

The Demographic Trends Impacting Need for Long-Term Services and Supports



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Overview

PART 1

The Impact of the Age Wave

PART 2

Forecasts of Dementia Prevalence Through 2040

PART 3

LTSS Policy Innovations and Rebalancing Towards Home- and Community-based Services

Appendix

Supplemental Social Security and Medicare Data by County Maps of LTSS Facilities and Broadband Access Trends in Adult Protective Services Medicaid in Washington State Oral Health and Older Adults COVID-19 Trends



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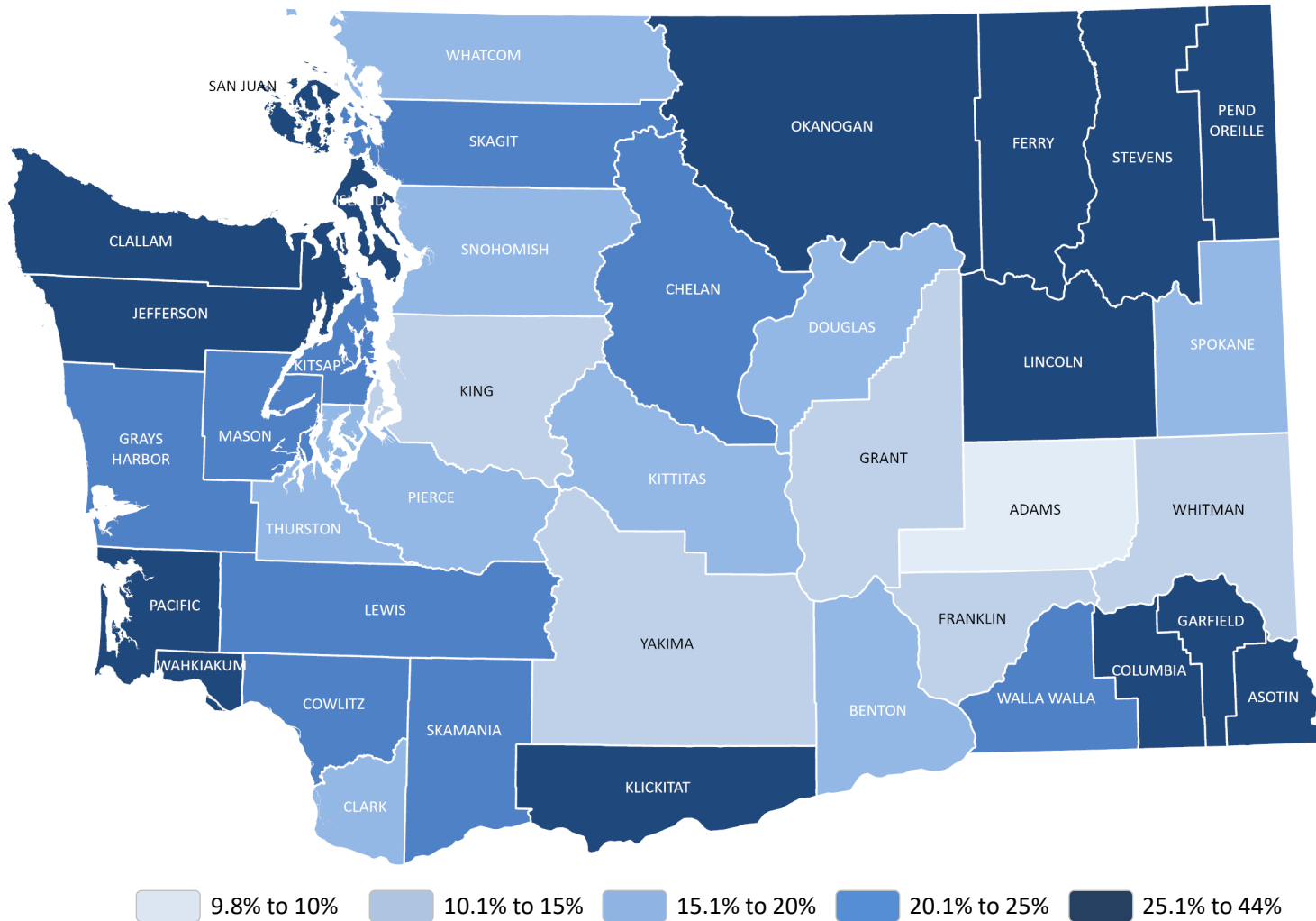
PART 1

