

2018 Delaware Nursing Home Utilization Report

2019-2024 Delaware Nursing Home Bed Projections

**Delaware Health Resources Board
September 26, 2019**

PART 1: 2018 Delaware Nursing Home Utilization Report



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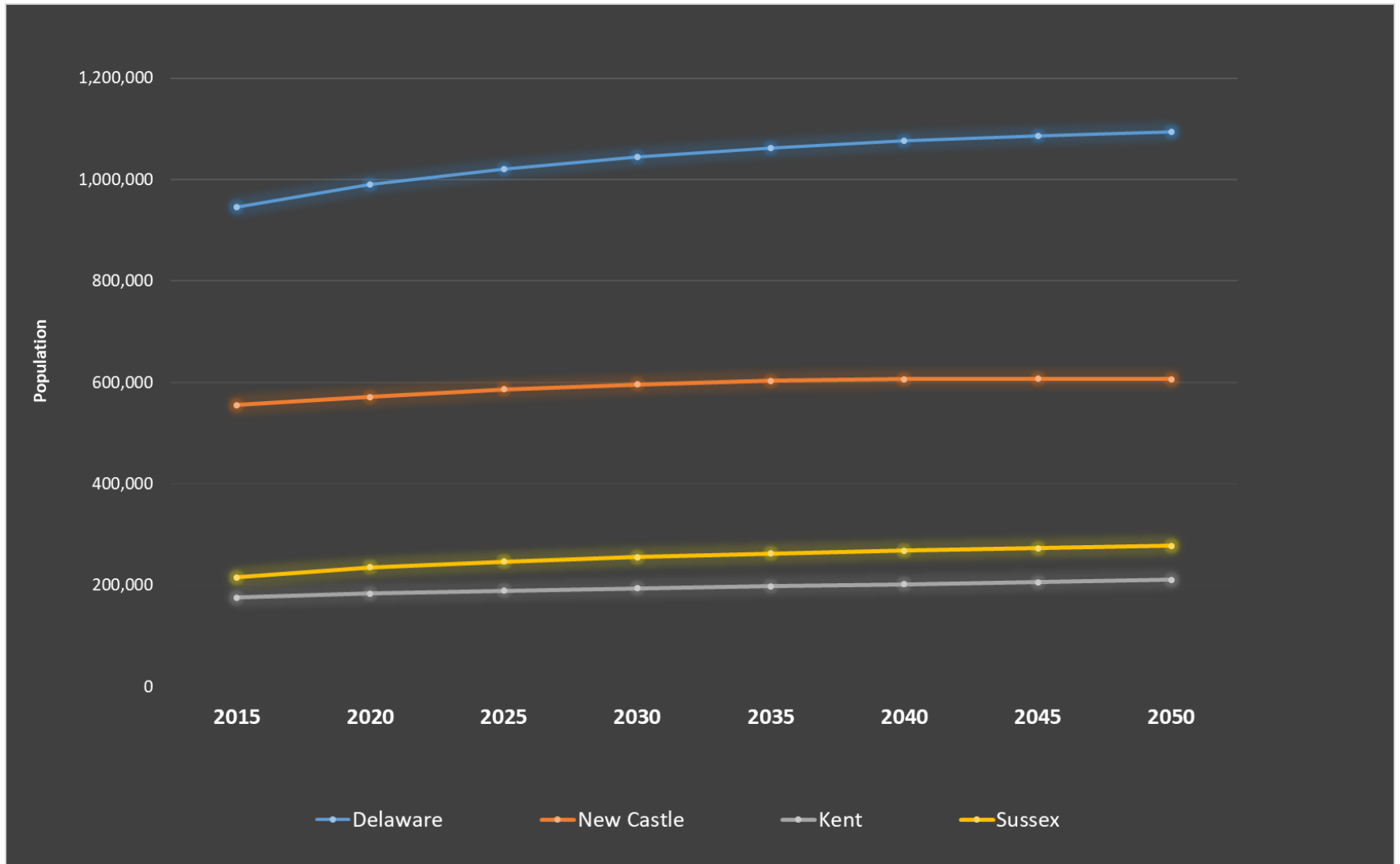
■ Data: January – December 2018

■ 2018 NH data used to project 2019-2024 NH bed need:

