

# **DELAWARE'S 2023 LONG-TERM CARE LANDSCAPE**

**Delaware Health Resources Board  
September 26, 2024**

# Agenda

- Review highlights from the **2023 Delaware Nursing Home Report**
- Preview **2024-29 Delaware Nursing Home Bed Projections**
- Add context using findings from the **2023 Delaware Assisted Living Report**

# Highlights from the 2023 Delaware Nursing Home Report

# Activities Subject to CPR Review in Delaware

Construction of a new healthcare facility

Healthcare expenditures in excess of \$5.8M

Change in bed capacity of more than 10 beds or more than 10% of total licensed bed capacity over 2-year period

Acquisition of major medical equipment

## Includes

- **Nursing Homes**
- **Acute Care Hospitals**
- **Hospital-Based Obstetric Care**
- **Freestanding Surgery Centers**

## Supporting Deliverables:

- Annual Nursing Home Report
- Annual Nursing Home Bed Projections

## Does Not Include

- **Assisted Living Facilities**

# Delaware Nursing Homes, 2023

44 Facilities

4,859 Licensed Beds



## New Castle County

- 24 Nursing Homes
- 2,530 beds
- 46.6% of DE's 65+ population

## Kent County

- 8 Nursing Homes (including DHCI - public)
- 965 beds
- 16.3% of DE's 65+ population

## Sussex County

- 12 Nursing Homes
- 1,364 beds
- 37.1% of DE's 65+ population

# Delaware Nursing Homes, 2023

## New Castle County (24)

1. Cadia Rehab Broadmeadow
2. Cadia Rehab Pike Creek
3. Cadia Rehab Silverside
4. Churchman Village
5. Cokesbury Village
6. Complete Care at Brackenville
7. Complete Care at Hillside
8. Coral Springs at Brandywine
9. Country House
10. Foulk Manor
11. Gilpin Hall
12. Jeanne Jugan Residence (Little Sisters)
13. Kentmere Nursing Care Center
14. Kutz Rehab & Nursing
15. Millcroft
16. New Castle Health & Rehab
17. Newark Manor
18. Parkview Nursing & Rehab
19. ProMedica Pike Creek
20. ProMedica Wilmington
21. Regal Heights Healthcare & Rehab
22. Regency Healthcare & Rehab
23. Shipley Manor Health Care
24. Stonegates

## Kent County (8)

1. Cadia Rehab Capitol
2. Complete Care at Silver Lake
3. Bay Terrace Rehab and Health (formerly Courtland Manor)
4. DHCI **\*Delaware's only public nursing home**
5. Delaware Veterans Home **\*unique pt. pop.**
6. Pinnacle Rehab & Health
7. The Center at Eden Hill
8. Westminster Village Health Center

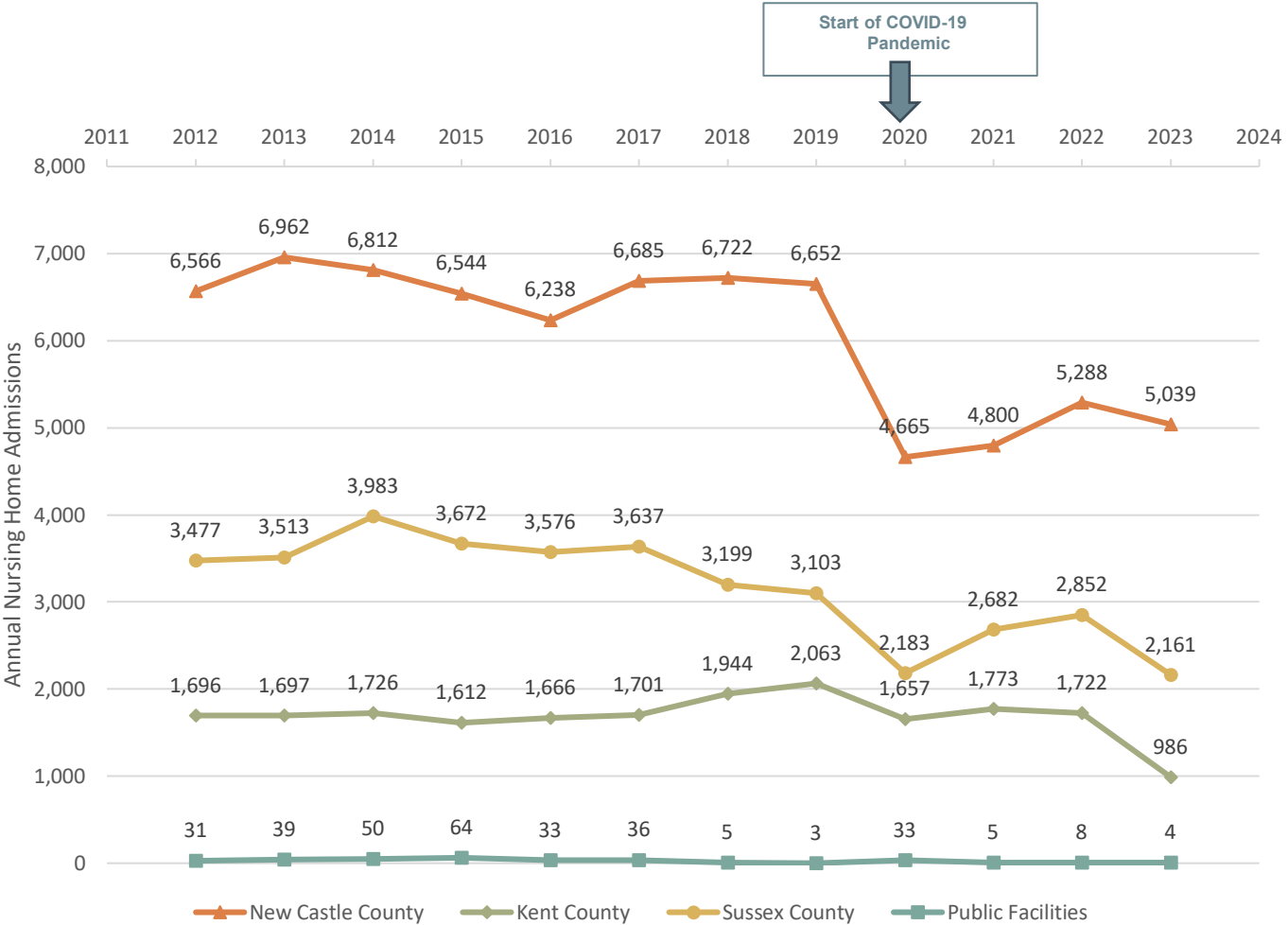
## Sussex County (12)