The Impact of the Age Wave

Persons 65+ as a Percentage of the Total Population

Estimates and Projections by County

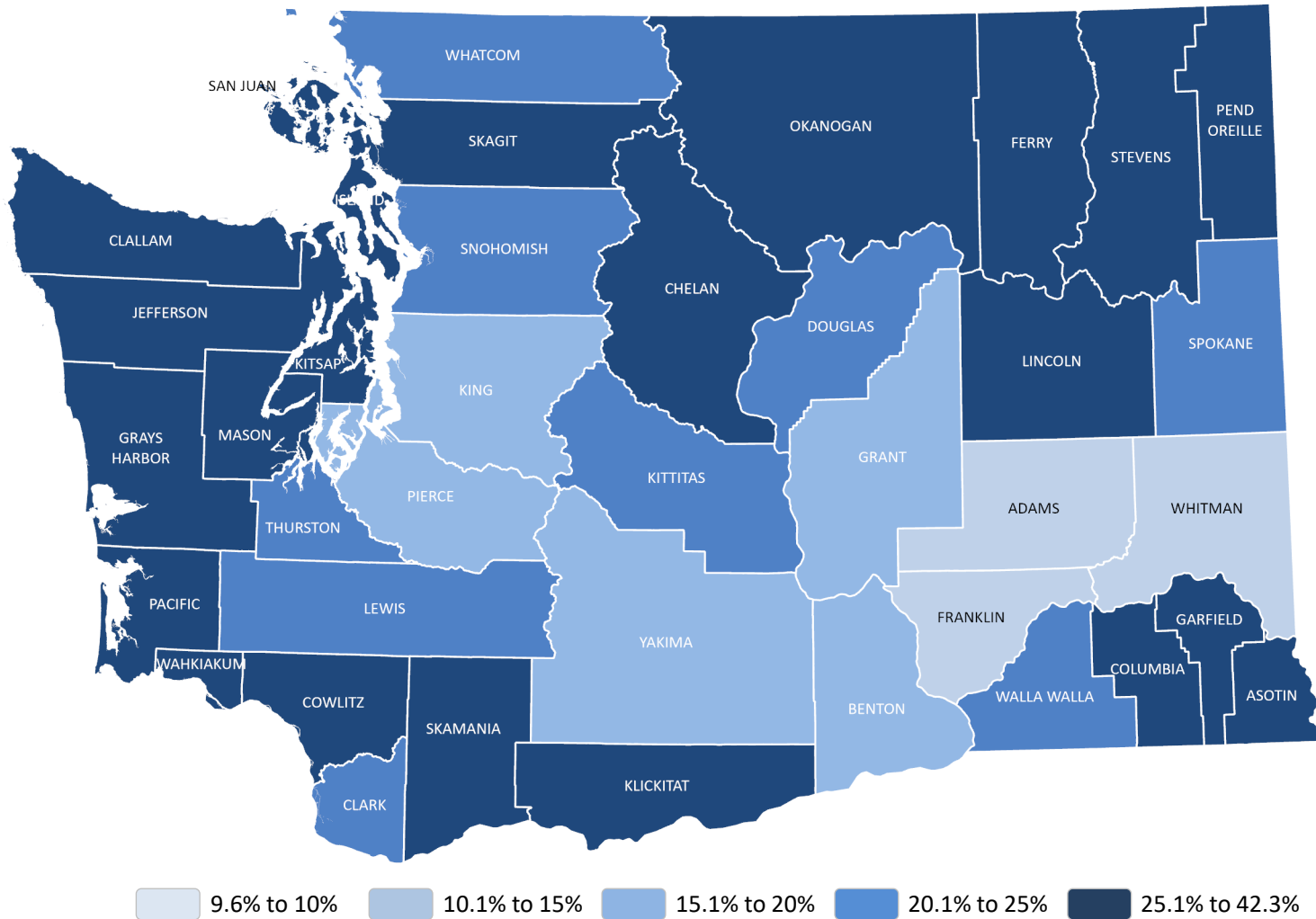
2020



Persons 65+ as a Percentage of the Total Population

Estimates and Projections by County

2030

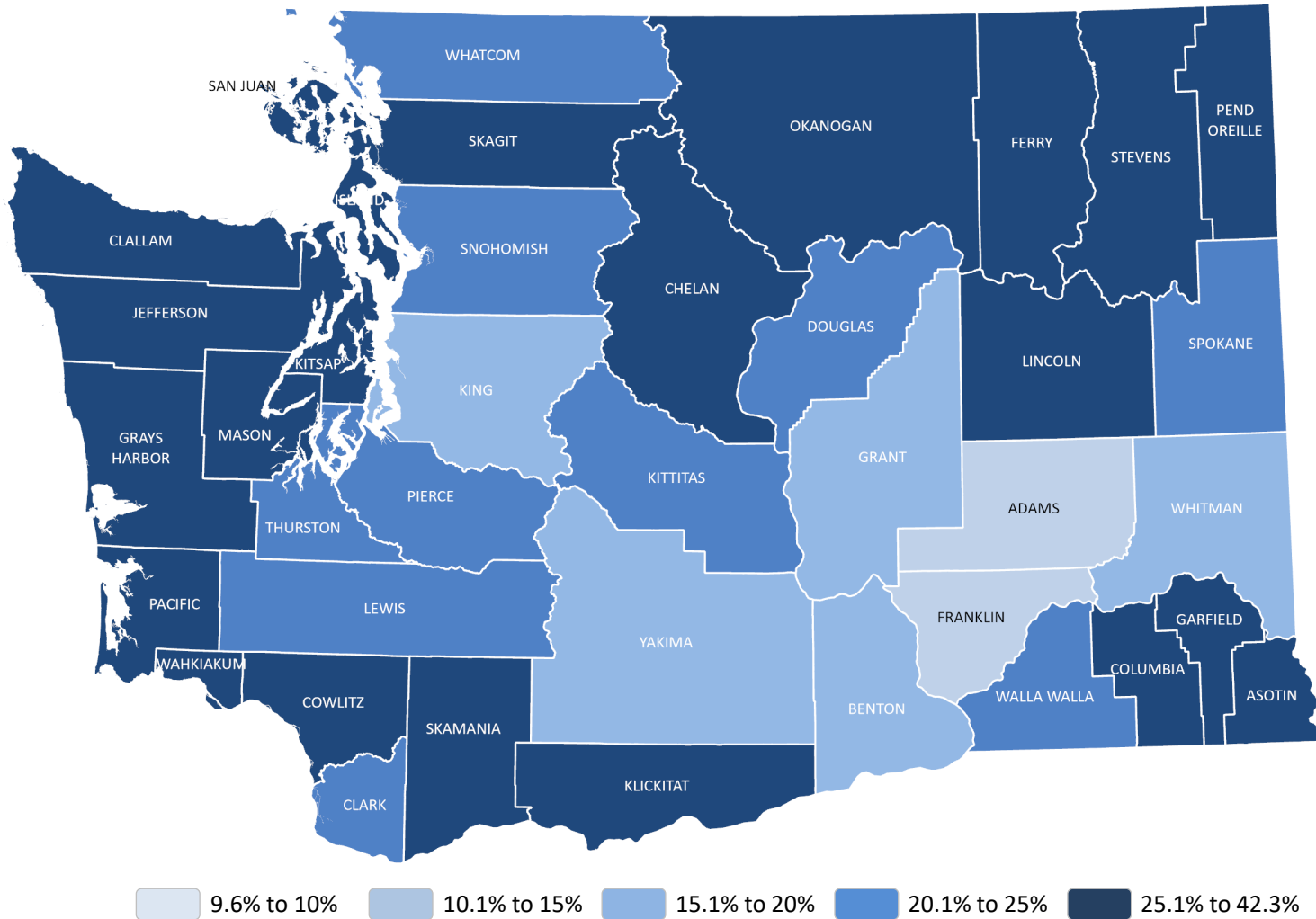


SOURCES: Washington State Office of Financial Management, Forecasting and Research Division. Projections of the Population Age 65 and Over for Growth Management, 2017 GMA Projections – Medium Series.

Persons 65+ as a Percentage of the Total Population

Estimates and Projections by County

2040



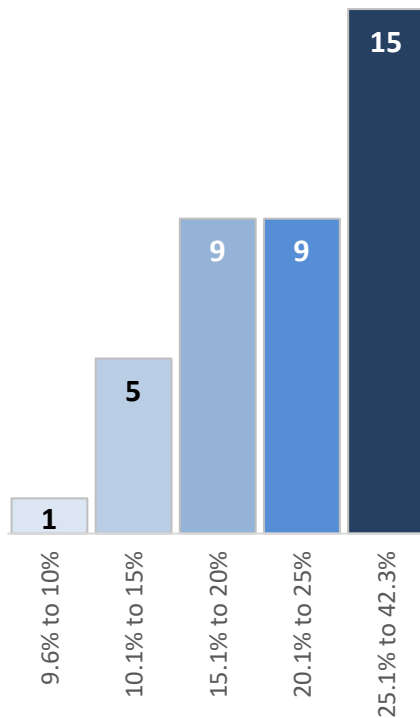
SOURCES: Washington State Office of Financial Management, Forecasting and Research Division. Projections of the Population Age 65 and Over for Growth Management, 2017 GMA Projections – Medium Series.

Persons 65+ as a Percentage of the Total Population

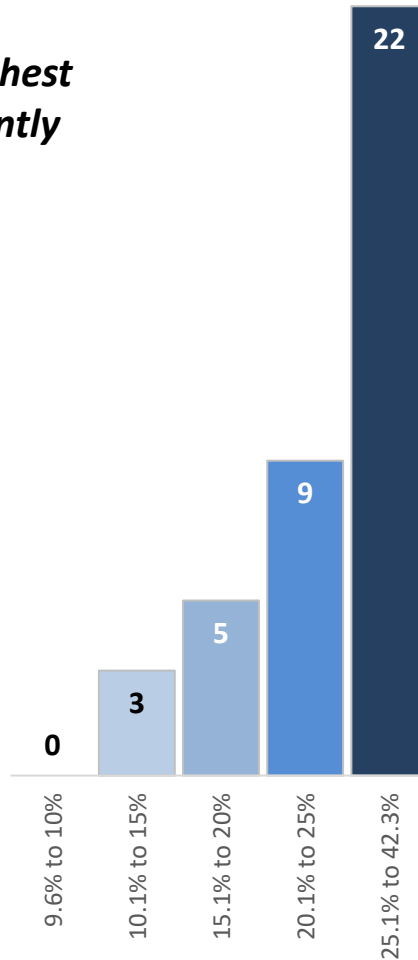
Estimates and Projections by County

2020

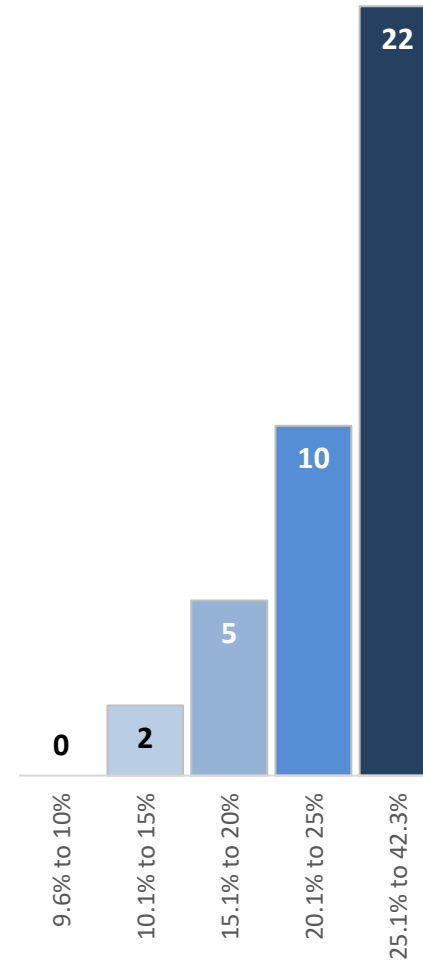
Number of counties at the highest interval will increase significantly over the next 20 years . . .



2030

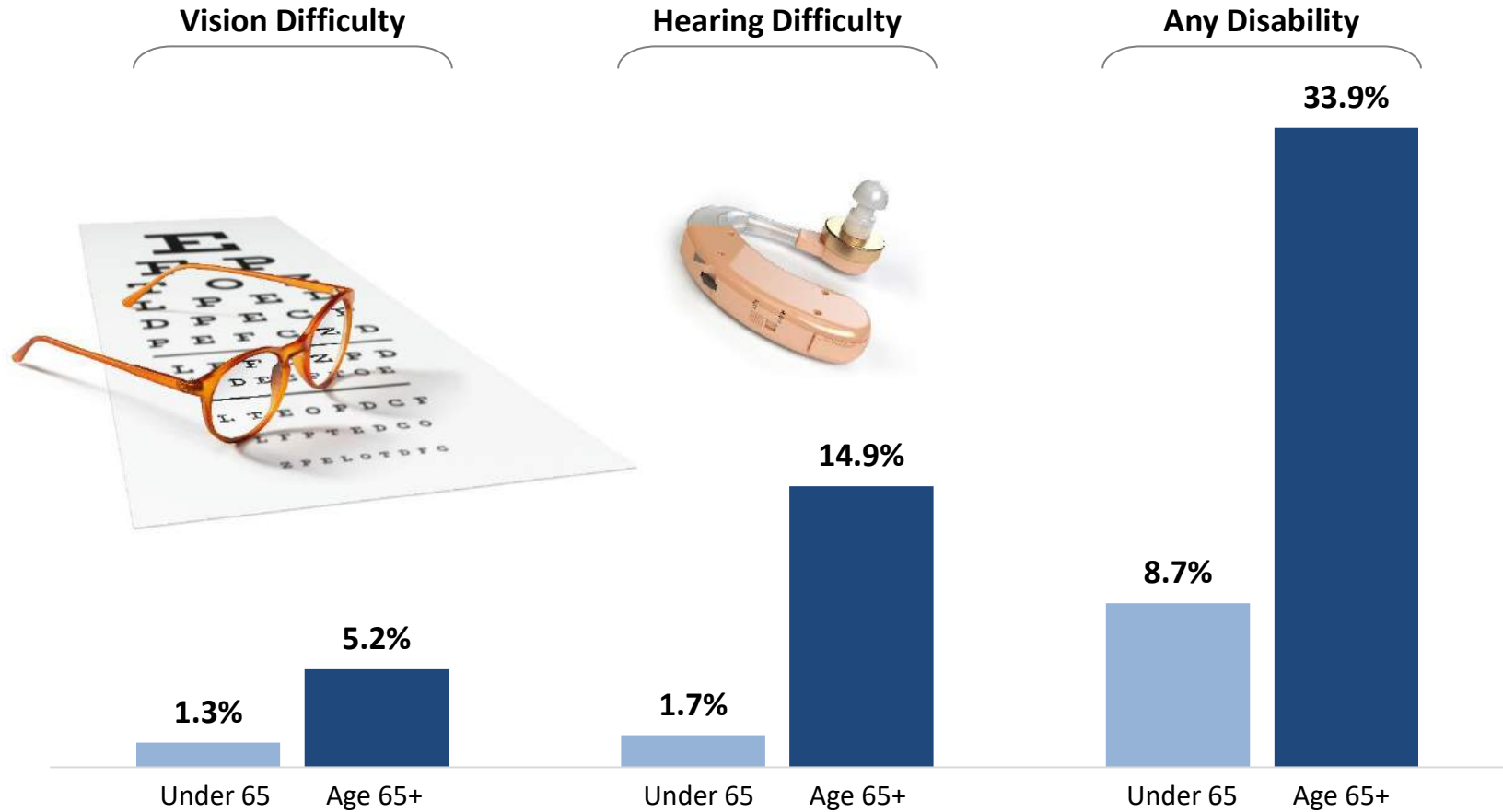


2040



Differences in Vision Difficulty, Hearing Difficulty, and Disability Prevalence by Age

Percent of Washington State population with . . .





