2020 Delaware Nursing Home Report

2020 Delaware Assisted Living Utilization Report

2021-26 Delaware Nursing Home Bed Projections

Delaware Health Resources Board
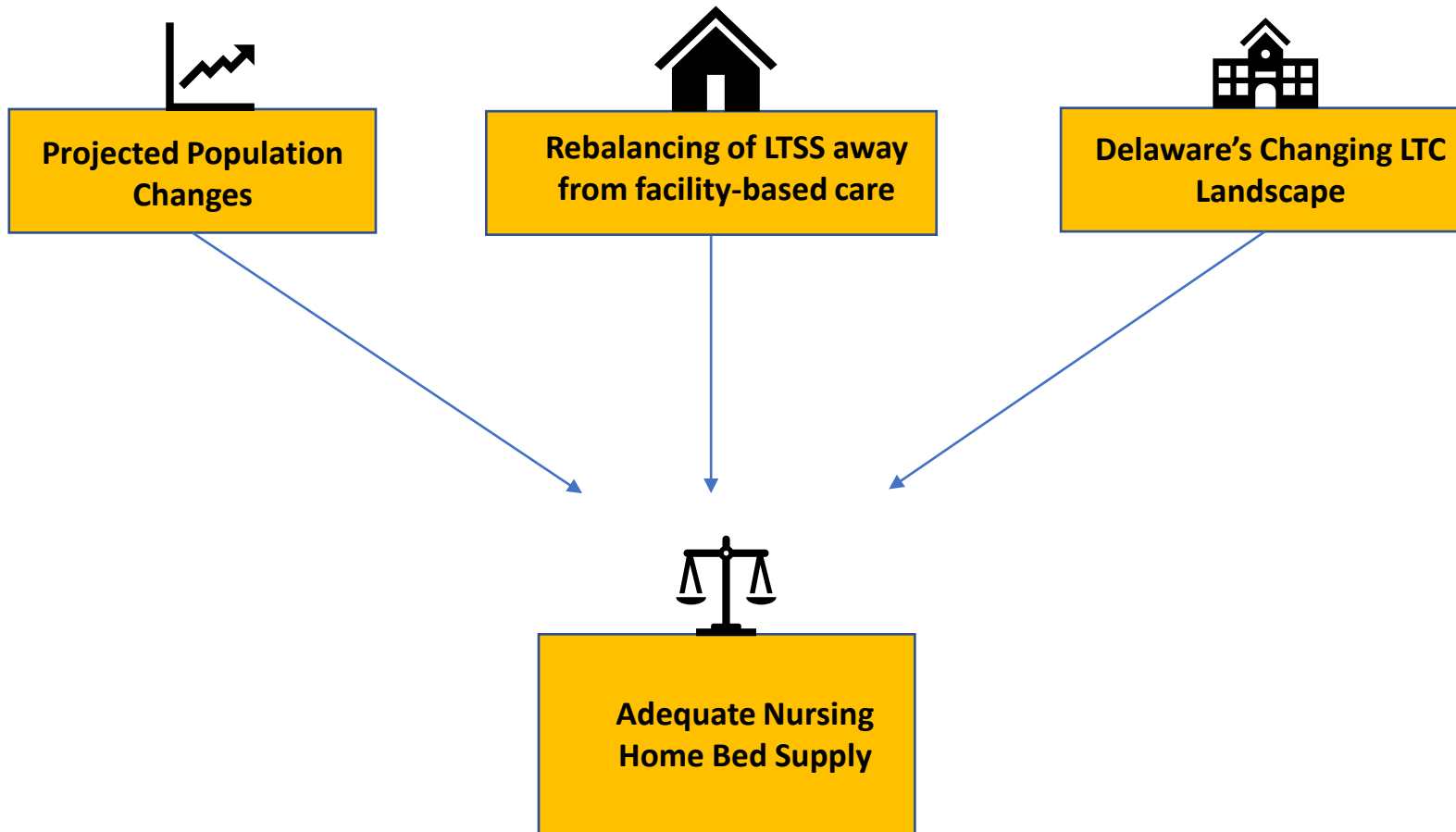**June 24, 2021**

Elder Care Continuum

- **Living at home**

- **Home-based care**

- **Community-based care**

- **Facility-based care**

    a. **Assisted Living / Rest Residential (AL/RR)**
- In 2020, 34 licensed AL/RR facilities in Delaware *(currently 33)*
- Not included in Delaware's CPR process
- AL/RR data collected and analyzed annually beginning in 2019
- 24-hour supervision, assistance with ADLs, medication management, homemaker services
- Residents age into additional services

    b. **Nursing Home (NH)**
- In 2020, 48 licensed NH facilities in Delaware *(currently 47)*
- Included in Delaware's CPR process
- NH data collected and analyzed annually
- 24-hour skilled nursing care
- Short-term rehab and long-term placements

Delaware NH and AL/RR Facilities, 2020

		Assisted Living / Rest Residential (AL/RR)	Private Nursing Homes (NH)
New Castle County			
	Facilities	24	27
	Beds	1,391	2,618
Kent County			
	Facilities	4	7
	Beds	378	762
Sussex County			
	Facilities	6	12
	Beds	485	1,290
Delaware			
	Facilities	34	46*
	Beds	2,254	4,670

*In 2020, two public nursing homes (DHCI in Kent County; GBHC in New Castle County) operated a total of 283 licensed beds. In mid-2020, GBHC closed permanently. Currently, DHCI (205 beds) is the only remaining public nursing home in Delaware.

Factors Impacting Delaware Nursing Home Bed Supply

Projected Population Changes

Rebalancing of LTSS away from facility-based care

Delaware's Changing LTC Landscape

Adequate Nursing Home Bed Supply

Q: How can we know if Delaware has enough Nursing Home beds to meet demand in the coming years?

Adequate Nursing Home Bed Supply

A: We use available data from today to predict tomorrow's bed need.

