

# **Delaware's 2021 Long-Term Care Landscape**

**Delaware Health Resources Board  
May 26, 2022**

# Long-Term Care Surveillance in Delaware

- A. **2021 DNHUSR** (Delaware Nursing Home Utilization Statistical Report)
- B. **2021 DALUSR** (Delaware Assisted Living Utilization Statistical Report)
- C. **2022-27 Delaware Nursing Home Bed Projections**

# Activities Subject to CPR Review in Delaware

- **Construction of a new health care facility or acquisition of a nonprofit healthcare facility**
  - Acute Care Hospitals
  - Obstetric Care (*Hospital-Based*)
  - Nursing Homes (*licensed as SNF or ICF by Delaware Office of Health Facilities and Licensing*)
  - Freestanding Surgery Centers
- **Expenditure by or on behalf of a health care facility in excess of \$5.8M**
- **Change in bed capacity of a health facility which increases total number of beds by more than 10 beds or more than 10% of total licensed bed capacity over a 2-year period**
- **Acquisition of major medical equipment, not including replacement equipment**

# Elder Care Continuum

- **Home-based care**



- **Community-based care**



- **Facility-based care**



- **Assisted Living / Rest Residential (AL/RR)**

- Not included in Delaware's CPR process
- AL: supportive services, supervision, personal assistance, and health care services to meet residents' ADL needs
- RR: personal care services for individuals who can managed ADLs without assistance
- In 2021, 34 AL/RR facilities in Delaware

- **Nursing Home (NH)**

- Included in Delaware's CPR process
- Skilled nursing beds: beds occupied by patients who require skilled nursing and supportive care on a continuous basis
- Intermediate care beds: beds occupied by patients who receive skilled nursing supervision and supportive care on a recurring basis, but who do not require continuous skilled nursing care
- Short-term rehab and long-term placements
- In 2021, 47 licensed NH facilities in Delaware

# Delaware's Assisted Living / Rest Residential Facilities, 2021

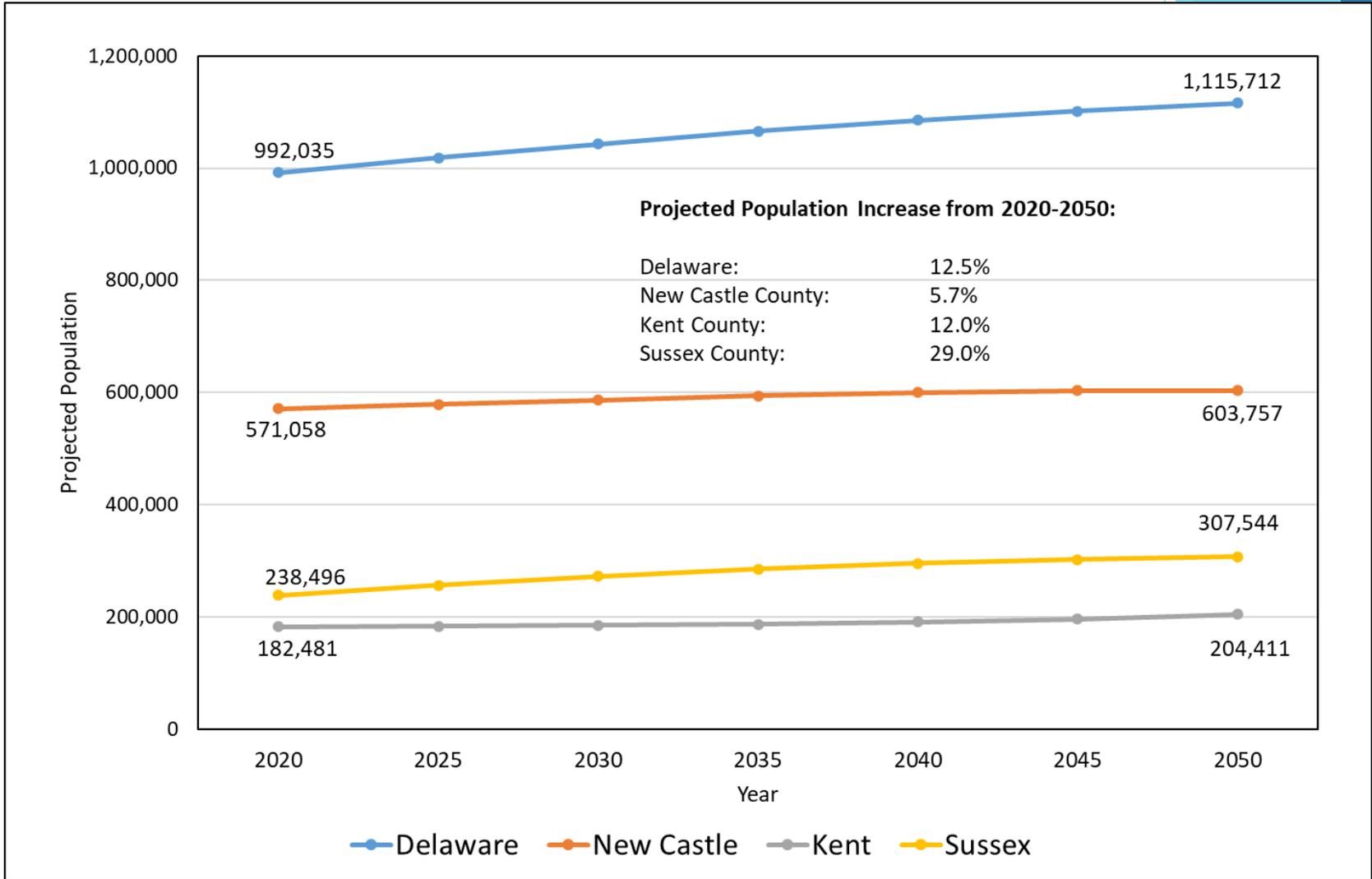
New Castle County	Kent County	Sussex County
<ol style="list-style-type: none"> <li>1. Arden Courts of Wilmington</li> <li>2. Brookdale Hockessin</li> <li>3. Forwood Manor</li> <li>4. Foulk Manor North</li> <li>5. Foulk Manor South <i>*closed 2/15/22</i></li> <li>6. Gilpin Hall <i>*Rest Residential</i></li> <li>7. HarborChase of Wilmington</li> <li>8. Ingleside Assisted Living</li> <li>9. Ivy Gables</li> <li>10. Jeanne Jugan Residence <i>*Rest Residential</i></li> <li>11. Lodge Lane</li> <li>12. Meadowcrest at Middletown <i>*opened 9/1/21</i></li> <li>13. Millcroft Assisted Living</li> <li>14. OakBridge Terrace at Cokesbury Village</li> <li>15. OakBridge Terrace at Country House</li> <li>16. Paramount Senior Living</li> <li>17. Rockland Place</li> <li>18. Serenity Gardens</li> <li>19. Shipley Manor</li> <li>20. Somerford House</li> <li>21. Somerford Place</li> <li>22. Sunrise Assisted Living of Wilmington</li> <li>23. The Lorelton</li> <li>24. The Summit</li> </ol>	<ol style="list-style-type: none"> <li>1. Brookdale Dover</li> <li>2. Dover Place</li> <li>3. State Street Assisted Living</li> <li>4. 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. Milford Place</li> <li>4. OakBridge Terrace at Manor House</li> <li>5. PeachTree Health Group <i>*unique pt. pop.</i></li> <li>6. The Moorings at Lewes</li> </ol>
<ul style="list-style-type: none"> <li>• Meadowcrest at Middletown Assisted Living obtained provisional licensure in September 2021. This facility is not included in the 2021 DALUSR.</li> </ul>		

