



Business Proposal:

Our Lady of the Woods

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December 12, 2018

Table of Contents

Background	3
Demographics	4
Market	5
Group Home Designation	6
Assisted Living Community Designation	9
Potential Referral Sources.....	13
Potential Competitors.....	14
Summary and Recommendations	15
References	16

Background

Franciscan Ministries

Franciscan Ministries, Inc., is a private non-profit human services organization sponsored by the Franciscan Sisters of the Poor. Franciscan Ministries seeks to address the unmet needs of people in Cincinnati who are underserved, vulnerable, and overlooked by being a healing presence and respecting the dignity of each person through a personal approach and diverse programs. These programs, which became incorporated under the auspice of Franciscan Ministries in January 2012, include:

Haircuts from the Heart, the first of Franciscan Ministries' six programs, was founded in 1988 by Sister Bonnie Steinlage. This program seeks to foster the dignity and self-esteem of those who are poor, homeless, elderly, or disabled by providing them with a professional haircut. Haircuts are offered at social partner agencies, through a voucher program, and in a salon.

Tau House, formerly Franciscans for the Poor, was founded in 1996 under the guidance of Sister Marie Clement Edrich. This program offers youth groups and young adults the opportunity to spend a week in community while volunteering with 30 different partnering agencies, including Habitat for Humanity and New Life Furniture.

Tamar's Place opened in 2010 under the direction of Sister Grace Miriam Pleiman. It is a place of respite and referral for women involved in prostitution who struggle with addiction. It provides referrals, support, and care in a non-judgmental setting.

The Centennial Barn, a brick barn built in the 1890s, was renovated under the supervision of Sister Arlene McGowan in 2010. It is used to host community events, business meetings, and celebrations for more than 24,000 people annually.

The Franciscan Community Garden, located on the grounds of the Saint Clare Convent, became a full program under Franciscan Ministries in 2016. The garden is host to 80 gardeners, many of whom are recent immigrants and refugees. Gardeners can participate in community plots which donate produce to non-profit organizations.

Our Lady of the Woods

In 1992, **Our Lady of the Woods (OLW)**, an independent living facility for older adults on a fixed income who would otherwise struggle to find affordable housing and support, opened its doors under the direction of Sister Antonita Mettert. The facility provides a safe and secure home in a community setting for up to 24 adults 55 years of age or older. The ages of current residents range from 55 to 98 years and most residents lived within 50 miles of OLW prior to moving in. When the facility is at full capacity, residents occupy 20 standard-sized rooms (177 sq. ft., on average), two large rooms (341 sq. ft.), one patio apartment with a full bathroom (450 sq. ft.), and one converted administrative office (144 sq. ft.).

Residents must be independent and capable of caring for themselves. "Independence" is defined as the ability to engage in activities of daily living (ADLs), the basic actions that involve caring

for one's self and body, including grooming/personal hygiene, dressing, toileting/continence, transferring/ambulating, and eating. As an independent living facility, OLW does not provide health care or assistance with ADLs and is not handicap accessible. OLW staff are allowed to gently prompt residents to take their medication; however, they cannot distribute any medication. If a resident is no longer capable of living independently, placement to another facility is promptly arranged.

Financial Analysis

To remain financially solvent, OLW relies on charitable donations and an annual subsidy provided by the Franciscan Sisters of the Poor Foundation. OLW does not receive any federal funding and its services are not covered under Medicare or Medicaid. Historically, OLW has operated at or near its 24 resident capacity and its operating revenue and funding sources have been sufficient to support its efforts. However, OLW recently experienced a sudden drop in its residents due to some no longer being able to live independently. In 2018, OLW had an average of 19 residents living in the facility and five vacant rooms. Although OLW gained five new residents during the 2018 calendar year, seven residents vacated the facility within this timeframe.

OLW has projected its operating revenue in 2019 at \$324,000, with an average of 23 enrolled residents for the calendar year. Additional revenue support will be provided by the Franciscan Sisters of the Poor Foundation (\$36,800) and the Sister Antonita Memorial Golf Outing (\$22,000). Total revenue in 2019 for OLW is projected at \$382,800. OLW has projected its total expense in 2019 at \$423,064, resulting in a deficit of \$40,264 for the calendar year.