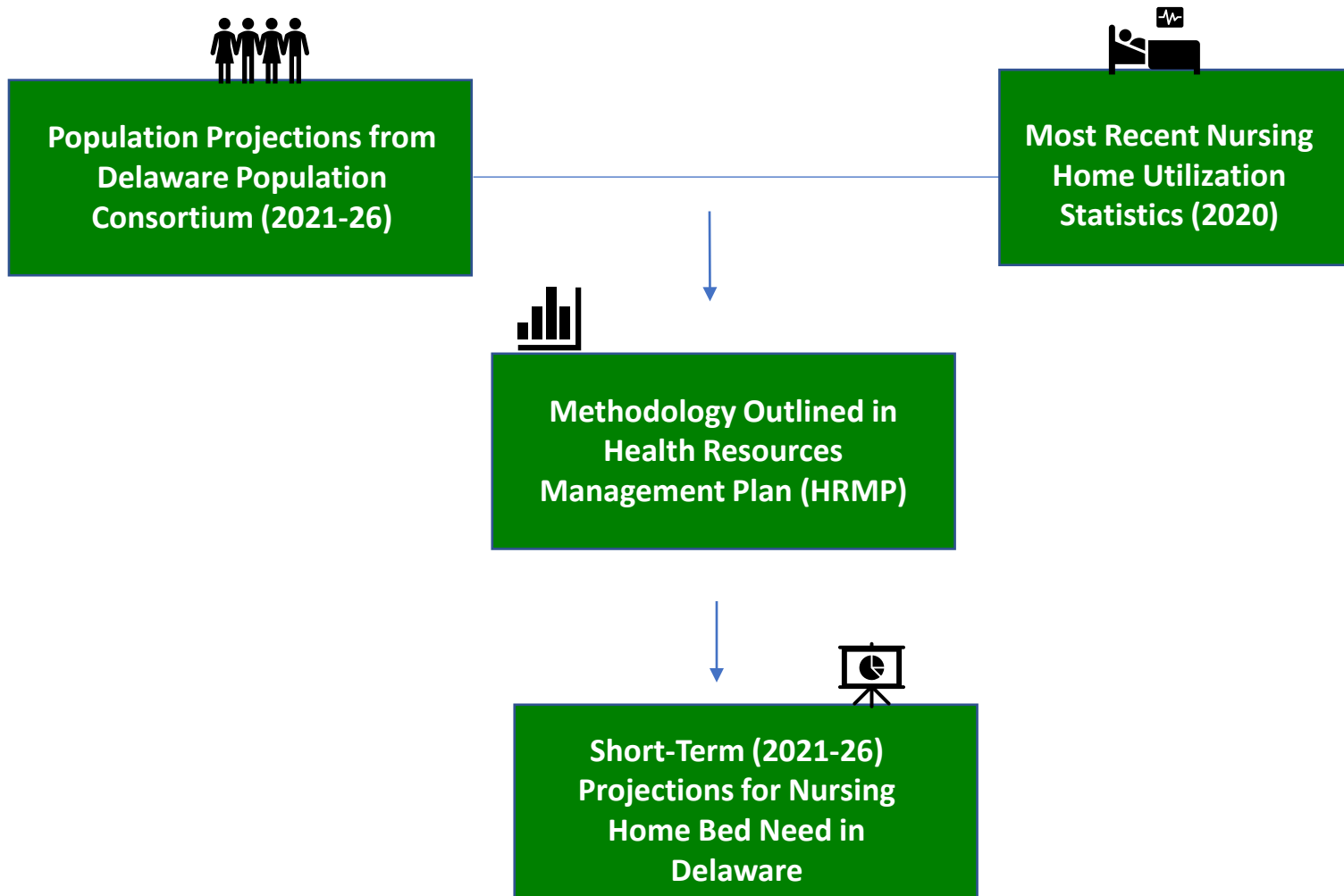# Preface: Predicting NH Bed Need is an Inexact Science

❑ **Many factors affect LTSS supply and demand.**

- 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 closures temporarily create higher demand for AL/RR and NH facilities
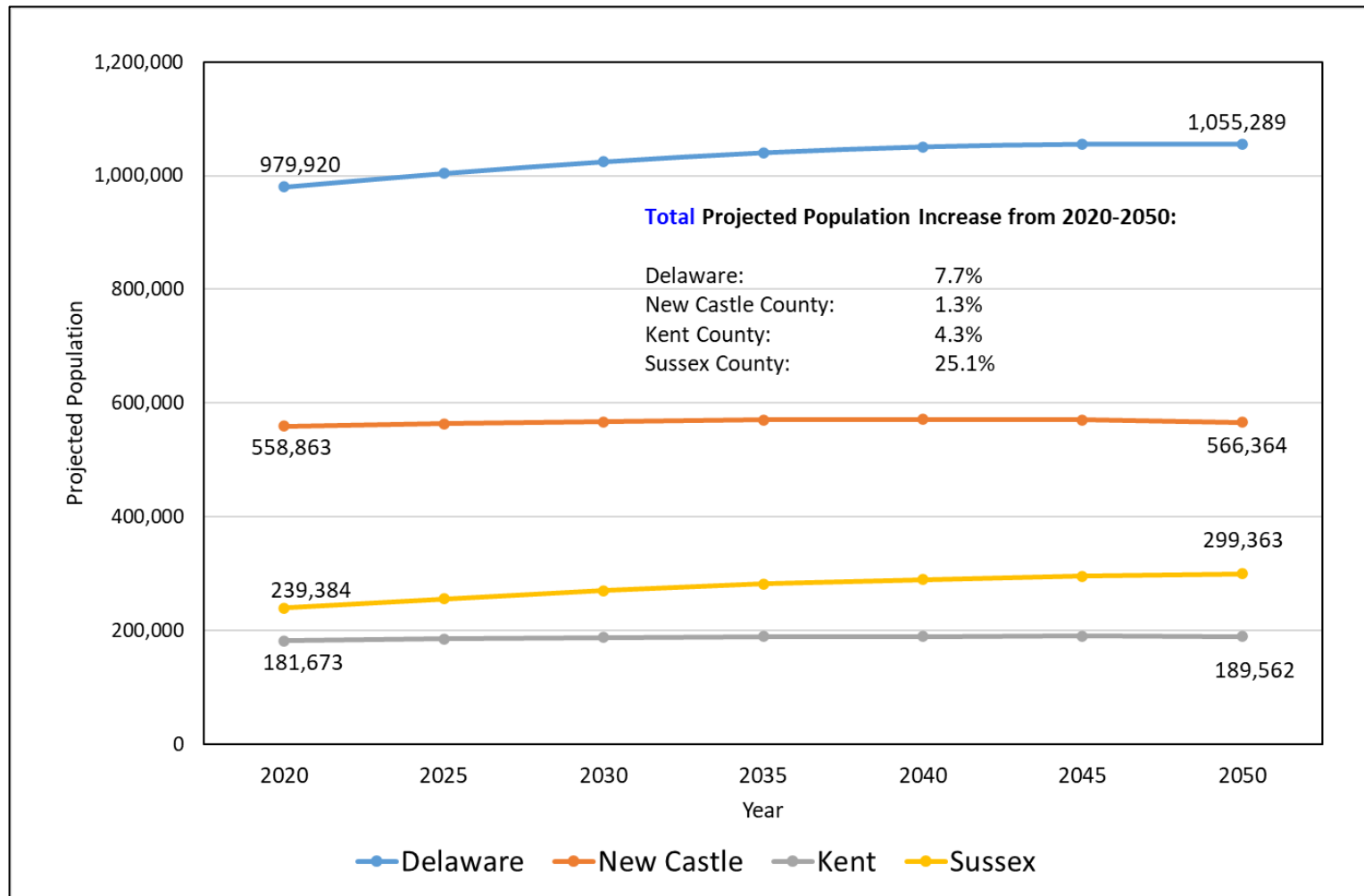
❑ **The COVID-19 pandemic has made the task of predicting NH bed need more difficult by introducing additional uncertainty about future LTSS trends.**