# Delaware Nursing Home Facilities, 2021

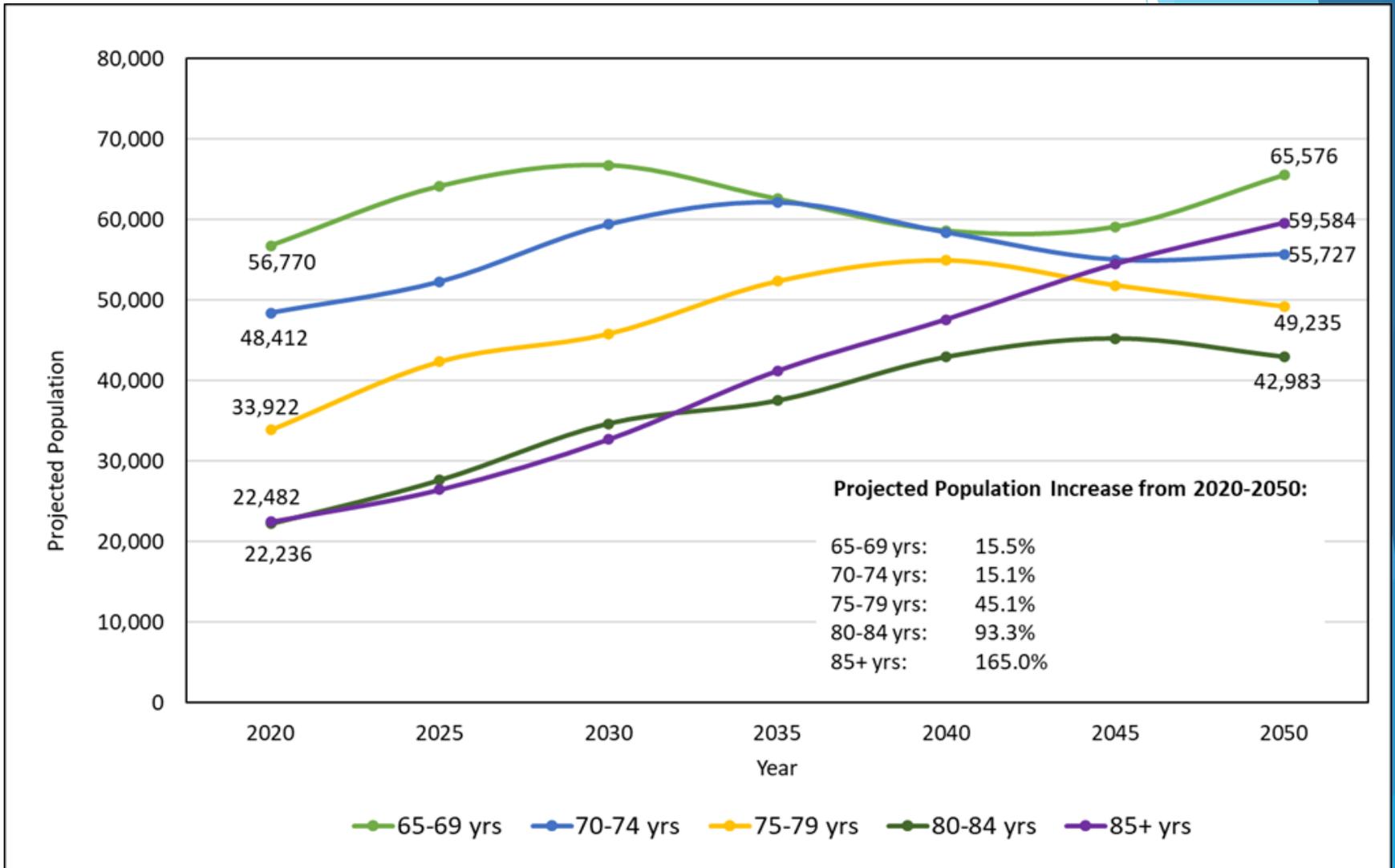
New Castle County	Kent County	Sussex County
<ol style="list-style-type: none"> <li>1. Cadia Rehab Broadmeadow</li> <li>2. Cadia Rehab Pike Creek</li> <li>3. Cadia Rehab Silverside</li> <li>4. Churchman Village</li> <li>5. Complete Care at Brackenville</li> <li>6. Complete Care at Hillside</li> <li>7. Foulk Manor North</li> <li>8. Foulk Manor South <i>*closed 12/31/21</i></li> <li>9. Forwood Manor <i>*closed 7/1/21</i></li> <li>10. Gilpin Hall</li> <li>11. Jeanne Jugan Residence</li> <li>12. Kentmere Rehab &amp; Healthcare</li> <li>13. Kutz Rehab &amp; Nursing</li> <li>14. Millcroft Nursing Home</li> <li>15. New Castle Health &amp; Rehab</li> <li>16. Newark Manor</li> <li>17. Parkview Nursing &amp; Rehab</li> <li>18. ProMedica Pike Creek</li> <li>19. ProMedica Wilmington</li> <li>20. Regal Heights Healthcare &amp; Rehab</li> <li>21. Regency Healthcare &amp; Rehab</li> <li>22. Shipley Manor Health Care</li> <li>23. Springs Rehabilitation at Brandywine</li> <li>24. Stonegates</li> <li>25. Weston Senior Living Center</li> <li>26. WillowBrooke Court Cokesbury Village</li> <li>27. WillowBrooke Court Country House</li> </ol>	<ol style="list-style-type: none"> <li>1. Cadia Rehab Capitol</li> <li>2. Complete Care at Silver Lake</li> <li>3. Courtland Manor</li> <li>4. DHCI <i>*Public NH Facility</i></li> <li>5. Delaware Veterans Home <i>*unique pt. pop.</i></li> <li>6. Pinnacle Rehab &amp; Health</li> <li>7. The Center at Eden Hill</li> <li>8. Westminster Village Health Center</li> </ol>	<ol style="list-style-type: none"> <li>1. Atlantic Shores Rehab &amp; Health Ctr</li> <li>2. Cadia Rehab Renaissance</li> <li>3. Country Rest Home</li> <li>4. Delmar Nursing &amp; Rehab</li> <li>5. Harbor Health Care</li> <li>6. Harrison Senior Living</li> <li>7. Lofland Park Center</li> <li>8. Milford Center</li> <li>9. Polaris Healthcare &amp; Rehab</li> <li>10. Seaford Center</li> <li>11. The Moorings at Lewes</li> <li>12. WillowBrooke Court Manor House</li> </ol>

- 47 NHs shown above included in 2021 DNHUSR
- As standard, the DNHUSR does not include facilities that serve individuals under the age of 18, as well as Intermediate Care Facilities for Individuals with Intellectual Developmental Disabilities (ICF/IID):
  - Exceptional Care for Children
  - Stockley Center ICF/IDD
  - The Mary Campbell Center