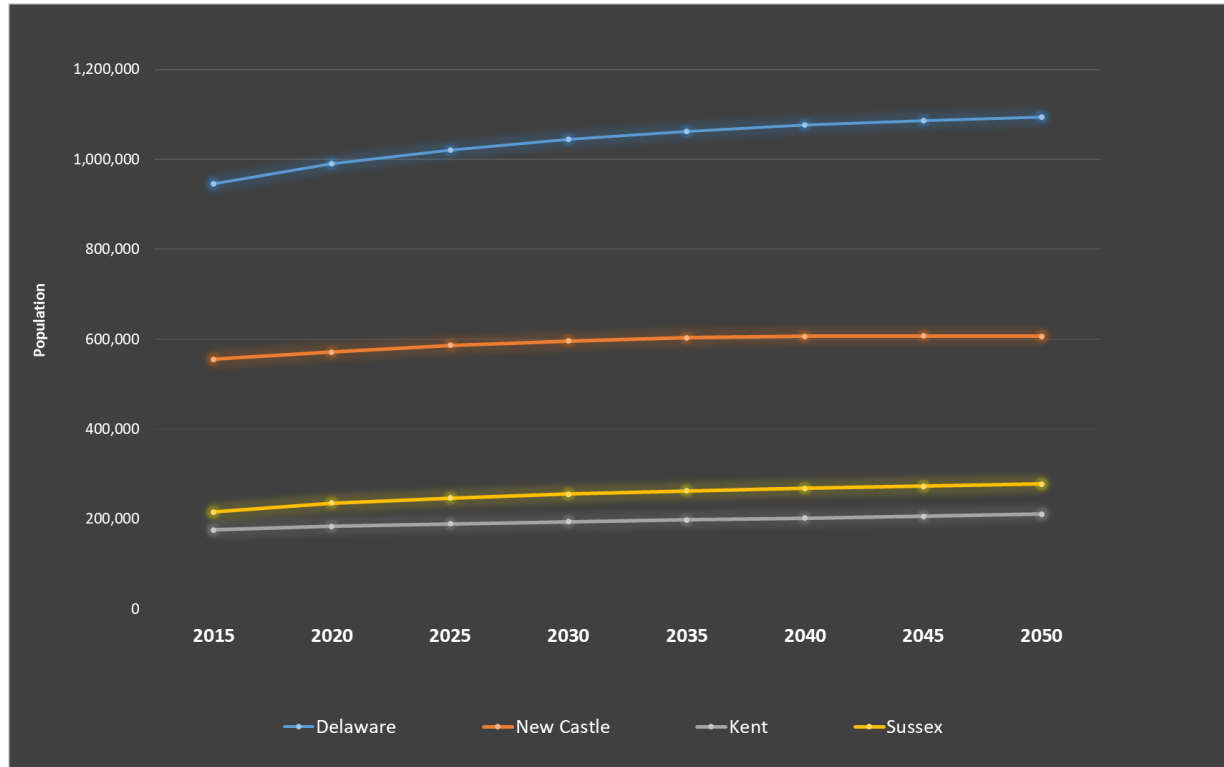
- 2019-2020 Projected bed need next year
- 2019-2021 Projected bed need 2 years from today
- 2019-2022 Projected bed need 3 years from today
- 2019-2023 Projected bed need 4 years from today
- 2019-2024 Projected bed need 5 years from today