Getty Images

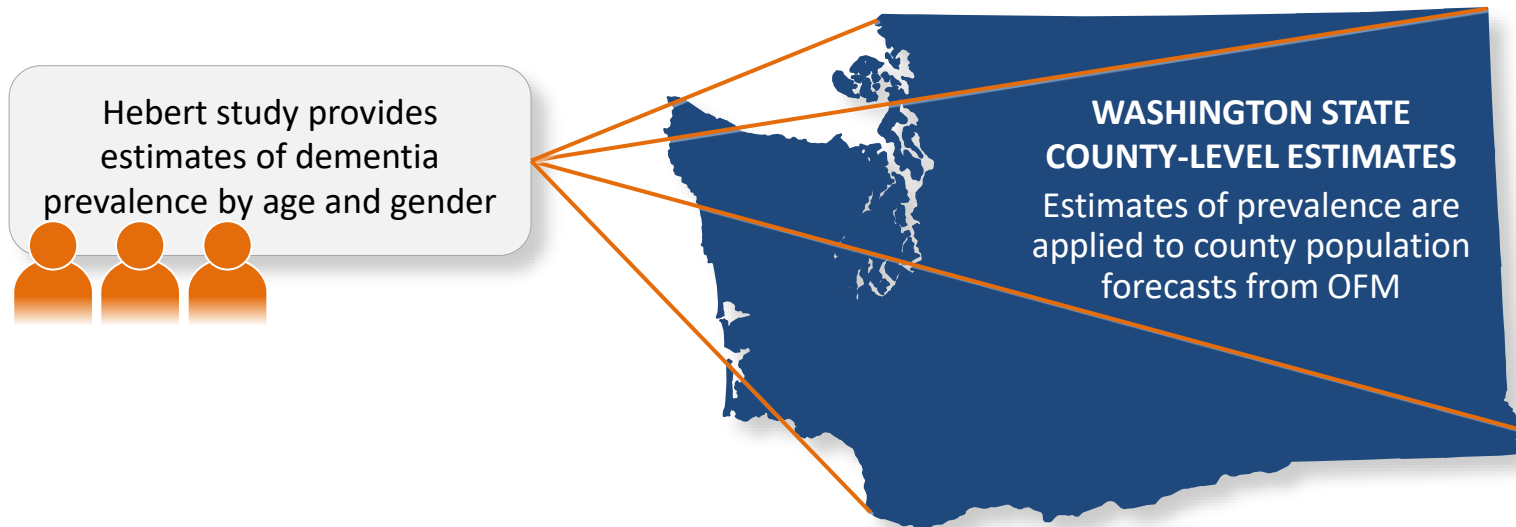
PART 2

Forecasts of Dementia Prevalence

Forecasting Dementia Prevalence

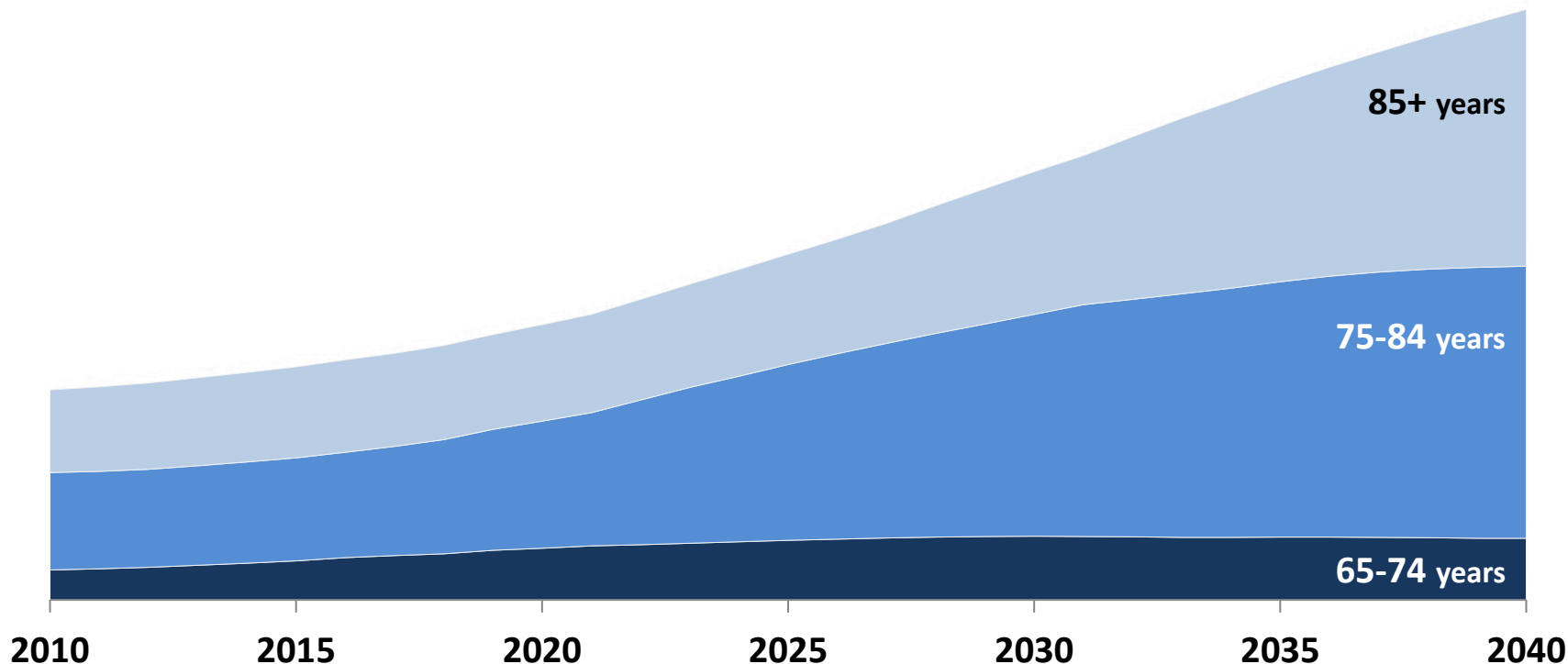
Data on dementia prevalence

- Prevalence estimates are derived from clinical studies or population surveys (in this case, Hebert et al, 2013)
- Prevalence rates by age and gender are calculated from the study population, then applied to state population estimates



Projections of Alzheimer's Dementia in Washington State, 2010 – 2040

Synthetic projections using national prevalence rates from Hebert *et al* (2013)



	2010		2020		2030		2040	
	NUMBER	PREVALENCE	NUMBER	PREVALENCE	NUMBER	PREVALENCE	NUMBER	PREVALENCE
65 -74 years	13,717	3.0%	23,600	3.1%	29,180	3.3%	28,187	3.4%
75 - 84 years	44,561	17.6%	58,251	16.7%	101,581	17.2%	124,500	18.0%
85+ years	37,879	32.3%	44,121	32.2%	65,255	32.9%	117,535	34.6%
Total 65+	96,156	11.6%	125,973	10.1%	196,015	11.7%	270,222	14.5%

DATA SOURCES

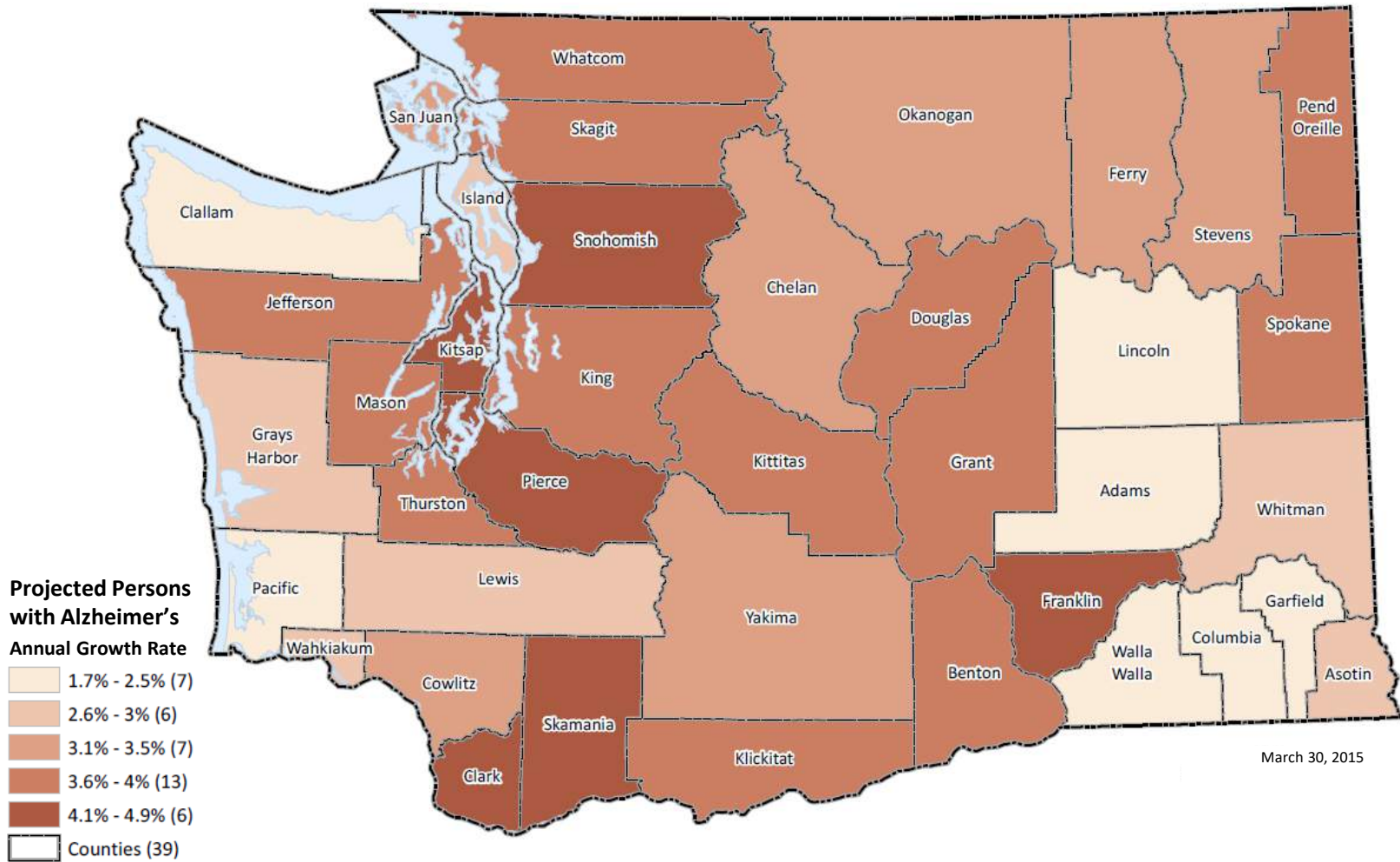
Total Population 65 and Over, by Age: Washington State Office of Financial Management, Forecasting and Research Division. Forecast of the State Population by Age and Sex: 2010-2040. Nov. 2013. **National Prevalence of Alzheimer's Dementia for Persons 65+, by Age:** Hebert L.E., Weuve J., Scherr P.A., and D.A. Evans. Alzheimer disease in the United States (2010–2050) estimated using the 2010 census. *Neurology* May 7, 2013 80:1778-1783.



