

# DELAWARE'S 2022 LONG-TERM CARE LANDSCAPE

Delaware Health Resources Board  
August 3, 2023



# Agenda

1. Review highlights from the **2022 Delaware Nursing Home Report**
2. Preview **2023-28 Delaware Nursing Home Bed Projections**
3. Add context using findings from the **2022 Delaware Assisted Living Report**

**Highlights from the**  
**2022 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, 2022

**45 Facilities**  
**4,783 Licensed Beds**



## New Castle County

- 25 Nursing Homes
- 2,461 beds
- 49.2% of DE's 65+ population

## Kent County

- 8 Nursing Homes
- 965 beds
- 16.3% of DE's 65+ population

## Sussex County

- 12 Nursing Homes
- 1,357 beds
- 34.5% of DE's 65+ population

# Delaware Nursing Homes, 2022

New Castle County (25)	Kent County (8)	Sussex County (12)
<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. Cokesbury Village</li> <li>6. Complete Care at Brackenville</li> <li>7. Complete Care at Hillside</li> <li>8. Coral Springs at Brandywine</li> <li>9. Country House</li> <li>10. Foulk Manor</li> <li>11. Gilpin Hall</li> <li>12. Jeanne Jugan Residence</li> <li>13. Kentmere Nursing Care Center</li> <li>14. Kutz Rehab &amp; Nursing</li> <li>15. Millcroft</li> <li>16. New Castle Health &amp; Rehab</li> <li>17. Newark Manor</li> <li>18. Parkview Nursing &amp; Rehab</li> <li>19. ProMedica Pike Creek</li> <li>20. ProMedica Wilmington</li> <li>21. Regal Heights Healthcare &amp; Rehab</li> <li>22. Regency Healthcare &amp; Rehab</li> <li>23. Shipley Manor Health Care</li> <li>24. Stonegates</li> <li>25. Weston Senior Living <b>*closed 6/15/22</b></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 <b>*Delaware's only public nursing home</b></li> <li>5. Delaware Veterans Home <b>*unique pt. pop.</b></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 Healthcare &amp; Rehab</li> <li>6. Harrison House</li> <li>7. Lofland Park</li> <li>8. Manor House</li> <li>9. Milford Center</li> <li>10. Polaris Healthcare &amp; Rehab</li> <li>11. Seaford Center</li> <li>12. The Moorings at Lewes</li> </ol>

- As standard, 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

# COVID-19 and Delaware Seniors: Attributable Deaths, 2020-2023

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## DEATHS BY AGE

Rate (per 10,000 people) **Count (total)**

Age	State of Delaware	New Castle County	Kent County	Sussex County
0-4*	3	🚫	🚫	🚫
5-17	2	🚫	🚫	🚫
18-34	34	🚫	🚫	🚫
35-49	114	57	29	28
50-64	541	283	122	136
65+	2,739	1,307	585	847
Unknown	0	0	0	0

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## DEATHS BY AGE

Rate (per 10,000 people) **Count (total)**

Age	State of Delaware	New Castle County	Kent County	Sussex County
0-4*	0.5	🚫	🚫	🚫
5-17	0.1	🚫	🚫	🚫
18-34	1.6	🚫	🚫	🚫
35-49	6.7	5.4	9.3	8.3
50-64	27.1	24.9	35.9	26.3
65+	150.5	150.0	190.8	131.8