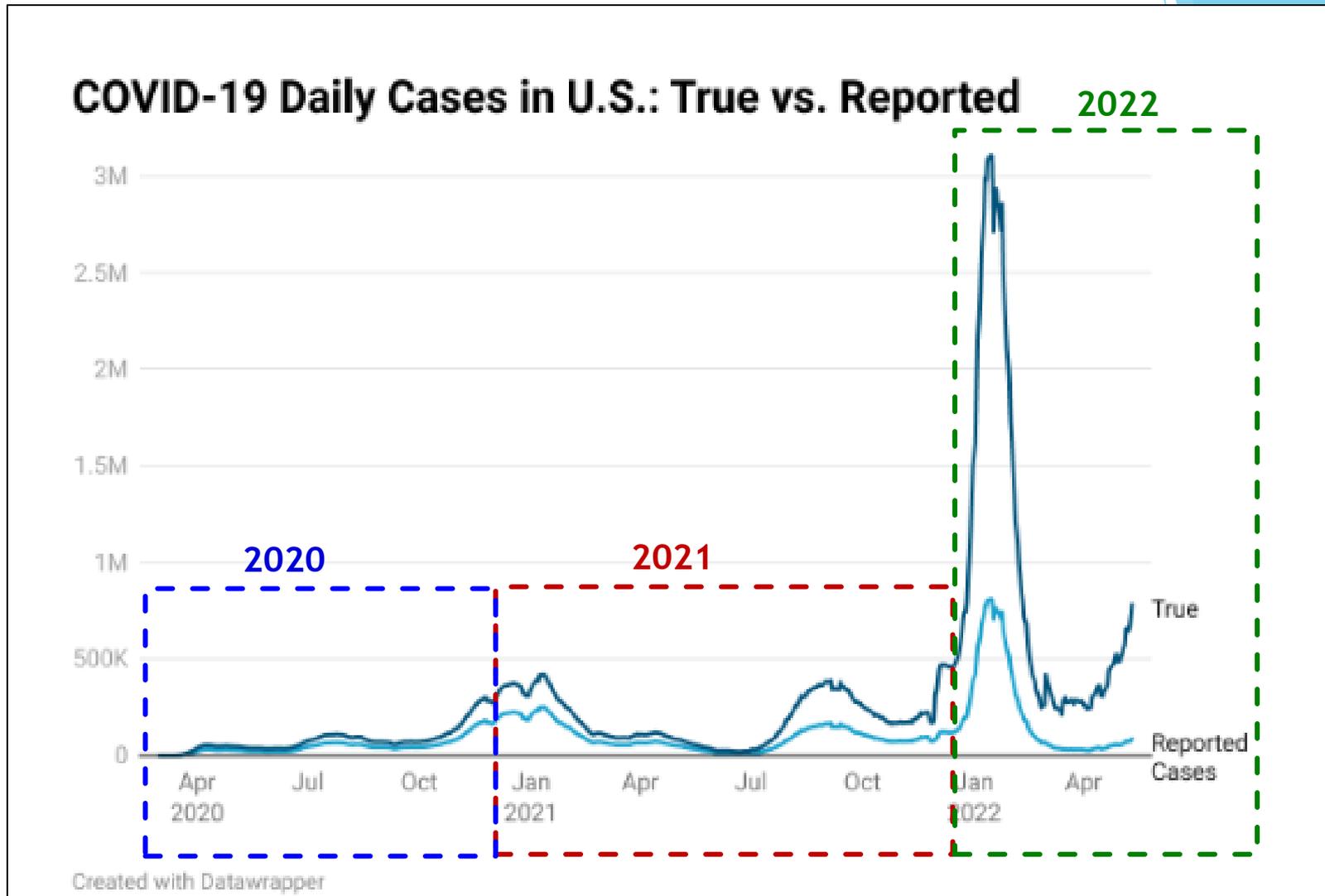
# TOTAL Population Growth in Delaware, 2020-2050



# 65+ Population Growth in Delaware, 2020-2050, by Cohort



# The COVID-19 Landscape: 2020-Present



# Delaware NH and AL/RR Utilization Metrics, 2019 - 2021

## Assisted Living / Rest Residential

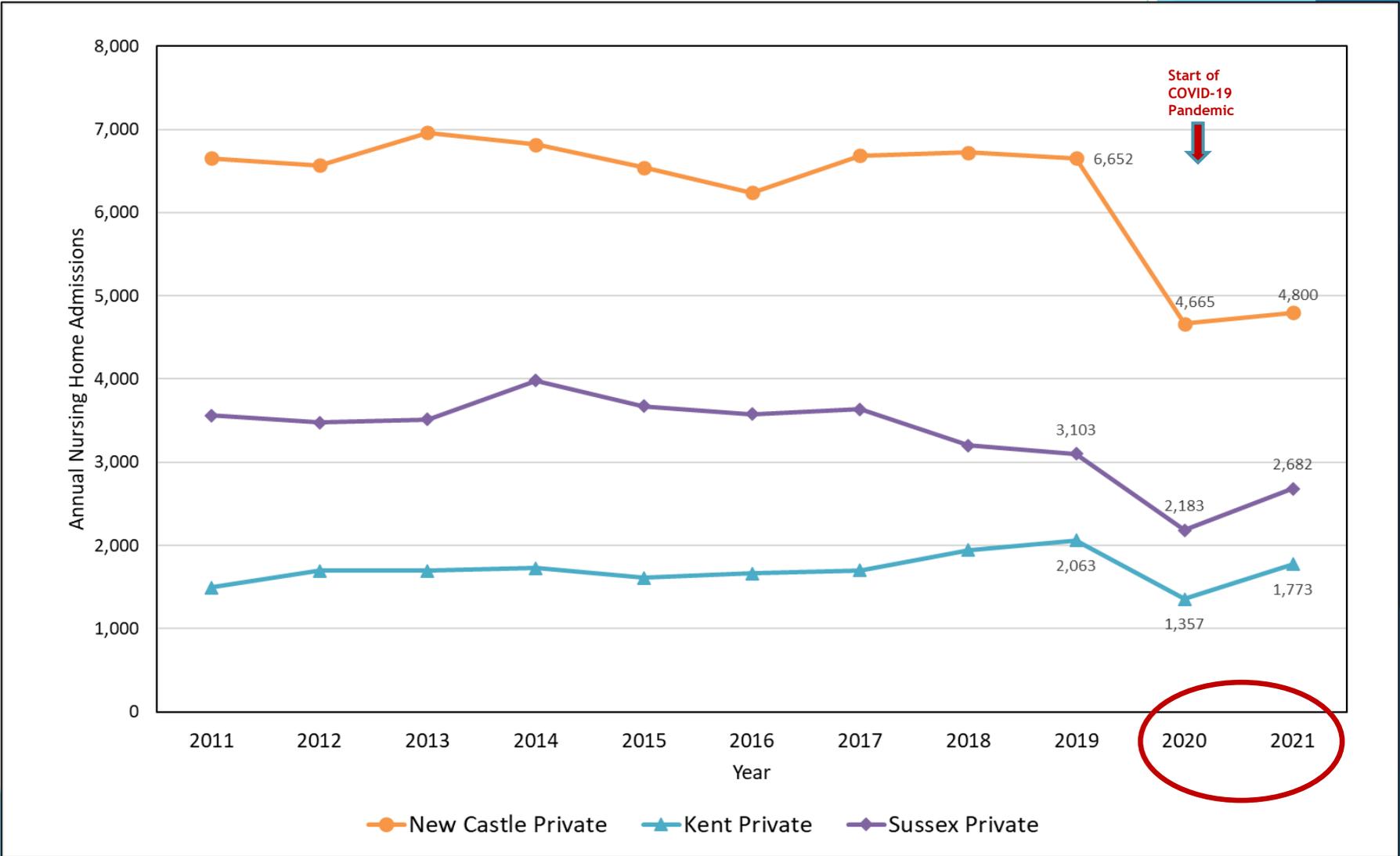
	2019	2020	2021	2020-21 Percent Change
Facilities	34	34	34	0.0%
Licensed Beds	2,254	2,234	2,320	3.8%
Billable Patient Days	633,148	619,277	602,514	-2.7%
Occupancy	77.0%	75.9%	71.2%	-6.2%
<b>Move-Ins</b>	<b>896</b>	<b>564</b>	<b>809</b>	<b>43.4%</b>
<b>Move-Outs</b>	<b>857</b>	<b>751</b>	<b>736</b>	<b>-2.0%</b>

