EXPANDING AFFORDABLE ASSISTED LIVING IN OHIO

AREA AGENCY ON AGING
Ohio District 5 | Serving North Central Ohio



DUANA PATTON, CEO
OHIO DISTRICT 5 AREA
AGENCY ON AGING, INC.



ALEX LAPSO
CHIEF LEGISLATIVE OFFICER
OHIO DEPARTMENT OF AGING



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OHIO HOUSING FINANCE
AGENCY



AMY EUBANK
VICE PRESIDENT OF
OPERATION SERVICES
SILVER BIRCH



BETH FRYMAN, CHIEF
OF MEDICAID SERVICES
OHIO DISTRICT 5 AREA
AGENCY ON AGING, INC.

AREA AGENCY ON AGING
Ohio District 5 | Serving North Central Ohio

Alex Lapso, Chief Legislative Officer
Ohio Department of Aging

Expanding Affordable Assisted Living in Ohio

Alex Lapso

Chief Legislative Officer

Legislative and Public Affairs Division

Thursday October 22, 2026

Ohio Department of Aging

Demographics



2020



2030



2040



2050

Ohio's Total Population			
2020	2030	2040	2050
11,799,448	11,694,767	11,425,531	11,123,896

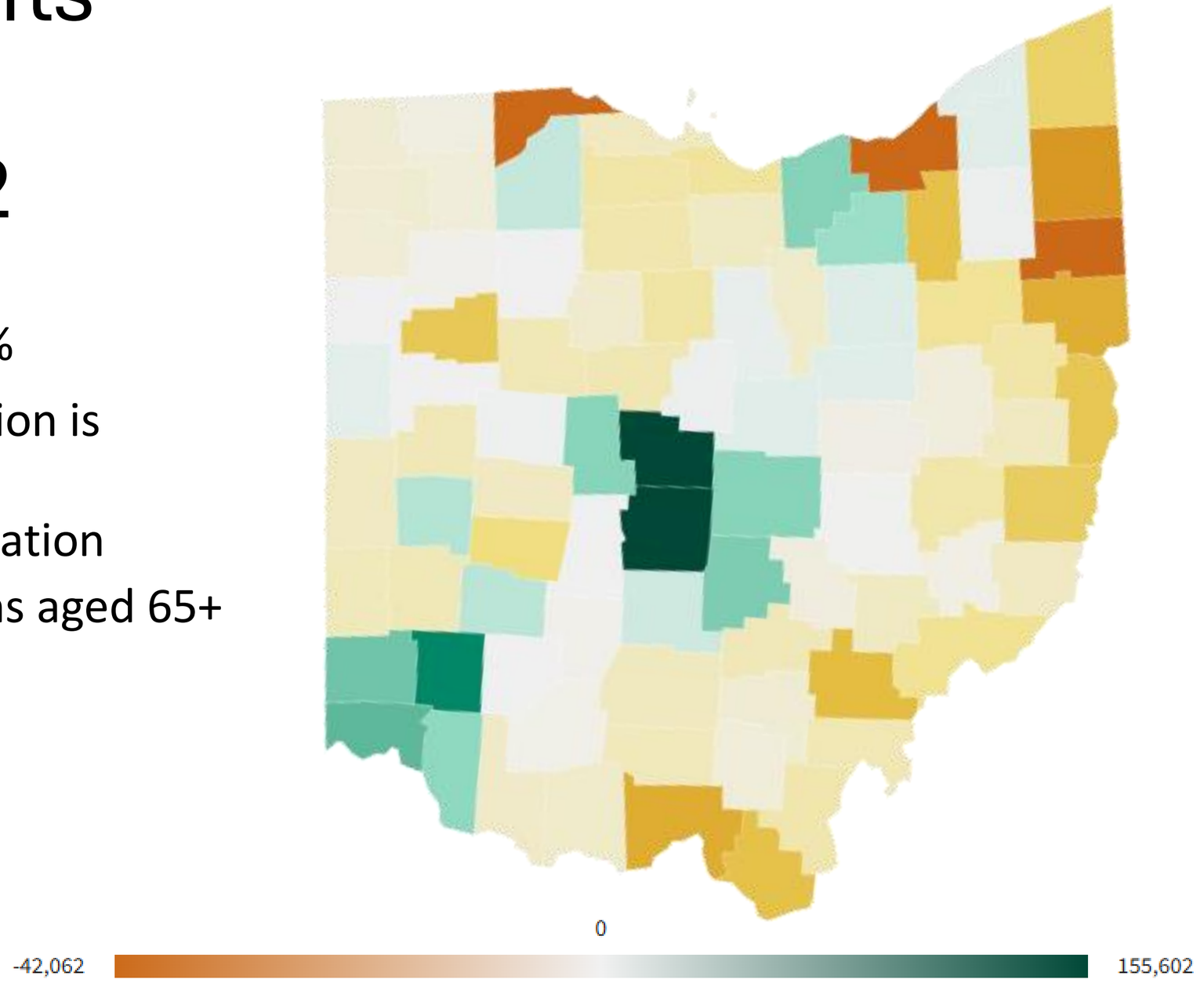


Source: Ohio Department of Development, Office of Research; Scripps Gerontology Center.

Population shifts

2010 - 2022

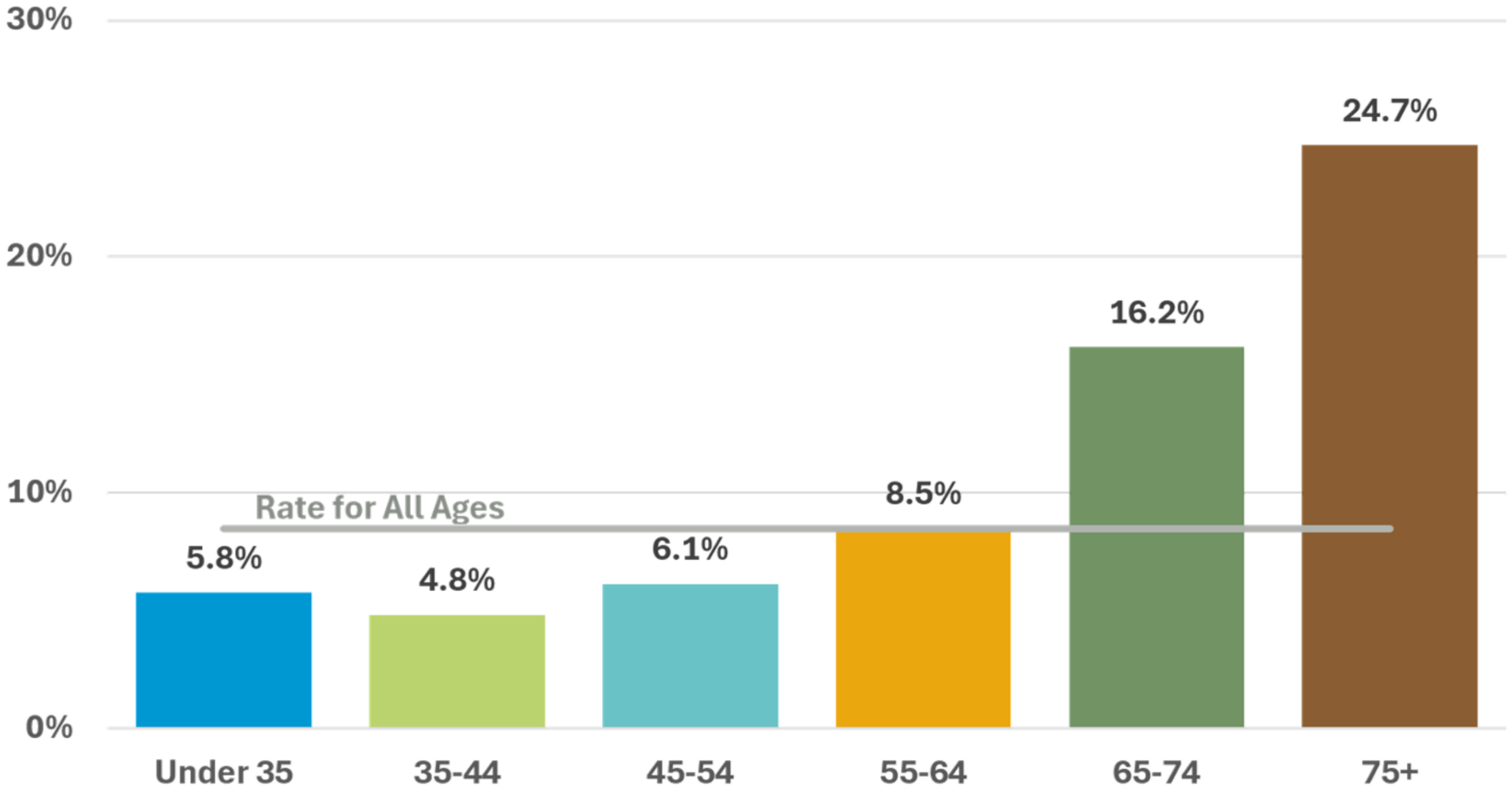
- 65 plus population grew 33%
- 35 to 49 age group declined 8.4%
- From 2020-2040, Ohio’s population is projected to:
  - Decline 3.2% in overall population
  - Increase 3.5% among Ohioans aged 65+



Source: Ohio Department of Development Population Projections.

Source: US Census; USAFacts.

Severe Mortgage Burden* by Age Group, Ohio, 2021



*Severe mortgage burden is defined as an owner-occupied household spending at least 50 percent of income on homeowner costs or having no income.
Source: US Census, American Community Survey; IPUMS USA, University of Minnesota (based on 2021 one-year estimates).

OHIO Department of Aging

Mission: Foster sound public policy, research, and initiatives that benefit older Ohioans.

Vision: Ohio – The best place to age in the nation.

Department of Aging

AGE's North Star

Quality of Life

Ensure older Ohioans thrive and are be connected to family and community.

Quality of Care

Enable providers to deliver care that drives positive health outcomes.

Elder Rights

Ensure those who need services receive them timely, with dignity and choice.

System Performance

Ensure modern efficient systems and processes to improve outcomes.