### Total Deaths

**3,433** 27.0 per 10,000 people ⓘ

### Confirmed ⓘ

**3,048**

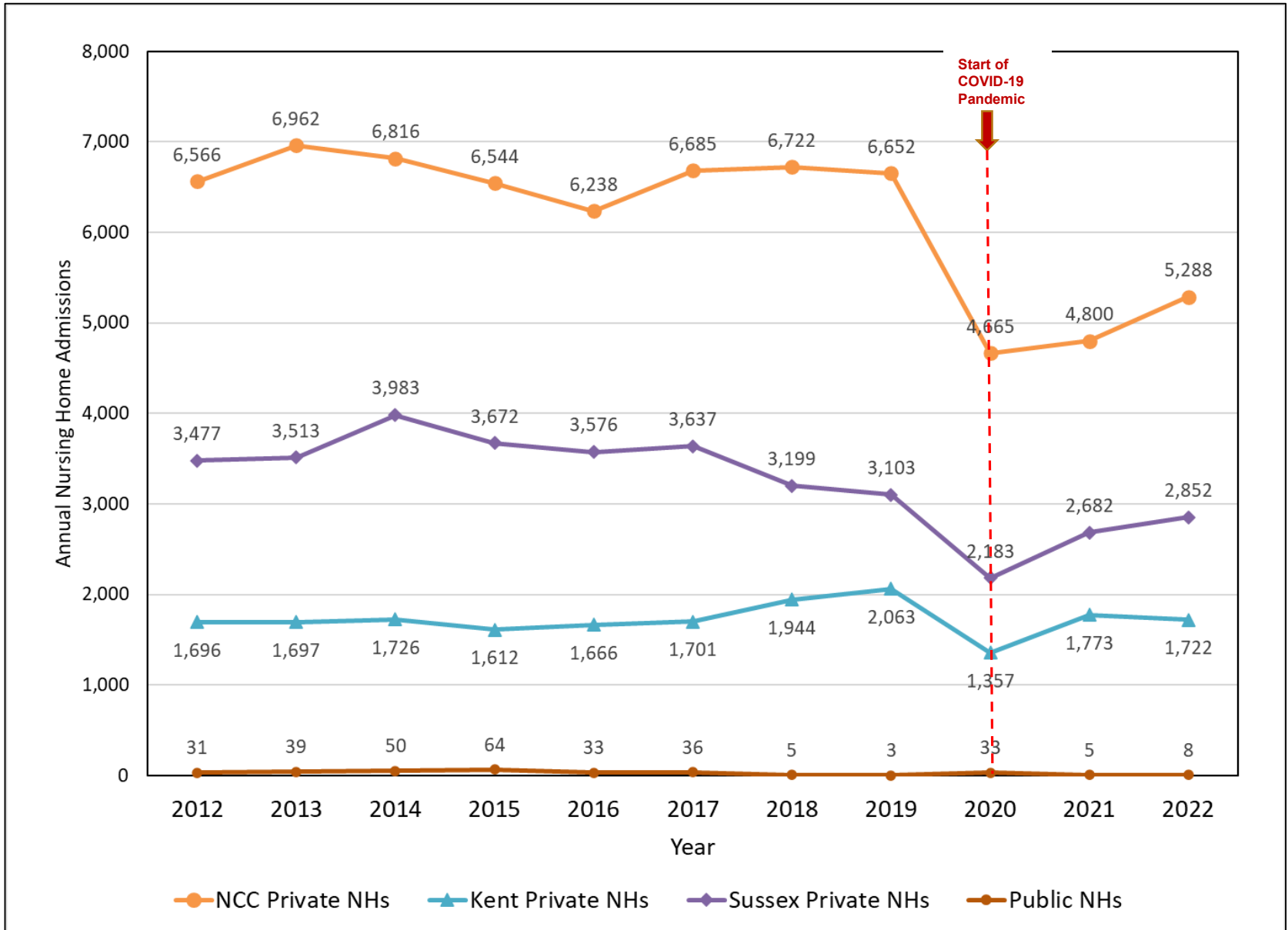