## Nursing Homes

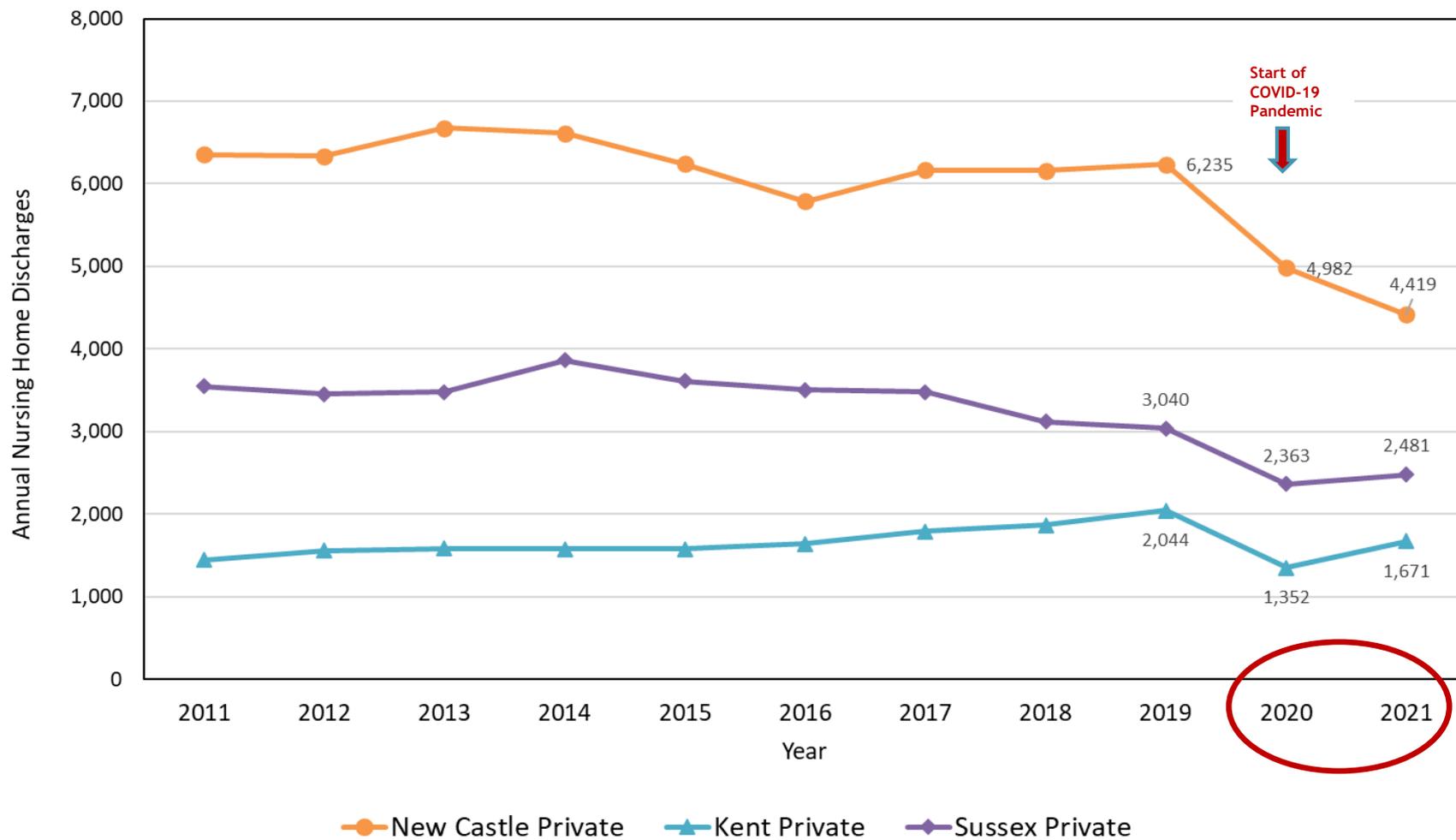
	2019	2020	2021	2020-21 Percent Change
Facilities	47	48	47	-2.1%
Licensed Beds	4,928	4,953	4,926	-0.5%
Billable Patient Days	1,514,969	1,352,305	1,285,648	-4.9%
Occupancy	84.2%	75.7%	72.6%	-4.1%
<b>Admissions</b>	<b>11,821</b>	<b>8,238</b>	<b>9,260</b>	<b>12.4%</b>
<b>Discharges</b>	<b>11,353</b>	<b>8,758</b>	<b>8,583</b>	<b>-2.0%</b>