■ Nursing homes fall under Delaware's CPR process

OVERALL Population Growth in Delaware, 2015-2050

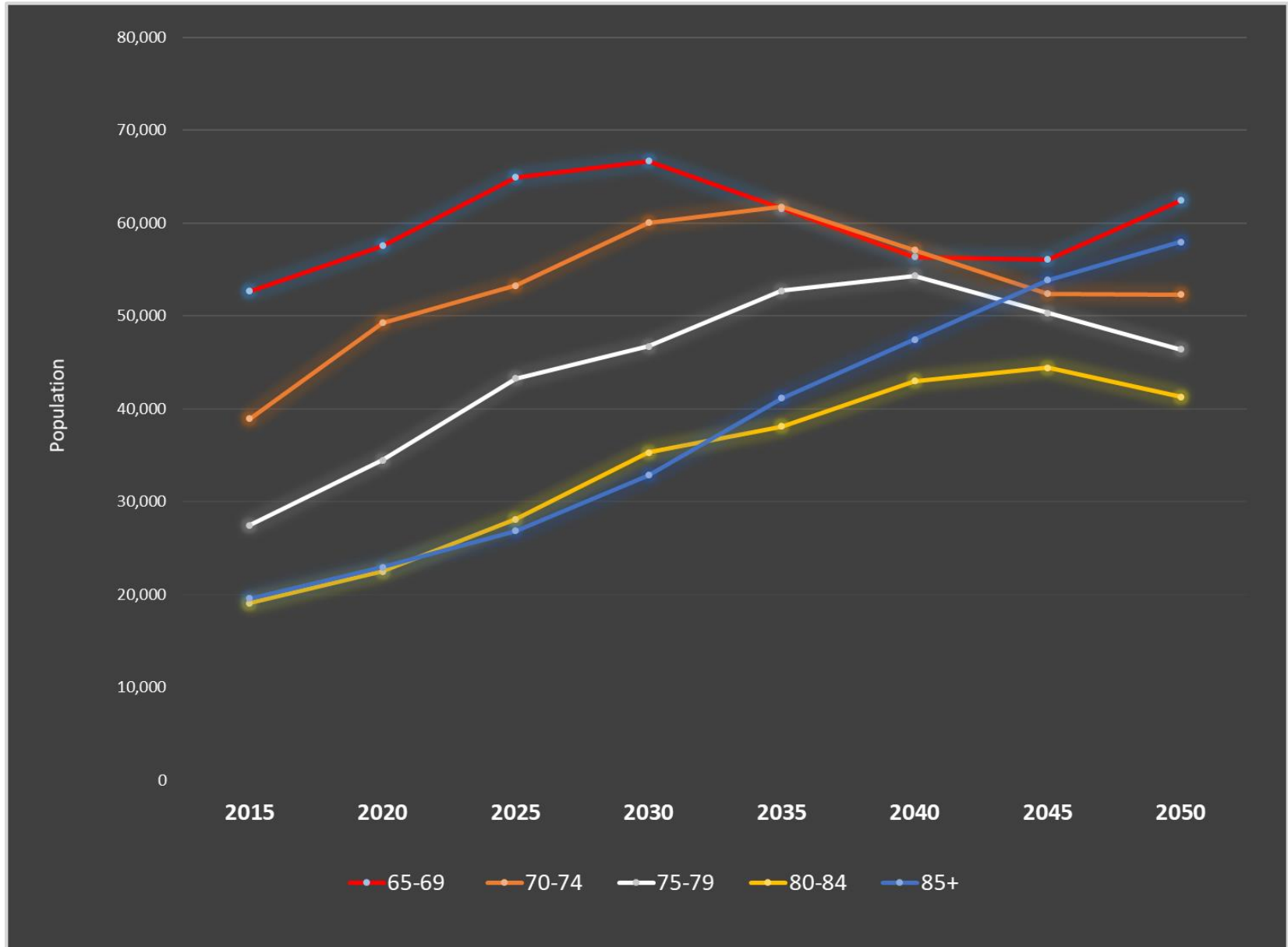


OVERALL Population Growth in Delaware, 2015-2050

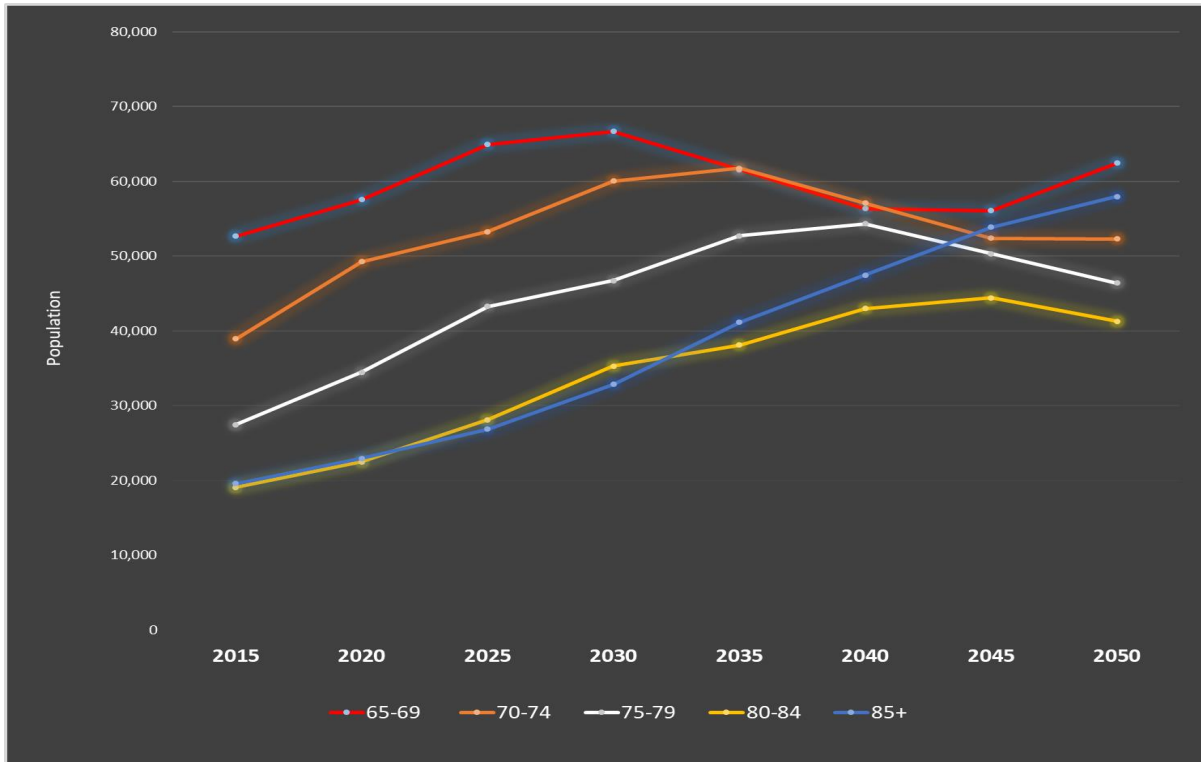


	2015	2020	2025	2030	2035	2040	2045	2050	2015-2050 Percentage Increase
Delaware	945,929	989,803	1,021,441	1,044,965	1,062,816	1,076,165	1,086,324	1,094,704	15.7%
New Castle	555,115	571,165	586,021	596,221	602,884	606,346	607,227	606,162	9.2%
Kent	175,412	183,242	188,929	193,601	197,682	201,639	205,926	210,671	20.1%
Sussex	215,402	235,396	246,491	255,143	262,250	268,180	273,171	277,871	29.0%

65+ Population Growth in Delaware, 2015-2050



65+ Population Growth in Delaware, 2015-2050



	2015	2020	2025	2030	2035	2040	2045	2050	2010-2050 Percentage Increase
65-69	52,663	57,579	64,933	66,706	61,567	56,367	56,070	62,445	18.6%
70-74	38,939	49,254	53,280	60,036	61,770	57,077	52,415	52,296	34.3%
75-79	27,467	34,454	43,285	46,735	52,725	54,322	50,303	46,413	69.0%
80-84	19,069	22,484	28,101	35,297	38,084	43,005	44,421	41,296	116.6%
85+	19,553	22,919	26,856	32,843	41,163	47,461	53,851	57,964	196.4%
Total 65+	157,691	186,690	216,455	241,617	255,309	258,232	257,060	260,414	65.1%



Long-Term Support Services (LTSS) Categories

■ Home Care Services

- Family Caregiving
- Home Health Care (wound care, medication management, physical therapy)
- Homemaker Services
- Home Telehealth
- Home-Based Hospice

■ Community Services

- Adult Day Care / Senior Centers
- Transportation Services
- Meal Services
- Retirement Communities

■ Assisted Living Facilities

- 24-hour Supervision
- Assistance with ADLs
- Medication Management
- Homemaker Services
- Social / Recreational Activities
- In Delaware, not included in CPR process