### Probable ⓘ

**385**

### Residents of Long-Term Care Facilities

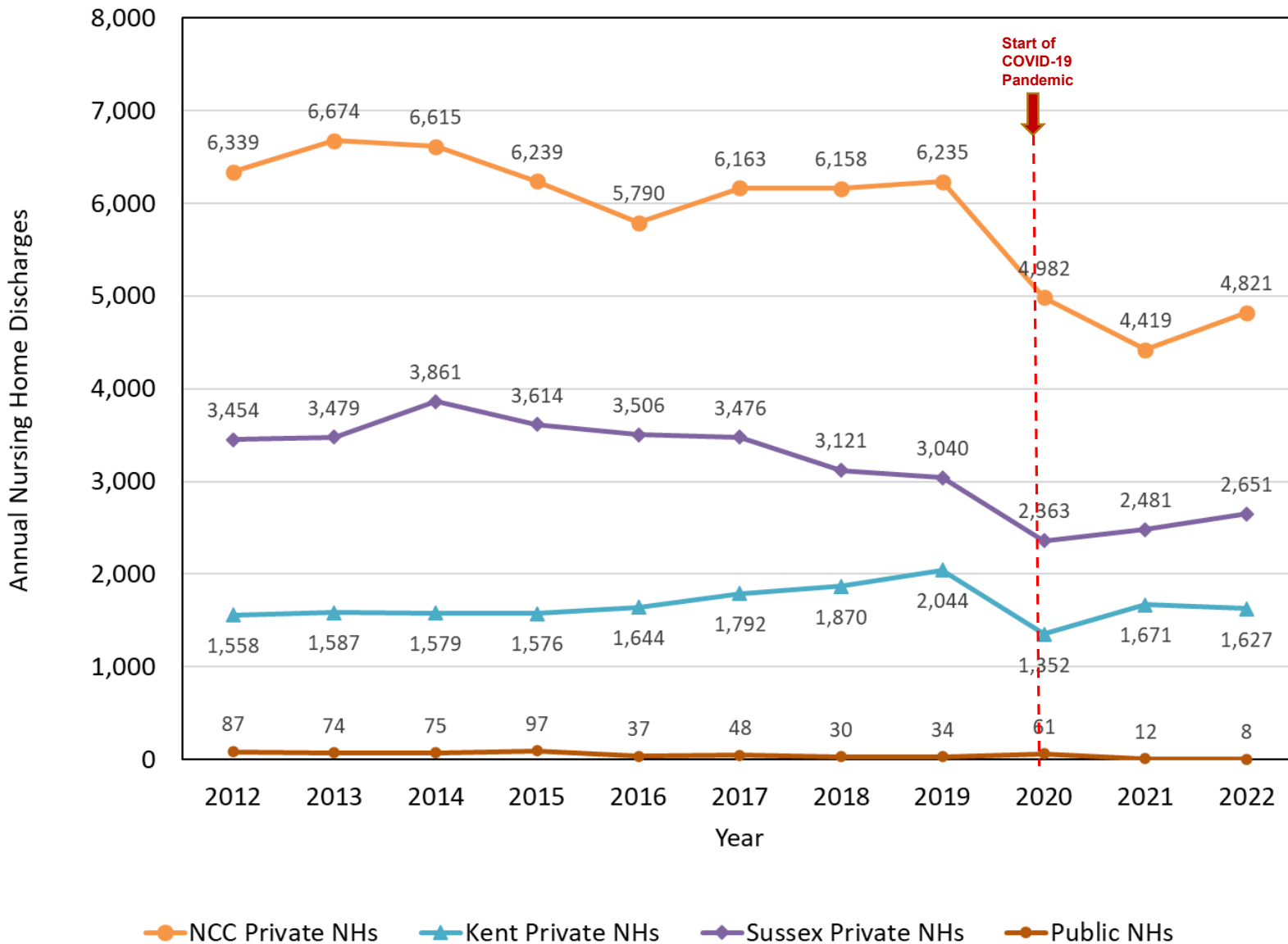
**1,071**

# Delaware Nursing Home Admissions, 