- Reduced admissions / occupancy rates exacerbate already-underfunded facilities
- AL and NH workforce challenges / caregiver shortage
- Need for NH facilities to improve current public image

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

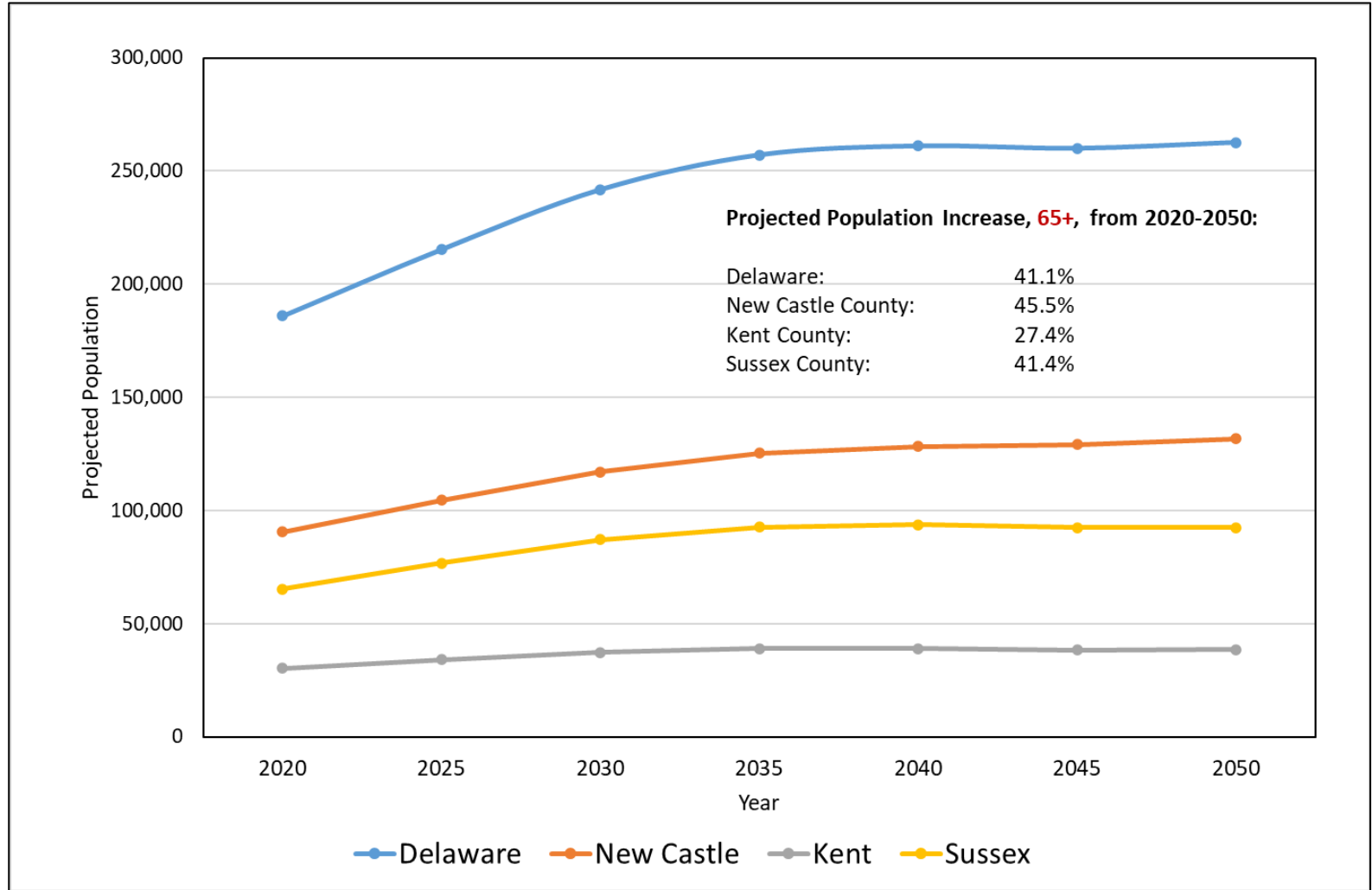**Population Projections from Delaware Population Consortium (2021-26)**

Most Recent Nursing Home Utilization Statistics (2020)

Methodology Outlined in Health Resources Management Plan (HRMP)

Short-Term (2021-26) Projections for Nursing Home Bed Need in Delaware

TOTAL Population Growth in Delaware, 2020-2050

Total Projected Population Increase from 2020-2050:

Delaware:	7.7%
New Castle County:	1.3%
Kent County:	4.3%
Sussex County:	25.1%

Source: Annual Population Projections, Delaware Population Consortium, Version 2020.0, October 2020

65+ Population Growth in Delaware, 2020-2050

Projected Population Increase, 65+, from 2020-2050:

Delaware:	41.1%
New Castle County:	45.5%
Kent County:	27.4%
Sussex County:	41.4%

Source: Annual Population Projections, Delaware Population Consortium, Version 2020.0, October 2020

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

Projected Population Increase from 2020-2050:

Cohort	Increase
65-69 yrs:	8.7%
70-74 yrs:	7.1%
75-79 yrs:	36.6%
80-84 yrs:	86.3%
85+ yrs:	158.1%

Legend: 65-69 yrs, 70-74 yrs, 75-79 yrs, 80-84 yrs, 85+ yrs

Data labels: 57,334; 49,026; 34,370; 22,810; 22,505; 62,315; 58,881; 52,499; 46,953; 41,933

Source: Annual Population Projections, Delaware Population Consortium, Version 2020.0, October 2020

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Impact of COVID-19 Pandemic on Long-Term Care Facilities: U.S.

- As of June 1, 2021:

  - Long-term care facilities account for 4% of U.S. cases and 31% of COVID-19 deaths

  - At least 32,000 long-term care facilities in U.S. reported one or more cases

  - Those age 65+ and with underlying health conditions most vulnerable to the effects of the virus

  - Spreads easily in congregate facilities: shared rooms, staff moving from room to room

In 5 states, at least half of deaths are linked to nursing homes.

