inter-city/county medical transport program. Add kitchen & meals equipment, mini-vans, educational programs, computer learning centers, job/workforce re-entry preparation, job-matching service, home repair services & loans, staff training & tuition programs, study future community & individual needs (professional surveys), etc.

### **Phase III. New Programs, Services, Facilities**

*(building for the future, both short- and long-term)*

Co-op projects to start or expand: current adult day care & caregiver respite programs; wellness programs with exercise, lifestyle changes and counseling (smoking, eating right, etc); community service/volunteer programs in parks & schools; intergenerational programs; high-profile information source or coordinated consultation service; respond to studies and observations; build programming for older ‘Boomers & Gen X-ers.

**Keep the plan simple to explain and understand**

**Make sure campaign workers & speakers understand & believe in the plan**

**Make commitments & make sure you can live up to them**

**Keep the leaders and community informed and involved**

**Nearly all failures come from lack of community involvement (business & civic leaders, media, etc), lack of an organized & financed basic campaign, lack of a formal plan on how the money will be used & how it will benefit the community**

**THREE MAGIC WORDS: \_\_\_\_\_**

*Summary of Ohio Campaign Laws, Ohio Secretary of State:*

“You may not make false statements during a campaign...punishable by fine or imprisonment”

## TWO WAYS TO PLACE LEVIES ON AN OHIO BALLOT

### **Initiative & Resolution**

ORC frustrations: SILENCE on key points leads to varied interpretations by legal authorities, including State taxation officials, county law directors and county auditors.

Rights to & definition for Initiative and Referendum included in the Ohio Constitution

**RESOLUTION = easiest way**; requires Taxing Authority cooperation/implied approval:

- ORC 5705.19 & .191; file resolution at Bd. of Elections at least 75 days prior to election
- Taxing authority (5705.01) can pass a resolution to levy above 10 mill discretionary limit;
- ORC 5705.19 includes senior services & facilities, provides 5 year limit;  
CATCH: allows Taxing Authority to levy only part of rate, possibly for part of purpose and/or part of time approved by the voters via "up to" language; see "rollback".
- 5705.191 reiterates "pieces & parts"; allows for but doesn't define 'human & social services levies up to 10 years' for certain purposes; provides that measures under 5705.19 must go before voters by the November election to draw against current year taxes  
(REMEMBER that property taxes are collected in arrears - January & July for previous year; ORC establishes that special elections require a 55% approval to pass)
- 5705.25 provides guidance for election timing; requires **November** election; limits renewal or replacement levies to last year they apply

**INITIATIVE = "THE HARD WAY"**; useful when Taxing Authority is politically sensitive to taxation or otherwise uncooperative; only two initiatives seriously conducted to date - one because commissioners choose not to support, other because commissioners had been recently defeated by a referendum vote repealing taxation they had enacted themselves.

- ORC 5705.71: allows for initiative petition for taxation only for senior services
- Requires gathering valid signatures of a number of local registered equal to at least 10% of those voting locally in the prior election for governor (20% goal best; some will be disqualified - illegible, moved w/o re-registering, not registered)
- Limits election to primary & general (May or November)
- Petitions must be submitted to board of elections at least 75 days prior to day of election
- Specify if apply to current year, limit to max. 5 years (except debt or facility financing)
- **FORMAT**: says format will be specified by the secretary of state; most common is that used for 5705.25, which **BUILDS IN "UP TO" LANGUAGE FOR RATE**: no mention in citation of allowing Taxing Authority to dilute purpose or duration, however. (Cinti. example).
- Initiative takes double the energy to conduct; petition campaign, then election campaign; run risk of volunteers & community 'burn-out', requires constant focus & balance of effort

#### **INITIATIVE PETITION CAUTION:**

**PETITION LANGUAGE MUST MATCH BALLOT LANGUAGE**  
**EXACTLY AS APPROVED BY THE BOARD OF ELECTIONS!**

Very minor differences have caused petitions to be thrown out...