ACCESS TO CARE

- The Older Americans Act
- Medicaid Home and Community-Based Services
  - PASSPORT
  - PACE
  - Assisted Living Waiver

ASSISTED LIVING WAIVER

- Base Rate
- Memory Care Add On
- Critical Access Rate

Reimbursement Rates

134th GA (SFY 2021 – 2022)

WAIVER SERVICE	UNIT	BILLING MAXIMUM
Assisted Living Service: Tier 1	1 day	~~$51.61~~ $54.76
Assisted Living Service: Tier 2	1 day	~~$61.95~~ $65.73
Assisted Living Service: Tier 3	1 day	~~$72.26~~ $76.67
Community Transition Service	Completed Job Order or Deposit Made	$2000.00

135th GA (SFY 2023-2025)

WAIVER SERVICE	UNIT	BILLING MAXIMUM
Base Assisted Living Service	1 day	$130.00
Critical Access Assisted Living Service	1 day	$145.00
Memory Care Assisted Living Service	1 day	$155.00
Community Transition Service	Completed Job Order or Deposit Made	$2000.00

MEMORY CARE ADD ON

- Keeps couples together longer
- Authorizes units outside of a memory care section
- Delays institutional care
- Additional requirements

CRITICAL ACCESS RATE

- 50 percent plus Medicaid census
- Room and board affordability
- Supports safe housing
- Delays institutional care

Today
and tomorrow

- Promotes person-centered care options
- Requires interagency collaboration
- Increases access to existing Medicaid services
- Supports Medicaid solvency
- Invests in Ohio’s communities



Department of Aging

Ohio – The best place to age in the nation!

Bill Beagle, Executive Director
Ohio Housing Finance Agency

Ohio™

Housing Finance Agency

We Open the Doors to an Affordable Place to Call Home

Mission

We Open the Doors to an Affordable Place to Call Home.

Structure

- Governed by a 15-member board
  - *Nine members appointed by the governor*
  - *Four non-voting members from the Ohio General Assembly*
  - *Ex-officio members: directors of Ohio Department of Commerce and Ohio Department of Development*
- Self-sustaining, state agency



MULTIFAMILY HOUSING PROGRAMS

MULTIFAMILY HOUSING: DEVELOPMENT

Using tax credits and other funding, OHFA supports the development of multifamily housing that strengthen Ohio communities and address affordable housing needs throughout the state.

Activities include:

- Creating program guidelines and plans
- Reviewing applications for funding
- Underwriting and determining funding amounts for projects
- Monitoring projects during construction
- Closing out awards and completing reports

LOW-INCOME HOUSING TAX CREDIT (LIHTC) PROGRAM:

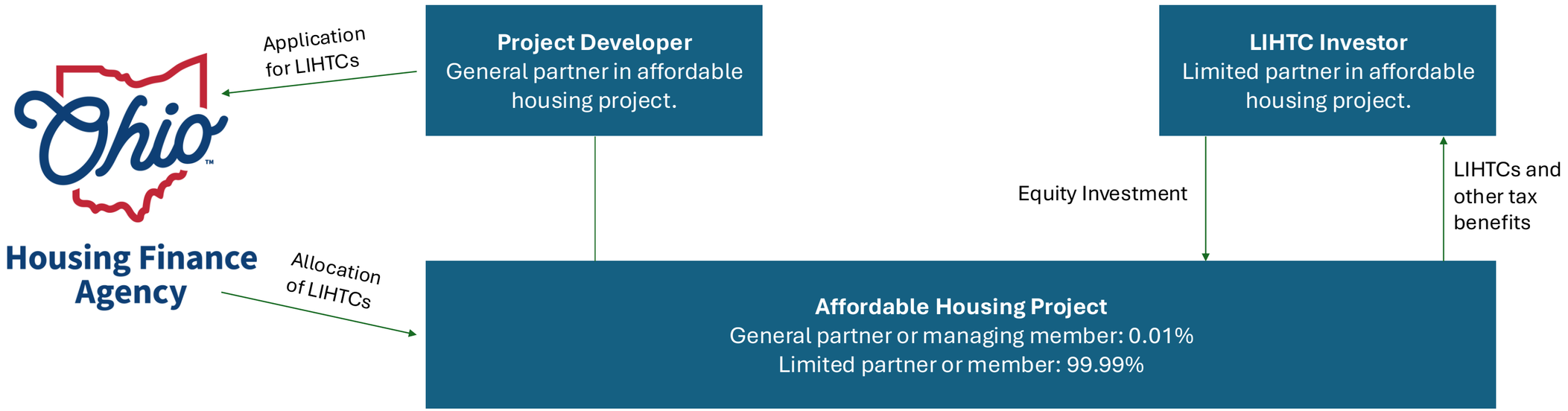
- Created as part of the Tax Reform Act of 1986
- Governed by the IRS but administered on a state level by individual state housing credit agencies
- Serves as the federal government's central tool for creating and rehabilitating affordable rental housing
- Created or preserved over **160,000** rental units in more than **2,500** Ohio properties



LIHTC PROGRAM

How It Works

- Developers and investors/syndicators enter a partnership to exchange LIHTCs for equity — or cash — for the project.



LIHTC PROGRAM

Federal Tax Credits

- Allocated according to a federally mandated but state-driven Qualified Allocation Plan (QAP), which outlines the state's housing priorities
- **9% LIHTC:**
  - Amounts to 70–80% of total development costs
  - Allocated $40 million in 2026 (credit ceiling)
  - Oversubscribed ≈ 3x
- **4% LIHTC:**
  - Amounts to 30–40% of total development costs
  - Non-competitive, but limited financing available
  - ≈ $200 million in Volume Cap annually available

MULTIFAMILY PROGRAMS

Program Name	Credit Type	Construction Type	Funding Round	Additional Resources
9% LIHTC	9% LIHTC	New Construction, Adaptive Reuse, and Rehabilitation	Annual Round – **Competitive**	HOME (limited soft funds for CHDO)
4% LIHTC Only	4% LIHTC	New Construction, Adaptive Reuse, Rehab	Open Round	None
4% LIHTC – Affordable Assisted Living (AAL)	4% LIHTC	New Construction Only	Open Round	Medicaid Waiver
4% LIHTC + Bond Gap Financing (BGF)	4% LIHTC	Rehabilitation Only	Annual Round – **Competitive**	HOME, NHTF (limited soft funds)
4% LIHTC + Ohio LIHTC	4% LIHTC + Ohio LIHTC	New Construction, Adaptive Reuse	Annual Round – **Competitive**	Ohio LIHTC, OHTF (rural only)
Housing Development Gap Financing (HDGF)	N/A	New Construction, Adaptive Reuse, and Rehabilitation 4-24 units	Annual Round – **Competitive**	HOME, NHTF, OHTF, and/or T-CAP

ADDITIONAL FINANCING PROGRAMS:

Multifamily Rental Housing

Housing Development Assistance Program (HDAP)

- Soft financing (payable only if cash flow is positive) used to close the gap between total costs and other funding sources
- Ohio Housing Trust Fund (OHTF) ≈ $10 million in 2025
- National Housing Trust Fund (NHTF) ≈ $4.4 million in 2025
- Federal HOME Investment Partnerships Program (HOME) ≈ $10.6 million in 2025
- Other one-time sources (e.g., CDBG-DR, HOME-ARP, TCAP, TCE, etc.)

Multifamily Lending Program

- First mortgage for LIHTC properties

Housing Development Loan (HDL)

- Bridge loan using Unclaimed Funds that helps to increase LIHTC equity pricing
- Currently funded at $200 million per two years

MULTIFAMILY HOUSING: PROGRAM COMPLIANCE

Ensures low-income Ohio residents have access to quality, affordable housing by conducting onsite monitoring for compliance with IRS, HUD, and OHFA program requirements.

Activities include:

- Monitors more than 1,500 apartment communities throughout Ohio
- Conducts tenant file reviews, building and unit inspections, and reviews the annual reports submitted by property owners
- Provides technical assistance to property owners and managers