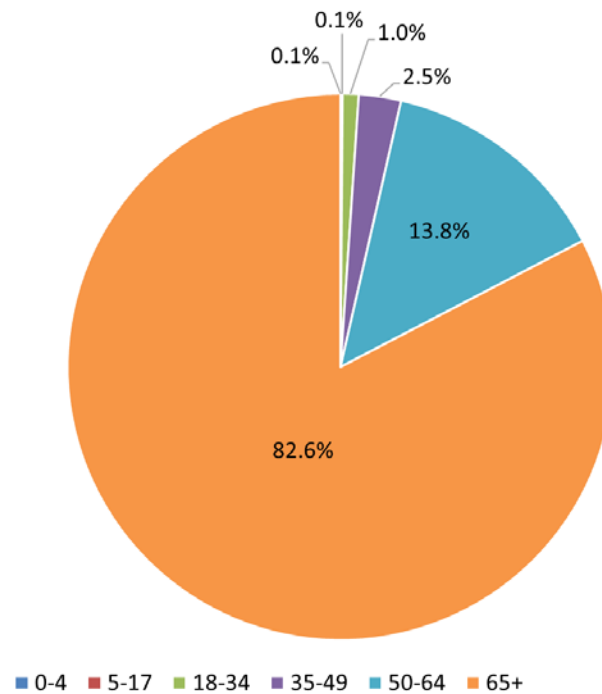Share of state's deaths linked to long-term care facilities
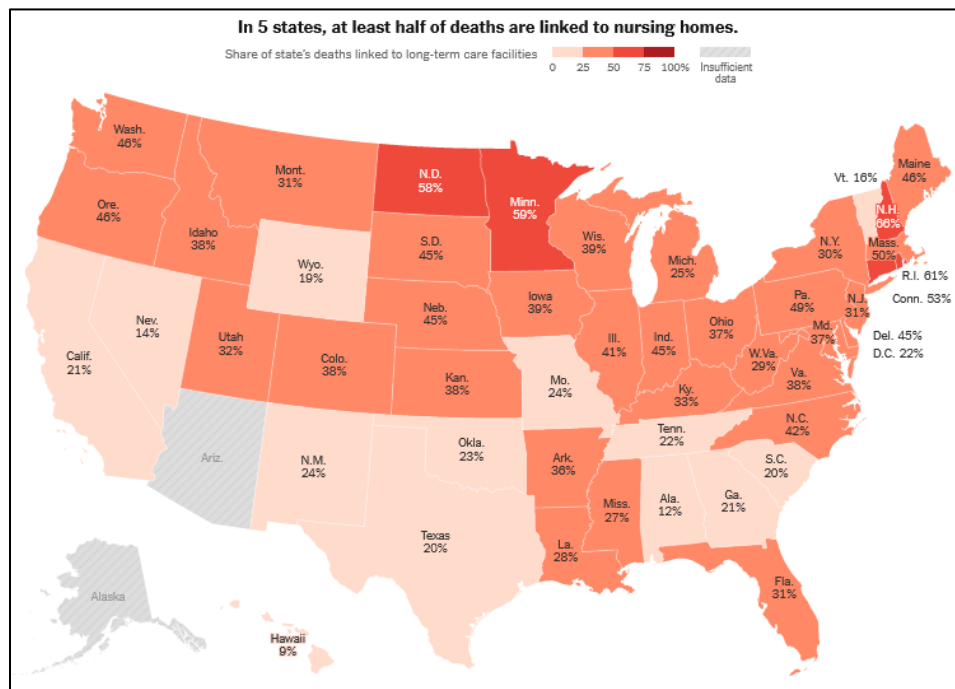
Impact of COVID-19 Pandemic on Long-Term Care Facilities: Delaware

- In Delaware, as of June 19, 2021:

- Residents of long-term care facilities accounted for 758 of 1,682 COVID-19 deaths statewide (45.1%)