Challenge

For the past year, OLW has been operating well below its 24 resident capacity; this has caused the facility significant financial and operational burdens. In order to cover its ongoing expenses, OLW needs to leverage additional sources of reliable funding and referrals. Specifically, OLW must investigate the feasibility of changing its designation to a group home or an assisted living community and consider potential referral sources.

Demographics

The OLW service area encompasses four ZIP codes on the west side of Cincinnati: 45211, 45239, 45247, and 45248. The facility itself is located in the White Oak neighborhood (ZIP code 45247). There are 31,851 persons 55 years of age and over living within these ZIP codes; these individuals constitute 28.1% of the population in the OLW service area and 46.1% of all Cincinnatians 55 years of age or older. The median age of individuals in the OLW service area (39.6 years) is notably higher than that of Cincinnati (32.3 years). The highest median age is observed in ZIP code 45247 (45.9 years); ZIP code 45248 has the second highest median age (41.1 years). The median age of OLW service area residents is 7.3 years older than residents in Cincinnati as a whole.

There are 11,549 households in the OLW service area with persons 65 years of age and over, which constitute 25.0% of all households in this area. Socioeconomically, there are 1,931

persons 60 years of age and over living in poverty in the OLW service area, with the highest numbers of low income older adults concentrated in ZIP codes 45211 (640 persons) and 45239 (620 persons). Moreover, persons 60 years of age and over represent a higher proportion of all individuals living in poverty in the OLW service area (11.4%) than in Cincinnati at large (9.9%).

Table 1. *Demographic Characteristics*

Demographic Characteristics	Cincinnati	OLW Service Area	ZIP Code			
			45211	45239	45247*	45248
Population	298,011	113,405	38,131	28,273	22,222	24,779
Male	142,740	55,038	18,167	13,853	10,791	12,227
Female	155,271	58,367	19,964	14,420	11,431	12,552
Age						
55 to 59 years	17,922	8,020	2,343	1,791	1,984	1,902
60 to 64 years	16,786	6,764	1,713	1,767	1,582	1,702
65 to 74 years	18,771	9,243	2,449	2,212	2,516	2,066
75 to 84 years	10,035	5,300	1,403	936	1,444	1,517
85 years and over	5,638	2,524	686	640	501	697
55 years and over	69,152	31,851	8,594	7,346	8,027	7,884
Median age (years)	32.3	39.6	33.9	37.4	45.9	41.1

Table 2. *Socioeconomic Characteristics*

Socioeconomic Characteristics	Cincinnati	OLW Service Area	ZIP Code			
			45211	45239	45247*	45248
Households	133,420	46,132	15,536	11,722	9,055	9,819
With persons 65 years and over	24,906	11,549	3,083	2,815	2,634	3,017
Economy						
Persons in poverty	85,595	16,916	9,073	4,366	1,530	1,947
60 years and over	8,444	1,931	640	620	275	396

Market

OLW addresses a critical need of Cincinnati's indigent older adult population by filling the service gap between those who can live independently and those who need assisted living services. The facility offers exciting activities that help to increase the health and quality of life of its residents, all within a supportive community setting. The OLW service area encompasses almost half of all Cincinnatians 55 years of age and over and has a higher median age than Cincinnati at large. Moreover, persons 60 years of age and over represent a higher proportion of all individuals living in poverty in the OLW service area than in Cincinnati as a whole.

OLW has the opportunity to draw from the already considerable older adult population in its service area, many of whom live in poverty. Furthermore, the higher median age of the OLW service area population suggests that OLW can potentially operate at or near its capacity in the

years to come. However, OLW must secure additional sources of reliable funding and referrals, possibly by changing the designation of the facility, in order to maximize enrollment and remain financially solvent.