## TYPES OF TAX SOURCES

Four possible-

1. **Bonds**/limited to capital improvements;
2. **Income**/not yet attempted;
3. **Sales** /not yet successful in Ohio; and
4. **Property**, the most traditional & only successful source so far in Ohio

### **SALES TAX:**

- limited to one issue per ballot, though two or more may be combined
- minimum rate @ 1/4% (.25%) - maximum 5 years in length
- auditor can estimate revenue to be generated based on current economy (example: growth of sales tax revenue due to two new "factory outlet" malls)
- who pays? tourists, travelers, conventioners, shoppers or locals

### SALES TAX ADVANTAGES:

- can generate lots of money, much from "strangers" (tourists, visitors, shoppers)
- spreads impact over all consumers, not just property owners
- less impact on (influential?) businesses & large (size or value) property owners
- less aggregate impact on older low or fixed income (spend less, taxed less total \$)
- can "float" with economy, increase in revenue as prices reflect inflation

### SALES TAX DISADVANTAGES:

- more impact as % on low income ("regressive" or "poor" tax, like a grocery tax)
- subject to economy influences (down in recession/low spending cycles)
- may be combined with an unpopular issue (county jail, mass transit, scandal)

### **PROPERTY TAX:**

- based on real estate property valuations; basically, "**fair market value**" (willing seller, willing buyer, no compulsion, knowledgeable of facts) **times 35%** = "assessed value"; then special factors are considered (abatements, reduction factor credits, rollback credits, homestead exemptions, CAUV Farm Value Reduction, etc) that reduce total revenue

### MILLAGE:

1/1,000<sup>th</sup>; 1 mill = 10 cents per \$100 valuation; 1/10<sup>th</sup> (.1) mill = 1 cent/\$100 valuation

**Valuation / Revaluation**: different factors apply to each county & each type of property; residential, commercial, industrial, agricultural. The total values for the jurisdiction (village, city, township, county, tax district) is recorded on the official "tax list", also referred to as the "**tax duplicate**" (simply a copy of the original list...).

**SEXENNIAL** - major revaluation, county usually hires a consulting firm/specialists;

**TRIENNIAL** - updates based on estimates, real estate sales values, etc; used to reduce "sticker shock" of waiting 6 years

## **TOP TWO RULES FOR PROPERTY TAX LEVY PREPARATIONS:**

- **RULE #1:** make county auditor & county commissioners your BEST FRIENDS (or find someone who already is or can be); control valuation & distribution processes, have up-to-date info on value of tax duplicate (record of county taxation values); don't rely on any other source
- **RULE #2: see Rule #1**
- county auditor can help determine tax cost per year on "average" home; ie, Clark Co. used \$50,000 home @ fair market value for campaign example, auditor advised them the tax cost @ .5 mills would be \$7.30/yr -> "**Just 2 Cents A Day**" slogan (a popular theme approach). Local Board of Realtors can help establish "average" home value; consider Mode, Median & Mean methods of computing "average".
- county auditor can advise you on how much 1 mill would yield (then simply divide for .5, .75, etc), when revenues are distributed from taxes, how your particular county usually disburses funds (cash flow projection, "loans" or advances against revenue, etc.)
- county auditor can also advise you regarding the peculiar treatment of tax valuation/tax duplicate changes during the period of the levy; most reduce millage to generate same amount of revenue as the first tax year of levy ....some don't, some do; some add intangibles, inventory increases, new properties, etc.

**"ROLLBACK"** - refer to ORC 319.301 addendum (also note township addition to levy); most auditors feel bound to "cap" income on OUTSIDE MILLAGE (beyond the 10 mills that counties are allowed to use without voter approval = "inside millage" (ORC 5705.07 - outside millage.). This usually results in a levy generating the **SAME NUMBER OF DOLLARS throughout its life**, regardless of changes in the value of the tax duplicate; this is a caution for choosing to go with a 'renewal' or a 'replacement'.

### **LENGTH OF LEVY:**

Maximum of 5 years; several considerations:

- how often do you want to campaign? Congressional House (2 yrs) vs. Senate (6yr) terms analogy
- will voters commit to this length of levy?
- will funding be enough at the end of the period?
- can funds be committed early to avoid a citizen "revolt" (see 5705.341 re: citizen appeal)
- will a re-valuation in mid-term increase the funds generated (different auditors have different interpretations) or will the millage rate be "rolled back"?; ask the auditor, your new best friend...