OHFA RENTER PROFILE

Median Resident Age

32

Median Head of Household Age

56

Median Annual Household Income

$13,992

Median Monthly Gross Rent

$925

Median Monthly Rent Portion Paid by Renter

$327

Residents Under 18 Years of Age

31%

Residents Aged 55 Years or Older

30%

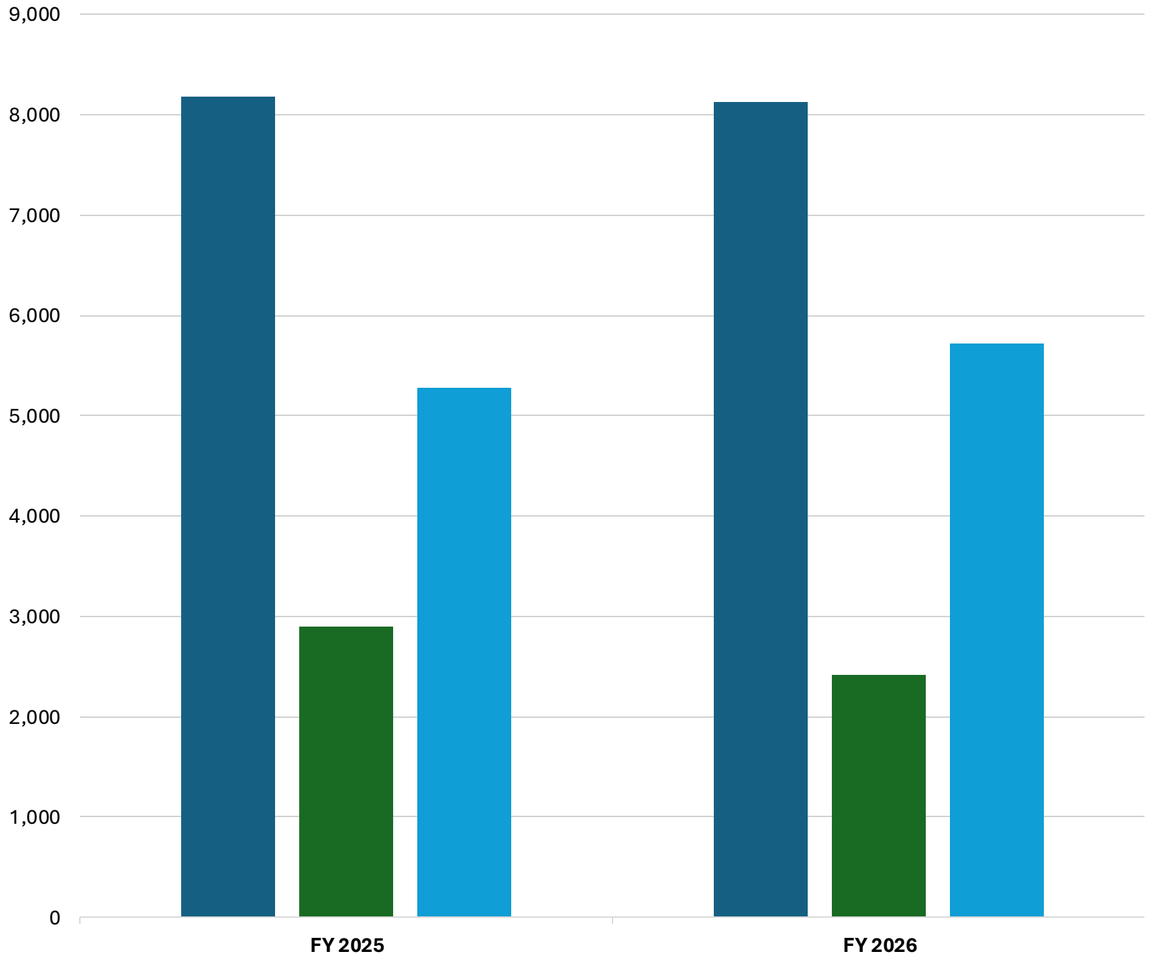
Women Heads of Household

71%

MULTIFAMILY HOUSING

Units Created or Preserved Statewide, FY 2025-2026

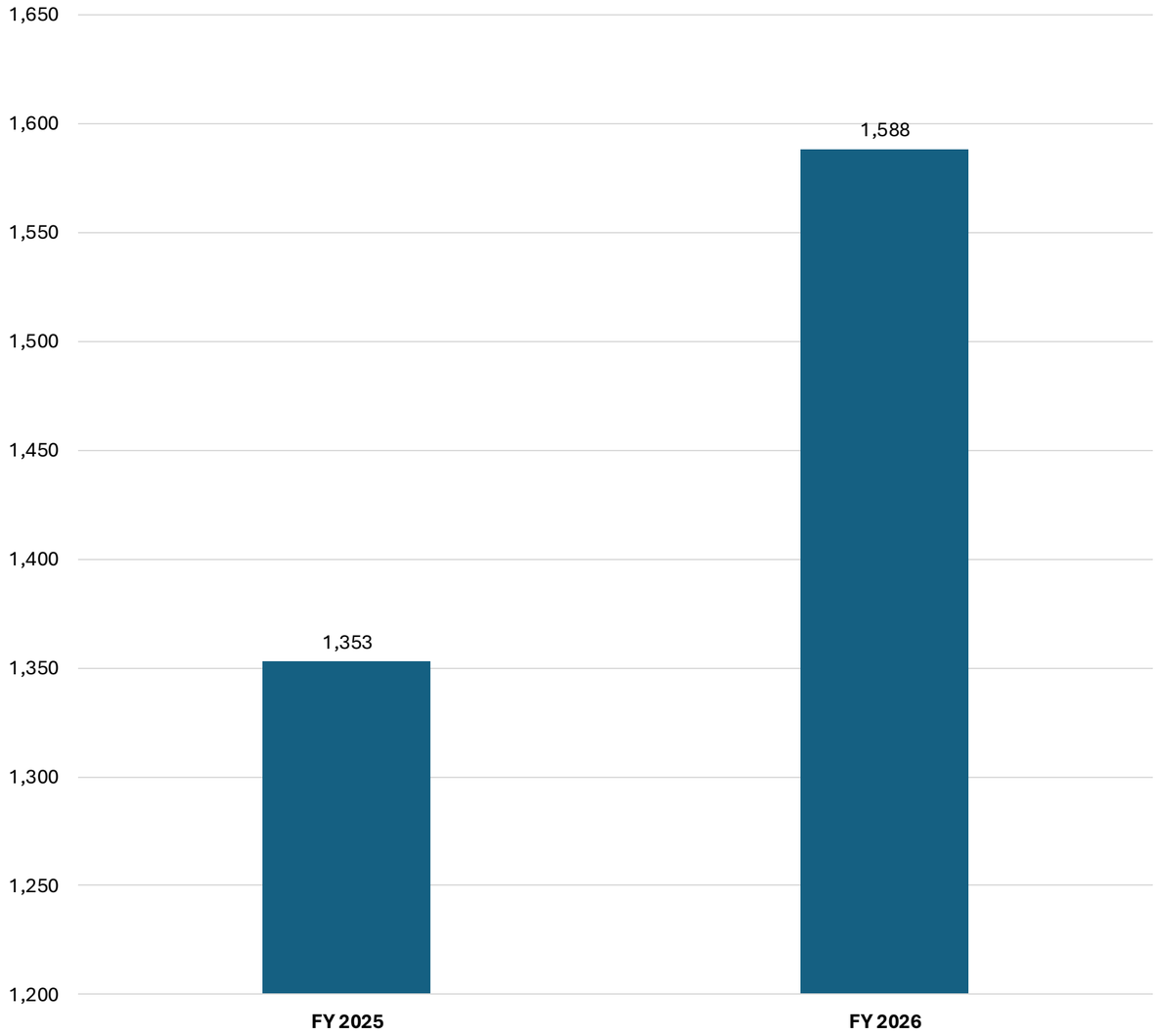
- Total Units Funded
- Preserved Units
- New Units



MULTIFAMILY HOUSING

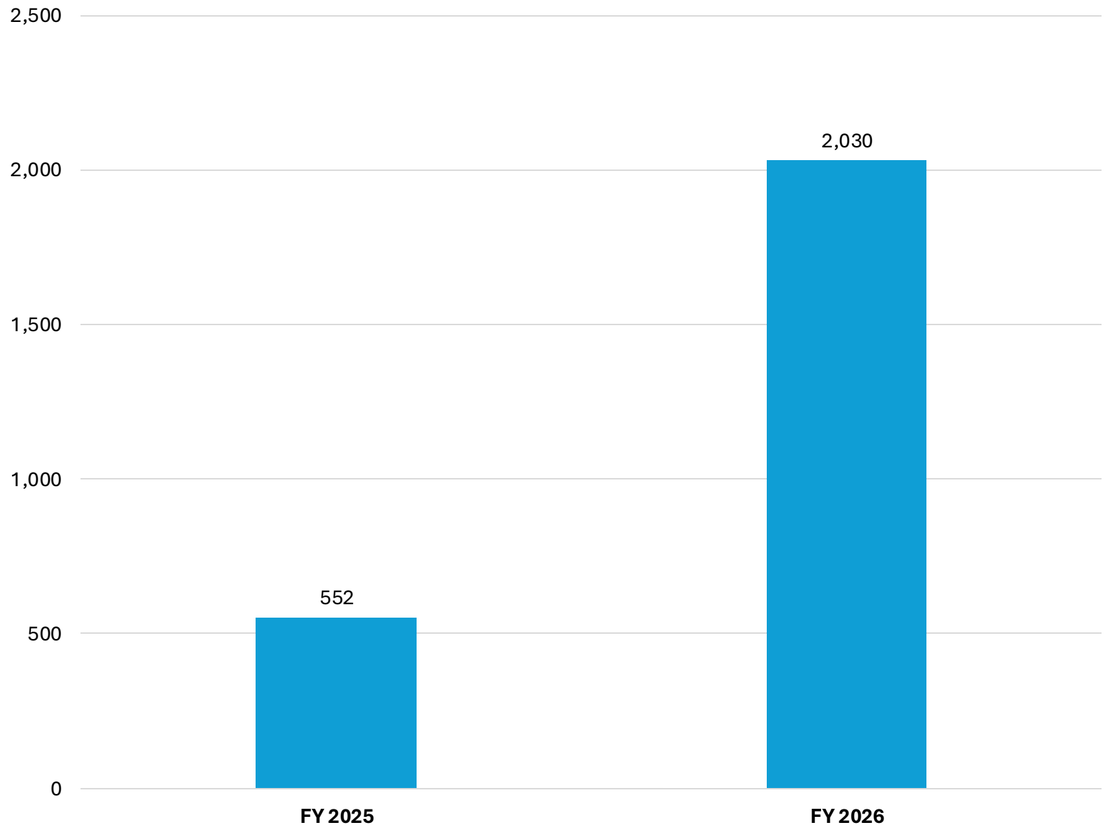
Units Created or Preserved for Older Ohioans

Statewide, FY 2025-2026



MULTIFAMILY HOUSING
Affordable Assisted Living Program

- Partnered with Ohio Department of Medicaid
- Specific Program Guidelines
- 4% LIHTC Funding
- For New Construction Only
- Application window closes October 30, 2026



CONTACT INFORMATION



Bill Beagle

Executive Director

bbeagle@ohiohome.org

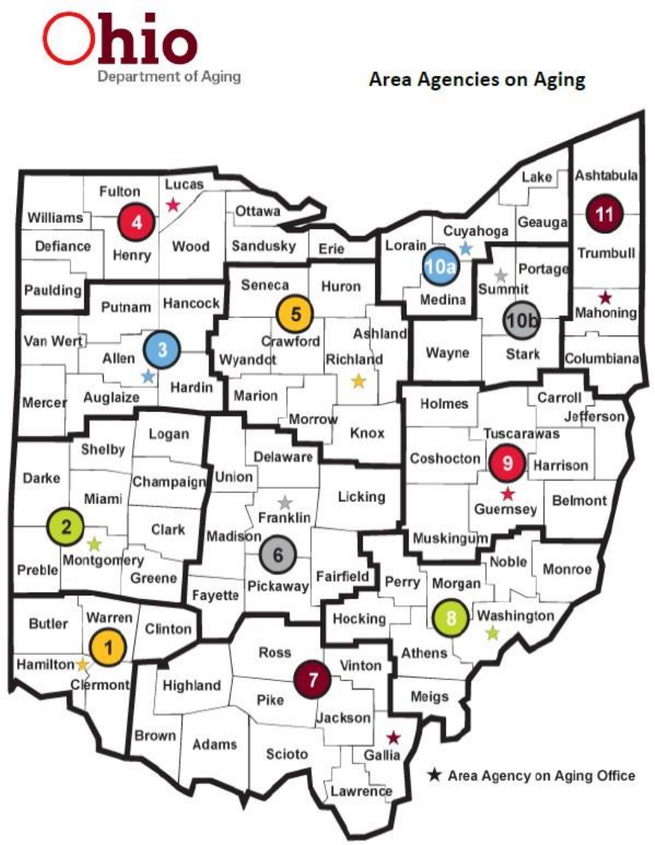
www.ohiohome.org

Housing Finance Agency

We Open the Doors to an Affordable Place to Call Home

OHIOHOME.ORG

Amy Eubank, Vice President o Operations Silver Birch



Silver Birch Living

Delivering Housing, Care, and Medicaid Savings

October 2026

SILVER BIRCH

Inspiring purposeful lives for all



Who We Are

Silver Birch Living is a growing family of **premier affordable assisted living communities** that promote wellness, convenience, and community. We help seniors live an inspired life no matter their financial situation and have designed a community that makes **quality assisted living affordable for everyone**.