2012-2022

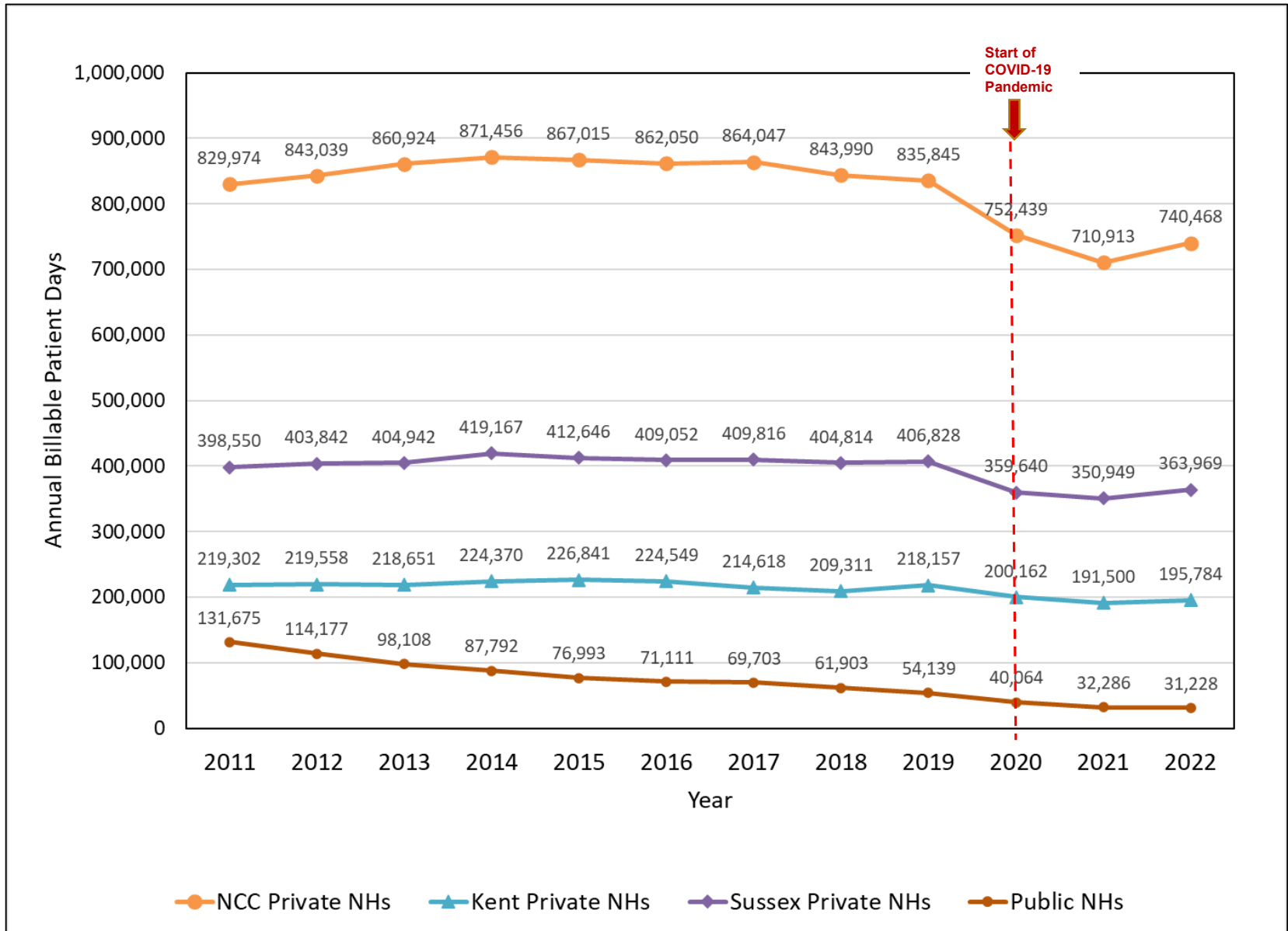




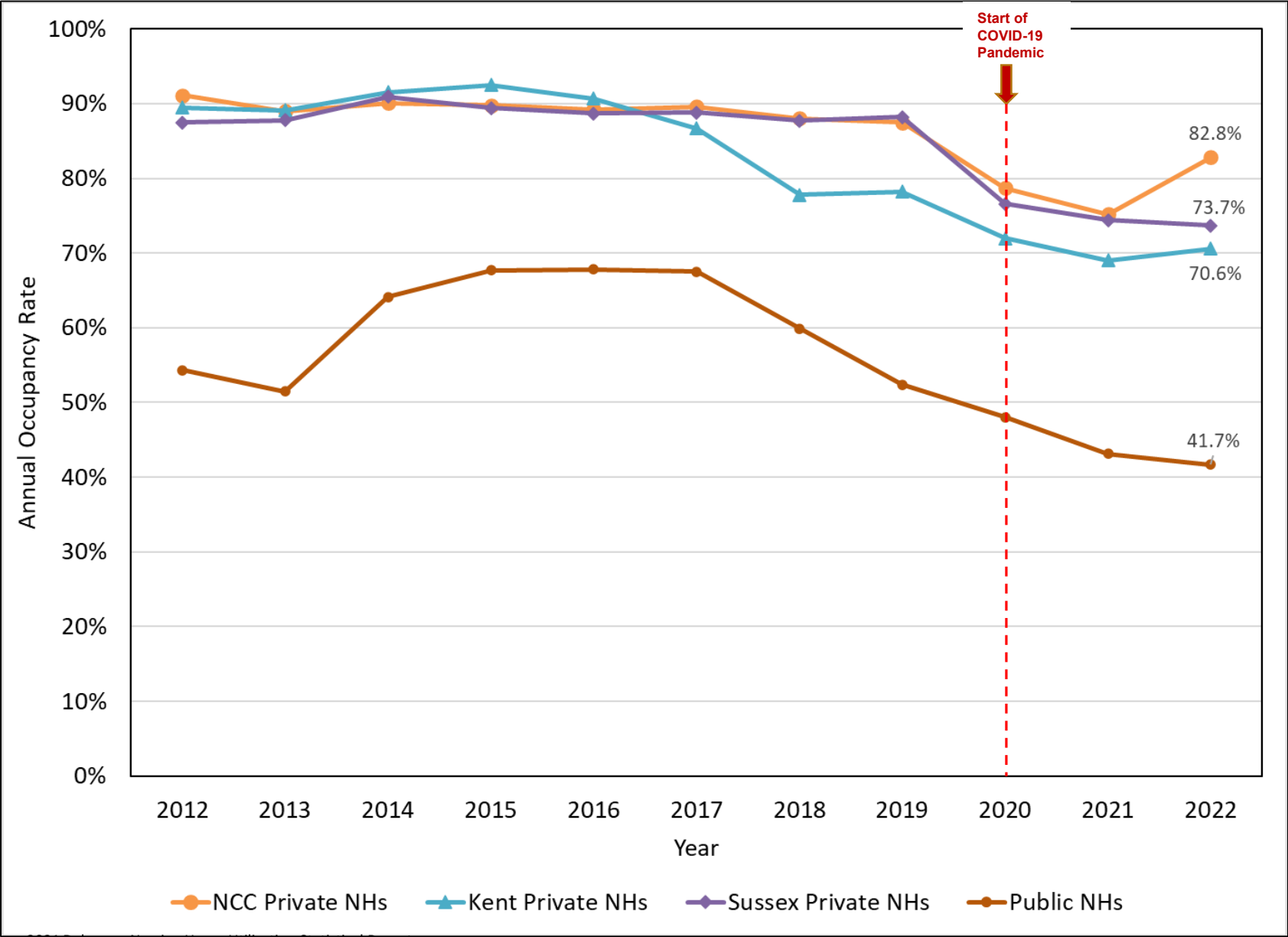
# Delaware Nursing Home Discharges, 2012-2022