### **TIMING OF A CAMPAIGN:**

- when is next property value re-valuation by the county auditor? Triennial revaluation @ 3 years (estimated), Sexennial @ 6 years (formal study.)
- when will collection & distribution start? Must specific in ballot language, must specify beginning this tax year to begin getting revenues next Spring.
- what else is on the ballot? Mental Health, MR/DD, school levies, health levies, etc; the county auditor will know, should be able to provide a list of when they expire (also Chamber of Commerce, Commissioners, Regional Planning office); you will have to check with the various campaign leaders to see when they plan to go on the ballot (they may go up to year before expiration)

### **PROPERTY TAX ADVANTAGES:**

- traditional form of support for activities of community-wide benefit
- small amount of cost per owner, predictable, stable dollars cost over period
- not considered "**regressive**", ie lower impact on lower income people (likely to live in lower property values = lower amount of tax, fixed limit based on that value)

### **PROPERTY TAX DISADVANTAGES:**

- hits fixed income harder = older people
- hits increased property value/decreased income = older middle/upper class
- very often up against other property tax levies, popular or unpopular (schools, MH/MR/DD, etc)

**BALLOT WORDING:**

**THE MOST CRUCIAL STEP** in the levy process;

- this is what voters read in the booth & newspapers
- what the critics have to "chew on"
- what the Taxing Authority is committed to &/or associated with

**MUST INCLUDE:**

- beneficiary            - purpose                    - millage rate                    - cost per \$100 valuation
- duration; inclusion of "beginning with current tax year 20\_\_" **STRONGLY** recommended; remember that property taxes are collected in arrears, failure can result in a year's delay in receiving funds.

**CAN INCLUDE:** *(depending on local Board of Elections perspective...)*

- none, one or more than one beneficiary; may be critical for future distributions
- establishment of a centralized intake/case management/purchase of service system
- how proceeds to be distributed (% or \$ amt to each beneficiary, United Way-like committee)
- general or specific uses in purpose statement
- wording is negotiable with the Board of Elections; they generally feel they know best....
- be sure to reflect your 'homework'; community feelings, facts & myths
- say what your group wants & will support (including commissioners & other agencies)
- include "beginning with current tax year 20\_\_" **STRONGLY** recommended

**ORC 5705.25 (edited): BALLOT FORMAT FOR QUESTIONS UNDER ORC 5705.19**

*(Current at 4/99; emphasis added - ALB/AAA9)*

"An additional tax for the benefit of \_\_\_(NAME OF SUBDIVISION OR PUBLIC LIBRARY; see #1 below)\_\_\_ for the purpose of \_\_\_(PURPOSE STATED IN RESOLUTION; see #2 below)\_\_\_ at a rate not exceeding \_\_\_(see #3 below)\_\_\_ mills for each one dollar of valuation, which amounts to \_\_\_(rate expressed in dollars and cents; see #4 below)\_\_\_ for each one hundred dollars of valuation, for \_\_\_(LIFE OF INDEBTEDNESS OR NUMBER OF YEARS THE LEVY IS TO RUN; see #5 below)\_\_\_

\_\_\_\_\_ For the tax levy  
\_\_\_\_\_ Against the tax levy"

- #1. county, township, district, etc. that is to be taxed
- #2. specify **all** desired pertinent information; may include (depending on Board of Elections interpretations):
  - a. revenue recipients: specific agencies by name, types of agencies, other group to perform distribution on behalf of the taxing authority
  - b. methods/means to distribute revenue: who gets how much (\$ or %), who decides on distribution
  - c. minimum dollar amount of revenue - ie, "..at least \$80,000 annually.."
  - d. listing of general or specific services or activities-always use "..including but not limited to.."
- #3. insert number of mills required to generate at least the minimum amount of dollars desired
- #4. verify calculation with auditor to assure generating desired amount of funding
- #5. insert number of years (the maximum of 5 years is recommended to avoid chronic campaigning and start/stop programming) **AND** insert "..beginning with the current tax year 19\_\_.." to assure revenue starting with the following February collections.