We are driven by our mission

To Inspire Purposeful Lives for All

and our core values every day in everything that we do.

SILVER BIRCH

Inspiring purposeful lives for all

SILVER BIRCH
Inspiring purposeful lives for all

Our Core Values

The words that define what we practice each day.

Own it!

When we commit to something. We own it.
Every day, we hold ourselves accountable to get it done.

Respect it!

Everybody is a somebody. Each day, we express dignity and respect through a spirit of service.

Improve it!

We are a learning organization, constantly improving ourselves through a listening ear and an open mind.
We strive to be better tomorrow than we are today.

Celebrate it!

We don’t use the good china just on holidays. We believe in celebrating successes, large and small.

Live it!

We believe in being genuine. We speak openly and truthfully about expectations and concerns.

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Silver Birch: a leading provider of affordable assisted living



1,450+ Residents



650+ Employees



13 Communities

and Growing!



2.3 Conditions per Resident Cared For



$300M+ Invested

and

$330M+ Pipeline



4 States

and Expanding

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INDIANA LOCATIONS



Hammond
Open Date: May 2017



Munice
Open Date: February 2018



Michigan City
Open Date: March 2018



Kokomo
Open Date: May 2018



Evansville
Open Date: November 2018



Mishawaka
Open Date: January 2019



Terre Haute
Open Date: February 2019



Fort Wayne — Hanna St.
Open Date: March 2019



Fort Wayne — Cook St.
Open Date: March 2020

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OTHER LOCATIONS

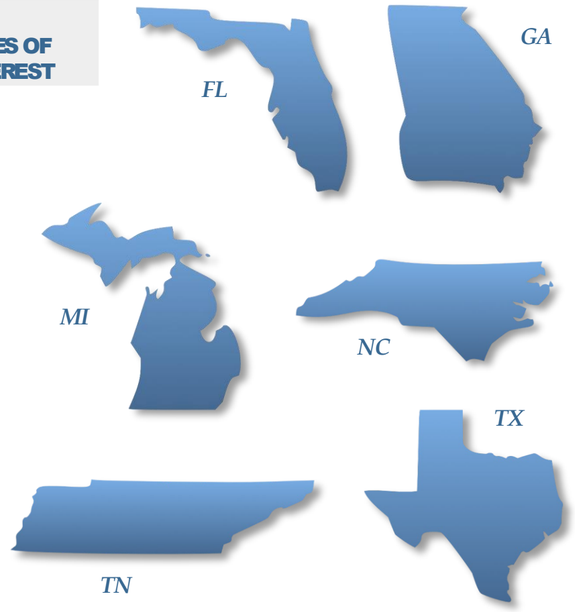
ILLINOIS LOCATIONS



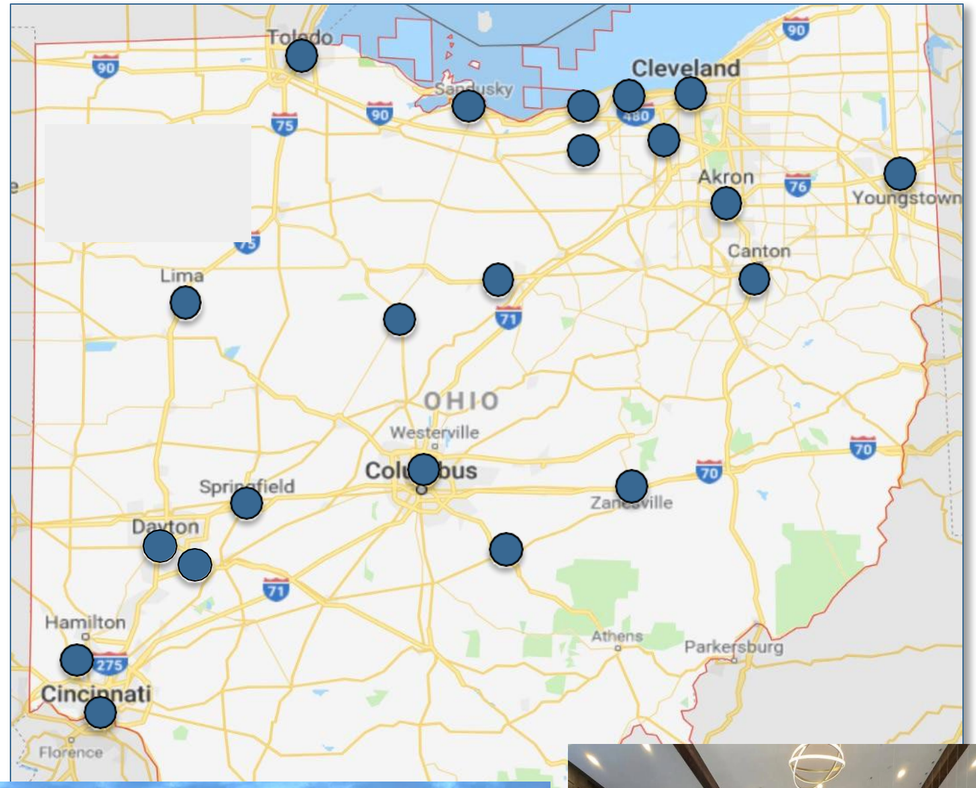
Peoria

Operations Date: January 2024

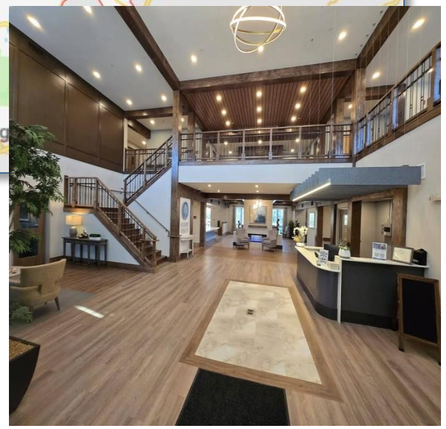
STATES OF INTEREST



OHIO TARGET MARKETS









SILVER BIRCH

Silver Birch Living is an expanding family of affordable assisted living communities dedicated to wellness, convenience, and connection. We believe every senior deserves an inspired life, regardless of financial circumstances, and we've designed our communities to make quality care accessible to all. Guided by our mission of **Inspiring Purposeful Lives for All**, we bring our core values to everything we do.

With new locations opening across Ohio in the coming months and years, we're proud to serve seniors throughout the Buckeye state.

Silver Birch Living - Ohio Locations

	Address	County	AAA Region	Open Date
Mansfield	300 Cline Avenue, Mansfield	Richland	AAA 5 - District 5 AAA	Now Open!
Bedford Heights	24781 Columbus Road, Bedford Heights	Cuyahoga	AAA 10a Western Reserve Area Agency on Aging, Cleveland	Early 2027
Amherst	47175 Hollstein Dr, Amherst	Lorain	AAA 10a Western Reserve Area Agency on Aging	Early 2027
Cuyahoga Falls	392 E Bath Rd, Cuyahoga Falls	Summit	AAA 10b Direction Home Akron Canton	Spring 2027
Canton	4567 Higbee Ave NW, Canton	Stark	AAA 10b Direction Home Akron Canton	Spring 2027
Mason	4851 Tylersville Rd, Mason	Warren	AAA1 Council on Aging of Southwestern Ohio	Spring 2027
Columbus	171 McNaughten Rd, Columbus	Franklin	AAA 6 Central Ohio Area Agency on Aging (COAAA)	Spring 2027
Painesville	620 Shamrock Blvd, Painesville	Lake	AAA 10a Western Reserve Area Agency on Aging	Early 2028
Euclid	27981 Euclid Avenue, Euclid	Cuyahoga	AAA 10a Western Reserve Area Agency on Aging	2028
Zanesville	Corner of Military & Northpointe Rd, Zanesville	Muskingum	AAA Region 9	2028

Website

Facebook

Inspiring Purposeful Lives for All

www.silverbirchliving.com



What We Do

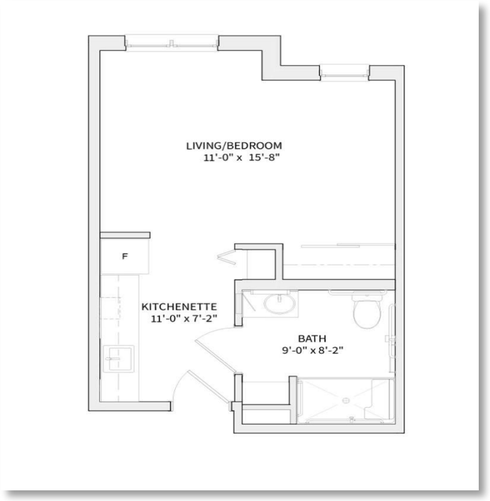
Services & Amenities

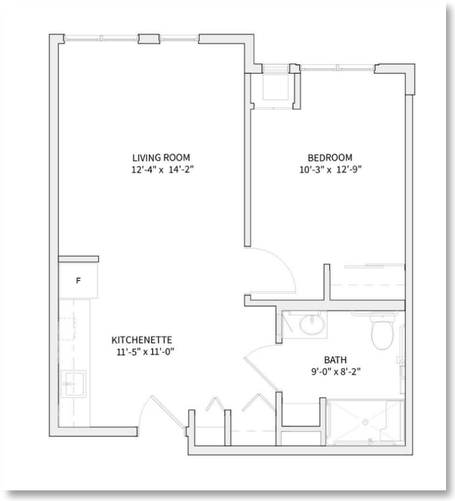
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Inspiring purposeful lives for all