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Persons 65+ Years with Alzheimer's Disease, Average Annual Growth Rate, 2015 – 2040

2040 Synthetic Projections by County

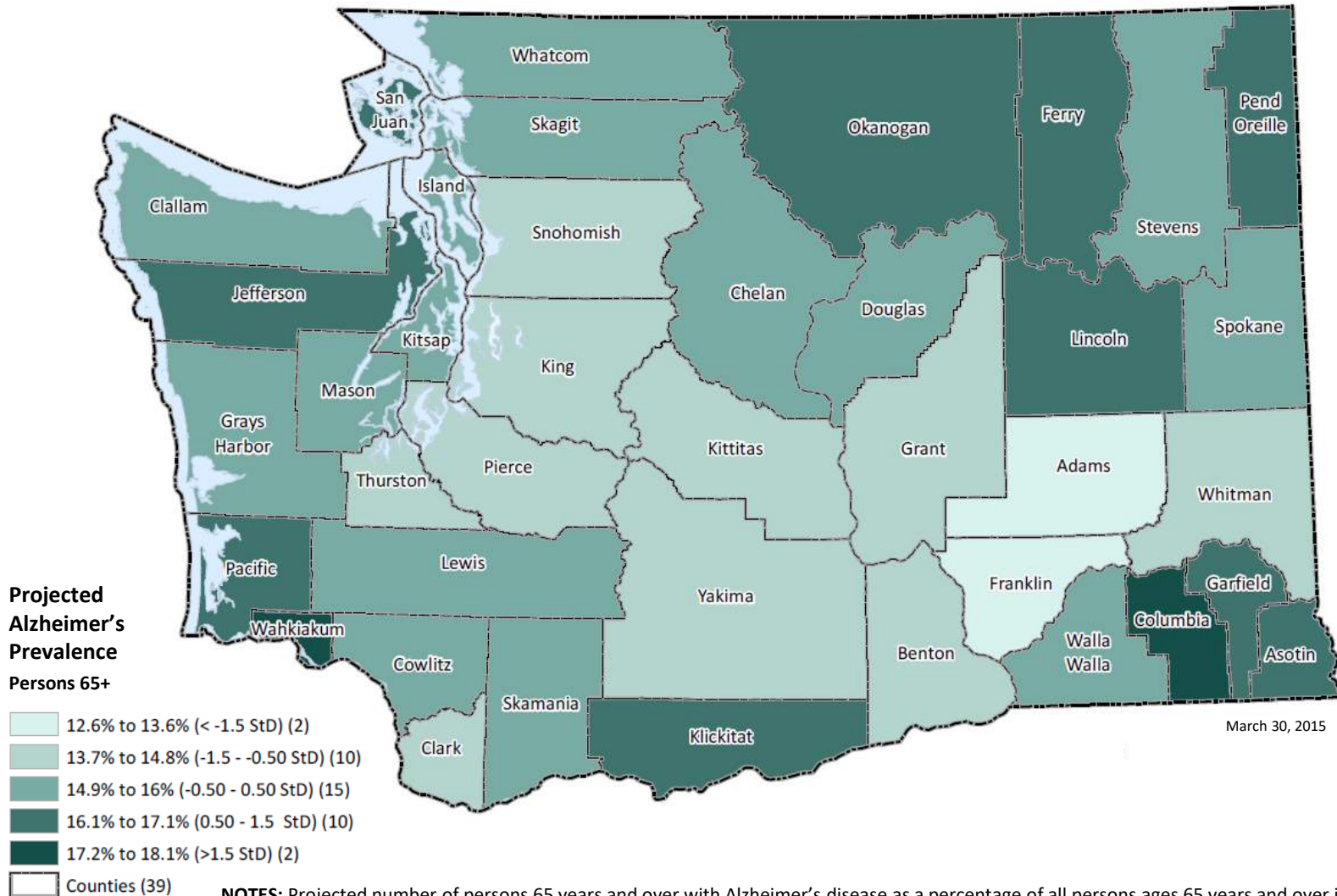


NOTES: Projected average annual growth rate of persons 65 years and over with Alzheimer's disease in 2015-2040. State growth rate = 3.8 percent. Projections use national prevalence rates of Alzheimer's disease from Hebert et al (2013).

SOURCES: Washington State Office of Financial Management, 2012 County Growth Management Population Projections by Age and Sex: 2010-2040. Prevalence of Alzheimer's disease: Hebert L.E., Weuve J., Scherr P.A., and D.A. Evans. Alzheimer disease in the United States (2010–2050) estimated using the 2010 census. *Neurology* May 7, 2013 80:1778-1783.

Proportion with Alzheimer's Disease Among Persons Age 65+

2040 Synthetic Projections by County

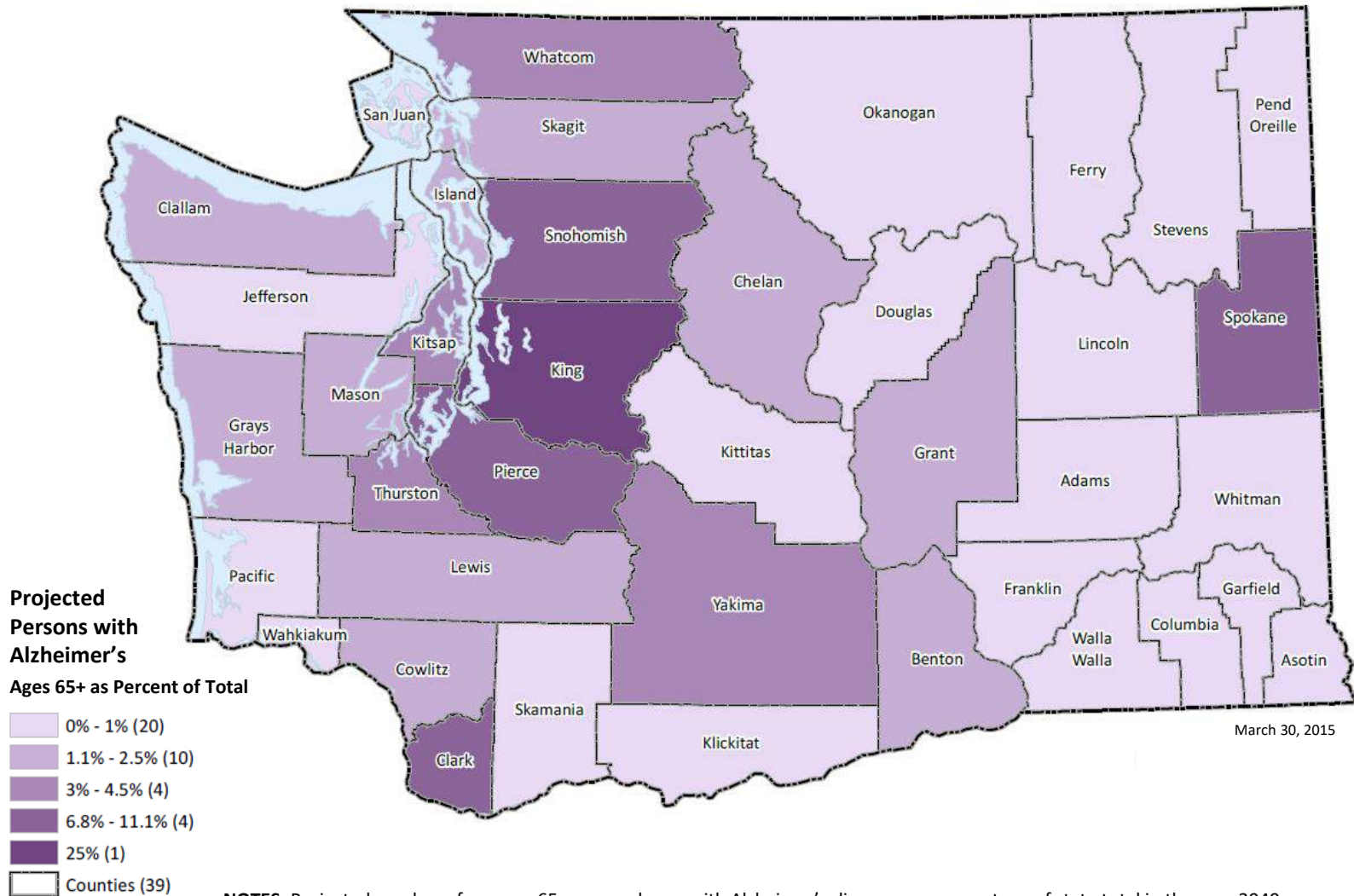


NOTES: Projected number of persons 65 years and over with Alzheimer's disease as a percentage of all persons ages 65 years and over in the year 2040. Projections use national prevalence rates of Alzheimer's disease from Hebert et al (2013).

SOURCES: Washington State Office of Financial Management, 2012 County Growth Management Population Projections by Age and Sex: 2010-2040. Prevalence of Alzheimer's disease: Hebert L.E., Weuve J., Scherr P.A., and D.A. Evans. Alzheimer disease in the United States (2010-2050) estimated using the 2010 census. Neurology May 7, 2013 80:1778-1783.

Persons 65+ with Alzheimer's Disease, County Share of State Total

2040 Synthetic Projections by County



NOTES: Projected number of persons 65 years and over with Alzheimer's disease as a percentage of state total in the year 2040. Projections use national prevalence rates of Alzheimer's disease from Hebert et al (2013).