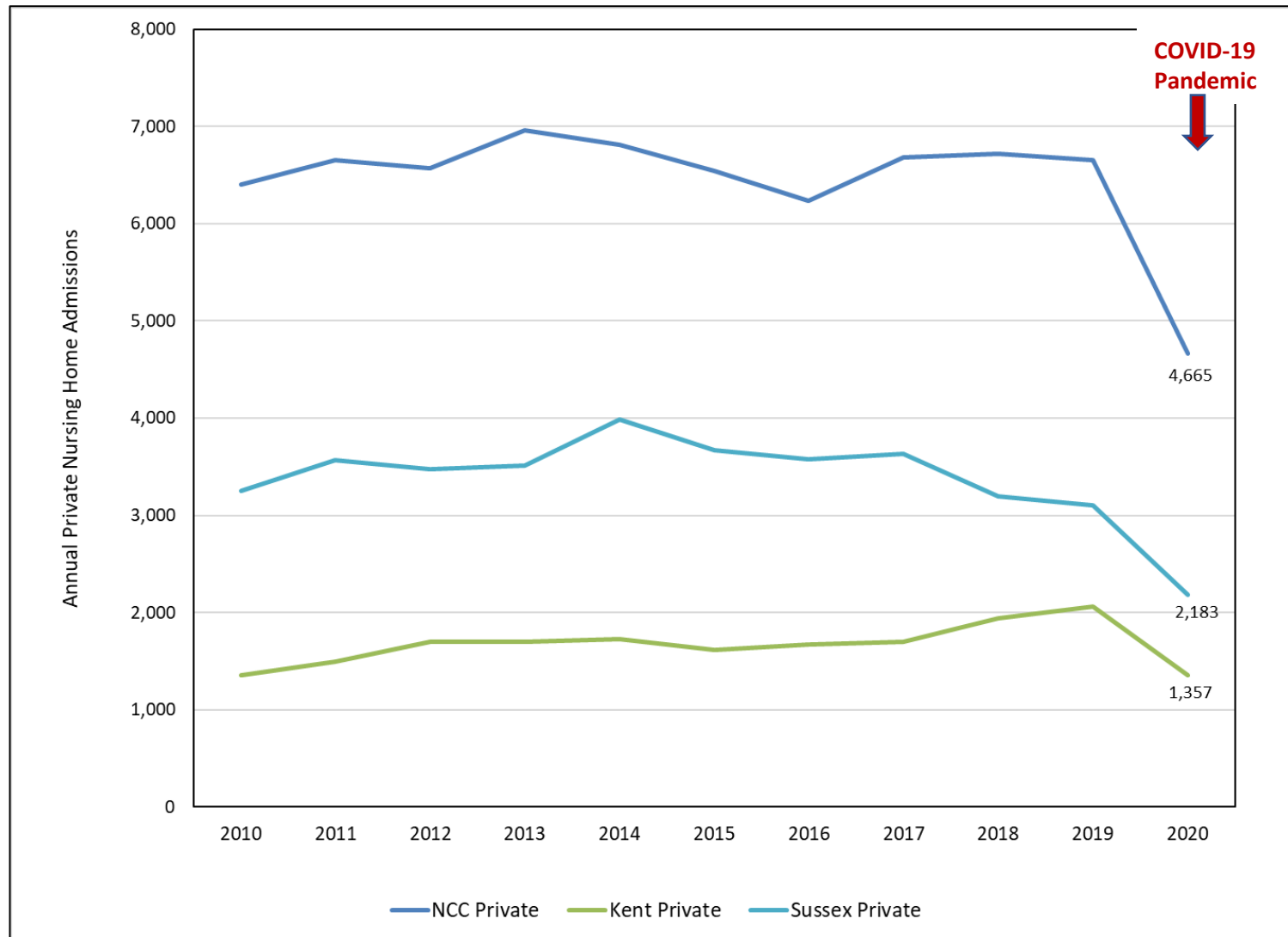- 82.6% of deaths occurred among Delawareans age 65+
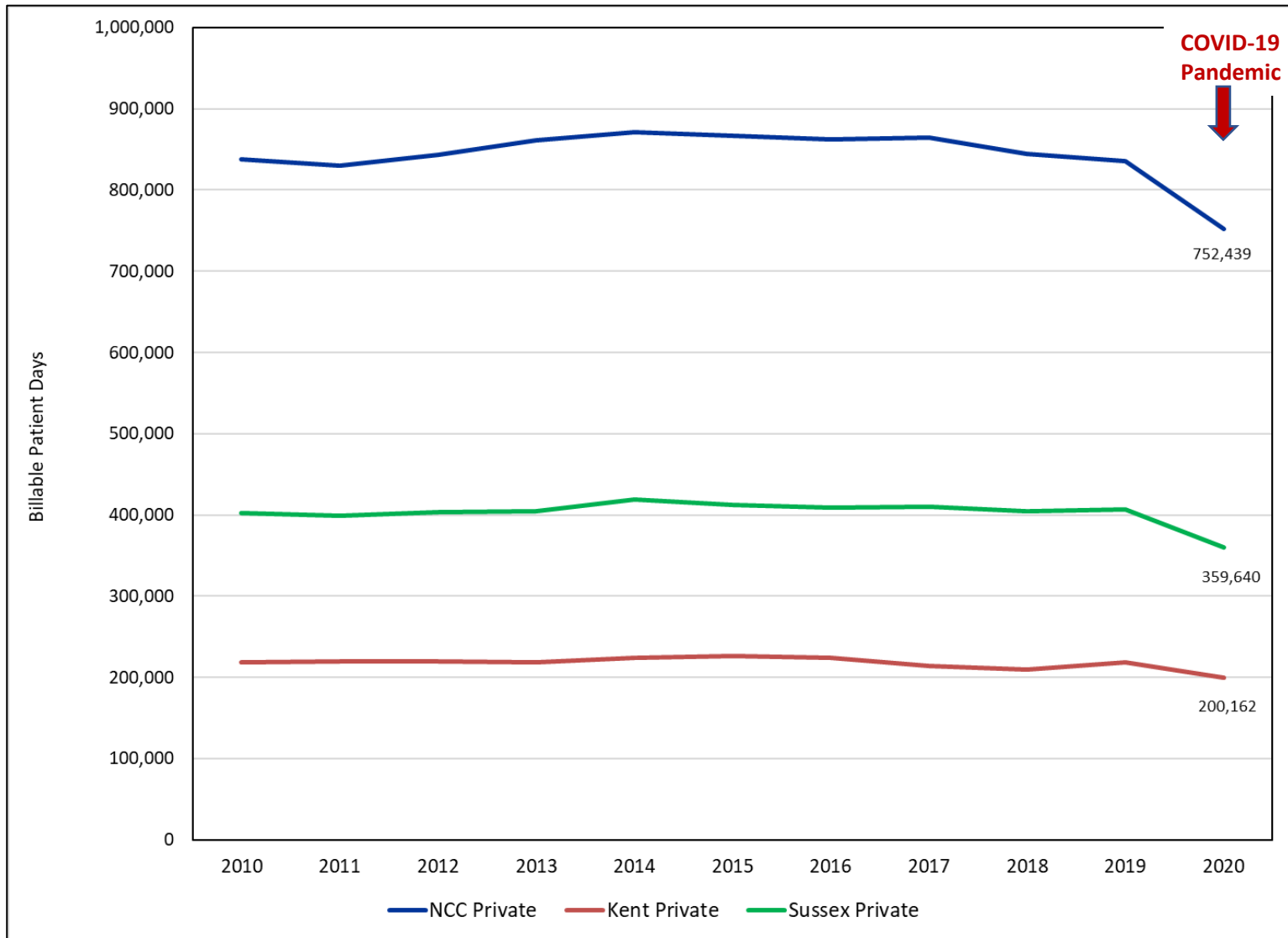
COVID-19 Deaths by LTC Resident Status

54.9% 45.1%

■ Long-Term Care Resident ■ Non-Long-Term Care Resident
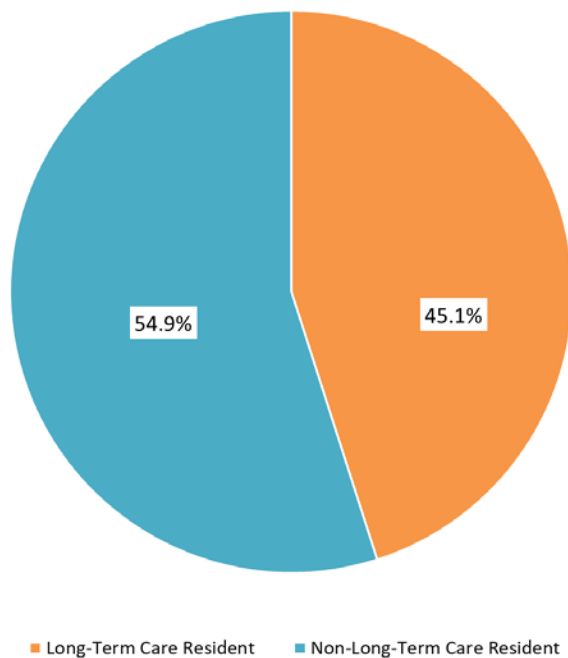
COVID-19 Deaths by Age Cohort