1. Atlantic Shores Rehab & Health Ctr
2. Cadia Rehab Renaissance
3. Country Rest Home
4. Delmar Nursing & Rehab
5. Harbor Healthcare & Rehab
6. Harrison House
7. Lofland Park
8. Manor House
9. Milford Center
10. Polaris Healthcare & Rehab
11. Seaford Center
12. The Moorings at Lewes

As practice, the annual Delaware Nursing Home Report does not include facilities that serve individuals under the age of 18, or Intermediate Care Facilities for Individuals with Intellectual Developmental Disabilities (ICF/IID). Three facilities meet the criteria for exclusion from the annual Delaware Nursing Home report:

- Exceptional Care for Children
- Stockley Center ICF/IDD
- The Mary Campbell Center

# Delaware Annual Nursing Home Admissions, 2012-2023

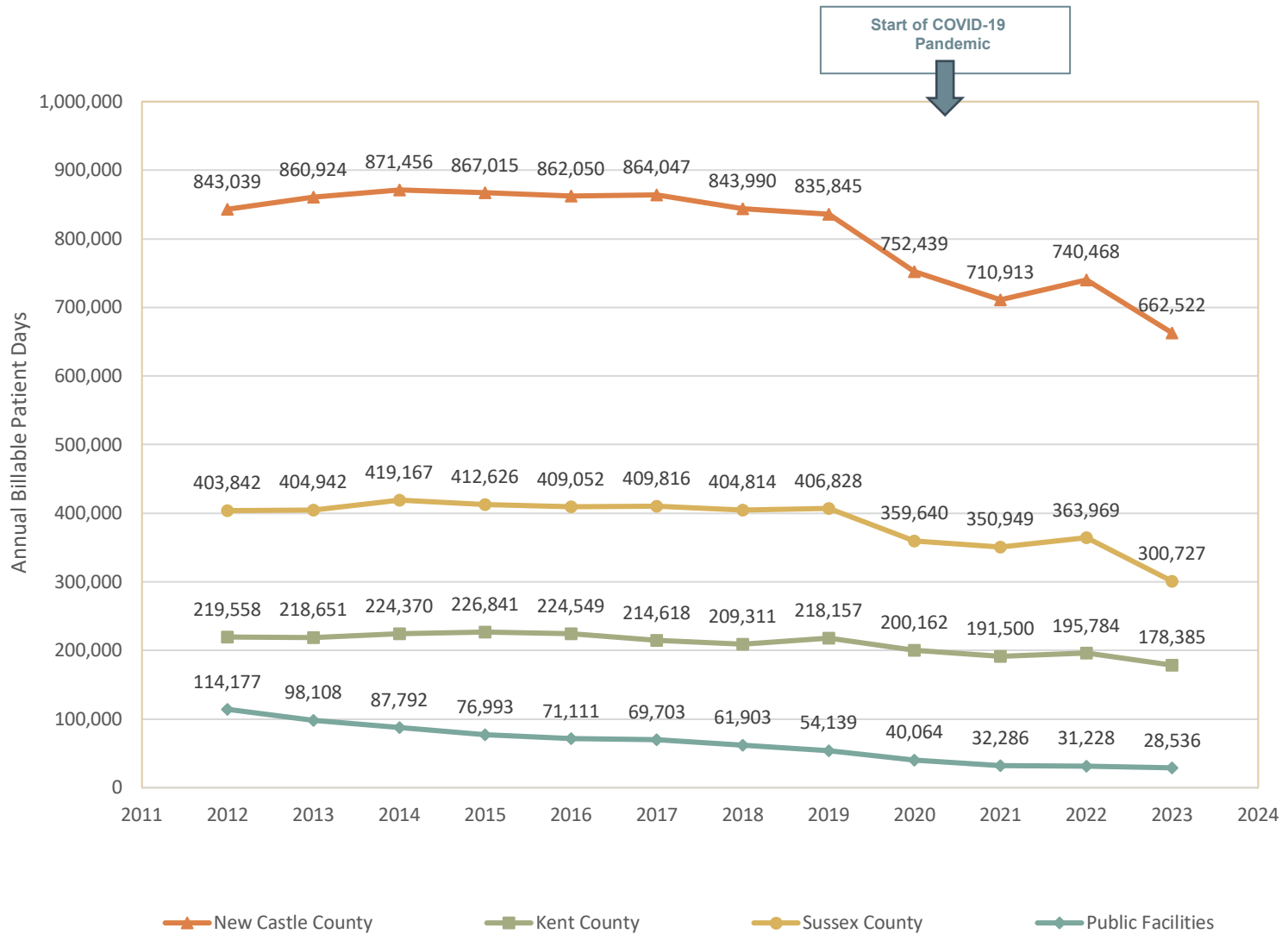


# Delaware Nursing Home Discharges, 2012-2023

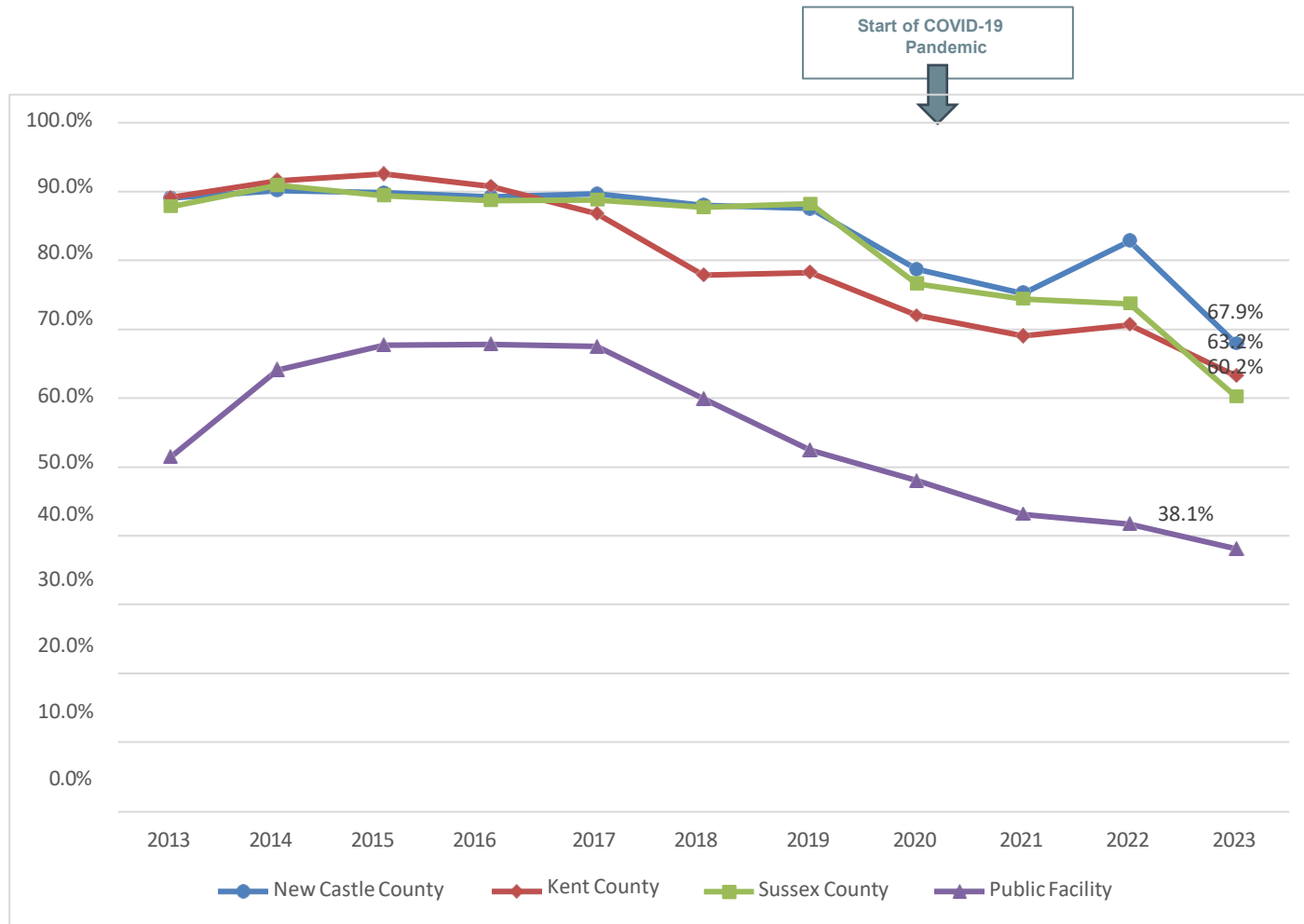




# Delaware Nursing Home Billable Patient Days, 2012-2023



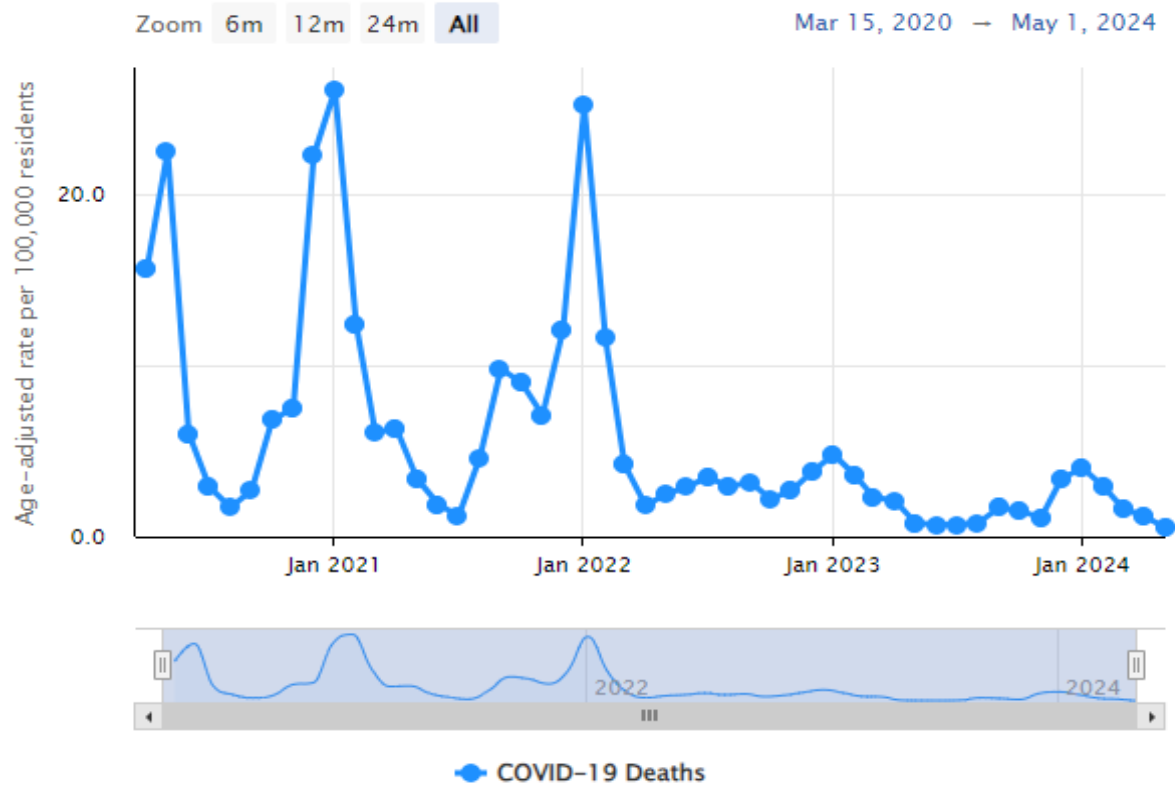
# Delaware Nursing Home Occupancy Rates, 2012-2023



## Factors influencing nursing home bed need

- **COVID -19 pandemic**
- **Long-term care workforce shortage**
- **Growth of 65+ population**

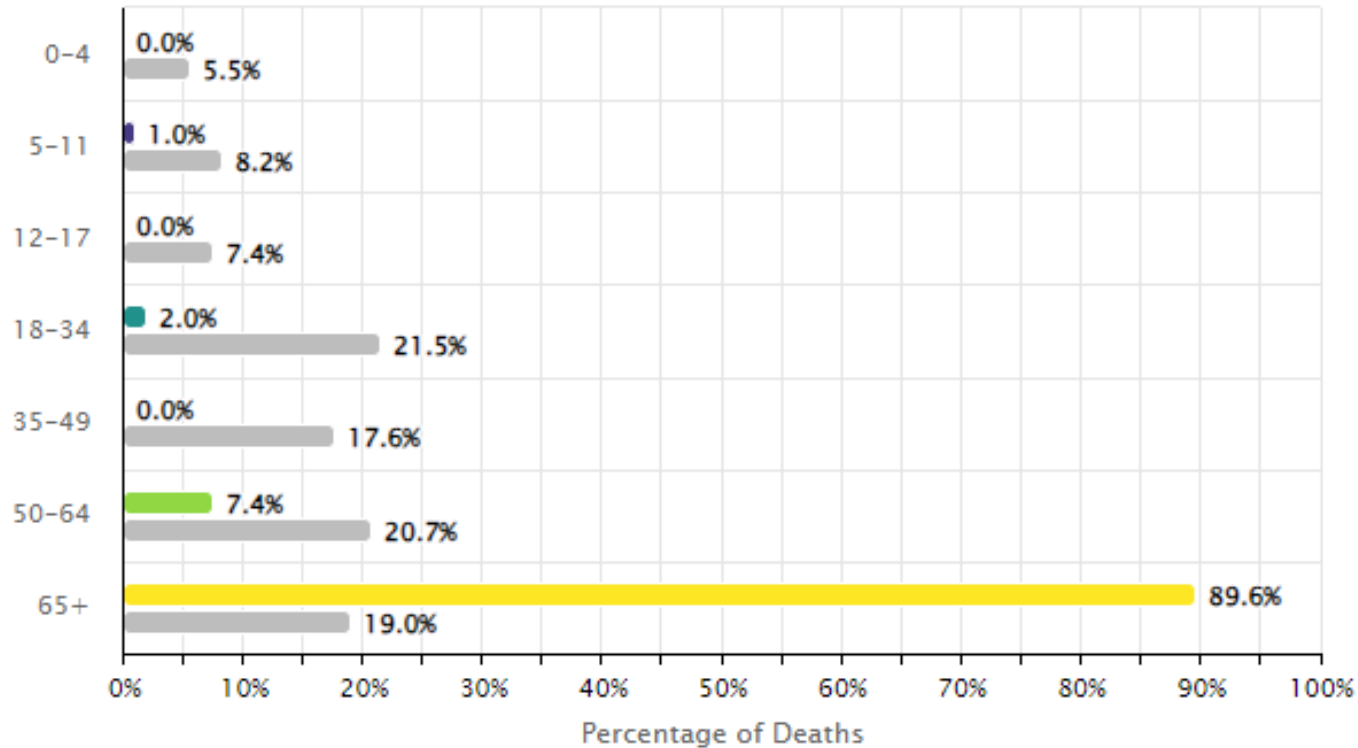
# COVID-19 Deaths in Delaware March 2020 to May 2024