SOURCES: Washington State Office of Financial Management, 2012 County Growth Management Population Projections by Age and Sex: 2010-2040. Prevalence of Alzheimer's disease: Hebert L.E., Weuve J., Scherr P.A., and D.A. Evans. Alzheimer disease in the United States (2010-2050) estimated using the 2010 census. Neurology May 7, 2013 80:1778-1783.



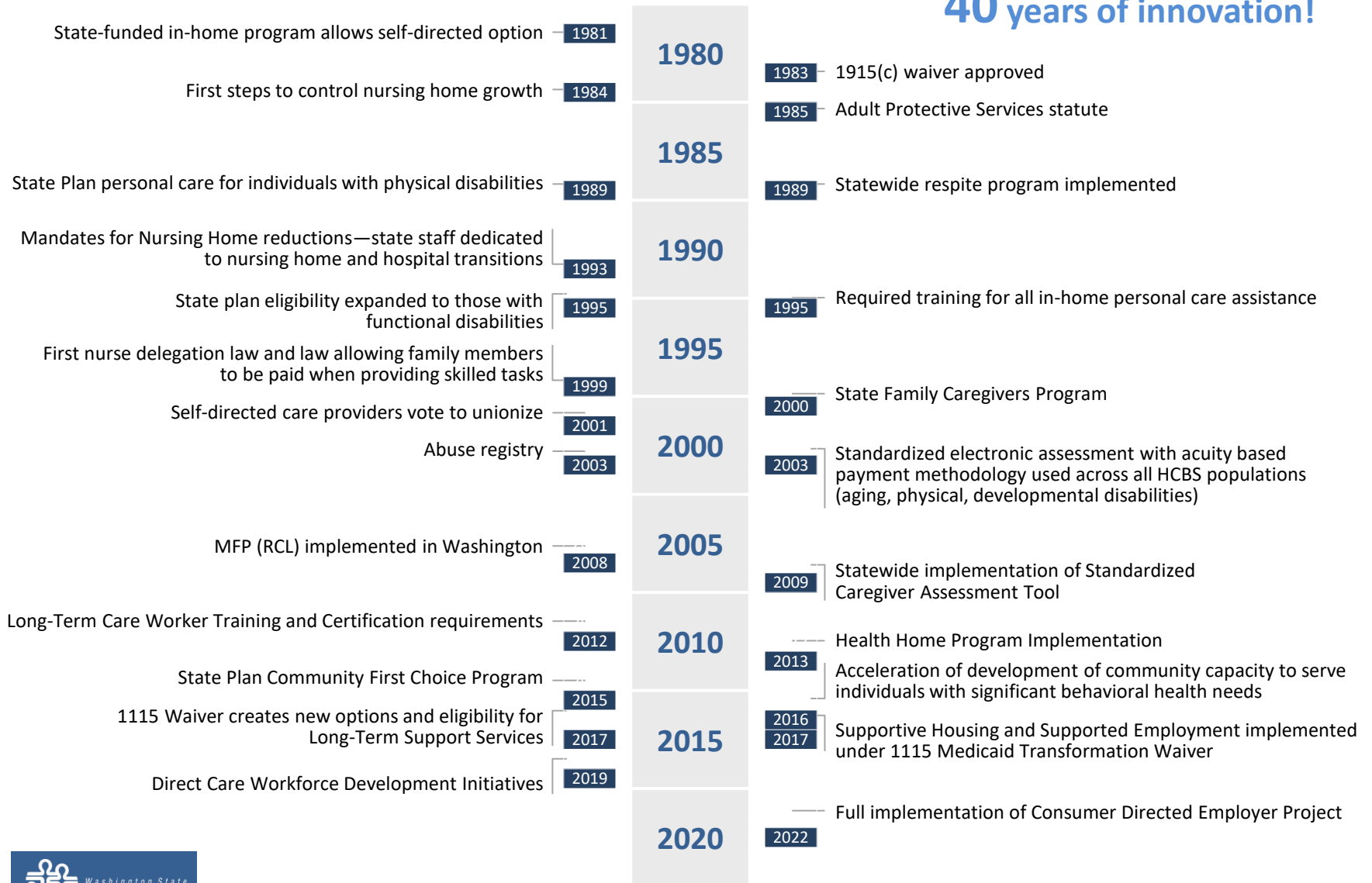
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PART 3

LTSS Policy Innovations and Rebalancing Towards Home- and Community-based Services

LTSS Program Initiatives Supporting Rebalancing

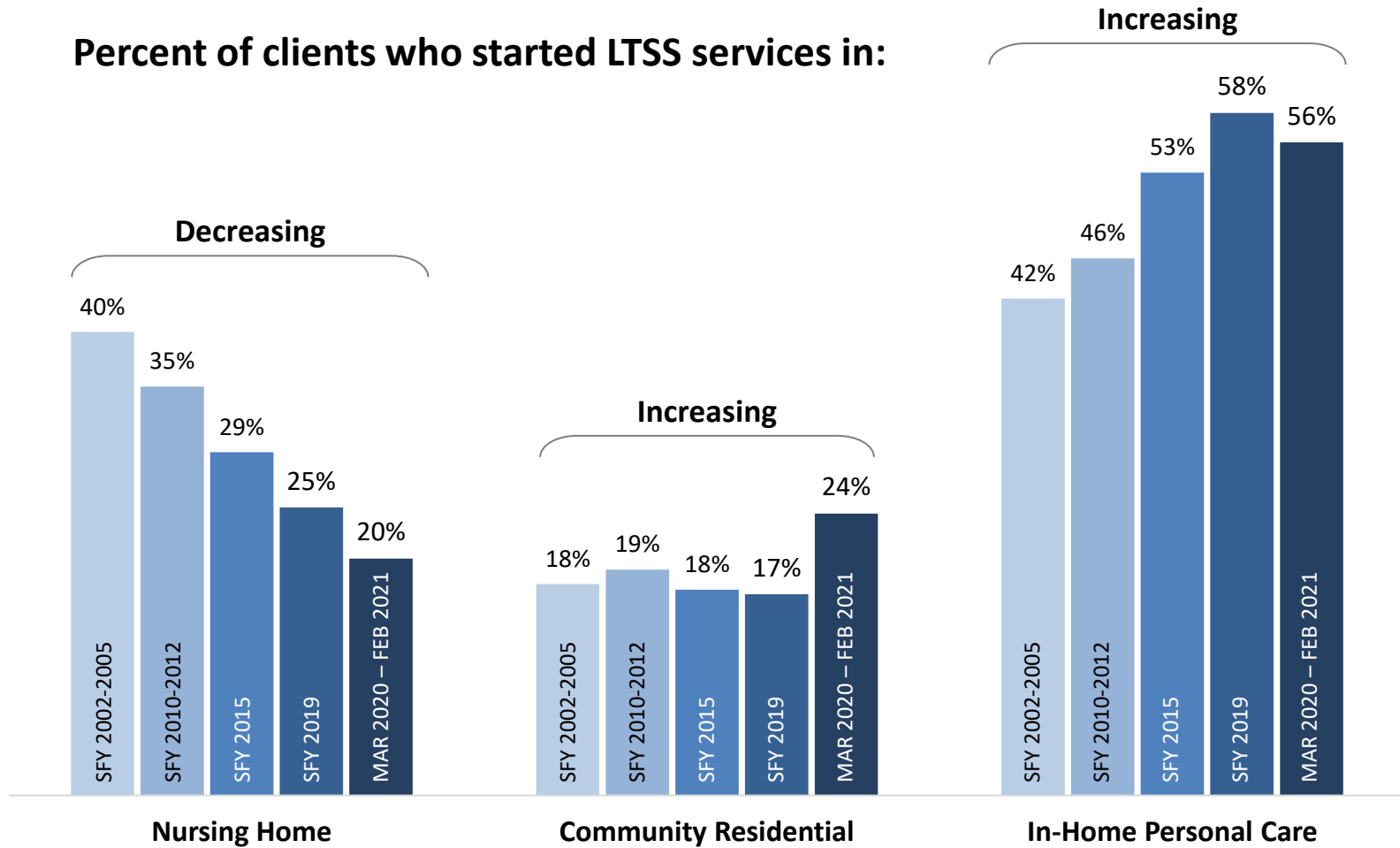
40 years of innovation!



Initial Service Modality Is Increasingly In-Home Personal Care

Comparison of cohorts starting LTSS services in SFYs 2002-05, 2010-12, 2015, 2019, and in first year of COVID pandemic

Percent of clients who started LTSS services in:

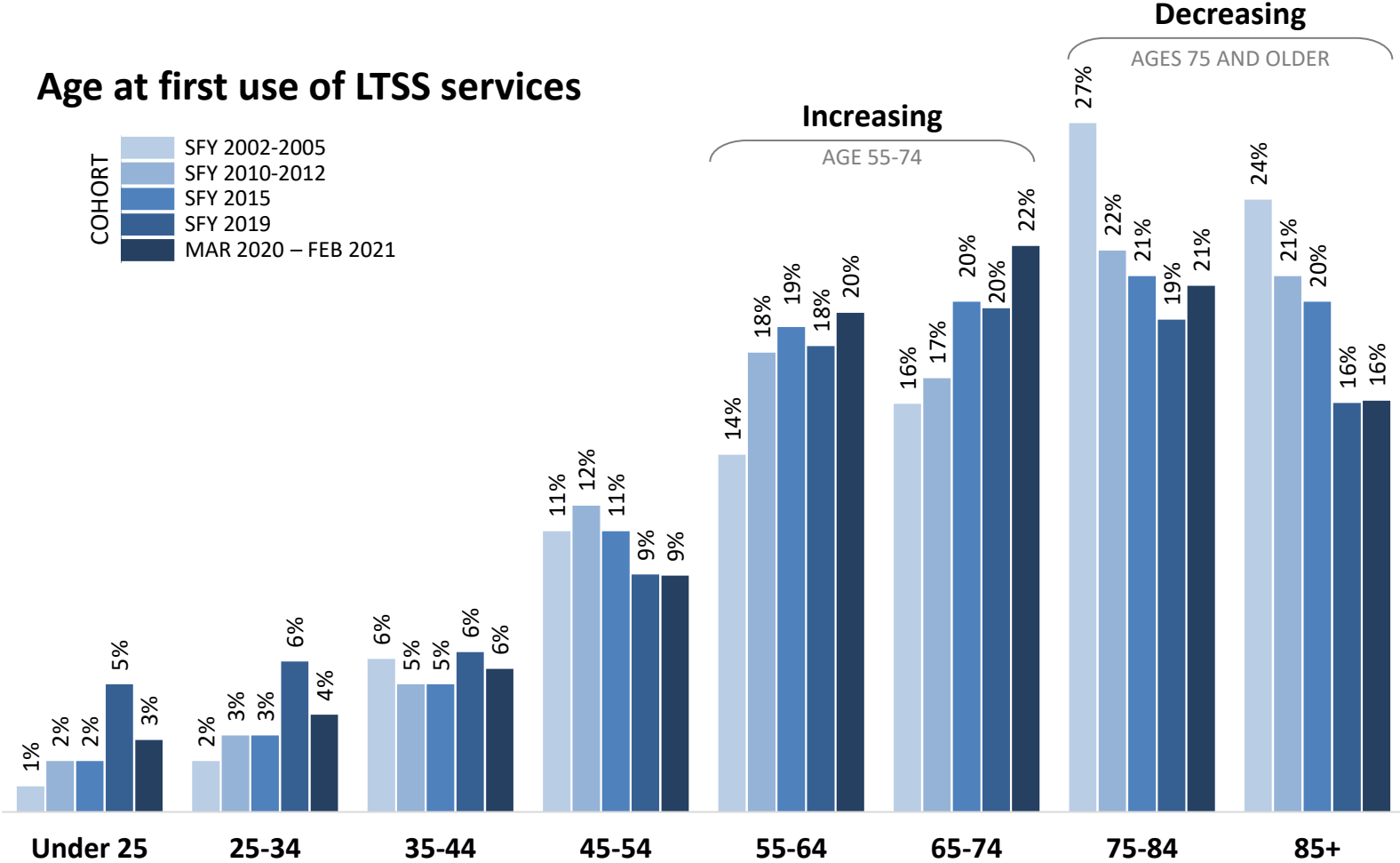


Age at First Use of LTSS Services Has Been Decreasing over Time

Comparison of cohorts starting LTSS services in SFYs 2002-05, 2010-12, 2015, 2019, and in first year of COVID pandemic

Age at first use of LTSS services

- COHORT
- SFY 2002-2005
- SFY 2010-2012
- SFY 2015
- SFY 2019
- MAR 2020 – FEB 2021

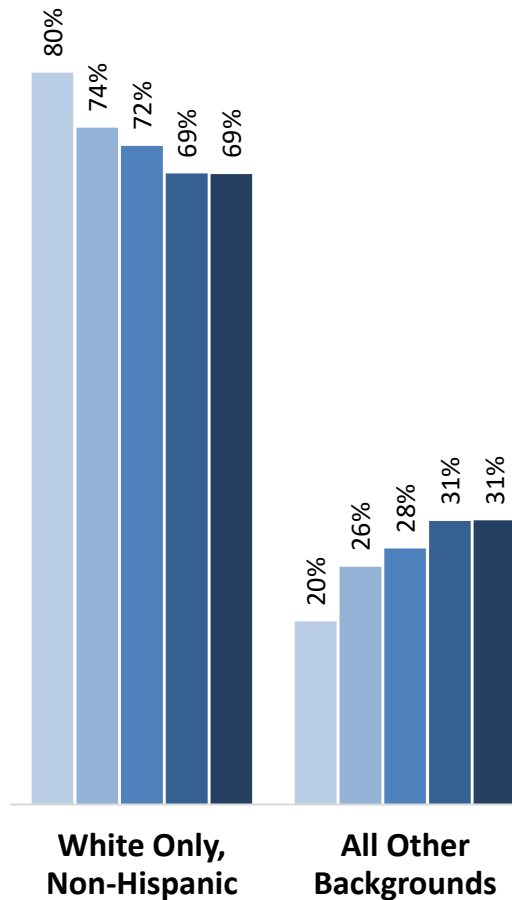


SOURCE: DSHS Research and Data Analysis Division, Integrated Client Databases.

Increasing Diversity of Medicaid LTSS Clients Over Time

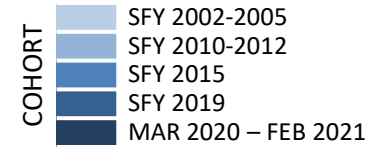
Comparison of cohorts starting LTSS services in SFYs 2002-05, 2010-12, 2015, 2019, and in first year of COVID pandemic

Race/Ethnicity

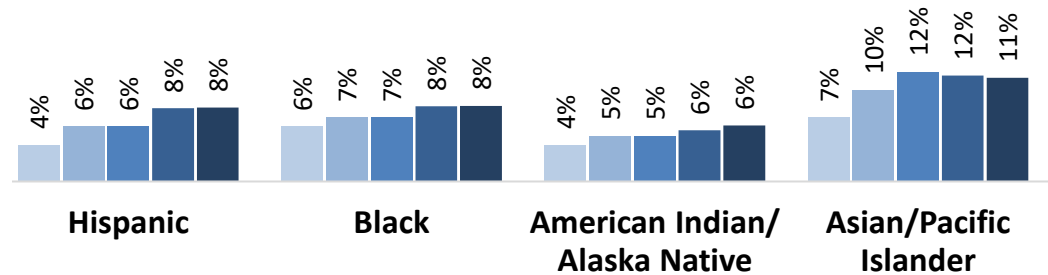


DETAIL

NOTE: Categories are not mutually exclusive.

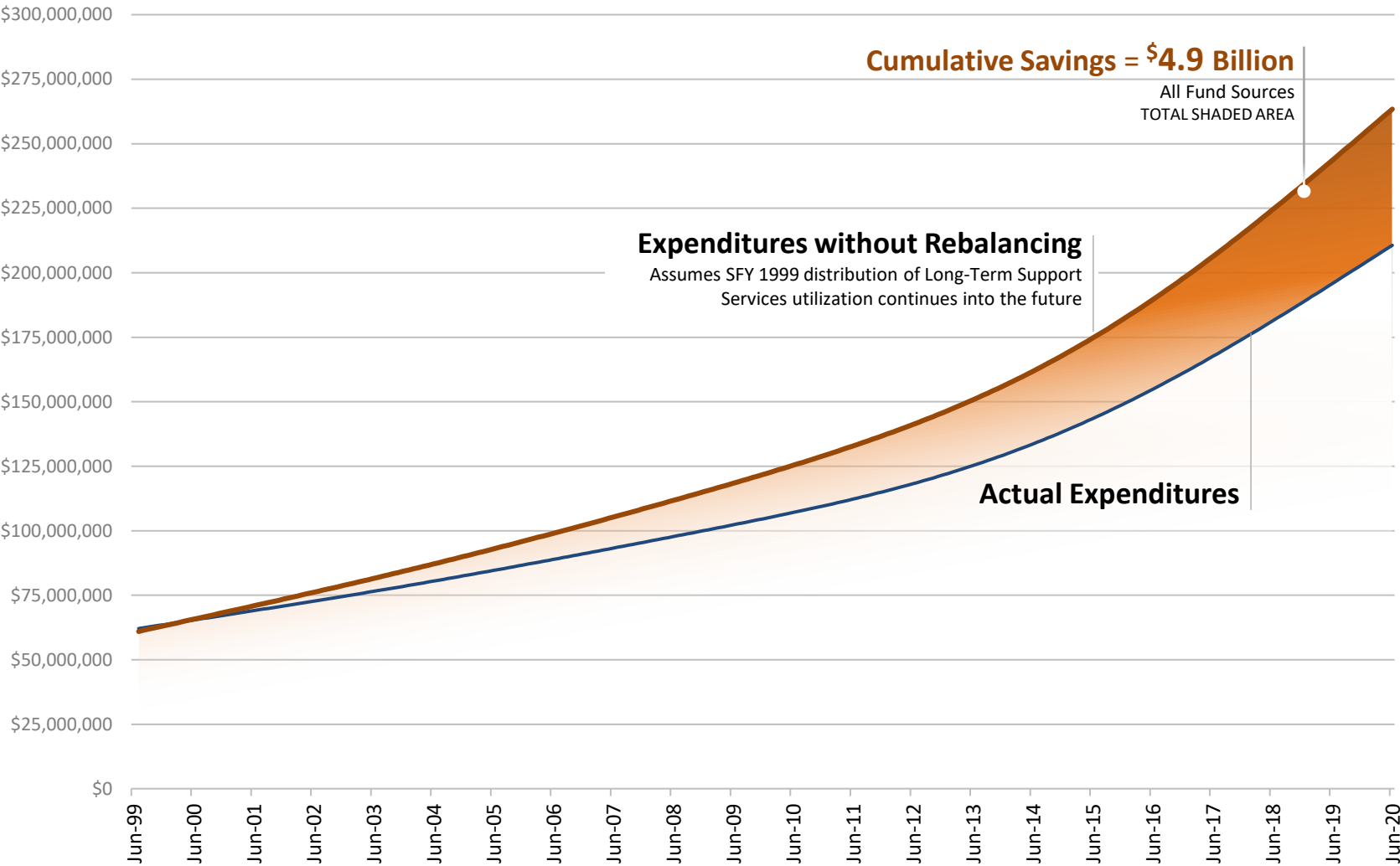


► Increased share of LTSS entrants are American Indian/Alaska Native, Asian, Black, and/or Hispanic



ALSA Long-Term Services and Supports Rebalancing Savings

Monthly Service Expenditures • All Fund Sources • SFY 2000-2020



DATA SOURCE: RDA EMIS. For In-home Services, RDA EMIS caseload data are adjusted to Caseload Forecast Council caseload data from July 2003 to January 2005.