### RENEWAL VS. REPLACEMENT:

"**Renewal**" requires use of the same millage & tax duplicate valuation level that existed when the original levy passed, meaning it will generate the same number of dollars that will have lost value to inflation; as an example, a 1995 **1-mill renewal** of a 3-year levy passed in 1992 using the 1991 valuations would not benefit from the increased values of a 1994, 1997, 2000 and 2003 sexennial re-valuation & would generate the same number of dollars, less inflationary effects, yield net **10% to 30% loss** in buying power.

A following levy with the **same millage** using a "**replacement**" levy could generate an **additional 10 to 30% increase** in buying power from increased triennial or sexennial values in taxable property. Some counties choose the 'renewal' vehicle of "... an additional tax ... increase of" format from ORC 5705.25 in order to achieve increased revenues.

My personal opinion is that **80% of voters don't know the difference**. Campaigners should know the difference if asked, but not go out their way to make it a campaign issue.

### CONDUCTING A LEVY CAMPAIGN

**CAUTION:** No guarantees in any kind of election; it may fail when all preparations have been done right: rain, snow, bad national news, sudden local plant closing, layoffs, drought, last minute negative publicity or scandal (or hint thereof) involving the program or someone associated with the campaign.

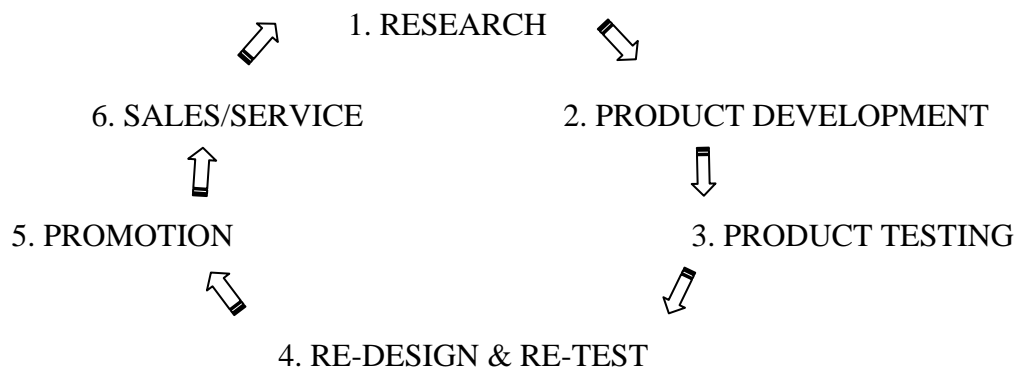
On the other hand, a levy may pass when everything is done "wrong" or not at all: 'guilt' vote, 'lesser of evils/civic need to support something' (high 6-10 mill school levy versus ½ mill senior levy), older voters in an off election, compassion vote (death of national or local leader associated with aging or center).

### "YOUR MISSION, MR. PHELPS, SHOULD YOU CHOOSE TO ACCEPT IT..."

What are you up to? Not selling, not advertising, not just presenting facts & asking voters to do what's right: **YOU'RE MARKETING!!**

Marketing is a continuous process of determining needs and wants, providing an acceptable means to address them, promoting the opportunity to partake of them, understanding consumer's (ie, voters in this case) reaction to them, changing or updating your offering make it more acceptable.

### "WHEEL OF MARKETING"



***PRODUCT - PRICE - PLACE - PROMOTION - PLAN\****

## **KEYS TO BUILDING CONSENSUS & WIDESPREAD SUPPORT:**

**Willingness to change your concept & approach = a key ingredient**

### **What is best for our community?**

Planning (research & development, testing) can begin as much as 3-5 years in advance! It begins again on the day after the levy election and never really stops, like the ‘Wheel of Marketing’.