■ Nursing Home Facilities

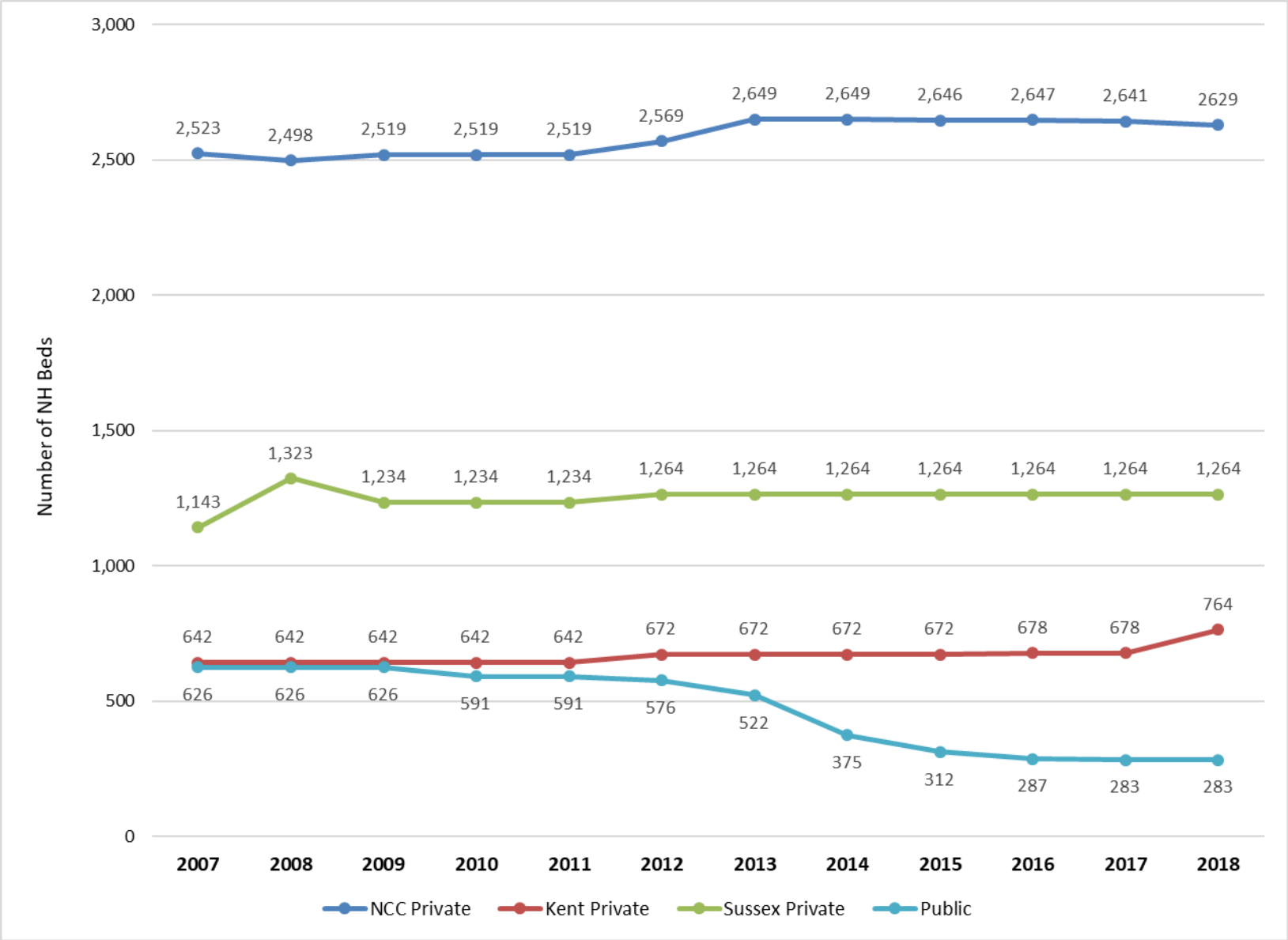
- 24-hour Supervision
- Comprehensive Skilled Nursing Care
- Respite care
- In Delaware, included in CPR process



Delaware Assisted Living Facilities & Private Nursing Homes (2019)

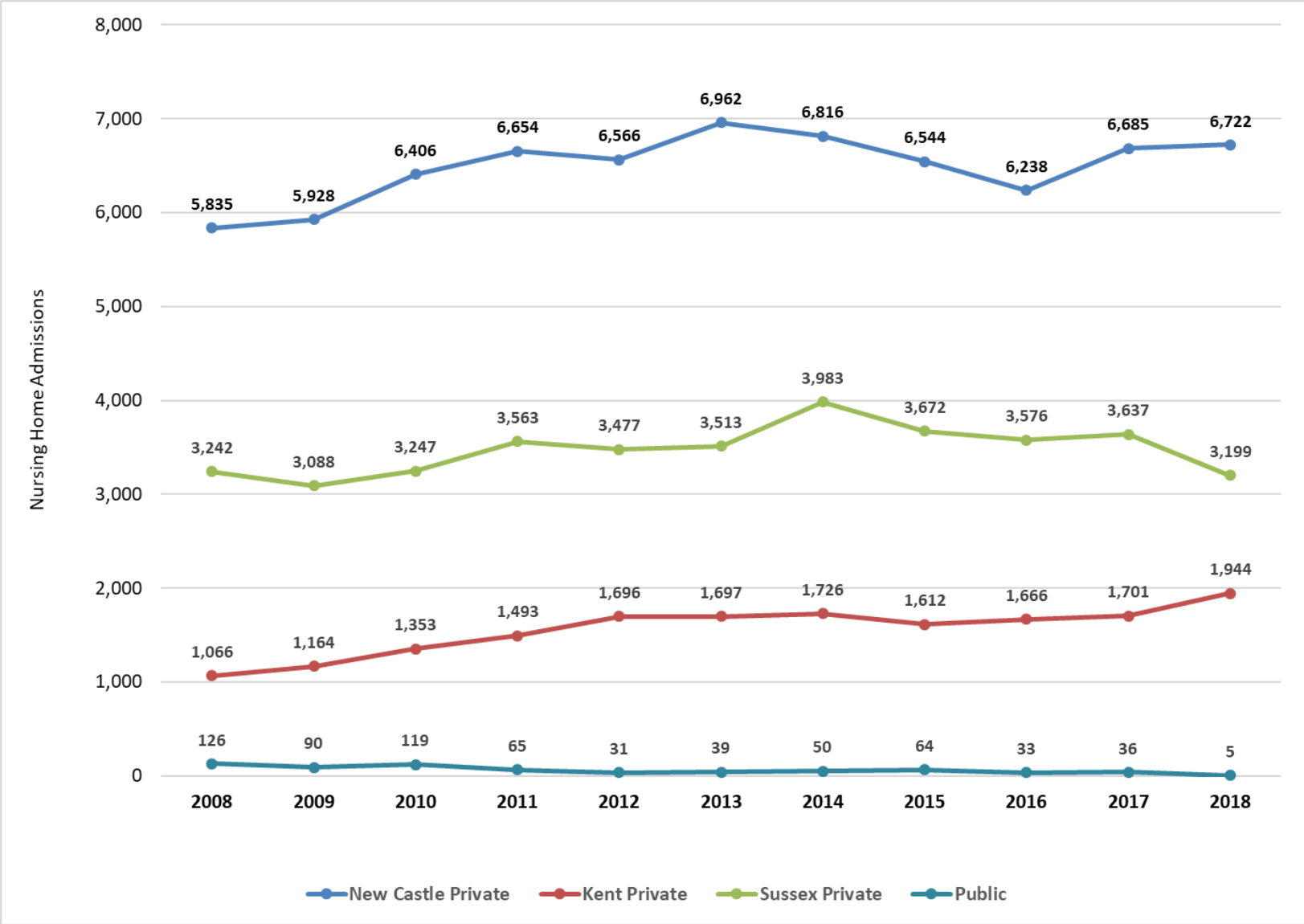
	Assisted Living (AL)	Private Nursing Homes (NH)	Ratio (AL / NH)
New Castle			
Facilities	23	27	0.85
Beds	1,433	2,629	0.55
Kent			
Facilities	4	7	0.57
Beds	373	764	0.49
Sussex			
Facilities	6	11	0.55
Beds	495	1,264	0.39
Delaware			
Facilities	33	45	0.73
Beds	2,301	4,657	0.49