Source: <https://myhealthycommunity.dhss.delaware.gov/topics/covid-19/deaths/locations/state>

# COVID-19 Deaths in Delaware by Age (Fall and Winter Virus Season 2023-2024)

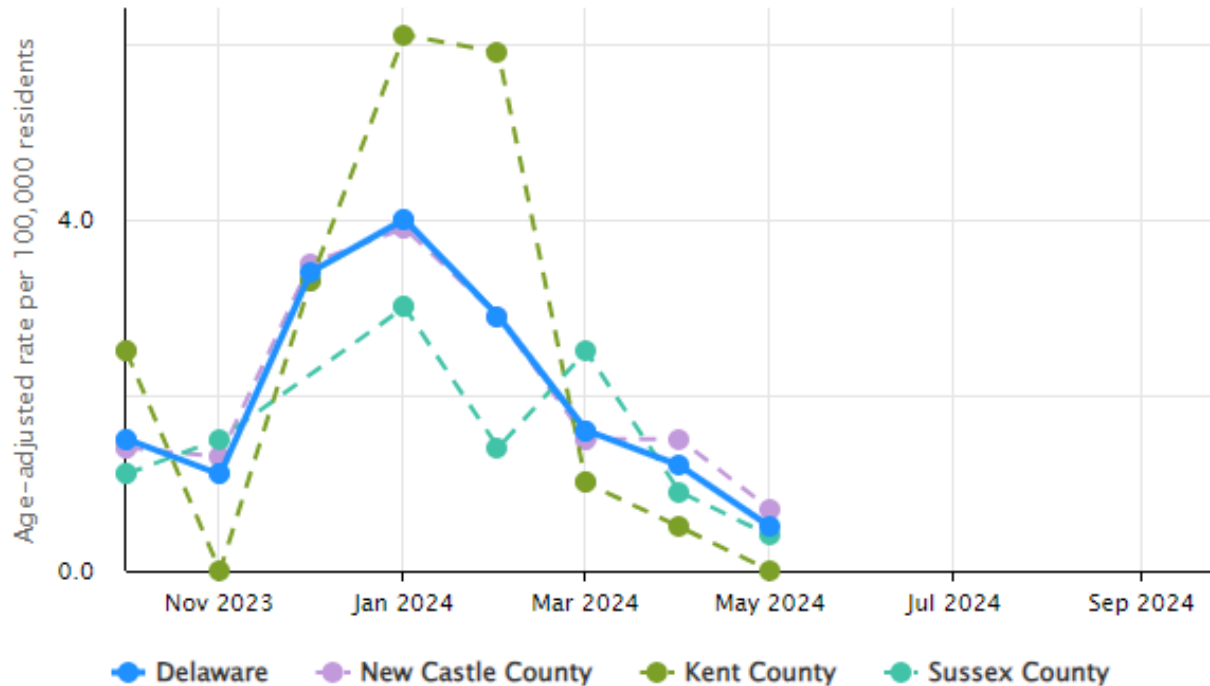
COVID-19 Deaths by Age Percentage of Deaths



Source: <https://myhealthycommunity.dhss.delaware.gov/topics/covid-19/deaths/locations/state>

# COVID-19 Deaths in Delaware by County (Fall and Winter Virus Season 2023-2024)

COVID-19 Deaths by County age-adjusted rate per 100,000 residents



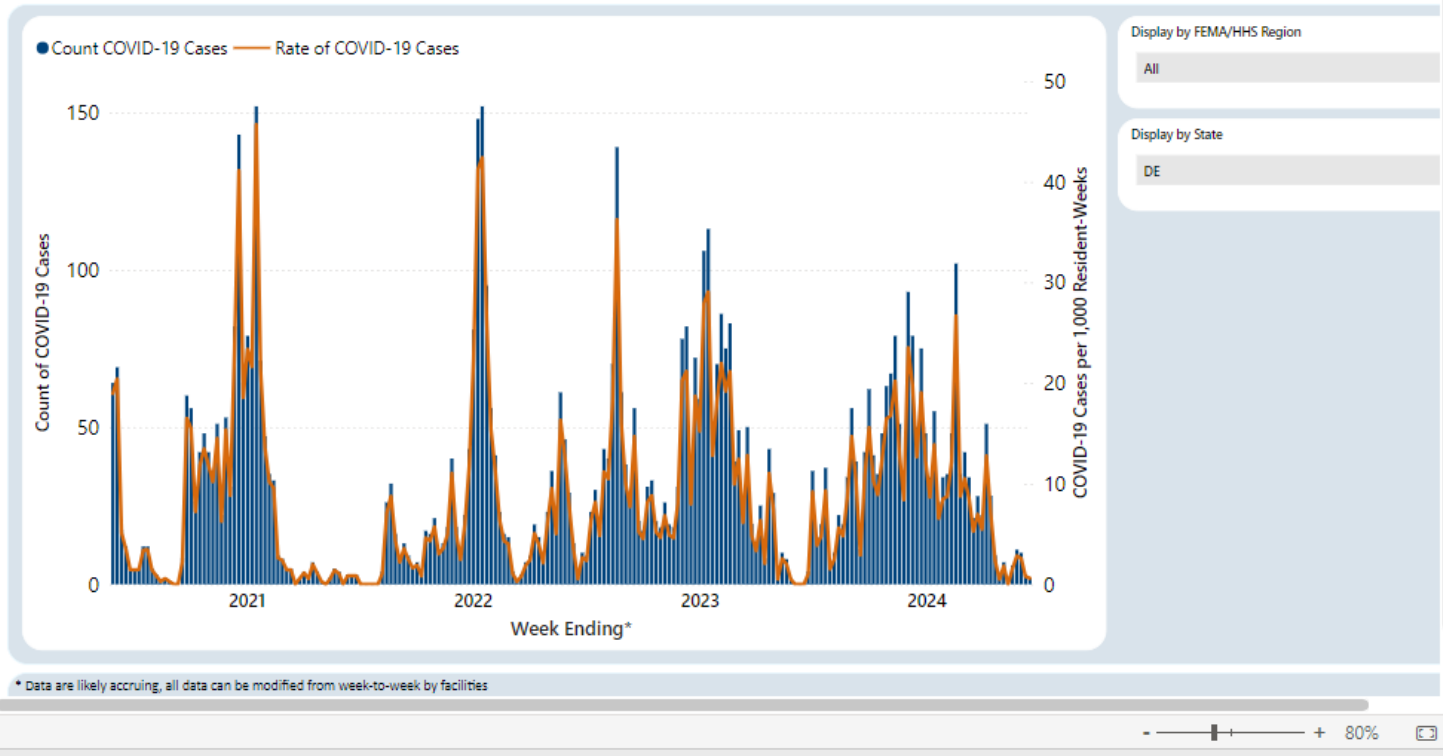
Source: <https://myhealthycommunity.dhss.delaware.gov/topics/covid-19/deaths/locations/state>