## **Examples of Senior Levy Themes Used in Ohio**

- ◆ Just Pennies A Day
- ◆ (Still) Only Pennies A Day
- ◆ Only 4 Cents A Day
- ◆ Just 4 Cents A Day
- ◆ Independence At Home: Four Pennies A Day
- ◆ Put In Your 2 Cents
- ◆ Be A Pennies Partner For Senior Services
- ◆ Less Than 2 Cents A Day
- ◆ Less Cost Than A Cup Of Coffee A Month
- ◆ Care A Lot, Give A Little
- ◆ Taking Care Of Our Own
- ◆ Support the Senior Levy
- ◆ Keep The Life In Living
- ◆ Helping Hand For Seniors
- ◆ Lend Your Hand
- ◆ Lend A Hand – Vote For Seniors
- ◆ Caring Hearts, Helping Hands
- ◆ Vote Your Heart For Senior Citizens
- ◆ Seniors Are Super Citizens
- ◆ Support Your Senior Citizens
- ◆ Serving The Needs of Seniors
- ◆ Support The Elderly
- ◆ S.O.S. (Save Our Seniors)
- ◆ S.O.S (Support Our Seniors)
- ◆ S.O.S (Serve Our Seniors)
- ◆ Care about Seniors
- ◆ Help The Elderly
- ◆ Help Us Be There When You Need Us
- ◆ Help The Elderly – Your Parents, Grandparents, Neighbors & Friends
- ◆ For Our Independent Future
- ◆ Invest In Your Future
- ◆ Your Vote Will Support Your Future
- ◆ Honor Our Past, Serve Our Future
- ◆ What We Do For Our Seniors Today,  
We Do For Ourselves Tomorrow
- ◆ It’s Your Future Too! Vote For Issue 2
- ◆ Don’t Defeat It – You Might Need It
- ◆ Help Make Aging A Good Experience
- ◆ #1 Services For Our #1 Seniors – 1 Mill
- ◆ Don’t Forget 2 - Vote On May 3<sup>rd</sup>  
4 The Senior Levy
- ◆ Keep A Good Thing Going

# MASTER CAMPAIGN CHECKLIST

(Adapted from “A Guide to Conducting Levy Campaigns”, Jed Morison, 1989)

## CAMPAIGN COORDINATOR

- Establish Working Committee
- Establish P.A.C. & Treasurer
- Establish Headquarters
- Provide Instructions to Committee
- Prepare Basic Fact Sheet
- Maintain Communications
- Recognize Volunteers
- Plan Election Night Party
- Prepare Final Report

## ENDORSEMENT COMMITTEE

- Prepare List of Hopeful Endorsements
- Prepare Standard Endorsement Form
- Request Endorsements
- Publicize Endorsements
- Prepare Final Report

## FINANCE COMMITTEE/TREASURER

- Seek Input of Committee
- Prepare Budget
- Establish Checking Account
- Develop Fund Raising Plan
- Conduct Fund Raising Projects
- Maintain Accurate Records
- Disburse Funds
- File Elections Reports
- Send Thank You's
- Prepare Final Report

## LITERATURE COMMITTEE

- Determine Themes
- Write Literature/Brochures, Signs, Flyers
- Design, Print Brochures, Signs, Flyers
- Include “Paid for by...” notice
- Develop Distribution Plan
- Secure Volunteers to Distribute
- Distribute Literature
- Coordinate Literature Distribution
- Retrieve Materials Day After Election
- Prepare Final Report

## MEDIA COMMITTEE

- Determine Themes
- Prepare Public Service Announcements
- Secure Free Media
- Determine Budget Funds
- Develop Ad Plan
- Produce Paid Ads
- Secure Media Buys
- Maintain copies of all
- Prepare Final Report

## RESEARCH COMMITTEE

- Secure Facts on Levy
- Help Coordinator With Basic Fact Sheet
- Research Previous Levy Results
- Research Community Attitudes
- Develop Targeting Plan
- Assist With Themes
- Prepare Final Report

## SPEAKERS' BUREAU COMMITTEE

- Recruit Speakers
- Prepare Speeches/Materials
- Schedule Speaking Engagements
- Train and Assign Speakers
- Prepare Final Report

## VOLUNTEER COMMITTEE

- Assess Volunteer Needs
- Recruit Volunteers
- Assign Volunteers
- Recognize Volunteers
- Prepare Final Report

## RESULTS COMMITTEE

- Secure Results of Election
- Analyze Results of Election; where it did well, not so well, why
- Assist With Campaign Evaluation
- Ensure Thank You's Are Sent
- Prepare, File & Distribute Final Report, including all committee final reports**