Group Home Designation

Group homes, also referred to as adult care facilities (ACFs), are small facilities located in community settings that are designed to serve children or adults that may or may not have chronic disabilities. ACFs include adult family homes and adult group homes. Adult family homes accommodate three to five residents whereas adult group homes house five to 16 residents; both provide housing, personal care, and housekeeping and laundry services. Although these facilities are staffed 24 hours a day by trained caregivers, residents must not require 24-hour supervision to live in a group home.

Group home residents usually have a disability, such as an intellectual disability, chronic or long-term mental/psychiatric disorder, physical disability, or even multiple disabilities; this is because the non-profit and state-regional organizations that began and first operated group homes served this population specifically. There are several types of group homes in the state of Ohio and throughout the United States that offer an array of services, including:

1. Residents and services.
2. Halfway houses and intermediate care facilities.
3. Group homes for seniors with disabilities.
4. Residential treatment services, including those for children with mental health needs.
5. Community and neighborhood resources.
6. Foster care and family support for children.
7. Supportive community options for adults with disabilities.

Licensing for Group Homes

In the state of Ohio, group homes are licensed by and must follow the rules and regulations of the Ohio Department of Mental Health and Addiction Services, especially group homes that serve individuals with mental illnesses. Ohio group homes can obtain three classes of licensure, with each particular licensure licensing up to 16 beds, as illustrated in the table below along with the fees associated with each class (see Table 3).

Table 3. Group Home Licensure Classes

	Licensure Class 1	Licensure Class 2	Licensure Class 3
Definition	Provides room and board, personal care, and certified mental health services to one or more adults, or children and adolescents.	Provides room and board and personal care services to one or two adults, or children and adolescents.	Provides room and board to five or more adults.
Licensing fee	Non-refundable, non-waivable fee of \$150.	Non-refundable, non-waivable fee of \$75.	Non-refundable, non-waivable fee of \$75.

Application for Group Homes

In order to establish itself as a group home, a prospective facility must complete the group home application through the Ohio Department of Mental Illness and Addiction Services, a document which requires all of the following to be included:

1. A completed application form, which shall indicate at least:
 - The class of facility to be licensed.
 - The maximum number of residents.
 - The maximum number of household members.
 - Whether the facility shall serve adults or children and adolescents.
2. For facilities serving adults, the application form shall also indicate whether or not the facility will serve those with mental illness.
3. Approved building inspection, upon initial application only, and when building modifications require appropriate building inspections per Ohio basic building code.
4. Approved fire inspection.
5. Non-refundable, non-waivable licensure fee of \$150 for class 1 facilities, and \$75 for class 2 and 3 facilities.
6. A line drawing or description of the location and function of all resident and staff areas.
7. If a waiver or variance is to be requested, the application shall include a written request in the form required by Rule 5122-30-07 of the Ohio Administrative Code.
8. Any other information or documentation requested by the department.

Funding

Group homes in the state of Ohio have little funding options associated with them directly. The Residential State Supplement (RSS) program is Ohio's optional state supplementation program. This program offers financial assistance to adults with disabilities to help cover the costs of accommodations, supervision, and personal care services in eligible living arrangements such as group homes. Individuals use RSS, which supplements their income, to pay the monthly allowable fee, or "rent," to eligible living arrangements.

The Ohio Department of Mental Health and Addiction Services administers the RSS program and reviews all applications. Once an RSS application has been reviewed, the individual's information is forwarded to their local County Department of Jobs and Family Services (CDJFS) office to determine their financial eligibility; eligible individuals can have a monthly income of up to \$1,300 and up to \$2,000 in assets. The RSS non-financial eligibility criteria are as follows:

1. 18 years of age or older.
2. Eligible or enrolled in Medicaid (not a waiver program).
3. Receiving Social Security, Supplemental Security Income (SSI) or Supplemental Security Disability Insurance (SSDI) benefits.
4. Either currently receiving treatment in a nursing home and planning for discharge, or meet at least one Protective Level of Care.
5. Currently residing or planning to reside in an eligible living arrangement, including:
 - ACFs licensed by the Ohio Department of Mental Health and Addiction Services.
 - Residential care facilities (RCFs), or assisted living facilities, licensed by the Ohio Department of Health for 16 beds or fewer.