# COVID -19 Cases among Nursing Home Residents - Delaware

## Confirmed COVID-19 Cases among Residents and Rate per 1,000 Resident-Weeks in Nursing Homes, by Week—United States



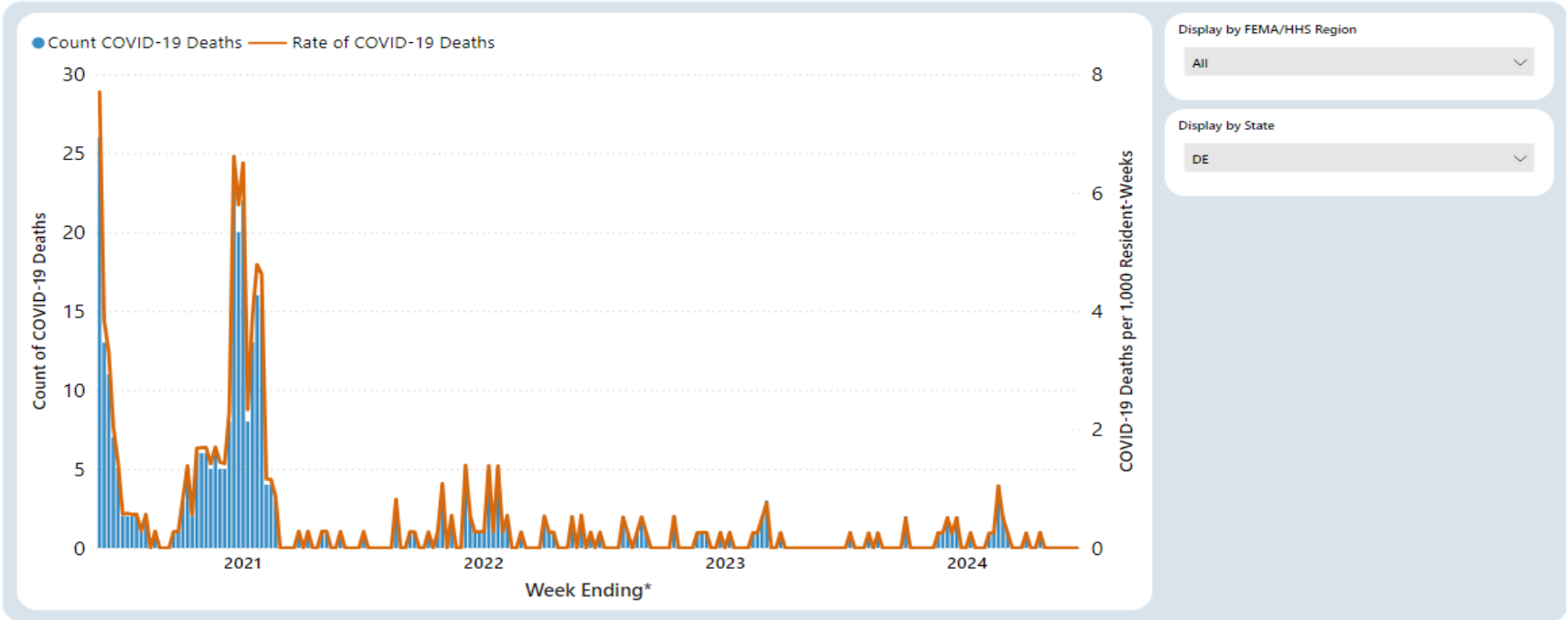
Confirmed COVID-19 Cases among Residents and Rate per 1,000 Resident-Weeks in Nursing Homes, by Week—United States



# COVID -19 Deaths among Nursing Home Residents - Delaware



COVID-19 Deaths among Residents and Rate per 1,000 Resident-Weeks in Nursing Homes, by Week — United States



\* Data are likely accruing, all data can be modified from week-to-week by facilities  
 For the purpose of creating this time-series graph, data that fail certain quality checks or appear inconsistent with surveillance protocols are assigned a value based on their patterns for data-entry or excluded from analysis  
 Data source: Centers for Disease Control and Prevention, National Healthcare Safety Network. Accessibility: [Right click on the graph area to show as table]  
 For more information: <https://www.cdc.gov/nhsn/rtc/covid19/index.html>

Data as of 6/17/2024 5:30 AM



# Long-term care workforce

- Nationally, the overall demand for workers in LTSS settings is projected to grow by **42%** between 2021 and 2036, from 1.88 million full-time equivalent (FTE) LTSS professionals to 2.67 million.
- Direct care workers – including home health aides, personal care aides, nursing assistants and psychiatric aides – make up the largest segment of the LTSS workforce. Demand for direct care workers is projected to grow by **41%** by 2036.
- Among direct care workers, demand for
  - psychiatric aides is projected to grow the fastest (135%)
  - nursing assistants (44%)
  - personal care aides (40%)
  - home health aides (38%).
- In contrast, the Bureau of Labor Statistics (BLS) projects that employment of home health and personal care aides will grow by just 22% over the next decade (2022-2032).