*Senior Levy Workshop Handout - Alan Burnett, AAA9, Ohio*  
**ADAMH FALL LEVY – FRANKLING COUNTY, OHIO**

Activity	June	July	August	Sep 4	Sep 11	Sep 18	Sep 25	Oct 2	Oct 9	Oct 16	Oct 23	Oct 30	Nov 6
Planning	X	X											
Fundraising	X	X	X										
Media Relations		X	X	X	X	X	X	X	X	X	X	X	X
Speakers Bureau													
--Recruitment		X	X	X									
--Scripts, Visuals			X	X									
--Presentations			X	X	X	X	X	X	X	X	X	X	X
Agency Tie-Ins				X	X	X	X				X		
Research													
--Message Testing		X											
--Snap Shot Survey ("How will you vote?")										X			
Phone Bank/Info-survey										X	X	X	
Advertising													
--Production/Buy		X	X										
--Broadcast Placement											X	X	X
--Print Placements											X	X	
--Billboard/Bus Signs								X	X	X	X	X	
Literature Drops						X	X				X	X	
Yard Signs									X	X	X		
Make Business & Labor Connections/presentations	X		X		X	X	X	X					
One-on-One Opinion Leader Report Card Meetings	X		X	X	X	X							
Opinion Leader Letters		X			X					X			
Special Events			X kickoff			X volunteers				X media		X media	

Pre-election Campaign Calendar – November 6 Election Day



# PUBLIC RELATIONS PLANNING

*Examples from COAAA/AAA #6 (Columbus/Central Ohio) senior levy surveys*

Best public relations is a **good reputation & message before** the campaign.

## **What counties have done:**

- Kick Off Rally – lots of officials – media coverage – visible high-traffic spot - sponsor
- Placemats in Restaurants
- Fans (hot weather novelty items) – “I’m a Big Fan of...”
- Bumper Stickers
- 8 1/2x11” Index Card Posters (bulletin boards, laundromats, churches, groceries, etc)
- Yard Signs
- Buttons
- Articles in Church Bulletins
- Direct Mailing: to registered voters random – Dispatch services
- Phone Bank for Voter Education and Solicitation
- Speaker’s Bureau
- Slide Show / PowerPoint presentation
- Radio: Ads, Interviews, talk shows, call-in shows
- Newspaper: Editorials, Ads, Letters to the Editor, Support Page, Informational Articles
- Television: Public Service Announcements, News, Ads, ‘crawlers’ in cable channels
- Door-to-Door Solicitation, literature drops
- Display a map of those receiving services (especially helpful in a renewal)
- Help with voter registration (also absentee ballots)
- Put literature in public places: stores, banks, doctors’ offices
- Provide transportation to those who need it on voting day
- Use public events to advertise, i.e. county fairs, festivals

## ***From 2001 ODA Survey re: Levy Campaigns***

Typical Planning Period: 18 months to a year in advance

Public campaign: 3 to 4 months before election

Campaign budgets: \$200 to \$150,000

\$1-\$999 (32%), \$1000-\$9999 (44%), \$10,000-\$49,000 (12%), \$50,000 plus (12%)

## **Organizational Assistance & Resources Used: advice, materials, services, cash donations**

board members	county commissioners
Area Agencies on Aging	community leaders
individual local businesses	local citizens
media	Chamber of Commerce
members	locals clubs and organizations

## **Campaign recommendations from survey narrative responses:**

Do all fund raising ahead of time	Know the characteristics of voters
Begin early, especially on new levies	Show dollars saved by keeping seniors at home
Be able to answer questions quickly and honestly	Maintain your credibility throughout the year
Show good work being done for seniors	Use a time line to keep committee on pace
Educate entire staff on need for levy	Cover all the county in one form or another