Source: 2020 Delaware Nursing Home Utilization Statistical Report; 2020 Delaware Assisted Living Utilization Statistical Report

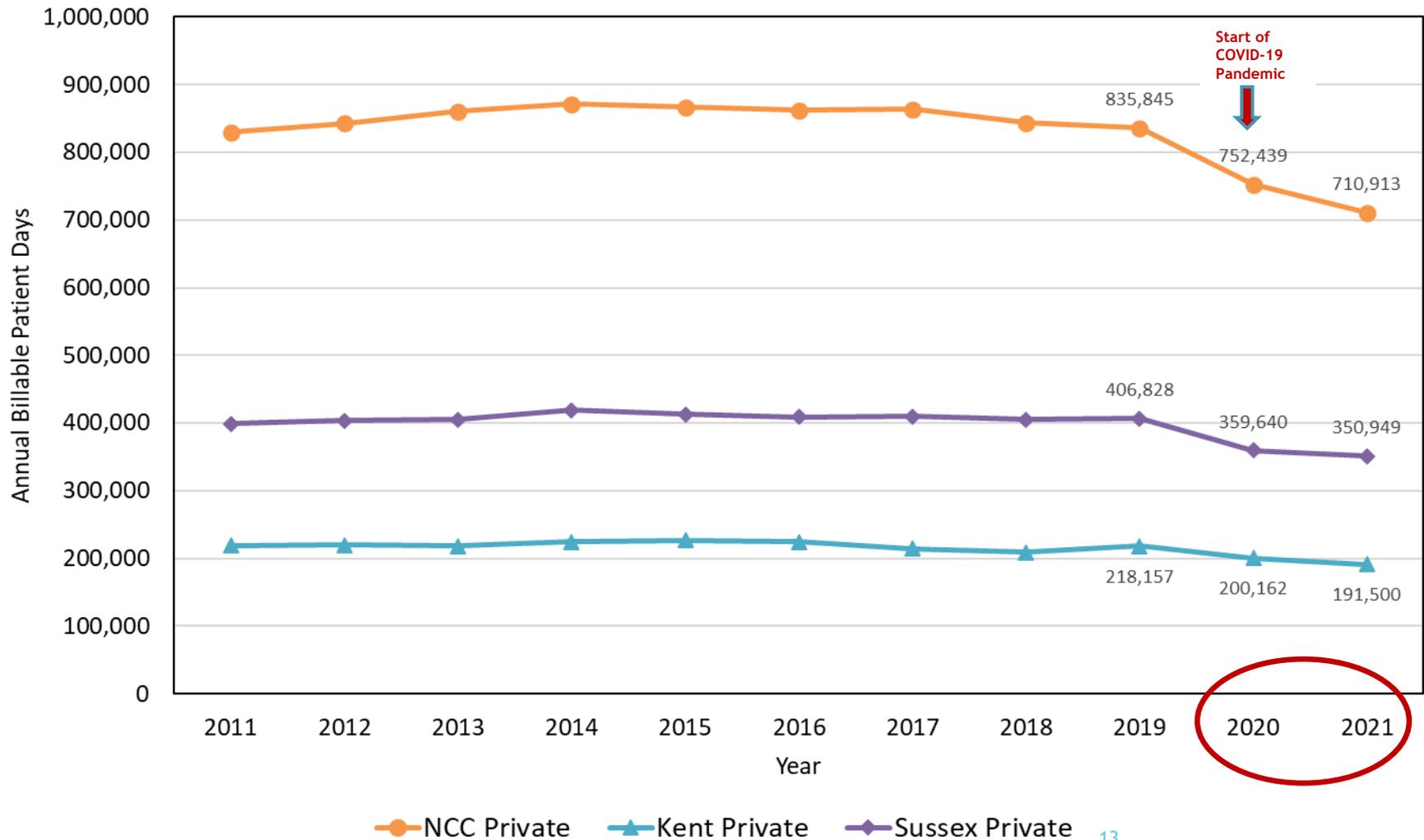
# Delaware Private Nursing Home Admissions, 2011-2021