# Delaware Nursing Home Billable PT Days, 2012-2022



# Delaware Nursing Home Occupancy Rates, 2012-2022



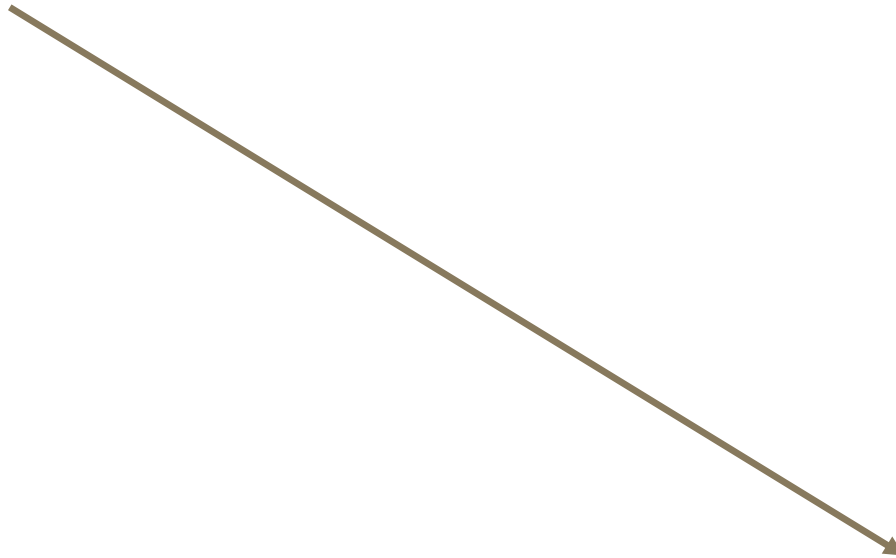
Source: 2021 Delaware Nursing Home Utilization Statistical Report