Key Findings

- More people are starting their LTSS experience receiving in-home care or services in a community residential facility, rather than in a nursing facility
- The LTSS population is becoming more diverse
- Rebalancing away from nursing facilities and towards home- and community-based services produced nearly \$5 billion in Medicaid savings (all funds) from SFY 2000 through SFY 2020
- Rebalancing is forecast to add \$2.3 billion in savings (all funds) from SFYs 2021 through 2023



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Appendix Supplemental Information

Medicare and Social Security Recipients

December 2019

	Medicare ¹		Social Security ²	
	Hospital and/or Medical	Prescription Drug	Total (All Categories)	Age 65 and Older
WASHINGTON	1,362,298	895,518	1,376,287	1,082,230
Adams	2,548	1,727	2,715	2,035
Asotin	6,247	4,315	6,770	4,950
Benton	35,681	24,111	37,260	28,530
Chelan	17,508	11,971	18,085	14,650
Clallam	26,763	17,036	27,275	22,505
Clark	89,154	65,702	90,805	71,815
Columbia	1,305	808	1,330	1,040
Cowlitz	26,318	19,783	28,460	20,980
Douglas	8,030	5,344	8,390	6,740
Ferry	2,357	1,340	2,500	1,905
Franklin	10,678	7,135	11,285	8,225
Garfield	707	458	685	530
Grant	16,027	10,990	17,015	12,795
Grays Harbor	20,262	13,021	21,935	15,840
Island	23,439	13,643	23,735	20,050
Jefferson	13,174	8,467	13,140	11,370
King	318,652	218,888	300,325	248,680
Kitsap	55,958	27,673	55,240	43,950
Kittitas	8,824	5,175	9,055	7,315
Klickitat	6,131	3,756	6,495	5,095
Lewis	20,906	14,153	22,570	16,720
Lincoln	3,162	1,931	3,310	2,610
Mason	17,594	10,192	18,515	14,240
Okanogan	10,788	6,706	11,280	8,740
Pacific	8,186	5,379	8,790	6,885
Pend Oreille	4,119	2,564	4,460	3,320
Pierce	151,712	92,343	157,040	117,615
San Juan	5,905	4,086	5,685	5,115
Skagit	31,271	20,804	32,075	26,065
Skamania	2,611	1,592	2,710	2,095
Snohomish	127,505	88,994	127,820	101,030
Spokane	105,225	71,776	109,000	81,215
Stevens	12,833	7,826	13,635	10,230
Thurston	60,440	32,252	63,235	48,520
Wahkiakum	1,581	1,075	1,595	1,240
Walla Walla	13,271	8,188	13,635	10,840
Whatcom	46,602	32,493	46,755	37,890
Whitman	5,970	3,127	6,190	4,865
Yakima	42,849	28,695	45,485	33,995
Unknown	*	*	N/A	N/A

SOURCES: ¹<https://www.cms.gov/Research-Statistics-Data-and-Systems/Statistics-Trends-and-Reports/CMSProgramStatistics/Dashboard.html>
²https://www.ssa.gov/policy/docs/statcomps/oasdi_sc/



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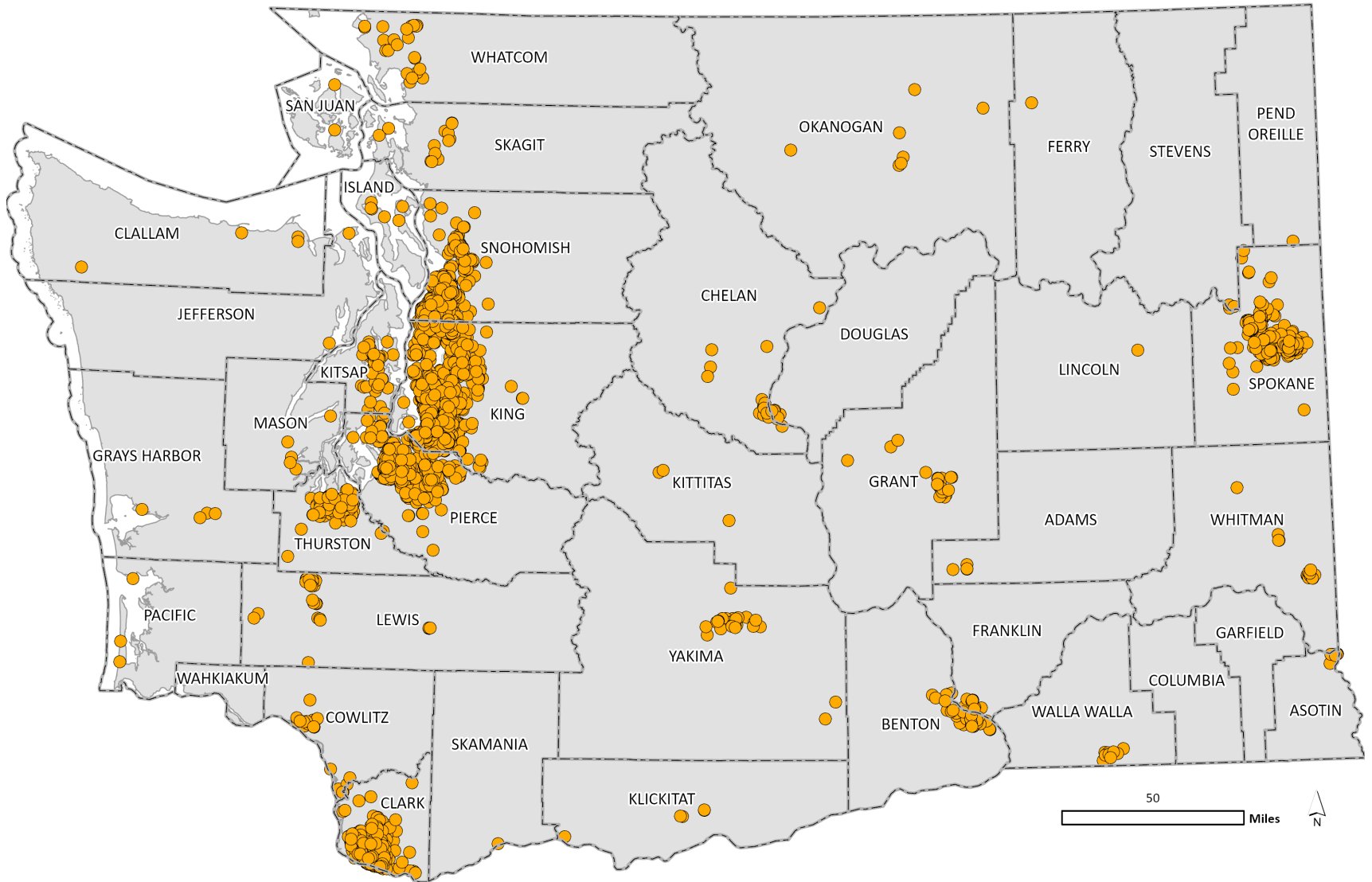
Projected Persons 65+ with Alzheimer's Disease in Washington Counties: 2015 – 2040

Based on National Prevalence Rates (Herbert, 2013)

County	Projected Persons 65+ with Alzheimer's Disease				Prevalence Rate				Average Annual Growth Rate			
	2015	2020	2030	2040	2015	2020	2030	2040	2015-2020	2020-2030	2030-2040	2015-2040
STATE	106,788	127,271	197,144	271,340	10.4%	10.1%	11.7%	14.5%	3.6%	4.5%	3.2%	3.8%
Adams	237	255	331	406	11.2%	10.8%	12.0%	13.3%	1.5%	2.6%	2.1%	2.2%
Asotin	566	680	958	1,175	11.3%	11.5%	13.5%	17.1%	3.7%	3.5%	2.1%	3.0%
Benton	2,672	3,229	4,973	6,764	10.4%	10.2%	11.8%	14.7%	3.9%	4.4%	3.1%	3.8%
Chelan	1,479	1,681	2,520	3,424	11.2%	10.4%	11.9%	15.4%	2.6%	4.1%	3.1%	3.4%
Clallam	2,182	2,468	3,269	3,958	11.4%	11.2%	12.5%	16.0%	2.5%	2.9%	1.9%	2.4%
Clark	6,346	7,944	13,052	18,530	10.1%	10.1%	12.1%	14.6%	4.6%	5.1%	3.6%	4.4%
Columbia	121	145	200	222	10.7%	11.4%	14.0%	18.1%	3.7%	3.3%	1.1%	2.5%
Cowlitz	1,995	2,359	3,493	4,509	10.4%	10.3%	12.1%	15.0%	3.4%	4.0%	2.6%	3.3%
Douglas	718	888	1,372	1,881	10.7%	10.8%	12.5%	15.4%	4.4%	4.4%	3.2%	3.9%
Ferry	171	225	330	380	9.5%	9.9%	12.9%	16.9%	5.6%	3.9%	1.4%	3.2%
Franklin	739	934	1,582	2,454	10.1%	9.7%	11.3%	12.7%	4.8%	5.4%	4.5%	4.9%
Garfield	68	70	93	104	12.5%	10.9%	13.0%	16.7%	0.3%	2.9%	1.2%	1.7%
Grant	1,338	1,626	2,441	3,424	10.4%	10.5%	11.7%	13.8%	4.0%	4.1%	3.4%	3.8%
Grays Harbor	1,447	1,670	2,416	2,995	10.2%	10.1%	11.9%	15.0%	2.9%	3.8%	2.2%	3.0%
Island	1,810	2,169	3,071	3,830	10.3%	10.5%	12.3%	15.6%	3.7%	3.5%	2.2%	3.0%
Jefferson	949	1,183	1,807	2,293	9.7%	10.1%	12.5%	16.5%	4.5%	4.3%	2.4%	3.6%
King	27,887	32,382	48,984	67,797	10.7%	10.2%	11.6%	14.1%	3.0%	4.2%	3.3%	3.6%
Kitsap	4,316	5,463	9,029	12,124	9.8%	9.8%	12.1%	15.5%	4.8%	5.2%	3.0%	4.2%
Kittitas	633	781	1,193	1,575	10.1%	10.2%	11.9%	14.7%	4.3%	4.3%	2.8%	3.7%
Klickitat	450	590	910	1,101	9.5%	9.9%	12.9%	16.2%	5.6%	4.4%	1.9%	3.6%
Lewis	1,631	1,845	2,496	3,080	10.9%	10.8%	12.0%	15.0%	2.5%	3.1%	2.1%	2.6%
Lincoln	280	322	424	482	10.9%	11.0%	12.7%	16.5%	2.8%	2.8%	1.3%	2.2%
Mason	1,391	1,702	2,575	3,486	10.4%	10.3%	11.6%	15.0%	4.1%	4.2%	3.1%	3.7%
Okanogan	902	1,113	1,638	1,968	10.0%	10.2%	12.7%	16.1%	4.3%	3.9%	1.9%	3.2%
Pacific	644	758	1,010	1,160	10.7%	10.9%	13.1%	16.6%	3.3%	2.9%	1.4%	2.4%
Pend Oreille	307	406	629	761	9.4%	9.9%	12.7%	16.9%	5.7%	4.5%	1.9%	3.7%
Pierce	10,903	12,972	20,904	30,195	10.2%	9.8%	11.1%	13.9%	3.5%	4.9%	3.7%	4.2%
San Juan	457	586	879	1,029	9.4%	9.9%	13.2%	17.0%	5.1%	4.1%	1.6%	3.3%
Skagit	2,472	2,955	4,593	6,267	10.6%	10.3%	12.0%	15.0%	3.6%	4.5%	3.2%	3.8%
Skamania	192	257	419	568	9.3%	9.5%	11.4%	15.4%	6.0%	5.0%	3.1%	4.4%
Snohomish	9,460	11,617	19,841	30,186	10.1%	9.6%	10.9%	14.0%	4.2%	5.5%	4.3%	4.8%
Spokane	7,949	9,188	14,209	19,165	10.7%	10.1%	11.8%	14.9%	2.9%	4.5%	3.0%	3.6%
Stevens	930	1,187	1,770	2,175	9.6%	10.0%	12.4%	15.7%	5.0%	4.1%	2.1%	3.5%
Thurston	4,200	5,131	8,167	11,166	10.2%	9.9%	11.9%	14.5%	4.1%	4.8%	3.2%	4.0%
Wahkiakum	128	163	233	244	9.5%	10.4%	14.3%	17.4%	4.8%	3.7%	0.5%	2.6%
Walla Walla	1,179	1,269	1,650	2,020	12.1%	11.5%	12.7%	15.7%	1.5%	2.7%	2.0%	2.2%
Whatcom	3,472	4,253	6,821	9,320	10.4%	10.1%	12.3%	15.0%	4.1%	4.8%	3.2%	4.0%
Whitman	544	627	882	1,109	11.2%	10.9%	12.3%	14.8%	2.9%	3.5%	2.3%	2.9%
Yakima	3,622	4,178	5,978	8,017	10.9%	10.7%	12.0%	14.4%	2.9%	3.6%	3.0%	3.2%