# Population Growth Among the 65+ Population

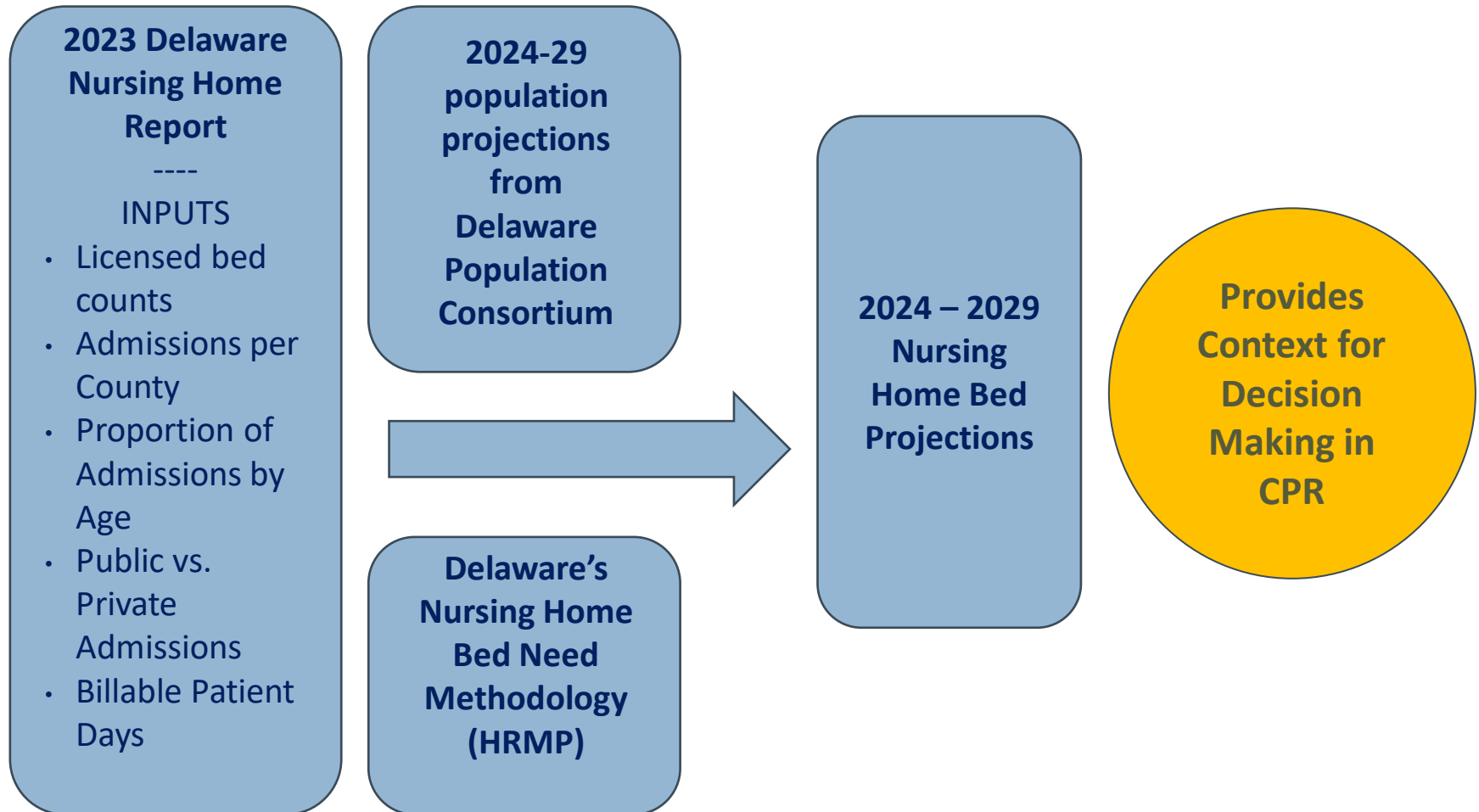
Population growth is more dramatic among older Delawareans. The expected rate of population growth increases with age. From 2020 to 2050, anticipated population increases include:

- The number of Delawareans ages 65 and older is expected to increase 41.0%, rising from 190,427 to 268,561.
- The number of Delawareans ages 65-69 and 70-74 is projected to increase 9.9% and 8.0%, respectively.
- The number of adults ages 75-79 and ages 80-84 is expected to increase 37.4% and 86.2%, respectively.
- In comparison, the number of Delawareans ages 85+ is expected to increase 150.8% from 2020-2050.

*Source: Delaware Population Consortium, 2023*

# 2024 -2029 Delaware Nursing Home Bed Projections

# Why Do We Need an Annual Nursing Home Report?



# Projected Nursing Home Bed Need is an Inexact Science

- The impact of COVID-19 pandemic on projected bed shortage / surplus is diminishing.
- Long-term care workforce projections indicate a growing shortage of skilled staff.
- Growth in the aging population.
- Facility openings / closures.
- Increases / reductions in licensed bed counts.
- Care shifting downstream throughout the Senior Living Spectrum.

# Delaware Nursing Home Bed Need Methodology

- Detailed description of the methodology is included in Delaware's Health Resources Management Plan
- **Inputs:**
  - 2023 (actual) licensed bed counts
  - 2023 (actual) billable patient days
  - 2023 (actual) proportion of admissions by age group
  - 2023 (actual) proportion of public NH admissions by county
  - 2024-29 population estimates
- **Outputs:**
  - 2024-29 (projected) billable patient days
  - 2024-29 (projected) bed need
- **Nursing Home Bed Need Projections:**
  - Compare projected bed need to current bed need to derive 2024-29 projected nursing home bed shortage / surplus

# 2024 – 2029 Nursing Home Bed Projections



Delaware

Delaware	Total Beds (2023): Private + Public	Projected Annual NH Bed Need	Projection Period	Projected Shortage / Surplus
2024-25	4,859	4079	Next year	780
2025-26	4,859	4,720	In two years	139
2026-27	4,859	4,673	In three years	186
2027-28	4,859	4,610	In four years	249
2028-29	4,859	4,553	In five years	306

# 2024 – 2029 Nursing Home Bed Projections



## New Castle County

New Castle	Total Beds (2023): Private + Public	Projected Annual NH Bed Need	Projection Period	Projected Shortage / Surplus
2024-25	2530	2299	Next year	231
2025-26	2530	2,506	In two years	24
2026-27	2530	2,478	In three years	52
2027-28	2530	2,430	In four years	100
2028-29	2530	2,415	In five years	116



# 2024 – 2029 Nursing Home Bed Projections



## Kent County

Kent	Total Beds (2023): Private + Public	Projected Annual NH Bed Need	Projection Period	Projected Shortage / Surplus
2024-25	965	646	Next year	319
2025-26	965	738	In two years	227
2026-27	965	732	In three years	233
2027-28	965	722	In four years	243
2028-29	965	703	In five years	262