Each Silver Birch community features:

Individual studio and 1-bedroom apartments

- Kitchenette
- Private bath
- Living area
- Bedroom
- Individual thermostats
- Emergency Nurse Call System in each Apartment







Significant amenity space

- Library
- Communal and private dining
- Fully-accessible fitness room & on-site therapy services
- Beauty / Barber Salon
- Resident lounges on each floor
- Activity rooms and café area
- Exterior walking paths & raised gardens
- On-site general store for necessities

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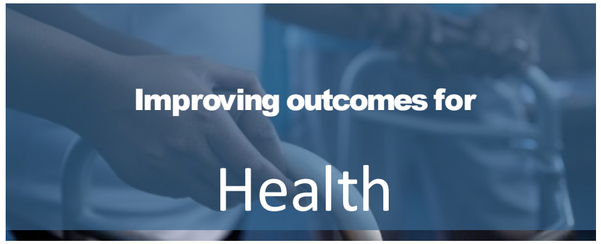
Affordable Assisted Living Services



- Life-enriching programming for residents.
- Assistance with care needs
  bathing, dressing, grooming, etc.
- Resident and family education and support.
- Beautiful common areas for socialization and entertaining.
- Transportation to shopping and scheduled outings.



- Private apartment.
- Three nutritious meals daily *(and snacks).*
- Light housekeeping, laundry, and maintenance services.
- Landscaped grounds with walking paths and raised gardens.
- Private dining room for special occasions.



- Health and wellness program
  weight monitoring, blood pressure checks, nurse consultation, coordination of licensed medical services.
- Medication management
  ordering, delivery, supervision, and administration.
- Coordination with physicians and ancillary medical service providers.
- Therapy services on-site.
- Disease prevention counseling and self-care education.

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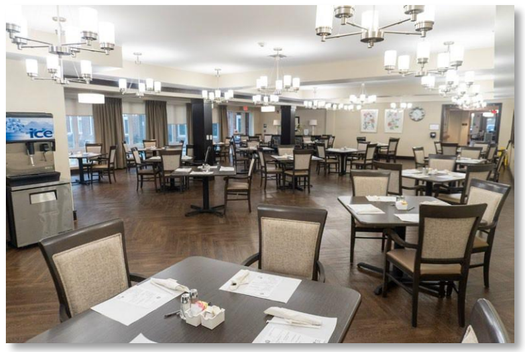
Silver Birch of Muncie (IN)



Entrance / Lobby



Living Room



Dining Room



Library

"It's beautiful. I wouldn't want to live anywhere else. The staff are beautiful and take great care of me. I just wouldn't want anything else. I love living here."

—Everett Godsey

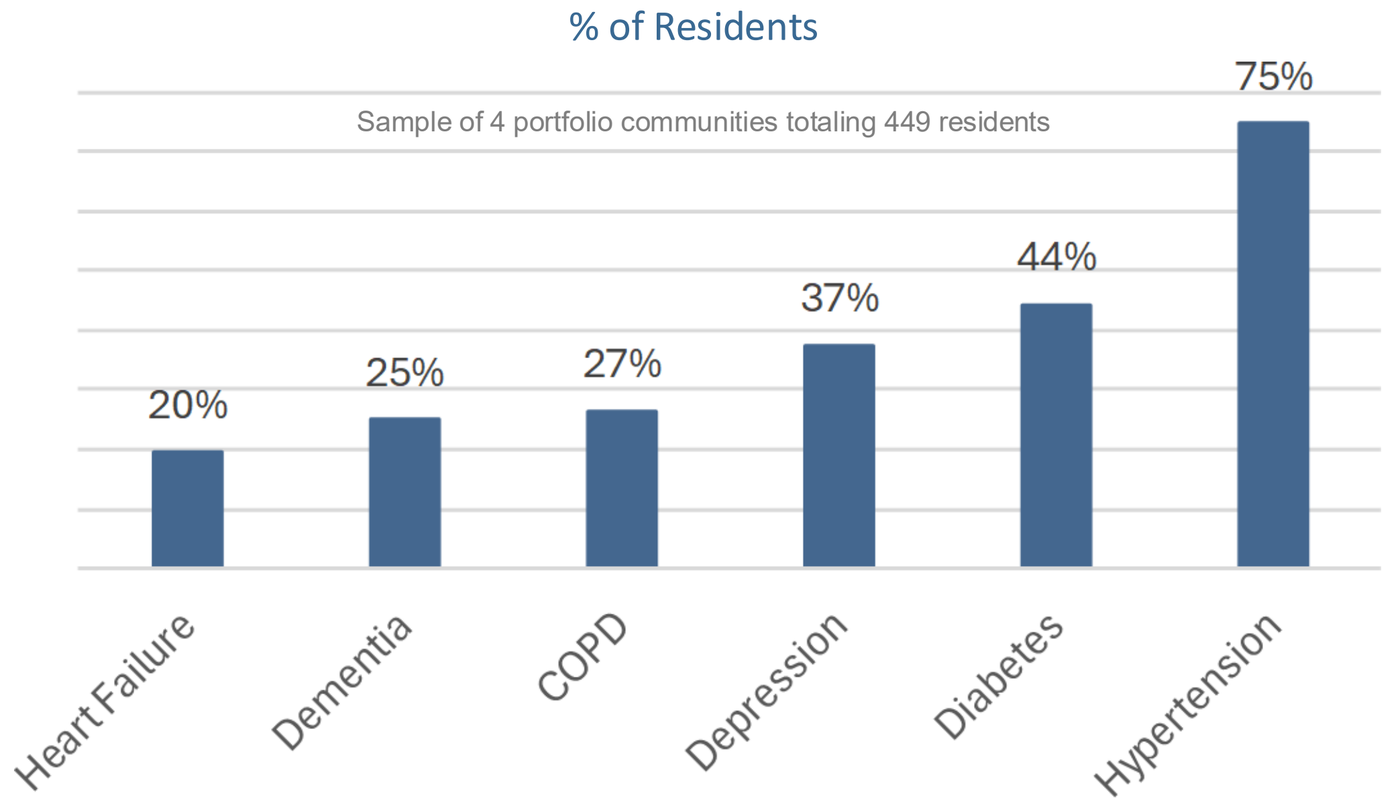


Our first resident

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Silver Birch residents' care needs are characterized by several common diagnoses and average 2.3 conditions each



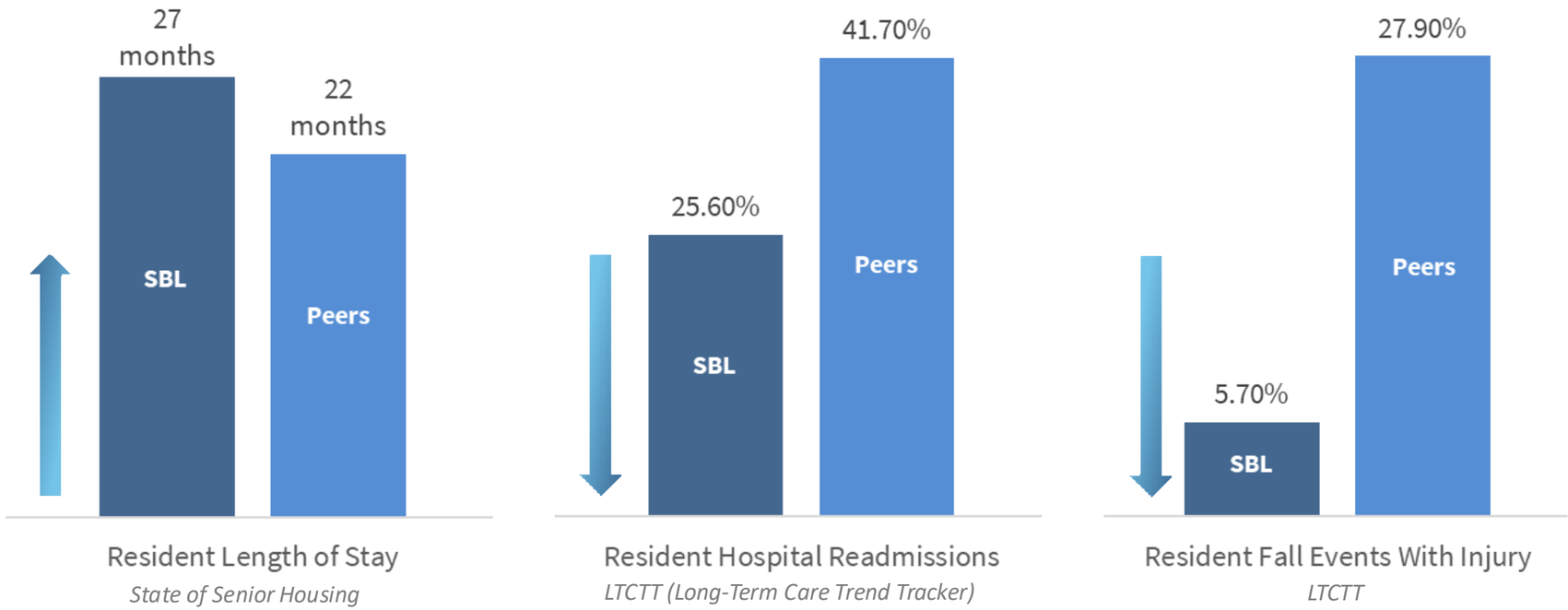
Silver Birch improves resident health outcomes across these conditions via wholistic wellness programs and diagnosis-specific interventions.