Delaware Nursing Home Licensed Bed Counts, 2007-2018



Source: 2018 Delaware Nursing Home Utilization Statistical Report

Delaware Nursing Home Admissions, 2008-2018

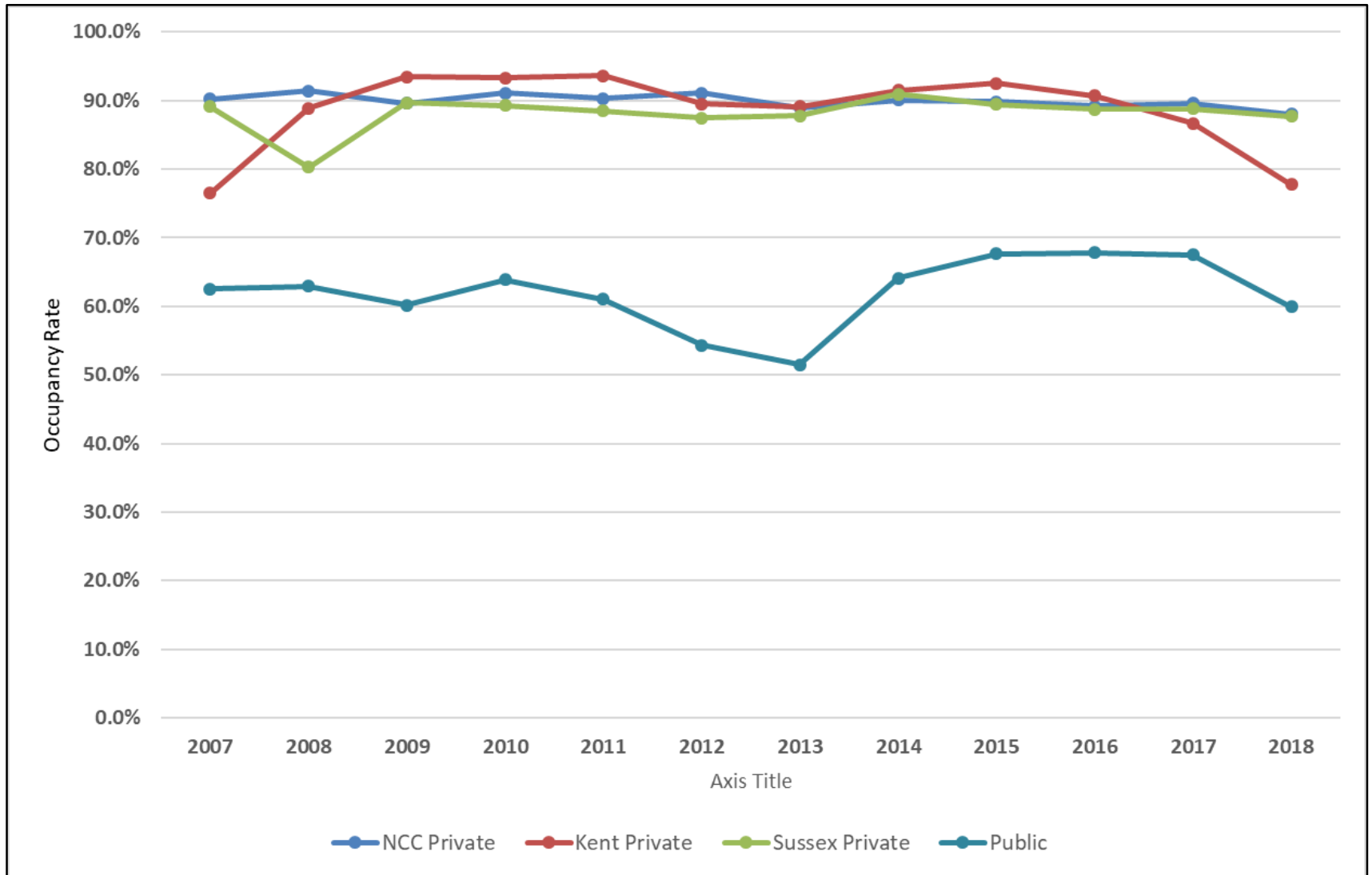


Source: 2018 Delaware Nursing Home Utilization Statistical Report

Delaware Nursing Home Occupancy Rates, 2007-2018

Year	Private Facilities				Public Facilities	All Facilities
	New Castle	Kent	Sussex	Total Private		
2007	90.2%	76.5%	89.1%	87.9%	62.5%	84.7%
2008	91.4%	88.9%	80.3%	87.7%	62.9%	84.7%
2009	89.6%	93.5%	89.7%	90.2%	60.2%	86.5%
2010	91.1%	93.3%	89.3%	90.9%	63.9%	87.7%
2011	90.3%	93.6%	88.5%	90.3%	61.0%	86.8%
2012	91.1%	89.5%	87.5%	89.8%	54.3%	85.8%
2013	89.0%	89.1%	87.8%	88.7%	51.5%	84.9%
2014	90.1%	91.5%	90.9%	90.5%	64.1%	88.5%
2015	89.8%	92.5%	89.4%	90.1%	67.7%	88.7%