0.1% 1.0%
0.1% 2.5%
13.8%
82.6%

■ 0-4 ■ 5-17 ■ 18-34 ■ 35-49 ■ 50-64 ■ 65+

Delaware Private Nursing Home Admissions, 2010-2020

Source: 2020 Delaware Nursing Home Utilization Statistical Report

Delaware Private Nursing Home Billable Patient Days, 2010-2020

Source: 2020 Delaware Nursing Home Utilization Statistical Report

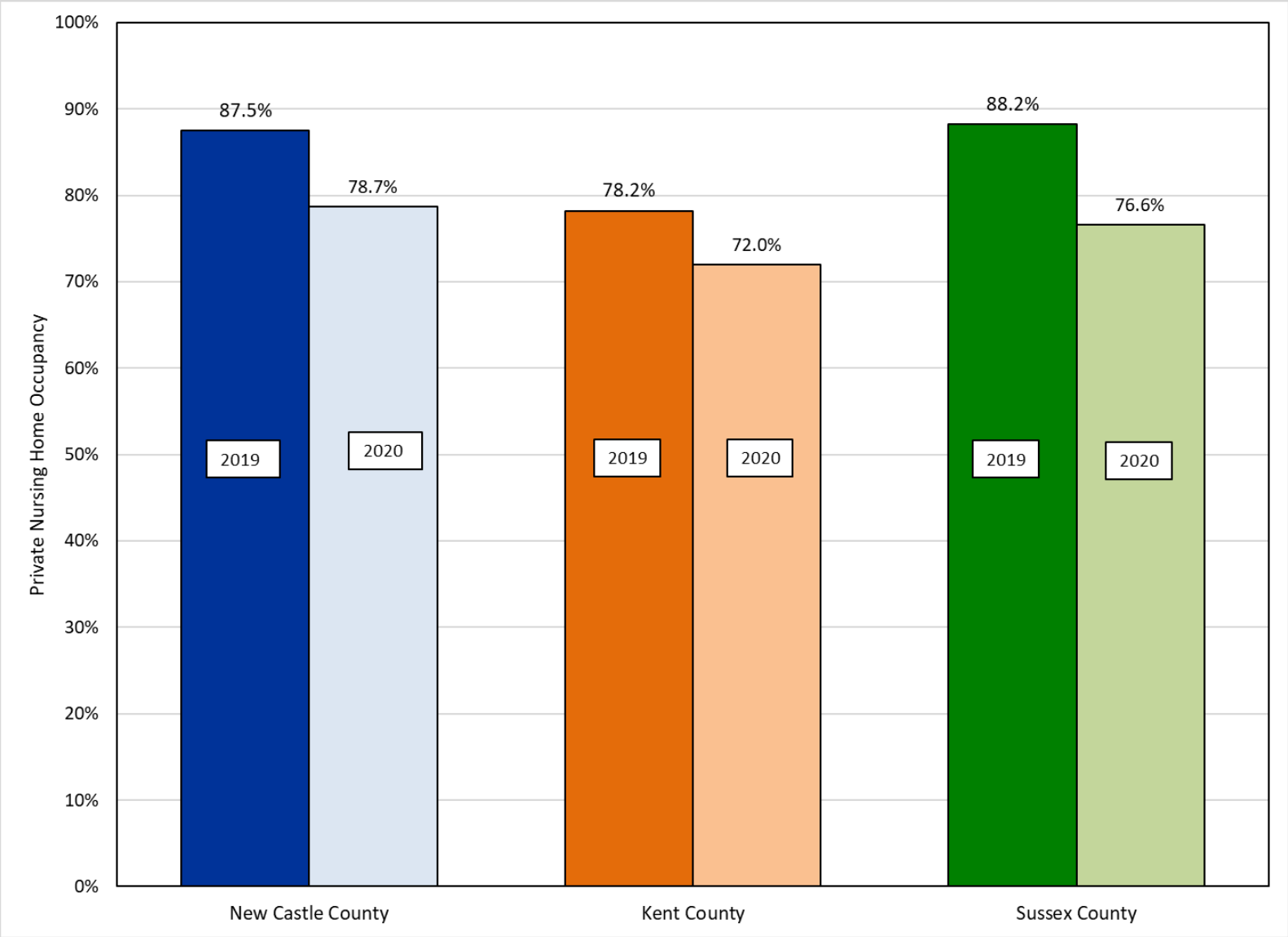# Delaware Nursing Home Occupancy Rates, 2010-2020