Operators of eligible living arrangements must follow Ohio Administrative Code 5122-36-04, which outlines the responsibilities of RSS-eligible living arrangements. On a quarterly basis, operators are required to verify that residents enrolled in the RSS program are living in their facilities. The Ohio Department of Mental Health and Addiction Services will mail operators the RSS living arrangement form every quarter, which lists the names of RSS individuals that have been reported as living at the facility's address. Operators must review the form for accuracy and return it to the Ohio Department of Mental Health and Addiction Services by the deadline.

The RSS benefit can be combined with an individual's monthly income to pay the allowable fee of \$1,100 per month to an eligible living arrangement. However, the eligible living arrangement must accept the monthly allowable fee as payment in full for accommodations, supervision, and personal care services. Moreover, the operator of the eligible living arrangement may charge ancillary fees for additional services if those charges are listed in the resident agreement and are agreed on by the individual or their sponsor. The personal needs allowance for RSS individuals is \$200 per month.

Potential OLV Strategy: Classify as a Group Home with Respite Care

OLW will face some challenges if it decides to designate itself as a group home. First, OLV would only be able to license a maximum of 16 beds, as this is the maximum number allowed for a group home in Ohio. In this scenario, the facility would be deprived of any operating revenue from the eight additional beds it currently maintains. To retain this revenue, OLV could provide respite care to individuals in the community using the eight additional beds. Respite care offers short-term relief to family members and primary caregivers, reduces their stress and anxiety, and ensures that they maintain their mental health. Moreover, respite care is flexible, fits the needs of the individuals involved, and allows caregivers to go to work, handle personal business, or simply relax while knowing that their loved one is well taken care of and safe. Respite care services are known to be well-reimbursed and thus providing these services along with group home services may help OLV remain financially solvent for years to come. Funding options for respite care include:

- **Family Caregiver Support Program:** Respite care is a support offered through the state of Ohio's Family Caregiver Support Program. Individuals eligible for respite care under this program are:
 - Family caregivers providing care for individuals 60 years of age or older.
 - Family caregivers providing care for individuals with Alzheimer's disease and related disorders, regardless of age.
 - Grandparents and other relative caregivers 55 years of age or older providing care to children under age 18.
 - Grandparents, parents, and other relative caregivers 55 years of age or older providing care to adults ages 18 to 59 with disabilities, to whom they are related by blood, marriage, or adoption.
 - Tribal organizations, which can set a lower age than 60 years for members to be considered as elders eligible for services.
- **Medicaid Waivers for Respite Care:** Medicaid waivers provide the largest federal source of funding assistance for respite care. Each state develops their own waiver

eligibility criteria and conditions for specific populations. Waivers are subject to federal approval. Many states maintain waiting lists for Medicaid waiver services and waivers are not considered an automatic entitlement.

- **Veterans in Need of Respite Care:** Individuals that provide respite care for veterans may be eligible for funding at the federal level and state level.

Assisted Living Community Designation

Assisted living is part of a continuum of long-term care services that provides housing, personal care, and health care services in a way that promotes independence to individuals who need assistance with ADLs. Assisted living services can be provided in freestanding communities or integrated within skilled nursing facilities (SNFs), hospitals, continuing care retirement communities (CCRCs), and independent living facilities.

Assisted living communities are multi-faceted residential care settings that offer 24-hour supervision and assistance, activities, and health-related services to residents that are designed to minimize the need to relocate, accommodate changing needs and preferences, maximize dignity, autonomy, privacy, independence, choice, and safety, and encourage family and community involvement. Assisted living homes are similar to assisted living facilities but are smaller. Assisted living homes only offer care for 10 to 15 older adults whereas assisted living facilities provide care for 40 to 300 older adults. In addition, assisted living homes are more focused on personal care services than assisted living facilities and therefore provide more of a home-like environment for older adults who are unable to live independently. Assisted living homes may also be referred to as residential care homes, board and care homes, personal care homes, adult family homes, or adult foster care.