# 2024 – 2029 Nursing Home Bed Projections

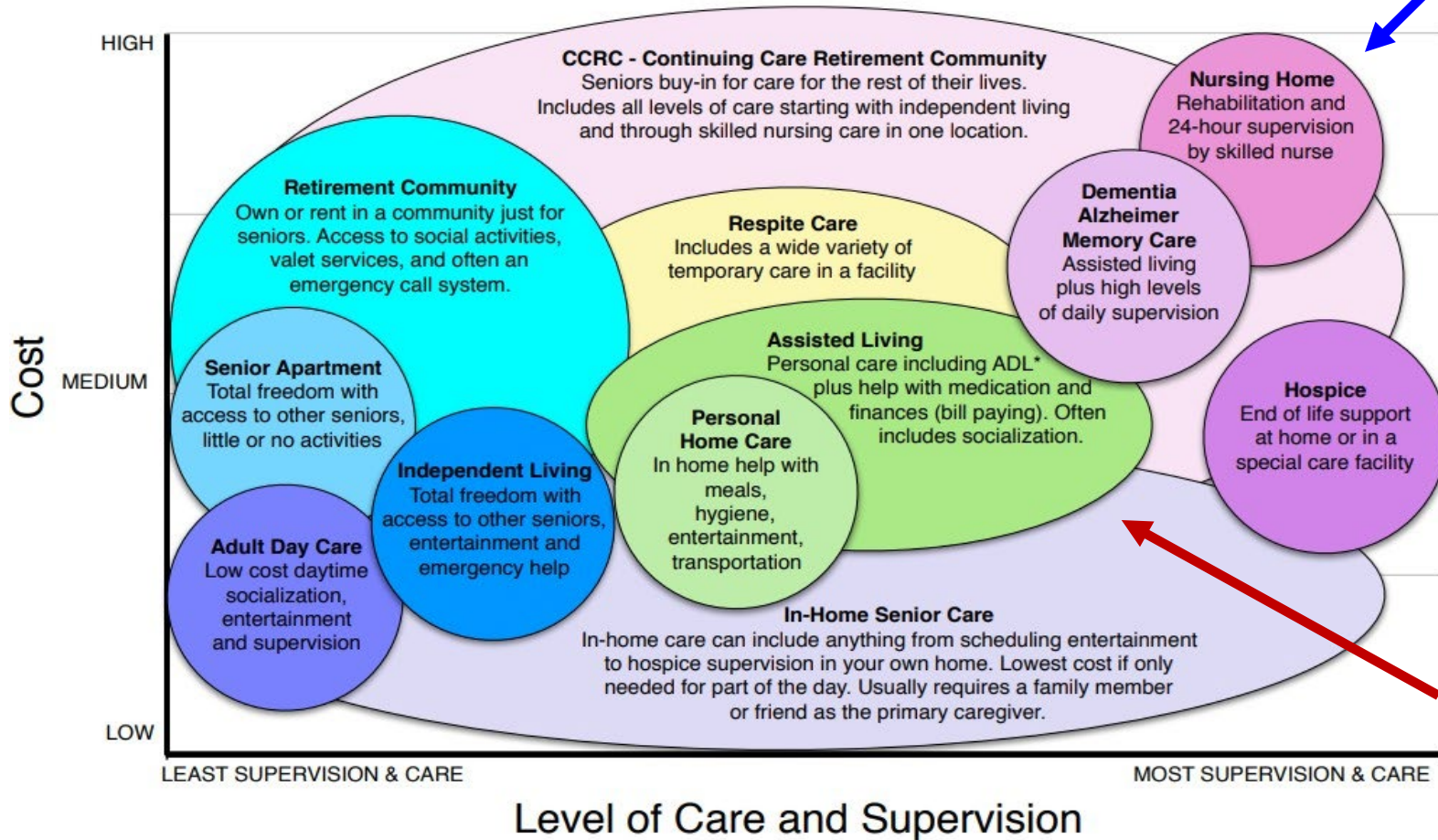


## Sussex County

Sussex	Total Beds (2023): Private + Public	Projected Annual NH Bed Need	Projection Period	Projected Shortage / Surplus
2024-25	1,364	1,185	Next year	179
2025-26	1,364	1,307	In two years	57
2026-27	1,364	1,312	In three years	53
2027-28	1,364	1,302	In four years	62
2028-29	1,364	1,275	In five years	90

# High-Level Findings from the 2023 Delaware Assisted Living Report

# The Senior Living Spectrum



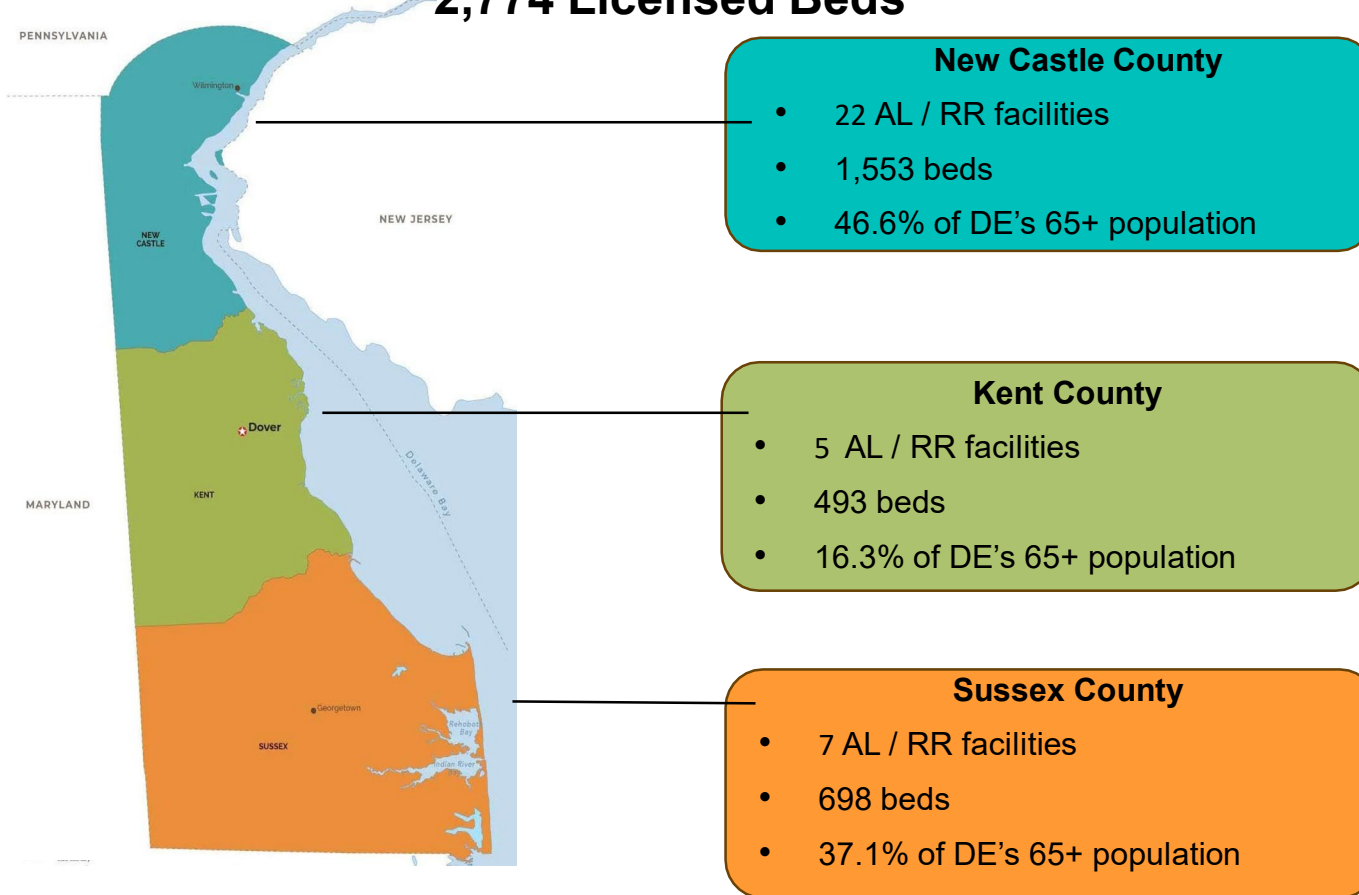
# Assisted Living / Rest Residential Facilities