## “10 TASKS IN CONDUCTING A CAMPAIGN”

by

**Raymond A. Schindler**

District Specialist, CNRD

The Ohio State University

1. Build on past campaign experience by seeking advice
2. Seek help and advice from key community influentials and capable leaders
3. Define your reasons why this issue is necessary. Gather facts, analyze situation, present information
4. Develop a written plan of action complete with budget and timetable
5. Create an understanding of need by:
  - Basic education** (logical reasons);
  - Building on past experience** (what people should already know or could recall);
  - Exploiting crisis** (community-wide trauma or threat);
  - Comparison and competition** (with other times, places, people, groups)
6. Set up a speaker’s bureau of persons who are well-respected, community-wide leaders, not staff
7. Tie the campaign to community systems (economic, civic and social, educational, religious, government; ie, needs & abilities of employers, workers, volunteers, civic & social leaders, etc)
8. Use all available mass media – News releases, Interviews, Paid professionally-prepared ads; Yard signs (use metal wicket-type); Billboards; Newspapers (dailies & weeklies), Newsletters of local organizations; Radio (‘spot’ announcements, talk shows, call-in shows); Fliers/handouts; Posters; Mail (direct, piggy-back with others, inserts); Broadcast & Cable TV; Paycheck inserts or blurbs on paystubs.
9. Set up an information center for drop-by, emails or telephone calls for questions & answers
10. Donations of money from private sources to pay for campaign costs; they won’t give if you don’t ask, and it doesn’t cost you anything to ask.

### Principles of Campaign Planning

*Five basic principles of campaign planning are incorporated in the preceding 10 tasks:*

1. The goals of a successful campaign must be designed to help **solve needs** felt by the majority of opinion leaders and their followers in the community in which the campaign is to be held.
2. Successful campaigns are linked to the majority of the important **community systems** within a community.
3. Successful campaigns are developed in terms of what is **familiar and acceptable** to the people.
4. Work through **opinion leaders** to influence people. People will turn you off if you are not creditable.
5. Create **awareness of the problem early** in the campaign using mass media.

X X X X X

## SUMMARY: Senior Levy Campaign Considerations



### 1a. **WHO** (involved in design, campaign, on-going advice):

- Community leaders: Chamber, employers, politicians, respected leaders, all agencies; **establish PAC & treasurer, pick a strong well-known leader as chair**
- Constituents: current clients, supporters, advisers
- Consumers/beneficiaries: future clients, friends, families
- **MEDIA: newspaper, radio, TV, outdoor ads & porch-bags;** owners, editors and reporters
- **Where's the money?** Campaign funds or serious in-kind support; \$2,000 to \$100,000 ...

### 1b. **WHO** (administration/operation if passed):

- Single agency
- Coalition of agencies
- County government
- Designated agent: Special board or commission; Area Agency on Aging; Single agency/central case-management/purchase-of-service model

### 2a. **WHAT** (taxation vehicle):

- Local property tax, income tax or sales tax levy; bond issue for construction
- Property tax @ 11/99 (new triennial valuation effective 12/00) for Wxyz Co., OH:  
1 full mill = \$735,263 annually    .50 mill = \$367,632    .75 mill = \$551,447
- Initiative (petition) or resolution (commissioners)
- "Personalized" campaign; meaningful on the individual level; focus on benefits

### 2b. **WHAT** (model/output/methods):

#### **MAKE A PLAN - MAKE COMMITMENTS - MAKE IT CLEAR - MAKE IT KNOWN**

- |                     |                  |                     |
|---------------------|------------------|---------------------|
| - Type of system    | - Accountability | - Clear description |
| - Types of services | - Eligibility    | - Charts & Graphs   |
| - Types of benefits | - Forecast       | - Written Plan      |
| - Types of clients  | - Contingencies  | - Consensus         |

### 3. **WHEN:** file at least 75 days prior to election

- May 6th primary election: must file with county board of elections for either initiative or resolution by February 19th
- November 4th general election: August 20th

### 4. **WHERE:**

- Countywide, tax district, township, city, village:  
Plan, benefits, services; promotion, personal-level communication, endorsement
- Service or activity location

### 5. **WHY:**

- Increasing senior population through year 2050; "Older-old" population (age 75+, age 85+)
- Decreasing value of federal & State funding, increasing limits on how it can be used
- Maximize opportunities for independent living & quality of life
- Increase preventive measures, access to service, respite for caregivers
- Keep younger caregivers at & focused on their vocational jobs
- Reduce long-term need for more expensive help, increase community "comfort level"/pride
- Provide for locally accountable programming, cost-effective, "pennies a day"
- "Meals-on-wheels" identification critical to campaign recognition & acceptance

## Keys for Senior Levy Renewal/Replacement Campaigns



The community - elected officials, media, community leaders, seniors and people of all ages - every village, every township, every group that can be reached - need to grasp the following elements.