Licensing for Assisted Living Communities

Assisted living communities in most states are licensed or certified by an appropriate state department or agency that has processes in place for obtaining initial licensure and renewing an existing licensure. In the state of Ohio, assisted living communities are licensed by the Ohio Department of Health. The following table shows the national average licensure fees and requirements for assisted living communities (See Table 4).

Table 4. *National Average Assisted Living Community Licensure Fees and Requirements*

Item	Fee	Requirement
Initial license application	\$8,750 fee (20 to 49 beds).	Notify the department by submitting a Letter of Intent and an application will be mailed to the facility. Completed application forms, attachments, and fee must be submitted at least 90 calendar days prior to the anticipated start-up date of the facility.
Increase in licensed capacity	\$500 fee.	Notify the department by submitting a Letter of Intent and an application form will be mailed to the facility. Application must be submitted at least 30 calendar days before the increase. An amended license will be issued.
Decrease in licensed capacity	\$360 fee.	Notify the department by submitting a Letter of Intent and application form will be mailed to the facility. Application must be submitted at least 30 calendar days before the decrease. An amended license will be issued.
Submission of renewal application	\$360 application fee, plus \$67 per licensed bed (for licenses with a renewal date on or after July 1, 2018).	Must submit renewal application, attachments, and license expiration.

Residential Care Facilities (RCFs)

Similar to assisted living communities, RCFs are classified as assisted living communities that provide either of the following: (1) accommodations for 17 or more unrelated residents, and supervision and personal care services for three or more residents who need assistance; or (2) accommodations, supervision, and personal care services for three or more unrelated residents who are dependent on the services of others, and skilled nursing care to at least one resident. Some of the basic services offered by RCFs include comfortable private or semi-private rooms, one to three home-cooked meals per day, housekeeping and laundry services, medication management, social programs and activities, and transportation to doctor's appointments.

Licensing for Residential Care Facilities (RCFs)

According to the Ohio Assisted Living Association, RCFs are licensed by the Ohio Department of Health. The Ohio Department of Health also conducts unannounced on-site inspections and surveys of RCFs during a nine to 15-month inspection/survey cycle in order to ensure their compliance with state rules and regulations. Additionally, every applicant for RCF licensure is required to complete and submit an initial application supplied by the Ohio Department of Health and pay a \$300 nonrefundable application fee no less than 60 days before the proposed opening of the RCF, as specified under Section 3721.02 of the Ohio Revised Code. The initial application

requires all of the following to be included:

1. Floor plan for the building or area of a building to be licensed as a RCF, including the beds to be licensed.
2. Certificate of occupancy required by paragraph (A) of Rule 3701-16-13 of the Ohio Administrative Code.
3. Inspection report of the state fire marshal or a township, municipal, or other legally constituted fire department approved by the marshal required by paragraph (A) of Rule 3701-16-13 of the Ohio Administrative Code.
4. Heating inspection report required by paragraph (A) of Rule 3701-16-15 of the Ohio Administrative Code.

Ohio Rules and Regulations

Preparation. To prepare for licensure as an assisted living community, any prospective facility should review zoning laws, clearly define the services to be offered, review its business registration and insurance coverage, and submit an application once all pertinent rules and regulations are reviewed, updated, and compliant with the state of Ohio.

Resident Agreements. Resident agreements must clearly describe monthly charges, fees, and payment policies, residents' rights, facility policies, services offered, and the type of skilled nursing care allowed and provided. These agreements must also expound on care for persons with cognitive impairments, accommodations for residents with disabilities, advanced directives, and discharge criteria.

Disclosure Provisions. Facilities that use managed risk agreements must provide a written explanation of their policies and provisions to prospective residents. A managed risk agreement is a process through which the resident or sponsor and the facility agree to share responsibility for making and implementing decisions that affect the scope and quantity of services provided by the facility to the resident. The facility also agrees to identify the risks inherent in a decision made by a resident or their sponsor. The Ohio Department of Health must approve this disclosure statement.