- AL/RR facilities are an important part of the long-term care landscape
  - Assisted Living: facilities that provide a combination of housing, supportive services, supervision, personal assistance, and health care services to help residents with activities of daily living
  - Rest Residential: facilities that provide resident beds and personal care services for those able to manage activities of daily living without assistance
- In Delaware:
  - AL/RR facilities licensed through the Delaware Division of Health Care Quality
  - AL/RR facilities are not regulated through the CPR process.
  - Unlike the established methodology for calculating NH bed need, there is no process for calculating projected AL/RR bed need.

# Delaware Assisted Living / Rest Residential Facilities, 2023

34 Facilities \*

2,774 Licensed Beds



\* Thirty-four Assisted Living and two Rest Residential facilities are identified in this report.

Note: There were nine facilities that did not submit any data for the 2023 reporting period.

# Delaware Assisted Living / Rest Residential Facilities, 2023

New Castle County (24)	Kent County (5)	Sussex County (7)
<ol style="list-style-type: none"> <li>1. Arden Courts of Wilmington</li> <li>2. Brookdale Hockessin</li> <li>3. Cokesbury Village</li> <li>4. County House</li> <li>5. Forwood Manor</li> <li>6. Foulk Manor</li> <li>7. Gilpin Hall - <b>Rest Residential</b></li> <li>8. Harbor Chase of Wilmington</li> <li>9. Ingleside Assisted Living</li> <li>10. Ivy Gables</li> <li>11. Jeanne Jugan Residence - <b>Rest Residential</b></li> <li>12. Lodge Lane</li> <li>13. Meadowcrest at Middletown*</li> <li>14. Millcroft Assisted Living*</li> <li>15. Paramount Senior Living*</li> <li>16. Rockland Place</li> <li>17. Serenity Gardens</li> <li>18. Shipley Manor</li> <li>19. Somerford House*</li> <li>20. Somerford Place*</li> <li>21. Sunrise Assisted Living of Wilmington*</li> <li>22. The Lorelton</li> <li>23. The Summit</li> <li>24. The Vero</li> </ol>	<ol style="list-style-type: none"> <li>1. Brookdale Dover*</li> <li>2. Dover Place</li> <li>3. Harmony at Kent*</li> <li>4. State Street Assisted Living</li> <li>5. Westminster Village</li> </ol>	<ol style="list-style-type: none"> <li>1. Brandywine Senior Living at Fenwick Island</li> <li>2. Brandywine Senior Living at Seaside Pointe</li> <li>3. Manor House</li> <li>4. Milford Place*</li> <li>5. PeachTree Health Group - <b>unique patient pop.</b></li> <li>6. The Moorings at Lewes</li> <li>7. The Lodge at Historic Lewes*</li> </ol> <div data-bbox="1203 872 1800 1150" style="background-color: #e0e0e0; padding: 5px; margin-top: 10px;"> <p>* Nine facilities did not submit data for the 2023 project reporting year and are not included in this report: Brookdale Dover, Harmony at Kent, Milford Place, Millcroft, Assisted Living, Paramount Senior Living at Newark, Somerford House, Somerford Place, Sunrise AL of Wilmington, The Lodge at Historic Lewes.</p> </div>

# Delaware NH and AL/RR Utilization Metrics, 2022 - 2023

## Nursing Homes (NH)

	2022	2023	2022-23 Percent Change
Facilities	45	44	-2.2%
Licensed Beds	4,783	4,859	1.5%
Billable Patient Days	1,331,449	1,130,626	-15.0%
Occupancy	76.5%	68.0%	-8.5%
Admissions	9,870	8,193	- 17.0%
Discharges	9,107	7,564	- 15.9%

## Assisted Living / Rest Residential (AL/RR)\*\*

	2022	2023	2022-23 Percent Change**
Facilities	32	34	6%
Licensed Beds	2,297	2,744	18.2%
Billable Patient Days	584,579	240,043	-58.9%
Occupancy	69.7%	36.8%	-32.9%
Move-Ins	669	476	-41.1%
Move-Outs	695	418	-43.2%

\*\*Data for the following facilities are not included: Brookdale Dover, Harmony at Kent, Milford Place, Millcroft Assisted Living, Paramount Senior Living at Newark, Somerford House, Somerford Place, Sunrise AL of Wilmington, The Lodge at Historic Lewes.



## Takeaways

- Although NH utilization metrics continued to rebound in 2023 from the impacts of the pandemic, metrics have not yet returned to pre-pandemic levels.
- The HRB uses annual nursing home data to predict future bed need in Delaware. Predicting future supply and demand for elder care services is a complex process.
  - All counties are projected to have a nursing home bed surplus through 2029.
- The 2024-2029 NH should be interpreted with caution due to the ongoing issues with the impacts of COVID-19 and facility staffing.

# Today's Takeaways

- AL/RR bed need calculations do not have a formal methodology, as they are not subject to the CPR process.
- The Delaware Assisted Living Utilization Statistical Report produced by DHCC annually to supplement the Nursing Home Report.
  - DHCC is strengthening data reporting channels with all AL facilities.
  - Future iterations of the Delaware Assisted Living Report will provide more information on Assisted Living / Rest Residential trends statewide.

**Thank You**