2016	89.2%	90.7%	88.7%	89.3%	67.8%	88.0%
2017	89.6%	86.7%	88.8%	89.0%	67.5%	87.7%
2018	88.0%	77.8%	87.7%	86.3%	59.9%	84.8%

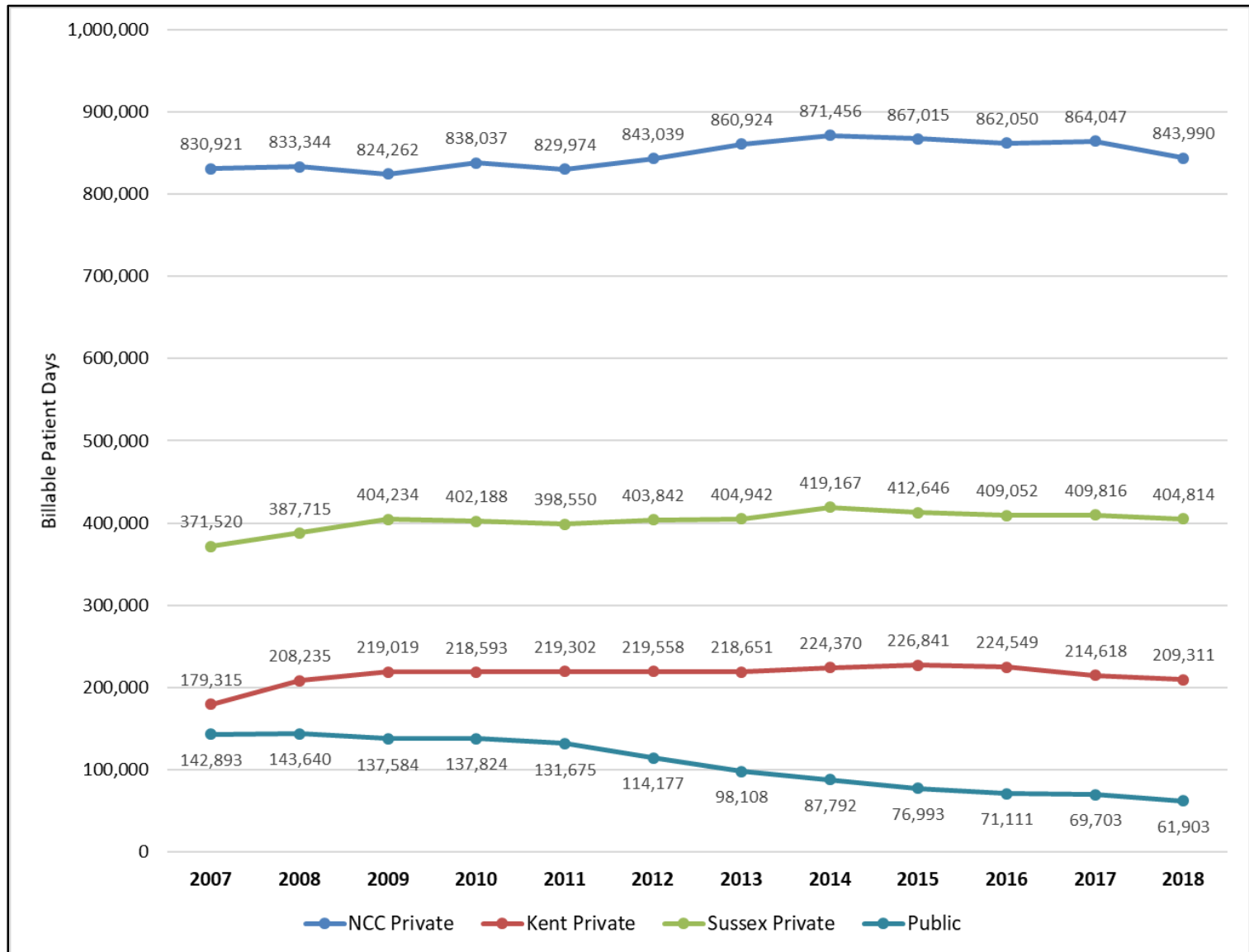
Delaware Nursing Home Occupancy Rates, 2007-2018



Billable Patient Days

- Billable Patient Day: a unit of time (i.e., one day) during which the facility's services are used by one patient.
- For example, if a nursing home has 100 patients on a particular day, the facility has generated 100 billable patient days for that particular 24-hour period.
- If a facility's number of billable patient days increases from one time period to the next, it is an indication that the facility is
 - a. Caring for ***more*** patients
 - b. Caring for patients for ***longer periods of time***, or
 - c. A **combination** of these two factors.