Resident Health Assessment. A resident health assessment must be completed before or within 48 hours of every admission/enrollment, annually, and when a significant change in condition occurs. A licensed health professional must assess the individual's ability to self-administer medication with or without assistance, or their need for medication administration. It is important to note that although there are specific components required in the assessment, there is no mandated form.

Square Footage Requirements. Private resident units must be a minimum of 100 sq. ft. and a multiple-occupancy resident unit must provide a minimum of 80 sq. ft. per resident. This does not include closets or toilet rooms.

Residents Allowed Per Room. There is a maximum of four residents allowed per multiple-occupancy resident unit.

Bathroom Requirements. One toilet, sink, and tub/shower are required for every eight residents. Additionally, if there are more than four persons of one gender to be accommodated in one bathroom on the same floor, a bathroom must be provided for each gender residing on that floor.

Services. Services must include supervision and personal care, activities, assistance with self-administration of medication, medication administration, and part-time/intermittent skilled nursing services.

Training Requirements. All staff must receive orientation and training in their job responsibilities, facility procedures, securing emergency assistance, and residents' rights. Staff must receive eight hours of continuing education annually in personal care techniques, observational skills, and communication skills; this training must be provided by a licensed nurse. All direct care staff must have first aid training within 60 days of hire. Administrators must receive nine hours of continuing education annually in gerontology, health care, business administration, and assisted living community/RCF operations.

Funding and Potential Relationships

If OLW establishes itself as an assisted living community, it may be able to leverage additional funds through a variety of sources, including:

- **Assisted Living Conversion Program:** A federal grant program administered by the United States Department of Housing that seeks to provide private, non-profit owners of eligible developments with funding to convert an eligible development into an assisted living community for older adults. Typical funding covers the basic physical costs of converting some or all of the units of an eligible development into an assisted living community, including the unit configuration, common and services space, and any necessary remodeling.
- **Ohio Medicaid Assisted Living Waiver:** An Ohio Medicaid program that covers the cost of certain services provided in assisted living residences for eligible state residents. The program, however, does not cover the complete cost for an elderly or disabled individual to reside in an assisted living community and federal law bars Medicaid from paying for the cost of room and board for assisted living. Waiver participants, or their families, are expected to pay for this portion of the monthly fee. The program is intended for Ohio residents who are 21 years of age and over, and applicants are evaluated based on their financial need and level of impairment.

OLW would also have the opportunity to build relationships with several community groups in Cincinnati that are also focused on assisted living, including:

- **The Ohio Assisted Living Association:** An organization that represents over 530 assisted living communities in the state of Ohio. The organization is very actively legislatively; it informs legislators about assisted living, impacts proposed legislation, and even initiates new legislation. OLW could benefit from building a relationship with this organization and may leverage additional funds from this relationship.

- **Council on Aging:** A non-profit organization that offers a variety of publicly-funded programs and services to promote independence, dignity, health, and safety to older adults in Cincinnati. Additionally, the organization offers free support, advice, and consultation for family and volunteer caregivers and operates a call center through which anyone can access unbiased information, advice, and referral. OLW could establish a relationship with this organization which may have long-term implications for future funding opportunities.

Potential OLW Strategy: Obtain Assisted Living Community Designation

It would be suitable for OLW to obtain a license as an assisted living community in the state of Ohio. In order to comply with Ohio state rules and regulations for assisted living communities, OLW will have to conduct resident assessments before or within 48 hours of every admission, annually, and when a significant change in condition occurs and keep these documents on file to ensure that residents meet the criteria set by the Ohio Department of Health. Currently, OLW meets most of the required rules and regulations for assisted living communities set by the Ohio Department of Health, which will help the facility save on many of the upfront costs associated with licensing and ensuring that it is sufficiently compliant to pass initial inspection.

Potential Referral Sources

Independent Living Facilities

There are 17 independent living facilities in Cincinnati with which OLW can build relationships and develop referral systems. Independent living facilities can refer to OLW when residents can no longer afford their services but are still independent. OLW has the potential to provide a more affordable housing option to these residents.