**2023-28 Delaware**  
**Nursing Home Bed Projections**

# Why Do We Need an Annual Nursing Home Report?

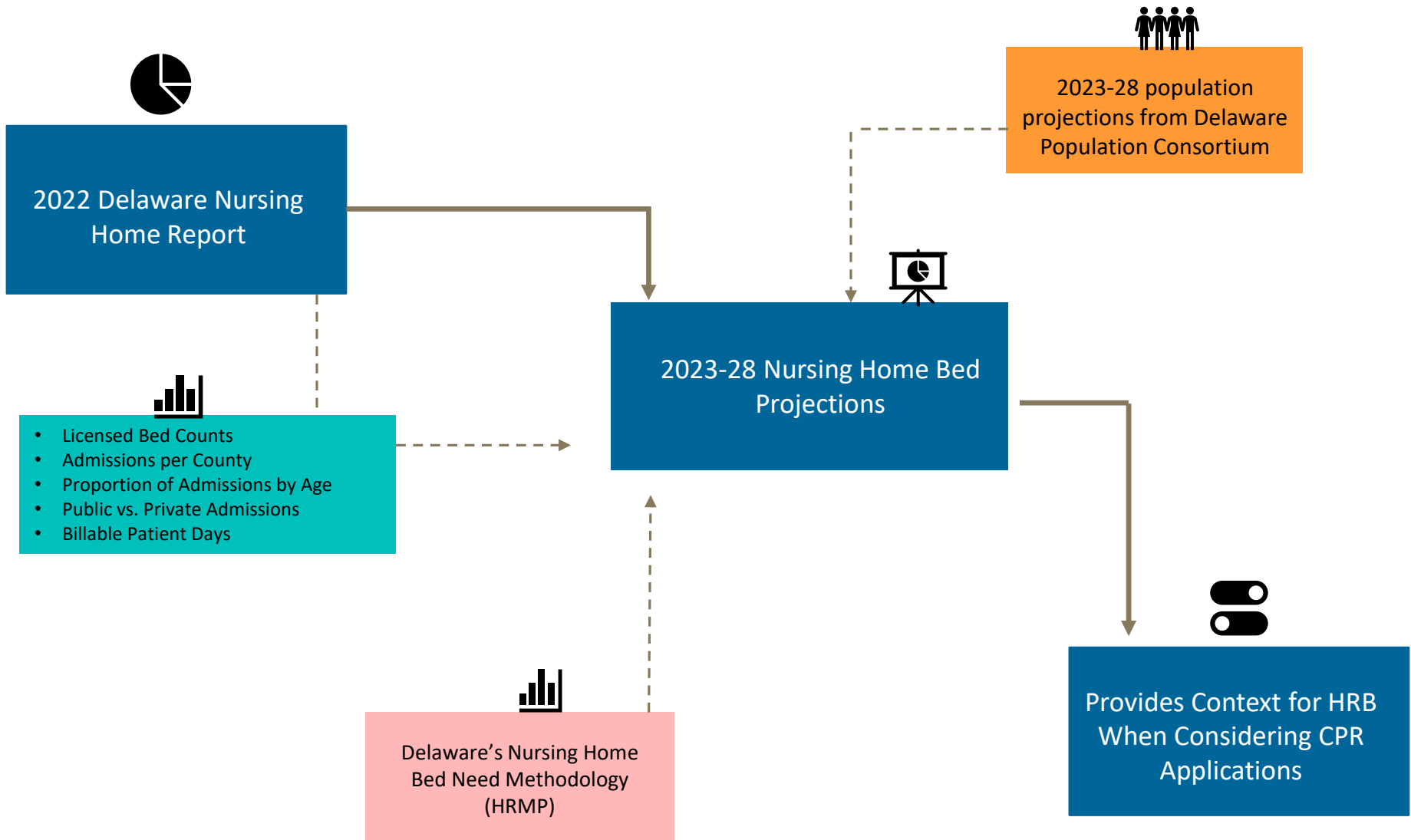


Annual Delaware  
Nursing Home Report



Provides Context for HRB  
When Considering CPR  
Applications

# Why Do We Need an Annual Nursing Home Report?



# Projected Nursing Home Bed Need is an Inexact Science

- **Ongoing impacts of the COVID-19 pandemic influence projected bed shortage / surplus**
  - Metrics are rebounding, but have not yet returned to pre-pandemic values
- **Size of the aging population**
  - Projected population growth is less precise the further you look into the future
- **Facility openings / closures**
- **Increases / reductions in licensed bed counts**
- **Health Plan members incentivized to avoid / shorten costly facility stays**
- **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:**
  - 2022 (actual) licensed bed counts
  - 2022 (actual) billable patient days
  - 2022 (actual) proportion of admissions by age group
  - 2022 (actual) proportion of public NH admissions by county
  - 2023-28 population estimates
- **Outputs:**
  - 2023-28 (projected) billable patient days
  - 2023-28 (projected) bed need
- **Nursing Home Bed Need Projections:**
  - Compare projected bed need to current bed need to derive 2023-28 projected nursing home bed shortage / surplus



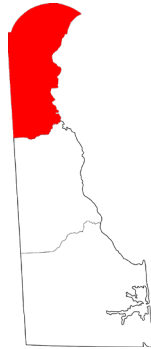
# 2023 – 2028 Nursing Home Bed Projections