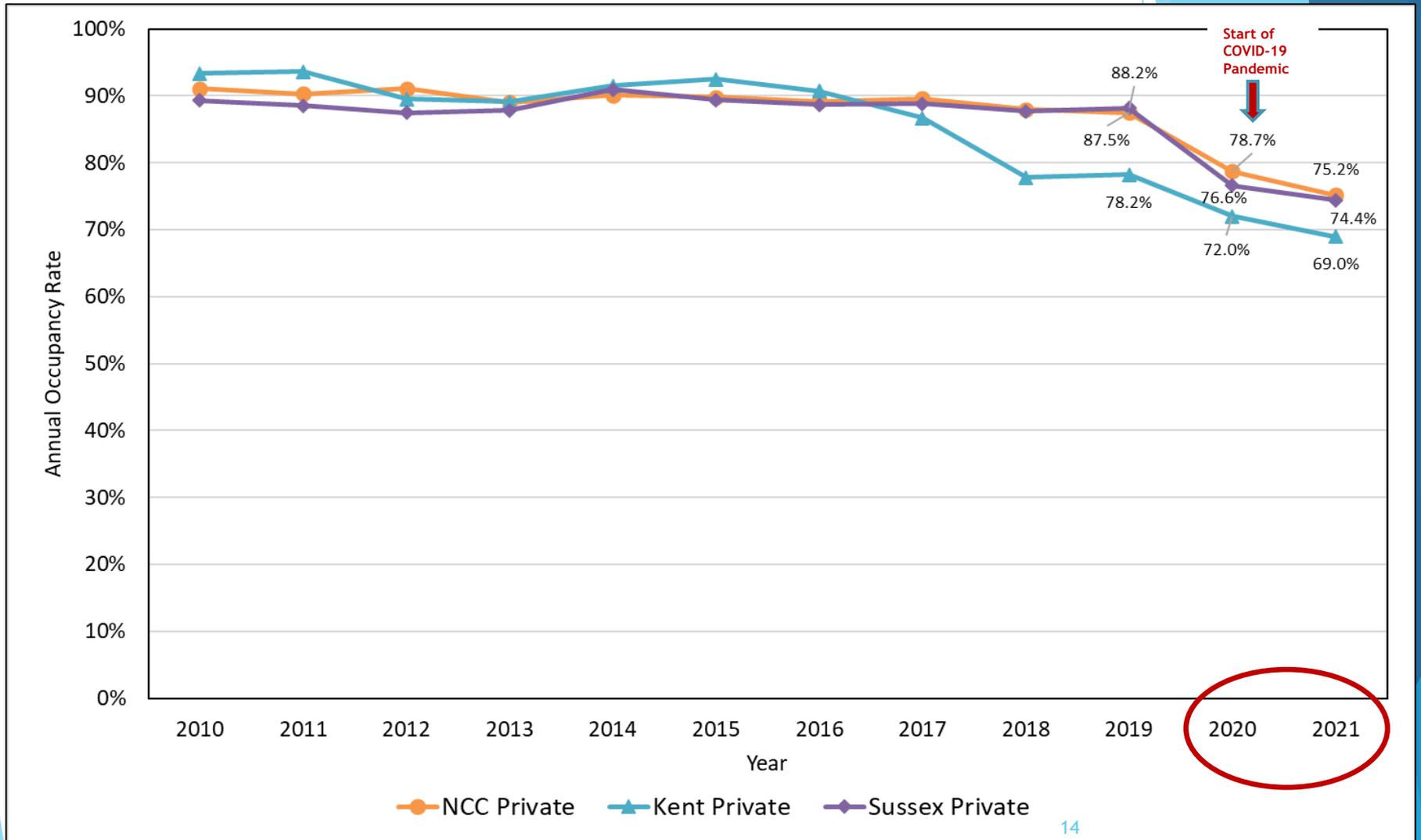
# Delaware Private Nursing Home Discharges, 2011-2021