Medicaid currently reimburses for assisted living but not independent living services. Residents 65 years of age or older from independent living facilities who are eligible for Medicaid and do not require assistance with ADLs would be preferable referrals to OLW. Moreover, the need for independent living facilities is continuously increasing, both in the OLW service area and across the United States. Referrals from independent living facilities in the greater Cincinnati area will allow OLW to expand its clientele and ameliorate or eliminate its current occupancy shortage.

Health Departments

The role of the local health department is to protect and promote health and prevent disease and injury. One core function of the health department is assessing the needs of the community. The Cincinnati Health Department understands the needs of the community it serves and can be a potential referral source for OLW. The Cincinnati Health Department serves a large Medicaid patient population; it is very likely that some of these patients are 55 years of age or older and live in poverty. It is important to note that the Cincinnati Health Department also serves patients with different payers, such as Medicare and private insurance. Therefore, a relationship with the Cincinnati Health Department has the potential to generate referrals of patients with a variety of payer types to OLW.

Respite Care Organizations

Respite care organizations deliver short-term relief services for primary caregivers. Respite care provides care and companionship to older adults in need of assistance and supervision during the day who are regularly taken care of by their primary caregivers. Respite care organizations could be a viable source of referrals to OLW because these facilities sometimes have patients that are eligible to be enrolled for independent living services.

Respite care is also known to be well-reimbursed. Typically, Medicare covers up to five days in a row of respite care. After this period ends, the individual or their primary caregiver pay out-of-pocket or can receive financial assistance from Medicaid. Utilizing respite care organizations as a referral source will create a diverse community of older adults at OLW, all while contributing substantially to their bottom line.

Home Health and Home Care Agencies

Home health and home care agencies provide personal care and companionship to clients with special needs, as well as those that are ill, recovering from surgery, or disabled, in the comfort of their own homes. Home health aides understand the needs of individual clients and are extremely valuable in determining when a client can no longer stay in their home and require a higher level of care. OLW may receive referrals when home health clients are no longer able to stay in their homes. It is evident that building relationships with some of the more than 60 home health and home care agencies that currently operate in Cincinnati will allow OLW to grow in their mission of providing an affordable housing option and care services to indigent older adults in the greater Cincinnati area.

Potential Competitors

The OLW service area contains many potential competitors with varying facility designations. In addition to independent living services, many of these facilities offer short-term and long-term care services such as skilled nursing care, assisted living services, memory care, hospice, and rehabilitation services (e.g., occupational therapy, physical therapy, and speech pathology). The potential competitors of OLW, organized by their ZIP code, include:

ZIP Code 45211

- Judson Care Center
- Harrison Pavilion Rehabilitation and Nursing
- Terrace View Gardens
- Chateau at Mountain Crest Nursing and Rehabilitation Center
- Tehan House
- Longmire Safe Haven Home

ZIP Code 45239

- CareCore at Lakeridge
- Mt. Airy Gardens

ZIP Code 45247

- Renaissance West and North Bend Crossing
- Liberty Nursing Center of Colerain

ZIP Code 45248

- Artis Senior Living of Bridgetown
- Pristine Senior Living of Three Rivers

Summary and Recommendations

For the past year, OLW has operated well below its 24 resident capacity, which has caused the facility significant financial and operational burdens. In order to cover its ongoing expenses, OLW will have to leverage additional sources of reliable funding and referrals. Therefore, it is recommended that OLW designate itself as a RCF, which will be a relatively inexpensive process for the facility as it already meets the vast majority of the required RCF rules and regulations set by the Ohio Department of Health. Additionally, OLW may be able to secure additional funds to convert the current facility to an RCF through the Assisted Living Conversion Program and collect monies from Medicaid through the Ohio Medicaid Assisted Living Waiver program once the facility has been established as an RCF. Regardless of its designation, OLW should also focus on building relationships with a variety of organizations located in the greater Cincinnati area to leverage additional funds and referral sources, including community groups, independent living facilities, health departments, respite care organizations, and home health and home care agencies.

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