Delaware Nursing Home Billable Patient Days, 2007-2018



Delaware Nursing Home Admissions, by Race and Age, 2018

	Age Groups				Total Admissions (by Race)
	Under 65	65-74	75-84	85+	
White (N=9,308)	12.4%	18.1%	33.0%	36.4%	78.4%
Black (N=2,263)	23.8%	27.8%	29.1%	19.4%	19.1%
Other (N=299)	13.4%	31.4%	26.8%	28.4%	2.5%
Total (N=11,870)	14.6%	20.3%	32.1%	32.9%	100.0%

- White patients represented 78.4% of all DE NH admissions in 2018
- Larger percentages of Black NH admissions represent patients Under 65 and 65-74
- Discharge trends mirror admission trends

Delaware Nursing Home Discharges, by Destination, 2018

Facility Type	Discharge Destination						
	Home	Hospital	Assisted Living	Private LTCF	State Owned LTCF	Death	Other
Private (N=11,149)	58.1%	22.9%	4.2%	3.0%	0.3%	10.8%	0.7%
Public (N=30)	6.7%	6.7%	0.0%	3.3%	3.3%	76.7%	3.3%
All facilities (N=11,179)	57.9%	22.9%	4.2%	3.0%	0.3%	10.9%	0.8%

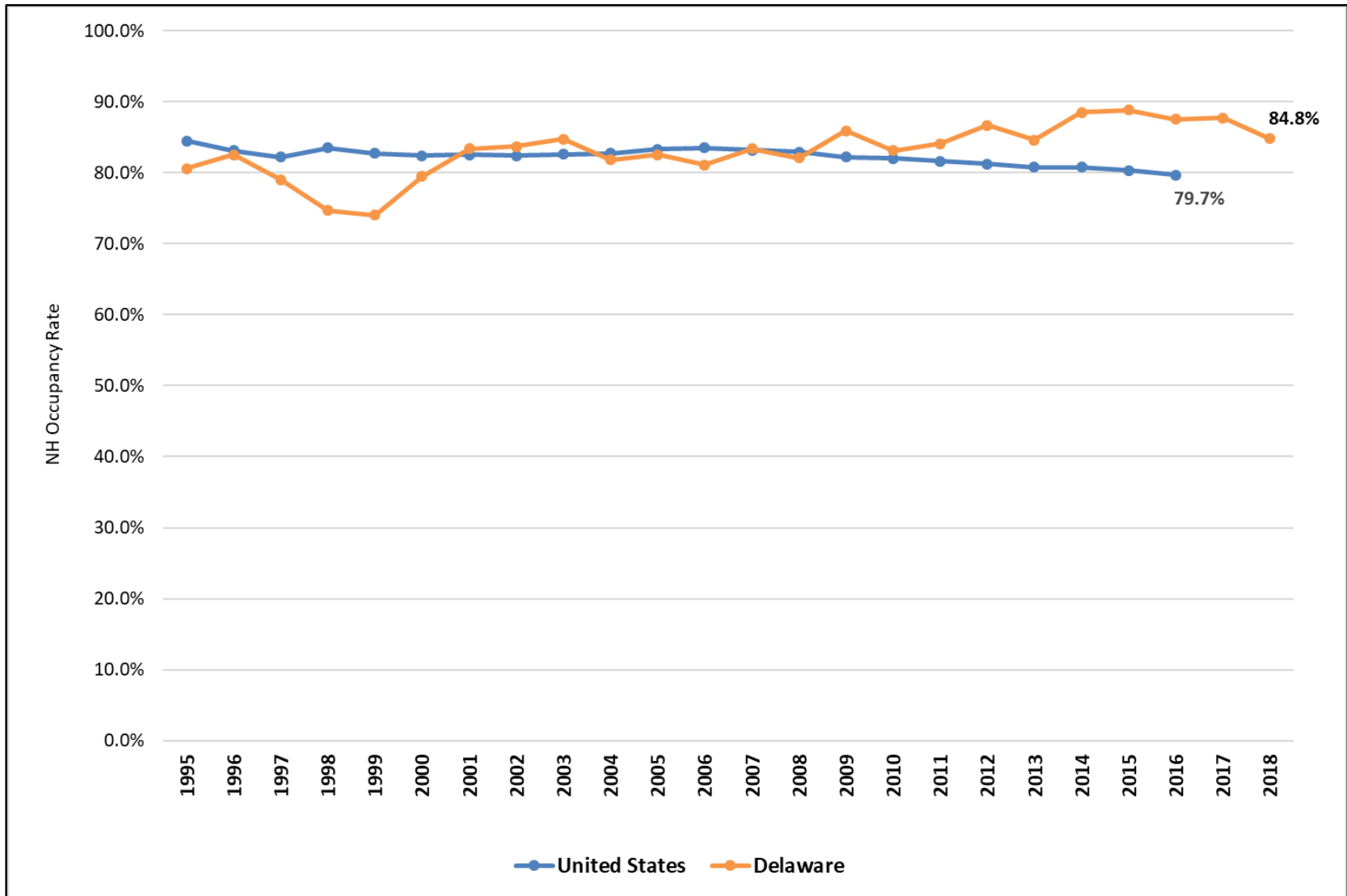
Rebalancing of Long Term Supports & Services (LTSS)

- Past two decades → gradual rebalancing of LTSS toward consumer-preferred HCBS
 - Emphasis on community integration for seniors
 - Increased number of and access to HCBS
 - Policy changes related to reimbursement (patients staying for shorter lengths of time)
 - Efforts to reintegrate NH consumers back into community settings
 - AL and NH workforce challenges / caregiver shortage
 - Multigenerational housing development