# Delaware Private Nursing Home Billable Patient Days, 2011-2021



# Delaware Nursing Home Occupancy Rates, 2011-2021





**Q: Does Delaware has enough Nursing Home beds to meet demand in the coming years?**

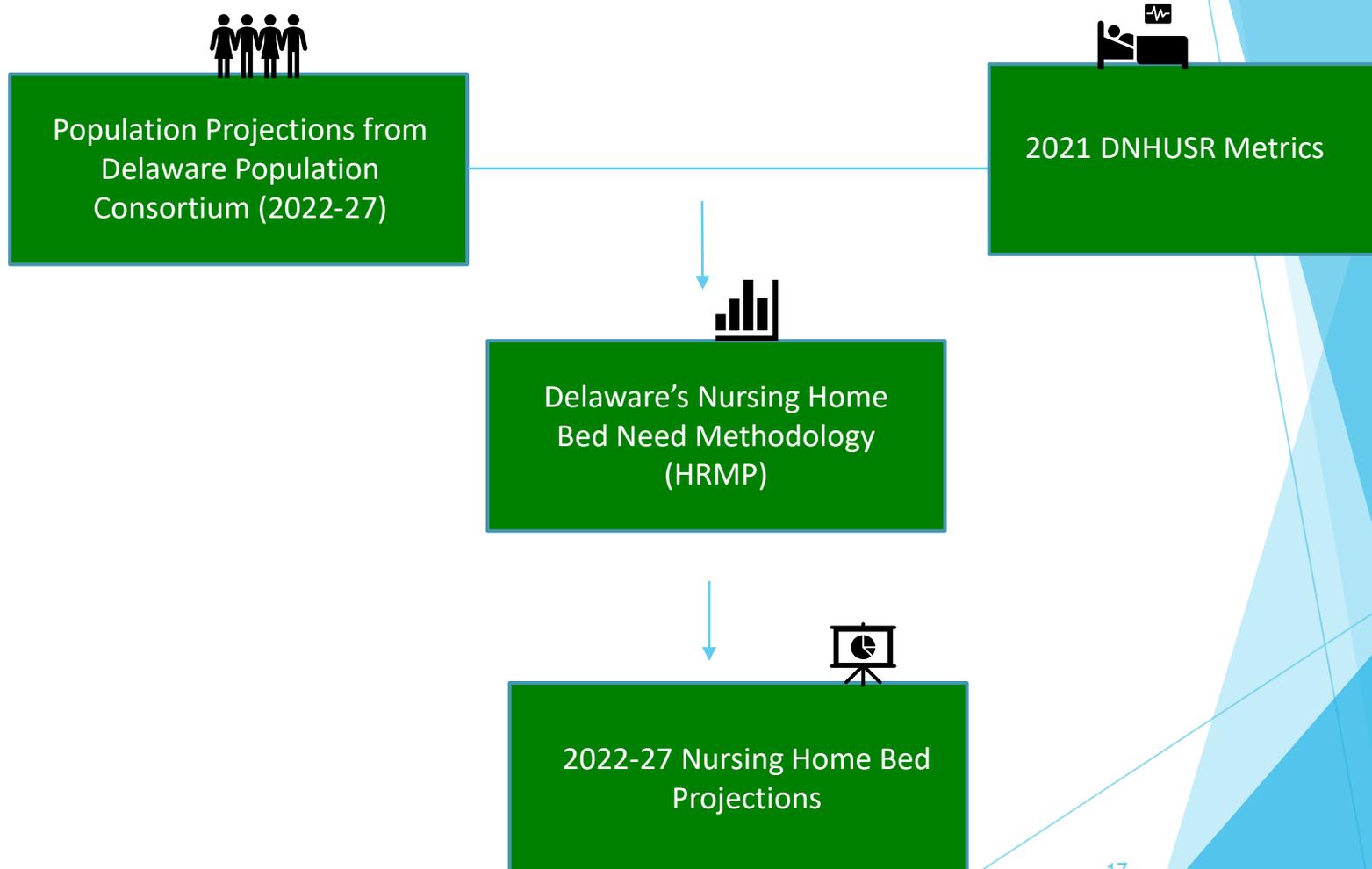


**A: We can use utilization data from today to predict tomorrow's bed need and determine if Delaware has a projected shortage or surplus of Nursing Home beds.**

# Predicting NH Bed Need is an Inexact Science

- **Many factors affect LTSS supply and demand.**
  - Size of the aging population
  - Payors incentivized to align level of LTSS care with patient needs
  - Members incentivized to avoid / reduce costly facility stays
  - Care shifting downstream toward Home & Community Based Services (HCBS)
  - Facility openings, expansions, and closures
  - Ongoing impacts of the COVID-19 pandemic

# Using Today's Data to Predict Tomorrow's Nursing Home Bed Need



# 2022-27 Nursing Home Bed Need Projections

## Inputs:

- 2021 billable patient days
- 2021 proportion of admissions by age group
- 2021 proportion of public NH admissions by county
- 2022-27 population estimates

## Outputs:

- 2022-27 projected billable patient days
- 2022-27 projected bed need

## Projections:

- 2022-27 projected nursing home bed shortage / surplus

# 2022 – 2027 Delaware Nursing Home Bed Projections

<b>Delaware</b>	<b>Total Beds (2021): Private + Public</b>	<b>Projected Annual NH Bed Need</b>	<b>Projection Period</b>	<b>Shortage / Surplus Scenario 1: Private AND Public Beds</b>
2022-23	4,808	4,033	Next year	775
2022-24	4,808	4,166	In two years	642
2022-25	4,808	4,288	In three years	520
2022-26	4,808	4,406	In four years	402
2022-27	4,808	4,522	In five years	286
<b>New Castle</b>	<b>Total Beds (2021): Private + Public</b>	<b>Projected Annual NH Bed Need</b>	<b>Projection Period</b>	<b>Shortage / Surplus Scenario 1: Private AND Public Beds</b>
2022-23	2,553	2,248	Next year	305
2022-24	2,553	2,314	In two years	239
2022-25	2,553	2,374	In three years	179
2022-26	2,553	2,436	In four years	117
2022-27	2,553	2,498	In five years	55
<b>Kent</b>	<b>Total Beds (2021): Private + Public</b>	<b>Projected Annual NH Bed Need</b>	<b>Projection Period</b>	<b>Shortage / Surplus Scenario 1: Private AND Public Beds</b>
2022-23	753	599	Next year	154
2022-24	753	613	In two years	140
2022-25	753	625	In three years	128
2022-26	753	636	In four years	117
2022-27	753	645	In five years	108
<b>Sussex</b>	<b>Total Beds (2021): Private + Public</b>	<b>Projected Annual NH Bed Need</b>	<b>Projection Period</b>	<b>Shortage / Surplus Scenario 1: Private AND Public Beds</b>
2022-23	1,502	1,185	Next year	317
2022-24	1,502	1,233	In two years	269
2022-25	1,502	1,278	In three years	224
2022-26	1,502	1,320	In four years	182
2022-27	1,502	1,361	In five years	141

# Top Takeaways

- The DHCC collects monthly utilization data from all licensed AL/RR and NH facilities in Delaware. Utilization data are aggregated and summarized in the annual DALUSR and DNHUSR.
- In Delaware, NHs fall under the CPR process but AL/RR facilities do not.
- **In 2021, AL/RR and NH utilization metrics partially rebounded from the devastating impact of the COVID-19 pandemic. However, they have not yet returned to pre-pandemic levels.**
- We use annual NH data to predict future NH bed need in Delaware. Because AL/RR facilities are not subject to CPR process, there is no formal methodology for calculating AL/RR bed need.
- Predicting future supply and demand for elder care services is a complex process.
- **Delaware, and all three counties, are projected to have surplus NH beds through 2027.**
- The 2022-27 NH bed need projections should be interpreted with caution due to the ongoing impacts of COVID-19 on facility-based elder care services.

**Thank You**