## Delaware

Delaware	Total Beds (2022): Private + Public	Projected Annual NH Bed Need	Projection Period	Projected Shortage / Surplus
2023-24	4,764	4,194	Next year	<b>570</b>
2023-25	4,764	4,323	In two years	<b>441</b>
2023-26	4,764	4,447	In three years	<b>317</b>
2023-27	4,764	4,567	In four years	<b>197</b>
2023-28	4,764	4,690	In five years	<b>74</b>

# 2023 – 2028 Nursing Home Bed Projections



## New Castle County

New Castle	Total Beds (2022): Private + Public	Projected Annual NH Bed Need	Projection Period	Projected Shortage / Surplus
2023-24	2,538	2,371	Next year	167
2023-25	2,538	2,440	In two years	98
2023-26	2,538	2,507	In three years	31
2023-27	2,538	2,575	In four years	-37
2023-28	2,538	2,648	In five years	-110

# 2023 – 2028 Nursing Home Bed Projections



## Kent County

Kent	Total Beds (2022): Private + Public	Projected Annual NH Bed Need	Projection Period	Projected Shortage / Surplus
2023-24	703	593	Next year	110
2023-25	703	609	In two years	94
2023-26	703	625	In three years	78
2023-27	703	639	In four years	64
2023-28	703	655	In five years	48