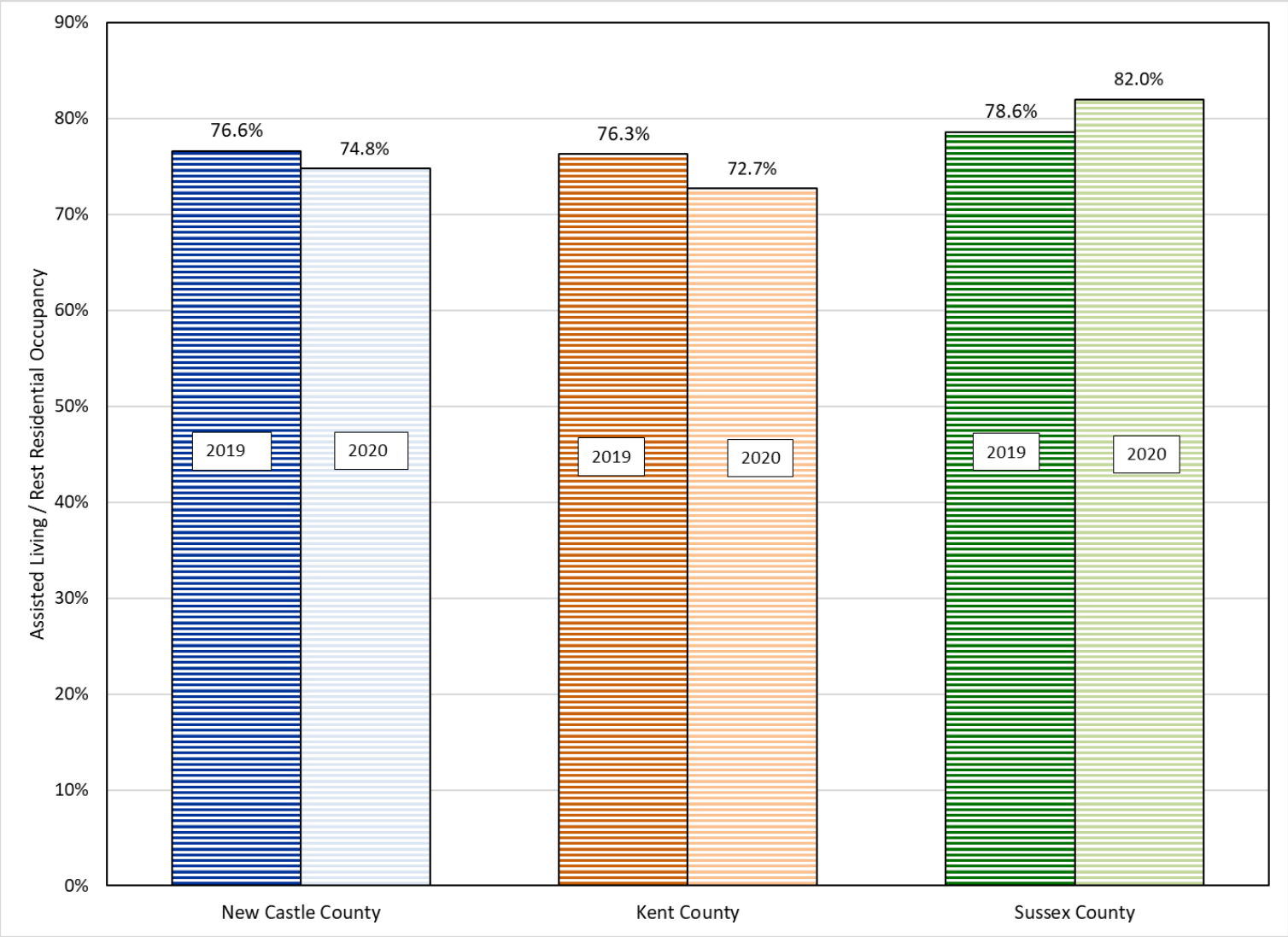Source: 2020 Delaware Nursing Home Utilization Statistical Report
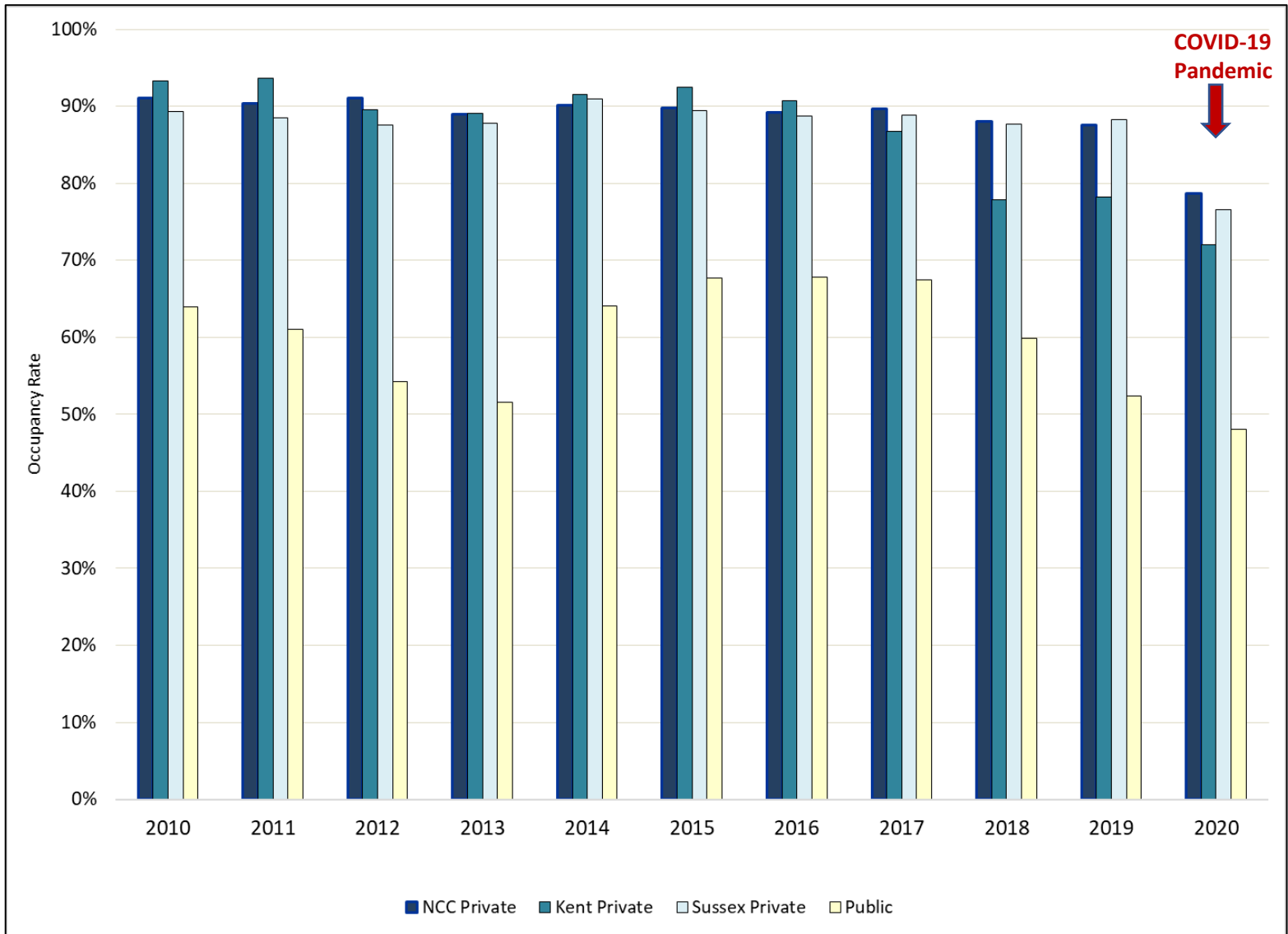
Delaware Private NH Occupancy, 2019 vs. 2020

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

Delaware AL/RR Occupancy, 2019 vs. 2020

Source: 2020 Delaware Nursing Home Utilization Statistical Report; 2020 Delaware Assisted Living Utilization Statistical Report
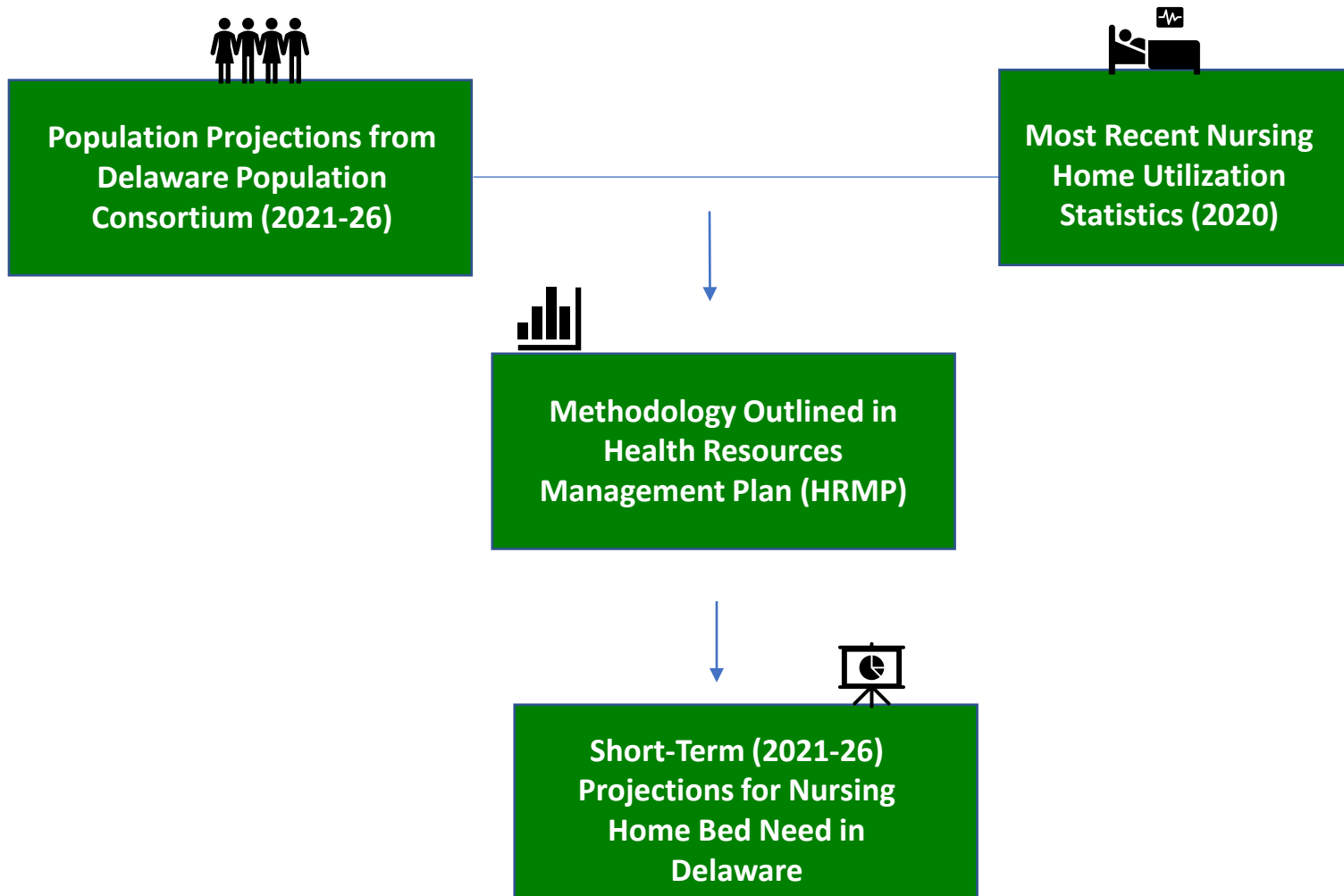
Delaware NH and AL/RR Utilization Metrics, 2019 vs. 2020