- Gradual decline in Senior Living and Nursing Care occupancy rates in the U.S.
 - AL occupancy fell to 85.1% in Q2 (2019), the lowest point since NICSHC began collecting data in 2006
 - IL occupancy fell to 90.2% in Q2 (2019)
 - Nursing Home occupancy rates dropped to 79.7% in 2016

- Senior Living construction slowing slightly; supply will eventually better match demand

Nursing Home Occupancy Rates, 1995-2018: DE vs US



SOURCE: Cowles CM. Nursing home statistical yearbook, 2016. Anacortes, WA: Cowles Research Group, 2017 and previous editions. Based on data from the Centers for Medicare & Medicaid Services' Quality Improvement Evaluation System and its predecessor, the Online Survey Certification and Reporting Database. See Appendix I, Quality Improvement Evaluation System (QIES).

Nursing Facility Occupancy Rates, 2016

	United States	79.7
1	South Dakota	90.8
2	District of Columbia	90.2
2	New York	90.2
2	North Dakota	90.2
5	Rhode Island	89.8
6	New Hampshire	89.1
7	Maine	88.8
8	Pennsylvania	88.4
9	Mississippi	87.6
10	Delaware	87.5
11	Florida	87.3
11	Maryland	87.3
13	West Virginia	86.9
14	Kentucky	86.4
15	California	85.7
16	Alaska	85.3
17	Connecticut	85.2
18	South Carolina	84.9
19	Minnesota	84.8
20	Alabama	84.5
20	New Jersey	84.5
20	Virginia	84.5
23	Massachusetts	83.9
24	Georgia	83.5
25	Ohio	82.7
26	Michigan	82.2

27	Vermont	82.0
28	Hawaii	81.3
29	Wyoming	80.6
30	North Carolina	80.5
31	New Mexico	79.4
32	Washington	78.9
33	Wisconsin	77.9
34	Colorado	77.8
35	Iowa	76.2
36	Louisiana	75.9
37	Nevada	74.7
38	Tennessee	74.5
39	Nebraska	74.4
40	Arkansas	71.8
40	Illinois	71.8
42	Arizona	69.4
42	Missouri	69.4
44	Kansas	69.3
45	Texas	67.7
46	Idaho	66.4
47	Montana	66.3
48	Oklahoma	65.7
49	Oregon	65.3
50	Utah	64.2
51	Indiana	63.1

PART 2: 2019-2024 Delaware Nursing Home Bed Projections

HRMP Methodology: Nursing Home Bed Projections

Outlined in the Delaware Health Resources Management Plan (located online)

1. Obtain annual billable patient day data (by state and county)
2. Calculate projected population growth by age group (by state and county)
3. Calculate the proportion of NH admissions by age group (<65, 65-74, 75-84, and 85+) and use these proportions to calculate a weighted sum of population growth
4. Multiply weighted population growth factor by current year billable patient days to obtain projected billable patient days for each year of the projection period
5. Divide projected billable patient days by 365 to obtain projected bed need
6. Calculate the difference in current and projected bed need to obtain the projected shortage / surplus of NH beds (by state and county)

2019 – 2024 Delaware Nursing Home Bed Projections

Delaware	Available Beds (2018)	Projected Bed Need	Shortage / Surplus
2019-20	4,940	4,750	190
2019-21	4,940	4,884	56
2019-22	4,940	5,015	-75
2019-23	4,940	5,181	-241
2019-24	4,940	5,357	-417
Kent	Available Beds (2018)	Projected Bed Need	Shortage / Surplus
2019-20	701	627	74
2019-21	701	646	55
2019-22	701	661	40
2019-23	701	682	19
2019-24	701	704	-3
New Castle	Available Beds (2018)	Projected Bed Need	Shortage / Surplus
2019-20	2,889	2,788	101
2019-21	2,889	2,856	33
2019-22	2,889	2,928	-39
2019-23	2,889	3,026	-137
2019-24	2,889	3,129	-240
Sussex	Available Beds (2018)	Projected Bed Need	Shortage / Surplus
2019-20	1,351	1,331	20
2019-21	1,351	1,375	-24
2019-22	1,351	1,418	-67
2019-23	1,351	1,466	-115
2019-24	1,351	1,519	-168

NH Bed Projections: Summary Points

- ❑ Latest projections predict immediate surplus of beds in all three counties

- ❑ Over the next several years, given current bed counts, trends, and population projections, the surplus will transition to a bed shortage

- ❑ The magnitude of bed shortages largest in New Castle and Sussex Counties

- ❑ When considered in the context of beds missing per 1,000 persons age 65+, in 2024:
 - **Delaware:** **1.98** beds short per 1,000 persons age 65+
 - **New Castle County:** **2.25** beds short per 1,000 persons age 65+
 - **Kent County:** **0.09** beds short per 1,000 persons age 65+
 - **Sussex County:** **2.40** beds short per 1,000 persons age 65+

NH Bed Projections: Summary Points

- ❑ Nursing Home bed projections do not factor in changing LTSS trends

- ❑ Beginning in 2019:
 - ❑ Delaware collects AL facility data to track admissions, discharges, and occupancy data across the state
 - ❑ Fall 2020: 2019 Delaware Nursing Home Utilization Report
 2019 Delaware Assisted Living Utilization Report

 - ❑ NH and AL admissions and discharge data collection efforts expanded to include never-before collected data on younger age groups:
 - ❑ 18-34
 - ❑ 35-44
 - ❑ 45-54
 - ❑ 55-64
 - ❑ 65-74
 - ❑ 75-84
 - ❑ 85+

END