

## **Licking County Senior Levy Funds Policy, Procedures, Practices**

Senior Levy funds are used exclusively to support the needs of Licking County senior citizens sixty (60) years of age and older.

### **Funding Pillars**

The following categories identify funding priorities or pillars for Senior Levy money. Applicants for funding must demonstrate how levy funds will be used to address needs in at least one of these pillars:

- **Food, Nutrition and Health**
  - Provision of hot, well-balanced meals on a regular basis to persons who are homebound, and/or cannot cook for themselves for a variety of reasons. Meals may also be provided at congregate dining sites to promote and encourage socialization for those needing hot meals; and
  - Provision of current information about prevention and early detection of chronic disease(s), health and nutrition including diet, fitness, exercise, and importance of regular social interactions.
- **Safety and Security**
  - Focus on the physical, emotional, and financial safety and well-being of senior citizens.
- **Home and Housing**
  - In-home care that may include assistance with chores; referral for and follow up on physical and mental health care needs; referrals and follow-up needed legal and/or financial services; facilitation of long-term care issues, including home maintenance, that make it possible for the senior to live alone, or with family in a safe environment that addresses their physical, emotional and mental needs; and
  - Providing temporary relief for caretakers from caregiving responsibilities (respite).
- **Transportation**
  - Assisting seniors to and from medical and other essential appointments such as grocery shopping, medical appointments, work, and personal/social engagements.
- **Social Connections, Personal Development and Life-Long Learning**
  - Providing opportunities for educational and informative classes, seminars and programs; and

- Providing opportunities for seniors to stay productive and maintain meaningful social and community-based connections; and
- Providing opportunities for seniors to participate in social, civic, cultural and recreational activities, and to continue to learn.

### **Eligibility for Senior Levy Funding**

The following eligibility requirements apply to all applicants. Services provided shall not duplicate other senior levy funded services without the recommendation of the Senior Levy Board and/or approval of the Licking County Board of County Commissioners.

- Services or activities support at least one of the Senior Levy Pillars
- A current mission statement that describes the purpose of the applicant is available
- Regular and predictable meetings of the Board or membership are held
- A separate bank account will be maintained to ensure tracking of Senior Levy funds. Accounting software with the capacity to track deposits and expenditures of senior levy funds meets this requirement
- Written rules or by-laws that address operations are adopted and kept current
- A slate of officers to include, at a minimum, President, Vice President, Secretary/Treasurer are elected to support the operations of the applicant
- The applicant demonstrates that mechanisms are in place to verify that senior levy funding is spent only on age eligible seniors currently living in Licking County

In addition to the eligibility requirements detailed above, **social clubs** are required to:

- Have a minimum of 15 active members. Active members are those who are present at routine meetings or events at least 50% of the time; and
- To include any eligible Licking County Senior in the bus trip program (details below), regardless of affiliation with a social club; and
- Include as a participant/ any Licking County Senior that is at least sixty (60) years of age or older.

### **Requests to Use Senior Levy Funds**

- The funding allocation process begins in January of each calendar year with funding decisions made by the end of February.
- If your group has received Senior Levy Funding within the last funding cycle/year, an application specific to whether the applicant is considered a service provider, or a social club, will be forwarded to the designated contact by the office of the Licking County Board of County Commissioners. Application forms are periodically updated. It is the responsibility of applicants to review the application carefully and complete it fully.
- Applicants are permitted to carry over funds to operate the following year. It is not required that all funds be used by year-end on unnecessary expenditures.

## **Licking County Social Clubs**

**Allowable Expenses:** Senior Levy funds **CAN** be used to pay for the following:

- **NOTE:** Senior Levy Funds CANNOT be used to pay for potluck style meals beginning January 1, 2024.
- Up to **100%** of the cost of meals (including tip) served at a restaurant for social club meetings/outings or meals catered or carried in to the social club.
- Up to **100%** of operating expenses for meetings, such as rent
- Up to **75%** of the costs for bus trips scheduled by the club. Trip costs include cost of the bus, event fees and cost of the meal. Additionally, meal costs, event fees, and tips for the bus driver may be included. Trips should meet the mileage and time frame to destination provisions detailed below:
  - Trips should be within a **150-mile radius of the pick-up location** and the **destination no more than 3 hours from the pick-up location**;
  - Trips should be planned that are **no more** than a **12-hour day**;
  - Trips that exceed the **mileage and time frame to destination provisions** will be eligible for a senior levy subsidy of up to 50%, rather than up to 75%, for the trip.
  - **All Overnight trips are excluded from funding with senior levy money.**

**Non-Allowable Expenses:** Senior Levy funds **CANNOT** be used to pay for the following:

- Gift certificates
- Donation of money to any cause (person, entity, charity, etc.)
- Greeting cards (birthday, sympathy, anniversary, etc.)
- Gifts
- 50/50 tickets
- Flowers for any occasion (illness, special occasions, memorials, etc.)
- Prizes for games that are played during meetings or other events
- Assistance with purchasing food for a senior for their home
- Holiday parties, to include end of the year parties or dinners to deplete Senior Levy Funding dollars
- Alcohol
- Overnight bus trips
- Potluck style meals

## **Termination Procedures**

- Notify the office of the Licking County Board of Commissioners in writing of your organizations' intent to dissolve, terminate or merge with another organization.
  - Social Clubs are required to document and submit a vote of the membership with the letter of intent to dissolve or merge; and
  - Provider agencies and other non-social club organizations must document the governing board's resolution or action to dissolve, terminate, or merge with another organization. This documentation will preferably be in the form of official board meeting minutes signed by an officer. The Board President should sign the letter of intent to dissolve or merge.
  - The letter of intent and other documentation referenced above should be sent to: Licking County Commissioners, 20 South Second Street, Newark, Ohio 43055
- With the letter of intent and supporting board/membership actions, submit a copy of:
  - The original check register,
  - The last/most current bank statement,
  - Receipts for the past year, and
  - A check payable to Licking County Commissioners for any unused Senior Levy Funds.
- The Commissioners will review the documents submitted and arrange for a fiscal review to verify that the amount of unused Senior Levy funds is accurate.

### Guidelines:

Approved: 11/8/2019

Amended: 1/19/2021

Amended: 10/6/2023

Amended: 1/26/2024

Amended: 10/4/2024