Nursing Homes (public & private)

	2019	2020	Percent Change
Facilities	47	48	**2.1%**
Licensed Beds	4,928	4,953	**0.5%**
Billable Patient Days	1,514,969	1,352,305	**-10.7%**
Occupancy	84.2%	75.7%	**-10.1%**
Admissions	11,821	8,238	**-30.3%**
Discharges	11,353	8,758	**-22.9%**

Assisted Living / Rest Residential

	2019	2020	Percent Change
Facilities	34	34	**0.0%**
Licensed Beds	2,254	2,234	**-0.9%**
Billable Patient Days	633,148	619,277	**-2.2%**
Occupancy	77.0%	75.9%	**-1.4%**
Move-Ins	896	564	**-37.1%**
Move-Outs	857	751	**-12.4%**

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

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Methodology Outlined in Health Resources Management Plan (HRMP)

Short-Term (2021-26) Projections for Nursing Home Bed Need in Delaware

HRMP Methodology: Nursing Home Bed Projections

(Outlined in the Delaware Health Resources Management Plan)

- **Inputs:**
  - Current population estimates
  - Projected population estimates
  - Billable patient days in most current data year
  - Proportion of NH admissions by age group in most current data year
  - Proportion of public NH admissions by county in most current data year

- **Used to project:**
  - Future billable patient days based on population growth
  - Future bed need based on projected billable patient days

- **Future Bed Need used to calculate:**
  - Shortage / surplus: the difference between current bed count and projected bed need

HRMP Methodology: Nursing Home Bed Projections

- **One important detail:**

  - <u>For bed need projections</u>, Delaware's methodology treats the Delaware Veterans Home (DVH) as a public facility

    - In actuality, DVH operates as a private NH facility

  - This attempts to account for the fact that the 150 beds at DVH are accessed through specific eligibility criteria (Military Services and Residency requirements)

    - The 150 DVH beds are available to those who meet eligibility requirements

    - Additionally, patients admitted to DVH come from all three counties

    - Attributing all 150 DVH beds to Kent County would create an artificial surplus scenario; we need to account for this in the methodology

  - **For this reason, the licensed bed counts used to calculate projected bed surpluses / shortages differ slightly from those published in the Delaware Nursing Home Utilization Statistics Report**

  - For more information, please refer to the Delaware Health Resources Management Plan Bed Need Calculation Methodology

2021 – 2026 Delaware Nursing Home Bed Projections

Delaware	Private Beds (2020)	Public Beds (2020)	Total Beds (2020): Private + Public	Projected Annual NH Bed Need	Projection Period	Projected Shortage / Surplus
2021-22	4,523	349	4,872	4,222	Next year	650
2021-23	4,523	349	4,872	4,353	In two years	519
2021-24	4,523	349	4,872	4,493	In three years	379
2021-25	4,523	349	4,872	4,622	In four years	250
2021-26	4,523	349	4,872	4,746	In five years	126

New Castle	Private Beds (2020)	Public Beds (2020)	Total Beds (2020): Private + Public	Projected Annual NH Bed Need	Projection Period	Projected Shortage / Surplus
2021-22	2,617	238	2,855	2,473	Next year	382
2021-23	2,617	238	2,855	2,535	In two years	320
2021-24	2,617	238	2,855	2,602	In three years	253
2021-25	2,617	238	2,855	2,665	In four years	190
2021-26	2,617	238	2,855	2,728	In five years	127

Kent	Private Beds (2020)	Public Beds (2020)	Total Beds (2020): Private + Public	Projected Annual NH Bed Need	Projection Period	Projected Shortage / Surplus
2021-22	616	47	663	649	Next year	14
2021-23	616	47	663	666	In two years	-3
2021-24	616	47	663	684	In three years	-21
2021-25	616	47	663	698	In four years	-35
2021-26	616	47	663	712	In five years	-49

Sussex	Private Beds (2020)	Public Beds (2020)	Total Beds (2020): Private + Public	Projected Annual NH Bed Need	Projection Period	Projected Shortage / Surplus
2021-22	1,290	64	1,354	1,174	Next year	180
2021-23	1,290	64	1,354	1,222	In two years	132
2021-24	1,290	64	1,354	1,274	In three years	80
2021-25	1,290	64	1,354	1,323	In four years	31
2021-26	1,290	64	1,354	1,368	In five years	-14

Top 9 Takeaways

1. The DHCC collects monthly utilization data from all NH and AL/RR facilities in Delaware.

2. Utilization data are aggregated and summarized in Delaware's annual NH and AL/RR Utilization Reports.

3. In Delaware, NHs fall under the CPR process; AL/RR facilities do not.

4. Annual NH utilization data are used to predict future NH bed need in Delaware.

5. Predicting future supply and demand for elder care services is a complex process.

Top 9 Takeaways

6. The impact of the COVID-19 pandemic is seen across nearly all 2020 utilization metrics for Delaware's NH and AL/RR facilities.

7. Delaware's 2021-26 NH bed need projections are based on 2020 NH utilization metrics; because of the pandemic, 2020 data are substantially different from previous years' metrics.

8. Delaware's 2021-26 NH bed need projections predict surplus beds through 2026 in New Castle County and at the statewide level. Kent and Sussex Counties are expected to experience NH bed shortages before 2026.

9. The 2021-26 NH bed need projections should be interpreted with caution due to the impact of the COVID-19 pandemic on 2020 utilization patterns.

Thank You!