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Silver Birch resident care quality data

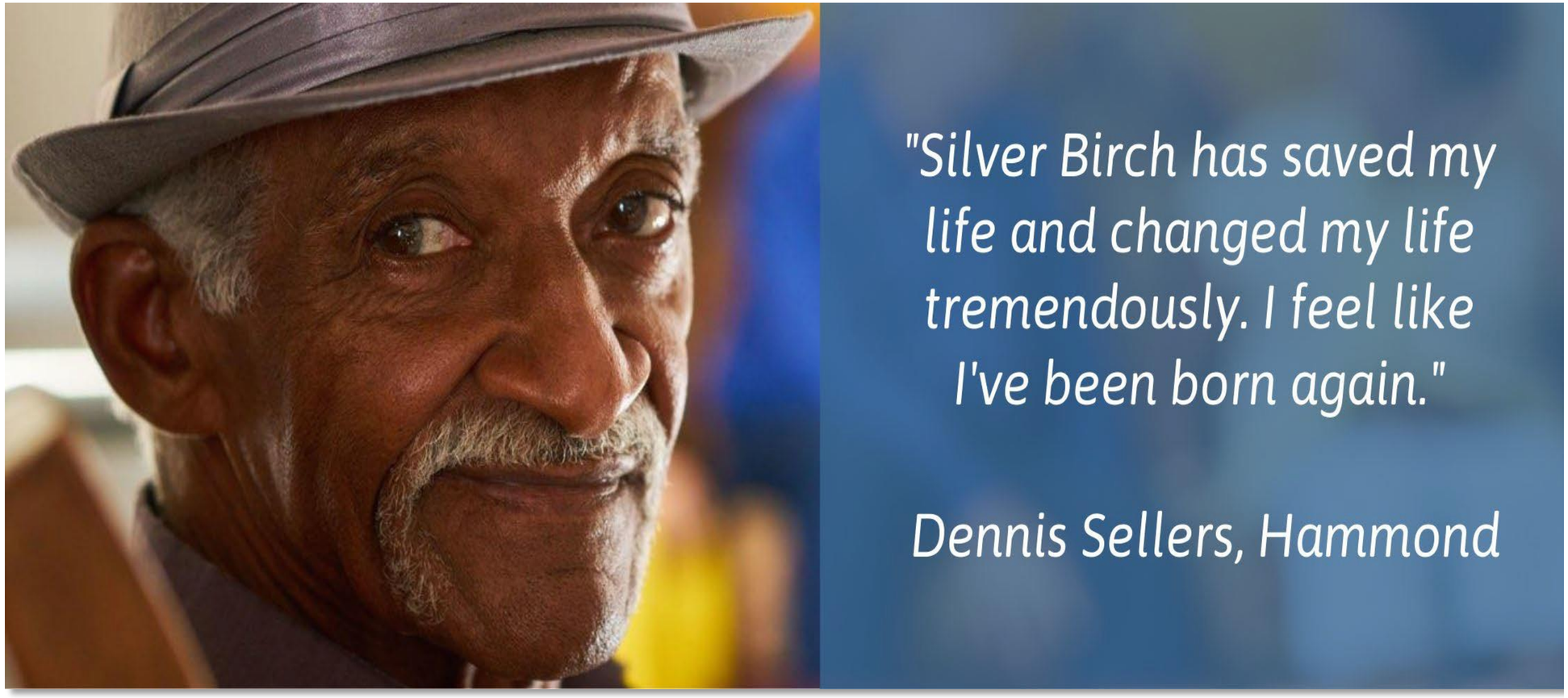
A snapshot of outcomes demonstrating Silver Birch's commitment to excellence:

- Resident length of stay (2024): **5 months** more than peers.
- Resident readmissions to hospital rate: **39% fewer** than peers.
- Resident fall events with injury: **80% fewer** than peers.

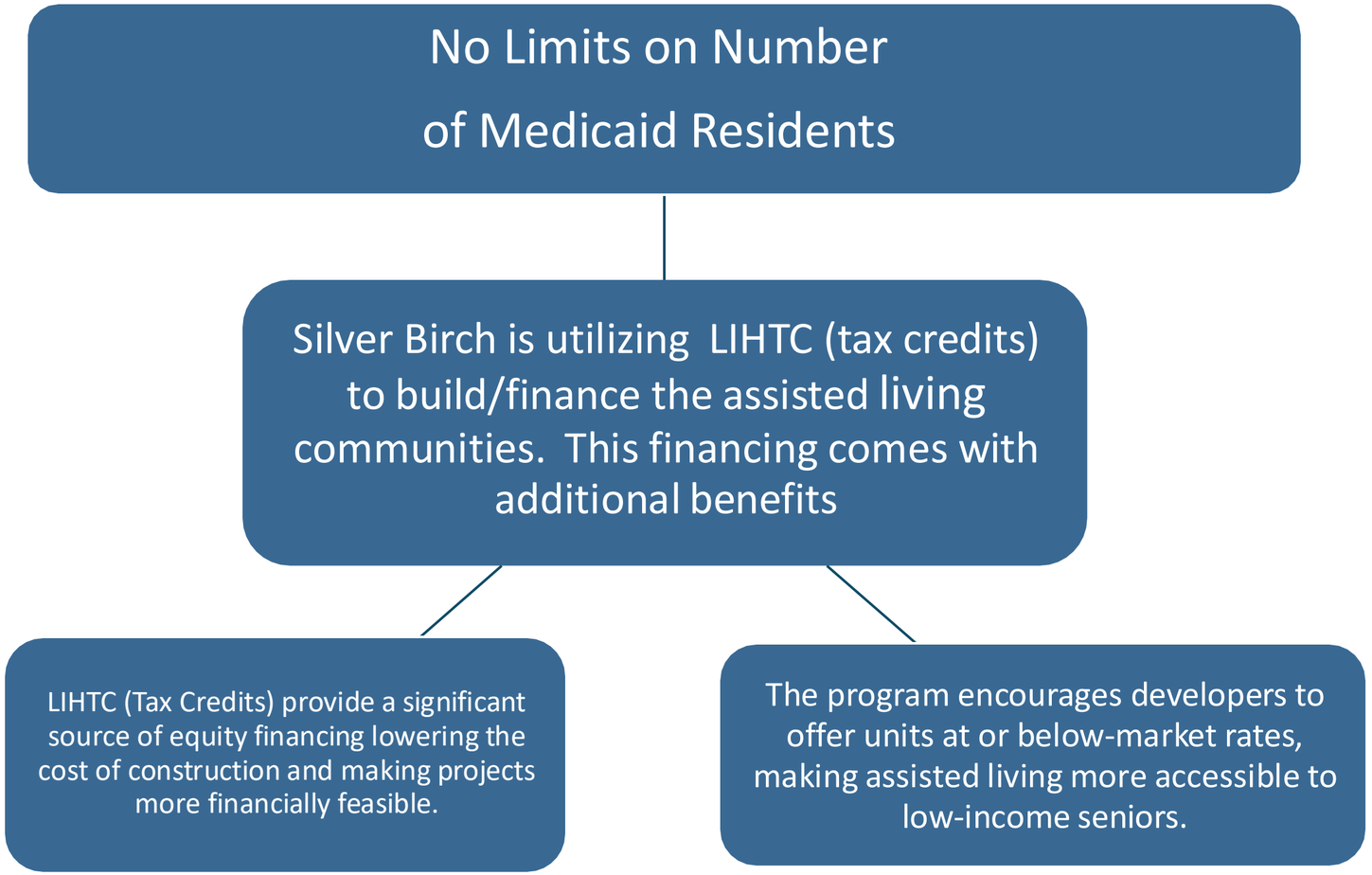


Additional areas Silver Birch outperforms peers include: occupancy, off label antipsychotic medication use, Executive Director and Director of Nursing turnover, and resident satisfaction *(LTCTT)*.

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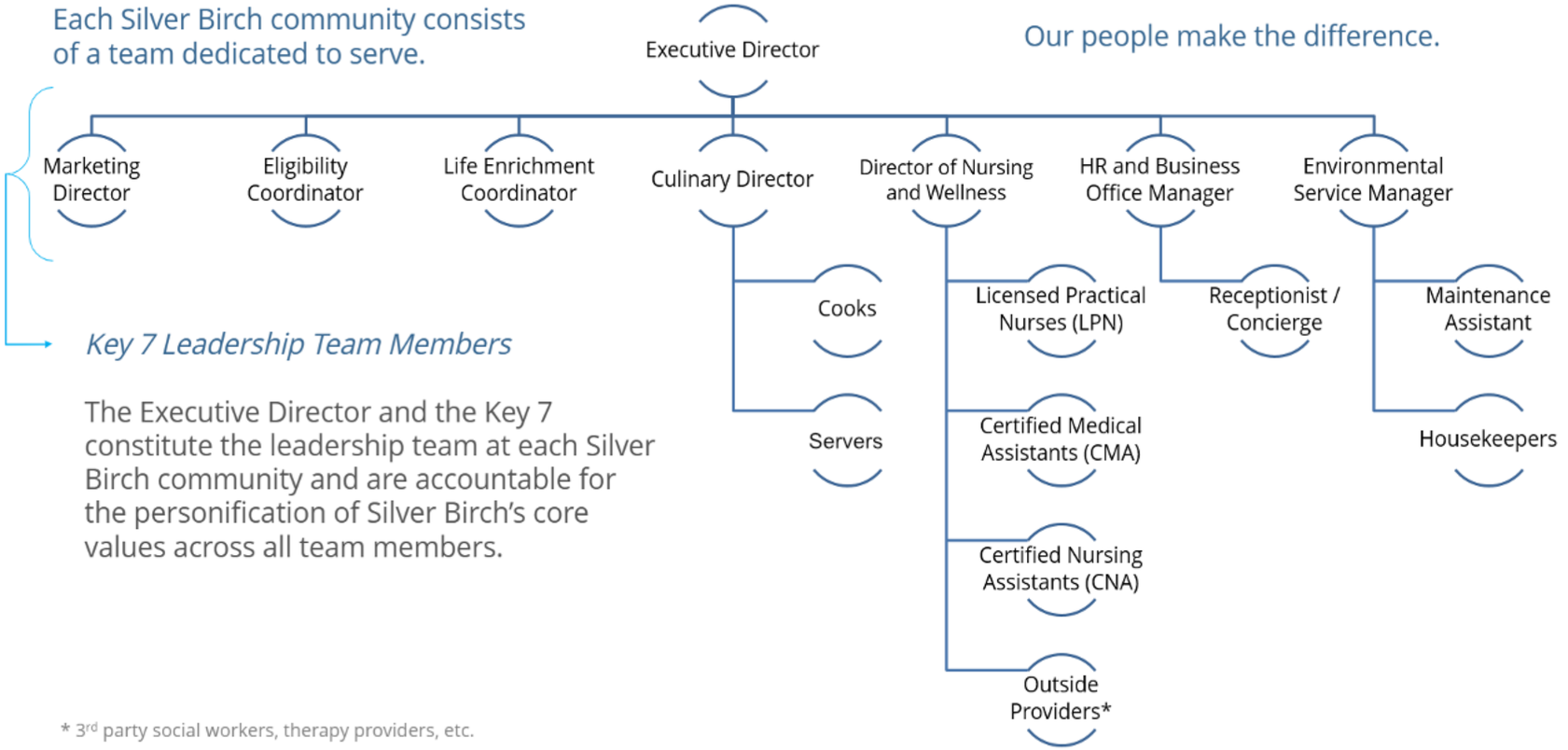
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SILVER BIRCH
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Each Silver Birch community consists of a team dedicated to serve.