# 2023 – 2028 Nursing Home Bed Projections

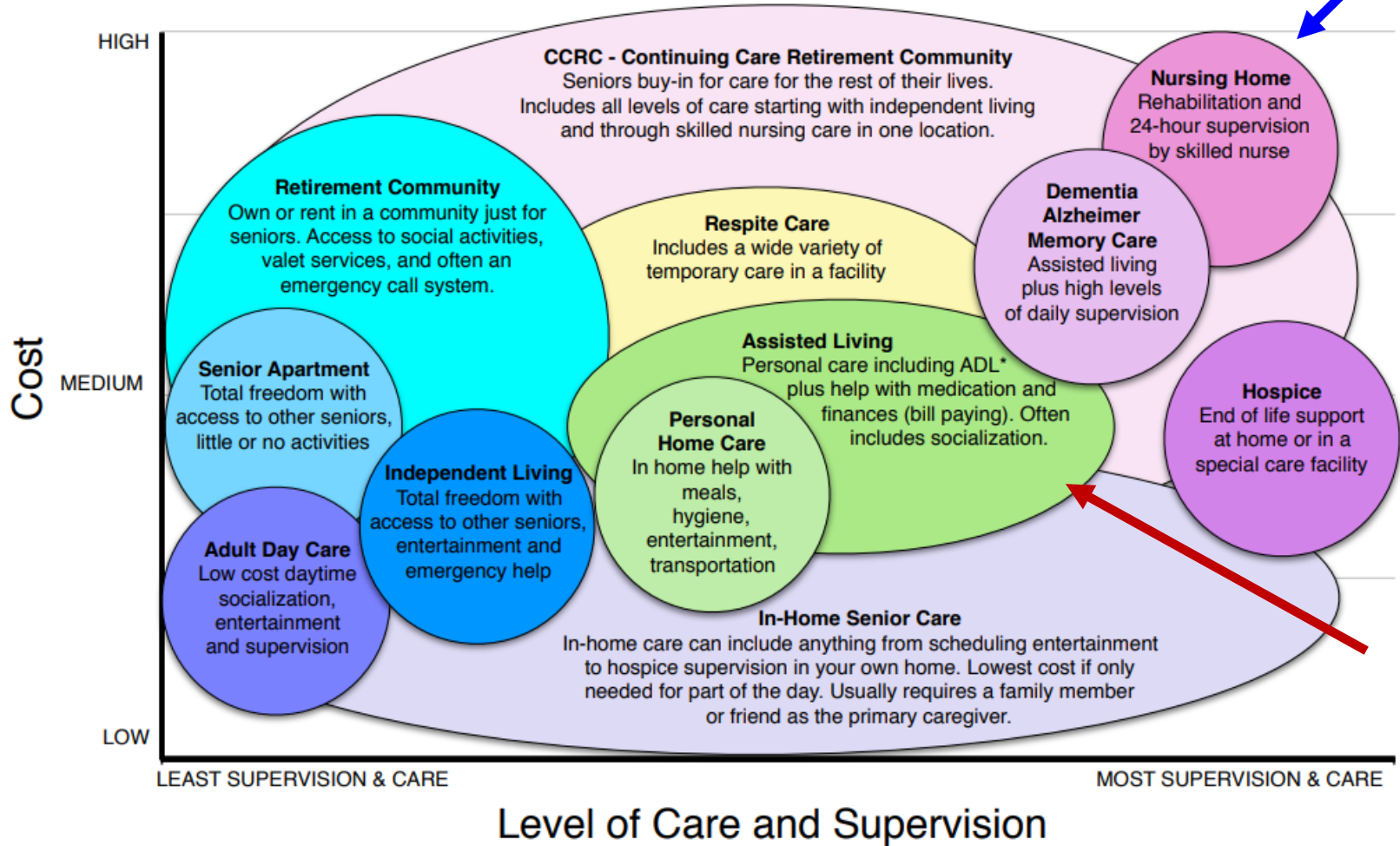


## Sussex County

Sussex	Total Beds (2022): Private + Public	Projected Annual NH Bed Need	Projection Period	Projected Shortage / Surplus
2023-24	1,523	1,226	Next year	<b>297</b>
2023-25	1,523	1,267	In two years	<b>256</b>
2023-26	1,523	1,305	In three years	<b>218</b>
2023-27	1,523	1,342	In four years	<b>181</b>
2023-28	1,523	1,378	In five years	<b>145</b>

**High-Level Findings from the**  
**2022 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, 2022

**34 Facilities**  
**2,521 Licensed Beds**



## New Castle County

- 23 AL / RR facilities
- 1,438 beds
- 49.2% of DE's 65+ population

## Kent County

- 5 AL / RR facilities
- 507 beds
- 16.3% of DE's 65+ population

## Sussex County

- 6 AL / RR facilities
- 576 beds
- 34.5% of DE's 65+ population



# Delaware Assisted Living / Rest Residential Facilities, 2022

New Castle County (23)	Kent County (5)	Sussex County (6)
<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> </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> </ol>
<p>*** Meadowcrest at Middletown, a 90-bed facility in New Castle County came online in Fall 2021. Harmony at Kent, a 134-bed facility in Kent County, came online in Spring 2022. DHCC is establishing data reporting channels with these facilities. While they are not included in the 2022 DALUSR, they will be included in next year's report.</p>		

# Delaware NH and AL/RR Utilization Metrics, 2021 - 2022

## Nursing Homes (NH)

	2021	2022	2021-22 Percent Change
Facilities	47	45	-4.3%
Licensed Beds	4,926	4,783	-2.9%
Billable Patient Days	1,285,648	1,331,449	3.6%
Occupancy	72.6%	76.5%	5.4%
Admissions	9,260	9,870	6.6%
Discharges	8,583	9,107	6.1%

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

	2021	2022**	2021-22 Percent Change**
Facilities	34	32	-5.9%
Licensed Beds	2,320	2,297	-1.0%
Billable Patient Days	602,514	584,579	-3.0%
Occupancy	71.2%	69.7%	-2.1%
Move-Ins	809	669	-17.3%
Move-Outs	736	695	-5.6%

\*\*Assisted Living utilization metrics for 2022 do not include data for Meadowcrest at Middletown (a 90-bed AL facility in New Castle County) or Harmony at Kent (a 134-bed AL facility in Kent County)

# Takeaways

- 2022 was a strong performance year for Delaware nursing homes, with year-over-year increases in billable patient days, occupancy rates, admissions, and discharges.
  - Increases in 2022 utilization metrics relative to 2021 were achieved despite the permanent closure of two nursing home facilities in New Castle County in 2021.
  - Although NH utilization metrics continued to rebound in 2022 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.
  - New Castle County is projected to have a nursing home bed surplus through 2026, at which point the county is expected to enter a shortage situation.
  - Kent and Sussex Counties are projected to have a nursing home bed surplus through 2028.
- 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.

## Today's Takeaways

- Because AL/RR facilities are not subject to CPR process, there is no formal methodology for calculating AL/RR bed need.
- DHCC produces an annual Delaware Assisted Living Report to supplement data from the annual Nursing Home Report and provide extra insight into long-term care patterns statewide.
- The 2022 Delaware Assisted Living Report showed slight declines in billable patient days, occupancy, move-ins, and move-outs relative to 2021.
  - DHCC is establishing data reporting channels with two AL facilities that recently opened (in 2021 and 2022, respectively).
  - Future iterations of the Delaware Assisted Living Report will provide more information on Assisted Living / Rest Residential trends statewide.

**Thank You**