**Knowledge:** recognition of the program's existence, recollection of passage, a good cause worthy of their active support

### **Understanding:**

Features – what is it that is being done

Benefits – how are those features actually helping individual or community quality-of-life

Impact on individuals served, their families, their employers

Larger impact on community:

quality of life, local spending, jobs, access, flexibility without outside regulation

### **Programs:**

3 magic words: “Meals-on-Wheels”

What kind of service: Transportation to doctor's appointments, grocery store...

Homemakers for the homebound...

Chore or personal care services for the disabled...

Educational programs for everyone concerned about...

for people of all ages...

How much programming with a levy as compared to without a levy

### **Progress:**

Was it what you promised or led the voters & officials to believe?

What have you done so far?

What have you done for me lately?

### **Plan:**

How are going to use the money now?

What are going to do that will benefit me & mine?

Where can I **SEE** this plan?

### **Aren't you doing this just to save your job?**

(Yes, because my job is important in keeping this community's older people safe & healthy in their own homes at 1/5<sup>th</sup> the cost to the taxpayers for nursing home care...).

# **Aging Services Levies in America – Contact Information**

**Current April 2004**

*check the Eldercare Locator for current contact information at <http://www.eldercare.gov>*

## **Ohio:**

Alan Burnett  
AAA9/Eastern Ohio  
60788 Southgate Road  
Byesville, OH 43723

(800) 932-7277 voice  
(800) 374-2736 fax  
[aburnett@aaa9.org](mailto:aburnett@aaa9.org)  
[aburnett@age.state.oh.us](mailto:aburnett@age.state.oh.us)

Marc Molea, PDE Division Chief  
Ohio Dept. of Aging  
50 West Broad Street  
Columbus, OH 43215

(614) 752-9167 voice  
(614) 466-5741 fax  
[mmolea@age.state.oh.us](mailto:mmolea@age.state.oh.us)

## **Kansas:**

Pamela Johnson-Betts, Secretary  
or Wilda Davison  
Kansas Department on Aging  
503 South Kansas Ave  
Topeka KS 66603-3404

(785) 296-4986 voice  
(785) 296-0256 fax  
(800) 432-3535 voice  
[wwwmail@aging.state.ks.us](mailto:wwwmail@aging.state.ks.us)  
[WildaDavison@aging.state.ks.us](mailto:WildaDavison@aging.state.ks.us)

## **Louisiana:**

Godfrey P. White, Director or Mary Tonore  
Governor's Office of Elderly Affairs  
PO Box 80374  
Baton Rouge, LA 70898-0374

(225) 342-7100 voice (Tonore 342-0171)  
(225) 342-7133 fax  
[MFTonore@goea.state.la.us](mailto:MFTonore@goea.state.la.us)  
[GPWhite@goea.state.la.us](mailto:GPWhite@goea.state.la.us)

## **Michigan:**

Jackie O'Connor, Assistant Director  
Area Agency on Aging/Western Michigan  
1279 Cedar NE  
Grand Rapids, MI 49503

•  
(616) 222-7002 voice  
(888) 456-5664 voice  
(616) 456-5692 fax  
[Jackie@aaawm.org](mailto:Jackie@aaawm.org)

## **North Dakota:**

Linda Wright, Director or Scott R. Hague  
North Dakota Aging Services Division  
600 South 2<sup>nd</sup> Street  
Bismarck, ND 58504

(800) 451-8693 voice  
(701) 328-8989 voice  
[dhssinf@state.nd.us](mailto:dhssinf@state.nd.us)  
[sowril@state.nd.us](mailto:sowril@state.nd.us) or [sohags@state.nd.us](mailto:sohags@state.nd.us)