Our people make the difference.



Key 7 Leadership Team Members

The Executive Director and the Key 7 constitute the leadership team at each Silver Birch community and are accountable for the personification of Silver Birch's core values across all team members.

* 3rd party social workers, therapy providers, etc.

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Silver Birch Local Community Team

SILVER BIRCH
OF MANSFIELD

300 Cline Avenue
Mansfield, OH 44907
www.silverbirchliving.com



Meet Our Leaders

MansfieldED@silverbirchliving.com

Provides overall leadership and oversight of Community operations, ensuring regulatory compliance, quality assurance, and coordination across all departments.

MansfieldBOM@silverbirchliving.com

Oversees human resources, payroll, employee relations, and training. Manages resident billing, financial reporting, and supports compliance with corporate and regulatory standards.

MansfieldSales@silverbirchliving.com

Drives occupancy through lead generation, Community tours, and strategic outreach. First line of contact for prospective residents and referral partners.

MansfieldLEC@silverbirchliving.com

Designs and delivers purposeful engagement programming that supports all Dimensions of Wellness (ICAA). Facilitates daily wellness activities that align with each resident's preferences, interests, and goals.

MansfieldEC@silverbirchliving.com

Manages all aspects of waiver eligibility and Medicaid/insurance documentation. Coordinates move-ins, maintains ongoing eligibility compliance, and serves as a liaison between clinical, financial, and regulatory stakeholders to support seamless resident transitions and service delivery.

MansfieldCulinary@silverbirchliving.com

Oversees culinary services, including kitchen operations, meal planning, and dietary compliance. Collaborates with clinical and wellness teams to support individualized preferences and culinary satisfaction.

MansfieldDONW@silverbirchliving.com

Leads all clinical and wellness services in collaboration with Community team members and external partners, including pharmacies, therapy providers, specialists, and managed care entities Oversees the nursing team, develops and monitors individualized service plans, and ensures regulatory compliance.

MansfieldESM@silverbirchliving.com

Leads all aspects of maintenance, housekeeping, and life safety. Ensures the Community environment remains safe, clean, and in full compliance with health and safety standards.

Living With Purpose



Ellen worked with children her whole life making just enough along with her husband to have a home and the necessities. Then her husband passed away.

With no insurance or savings, and without her husband there to help, Ellen continued to work hard up until she was 82 to be able to afford to stay in her home and afford the necessities of living and care.

At age 82, Ellen retired with $300 in her savings, no Medicaid, no insurance, and nowhere to stay. When she retired, she had the undesirable prospect of losing her home and received less care than she needed to feel secure.

If anything happened and her health declined, she'd have been relegated to a SNF where she couldn't keep her belongings, her sense of security, or her independence. Then she discovered Silver Birch Affordable Assisted Living.

Through Silver Birch Living, Ellen was able to find an apartment of her own and with the help of the Aged and Disabled Waiver she has the financial assistance to afford a great community with a full complement of amenities and services. Most importantly, Ellen has the security to live independently as possible, with access to the care she needs, without feeling scared or alone.

"I'm not scared or insecure here… I can afford to live somewhere safe and secure because of this program"

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What is the need for seniors housing with services in Ohio today?



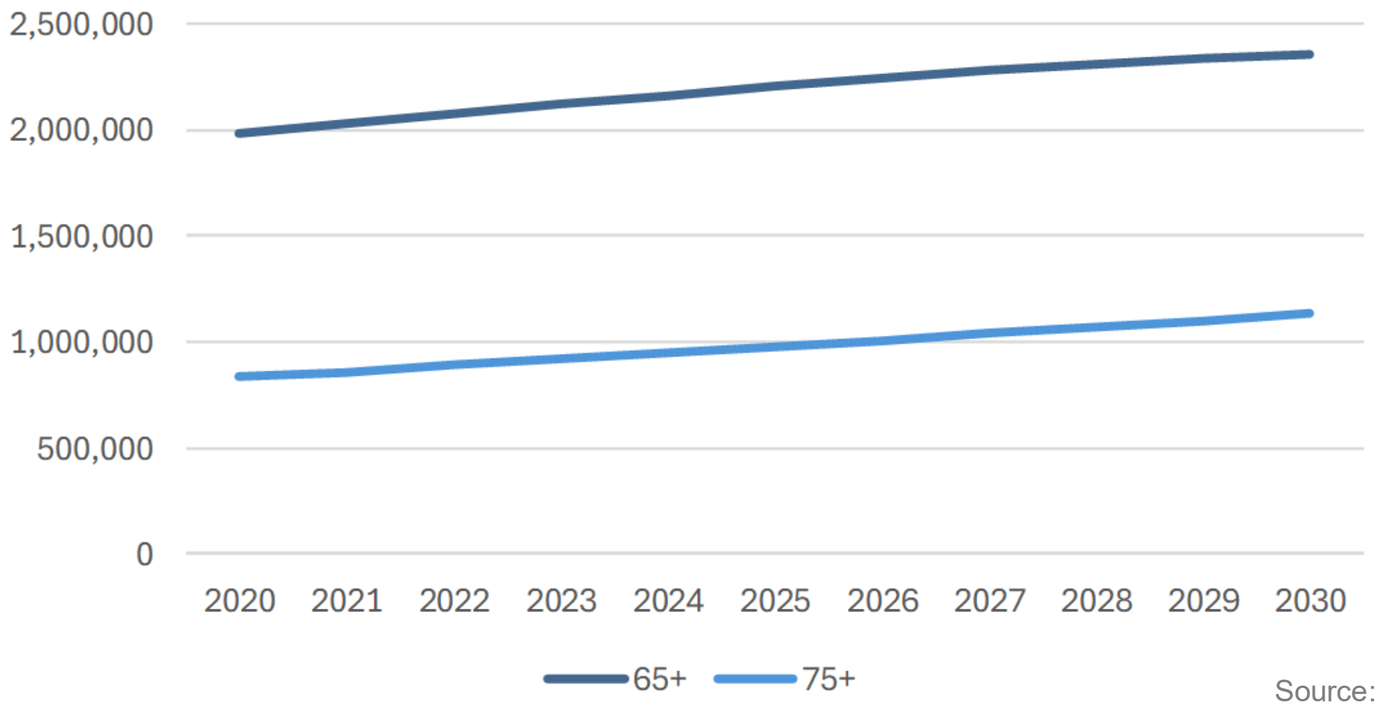
THE HEART OF IT ALL™

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Between 2020 – 2030, Ohio's 65+ and 75+ age cohorts are steadily growing, while its 0-64 cohort is decreasing

By 2030:

- 65+ **increases** by 19.1% equating to 379,000 people.
- 75+ **increases** by 34.7% equating to 291,000 people.
- <65 **decreases** by 4.9% equating to 472,000 people.



Source: CDC projections

The growth of Ohio's aged cohorts will only add to the already substantial state Medicaid spend.

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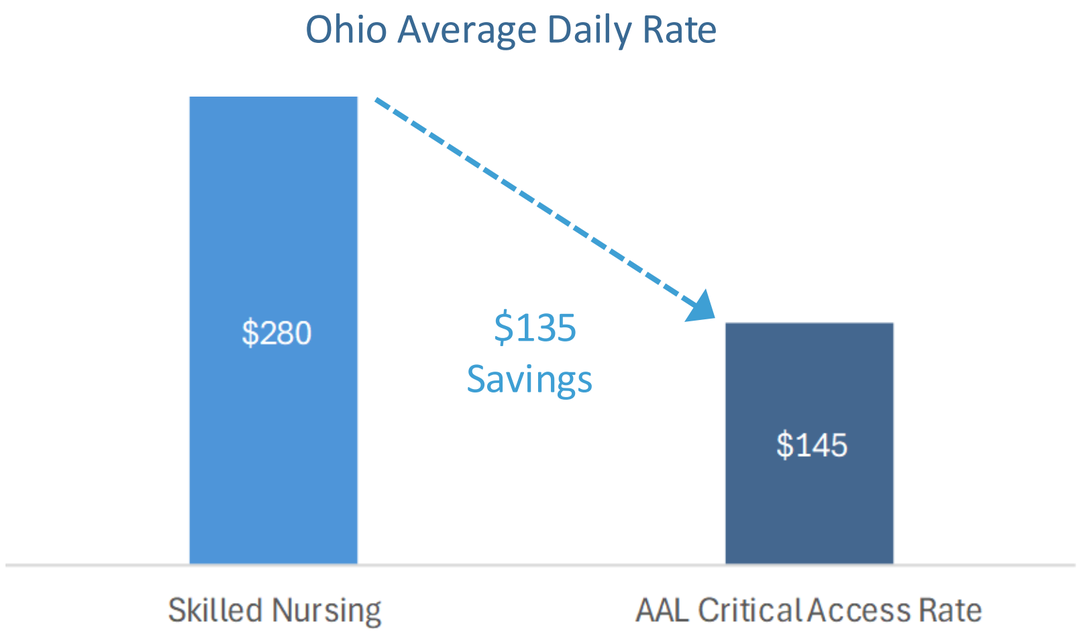
Assisted living provides substantial cost savings

Ohio Medicaid's skilled nursing home costs:

- $280 average daily rate.
- Roughly 40,000 Ohioans in skilled nursing homes funded by Medicaid.
- Roughly $4.1 billion annual Ohio Medicaid spending on long-term care, which is mainly nursing homes.

Affordable Assisted Living ("AAL)":

- $145 per day for assisted living at critical access rate.
- Every resident that shifts from a high-cost skilled nursing setting to AAL saves Ohio ~ **$49,000/yr**.



Medicaid-funded assisted living costs 48% less than Medicaid-funded skilled nursing.

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2023 Ohio General Assembly action

OHIO'S TIME
BUDGET OF THE STATE OF OHIO FY 2024-2025

- As part of H.B. 33, the Ohio General Assembly invested substantial dollars in alternatives to nursing home care for low-income persons that cannot care for themselves.

- The daily reimbursement rate for Ohio's Assisted Living waiver program increased to
- $130 per day.

- Created a "critical access" reimbursement rate of $145 per day for assisted living communities with at least 50% of their residents supported by Medicaid.

- Created a memory care reimbursement rate of $155 per day for residents in assisted living communities with memory impairments.

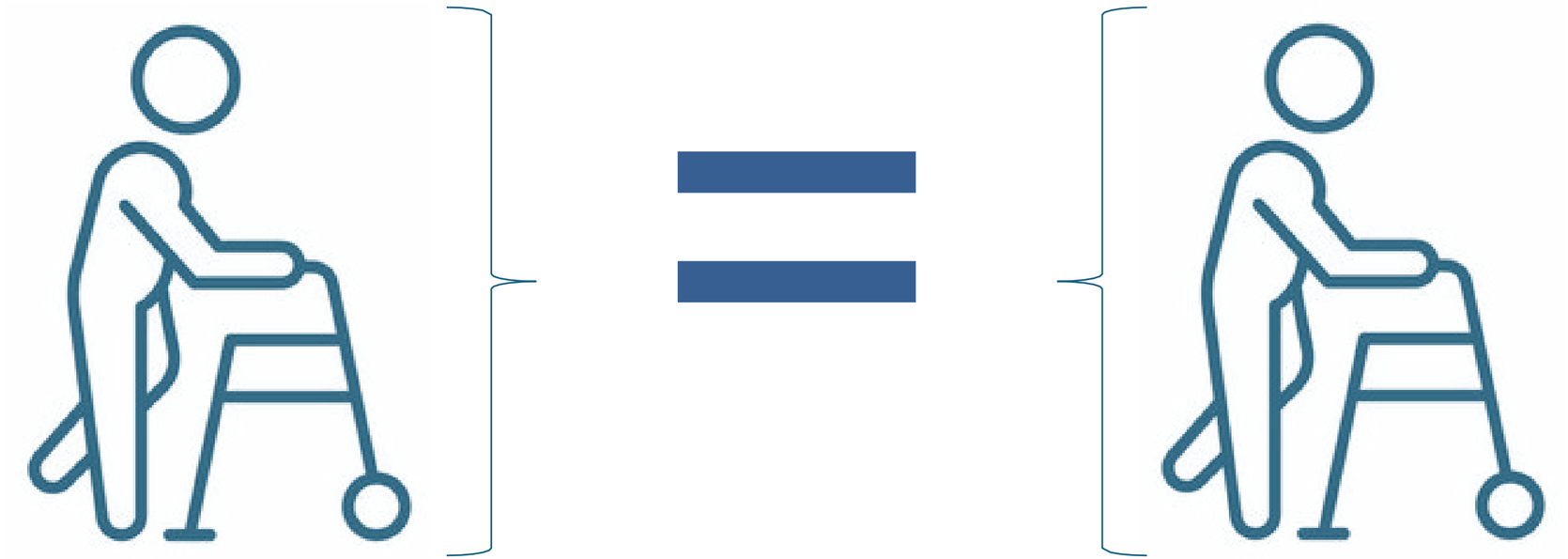
Silver Birch educated legislators on affordable assisted living's ability to reduce Medicaid spending on long-term care.

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On July 3, Governor Mike DeWine signed House Bill 33, the state's two-year budget for fiscal years 2024-2025.

By law, affordable assisted living (“AAL”) residents meet the same health and financial thresholds that qualify people for a nursing home

AAL Resident = **Medicaid Eligibility** = **Nursing Home Resident**



AAL residents enjoy more independence in a non-institutional setting: right care; right time; and right place.

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AAL simultaneously addresses health vulnerability for low-income frail persons and state Medicaid spend

The primary goals of the affordable assisted living model are:

1. To create better health outcomes compared to living alone.

2. While serving persons who would otherwise need skilled nursing home care.

3. And do so at a fraction of the cost of skilled nursing home placement.

Health outcomes improve while state spending decreases.

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Affordable Assisted Living – Public Policy Benefits

Better quality of life for seniors

- Residents are nursing home eligible
- Enjoy more independence in a less institutional setting
- Provides both affordable housing and assisted living services
- Substantially enhances right care, right time, and right place

Medicaid savings

- $4M annually ($1.5M OH General Fund savings) on 120-unit facility vis-à-vis skilled nursing care
- Supports CMS goals to rebalance Medicaid expenditures
- $80M annually ($30M OH General Fund savings) for 20 communities statewide
- **$300M annually if Ohio can replicate Indiana's ratios (based on enrollees <u>today</u>)**

Economic development

- 35-40 full time jobs per facility
- Payroll > $1.6 million annually
- $35+ million investment per facility

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Living With Purpose

Joe began his career working in grocery when he was in high school. His entire working life centered around working in and managing produce departments in several grocery stores.

In 2016, at the age of 63, Joe had to go to the hospital to have an artery replaced in his leg. His leg became infected and, unfortunately, he ultimately had to undergo an above knee amputation.

Prior to this life changing event, Joe was living life like most 63-year-olds, working, driving, and living independently, all the things we take for granted.

Once discharged from the hospital, Joe was sent to a local skilled nursing facility. This is where Joe lived for the next three years, in a shared companion room with no privacy. Not being a candidate for a prosthetic and unable to live alone in an apartment, this was the only option available to him.

Joe said none of his families' homes are wheelchair accessible so living with anyone of them was not possible. This was a grim reality for someone who worked hard his entire life, raised a family, and then was struck by an unforeseen medical situation in the prime of his life.

Joe moved into Silver Birch in 2019, able to afford his own private apartment thanks to the waiver program. He is again a productive member of society, living life as independently as possible.

Since moving in Joe has taken an active role, becoming a Resident Council President and Head of our Garden Club.



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Thank You

for your consideration to solve Ohio's growing problems with affordable housing and Medicaid expenditures.

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OHIO’S ASSISTED LIVING WAIVER

AAA5-a look at transitions, choice and practical lessons from expanding local access.

ALW -STRATEGIC ROLE

ALW keeps the continuum from becoming a binary choice

The value is greatest when it preserves a community-based option between home supports and institutional care.

01

HOME + SERVICES

Best fit while scheduled supports and informal help can reliably cover needs.

02

ASSISTED LIVING

24-hour response for intermittent, daily support in a home-like setting.

03

NURSING FACILITY

Best fit when clinical or safety needs cannot be met in a community setting.

ALW provides another community-based option

Ohio Medicaid, HCBS Nursing Facility Waivers; Ohio Department of Aging, PASSPORT.

PRACTICAL FIT

The best option depends on the match between the person, the support level and what is available.

01

FIT

Does the setting match the person’s goals and routines?

02

SAFETY / LEVEL OF CARE

Can needs be met safely at this level?

03

ROOM & BOARD

Is the room-and-board plan sustainable?

04

CERTIFIED SETTING

Is a certified residence available when needed?

Start planning early when possible

Ohio Medicaid, Ohio HCBS Waiver Programs; Ohio Department of Aging, Assisted Living.

TRANSITION PATHWAY

From independent home living to assisted living

WHAT MAY CHANGE

- A fall or hospitalization
- Loss of a caregiver
- New nighttime or unscheduled-care needs
- Home supports no longer cover the gaps



Ohio Department of Aging, PASSPORT and Assisted Living; Ohio Medicaid, HCBS Waivers.

PERSON-CENTERED OUTCOMES

Independence does not mean doing everything alone—it means retaining meaningful options/control/input.



When to get up, where to eat, what to do each day.



Keep the rhythms and preferences that feel like home.



Stay connected to people, community and activities.

TRANSITION PATHWAY

From a nursing facility to assisted living

NURSING FACILITY

↓

Has function, risk or support changed?

↓

ASSISTED LIVING

HOME Choice



Ohio Medicaid, HOME Choice and HCBS Nursing Facility Waivers.

LOCAL CAPACITY

Opening a waiver-certified facility can expand choice

A new local option can create meaningful opportunities—but it also increases coordination needs.

01

Expanded local options

More people can access assisted living in their own community.

02

Meeting a growing need

Flexible supports respond as individual needs change.

03

A path from nursing facilities

A step-down option when nursing-facility care is no longer needed.

04

Preserving independence

Support people to remain connected, engaged and as independent as possible.

LESSONS LEARNED

Build the operating structure before referrals accelerate

Early coordination helps partners manage variable timelines and rising demand.

01

Build communication early

Bring key partners together; clarify roles, channels, updates and expectations. Include clinical and provider-relations leadership.

02

Plan for variable timelines

County JFS processing times and staffing vary. Build flexibility, share delays and keep the individual's goals central.

03

Use HOME Choice early

Start early, maintain regular communication and help partners understand the steps for transitions from nursing facilities.

04

Prepare for more assessments

A new certified facility can increase front-door referrals and assessment requests. Plan for the volume in advance.

LESSONS LEARNED

Make referrals visible from start to finish

Shared tracking and clear points of contact reduce fragmented updates.

05

Align staffing

Plan capacity as assisted living assessments referrals increase and for some enrollment growth.

06

Track every referral

Use a shared OneDrive document from referral through outcome

07

Name points of contact

Identify one primary contact and a backup with access to the full tracking information.

TRACKER FIELDS

- Name + referral date
- Outcome + pending reason
- Contact attempts
- Latest update
- Assessment date / decline reason

One shared source of truth improves visibility and reduces time spent reconciling separate logs and systems.


thank
you

QUESTIONS ?