DSHS Licensed Adult Family Homes

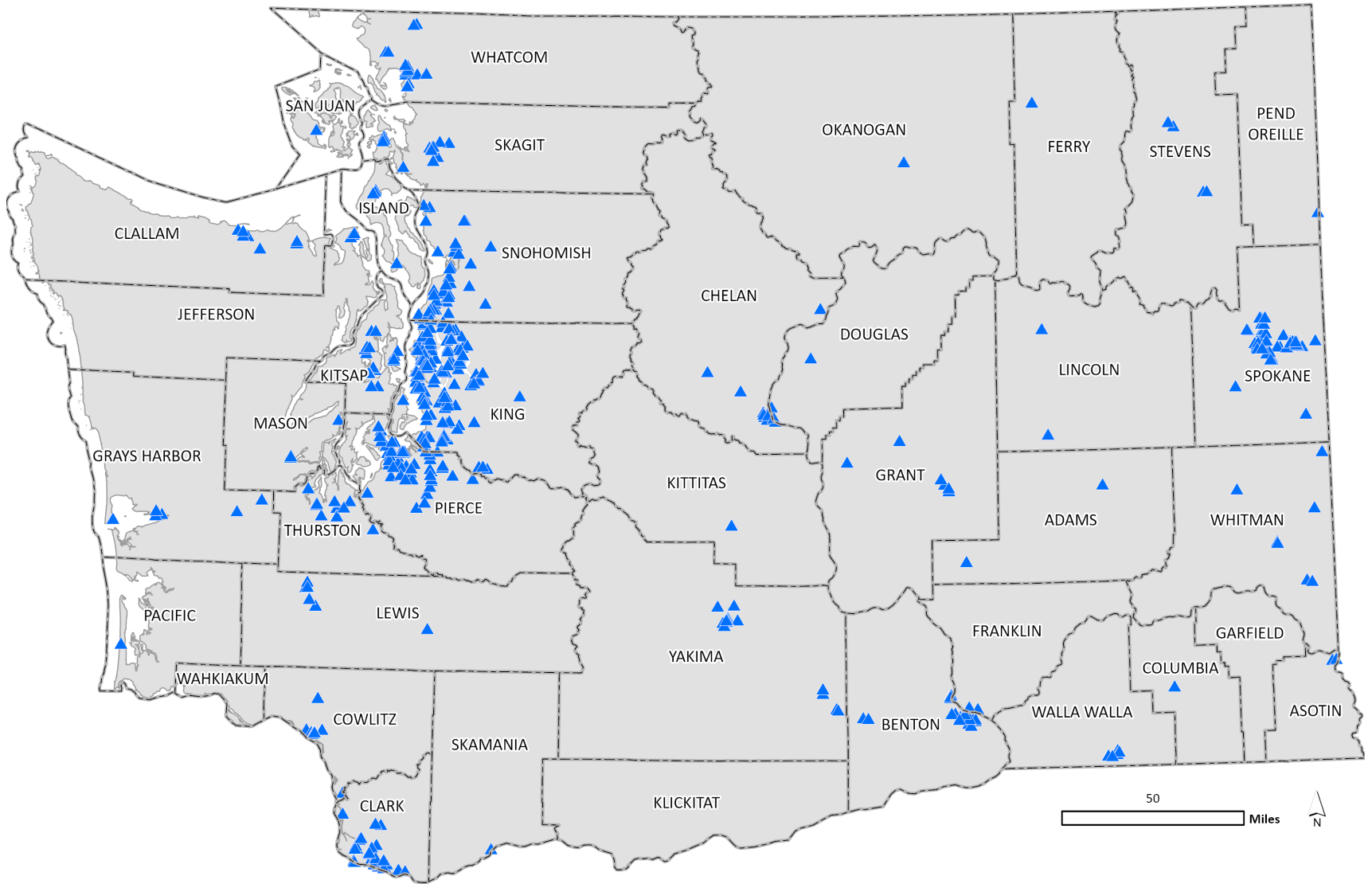
AS OF SEPTEMBER 28, 2021, TOTAL = 3,568



SOURCE: DSHS Enterprise GIS Geospatial Data Library, accessed September 28, 2021.

DSHS Licensed Assisted Living Facilities

AS OF SEPTEMBER 28, 2021, TOTAL = 546



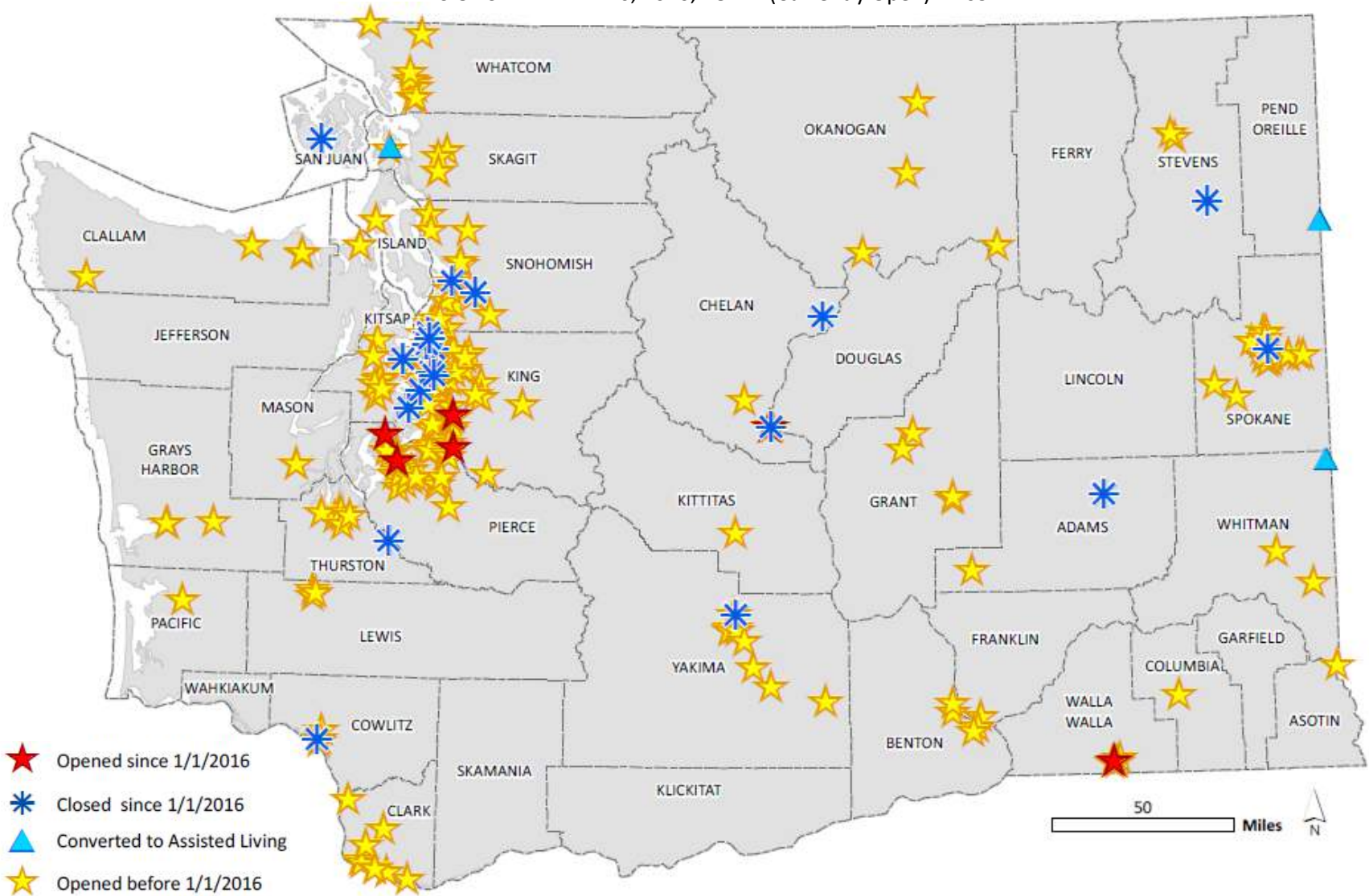
SOURCE: DSHS Enterprise GIS Geospatial Data Library, accessed September 28, 2021. Includes Assisted Living, Adult Residential Care, Enhanced Adult Residential Care, Expanded Community Services, Dementia Care, and No Contract.



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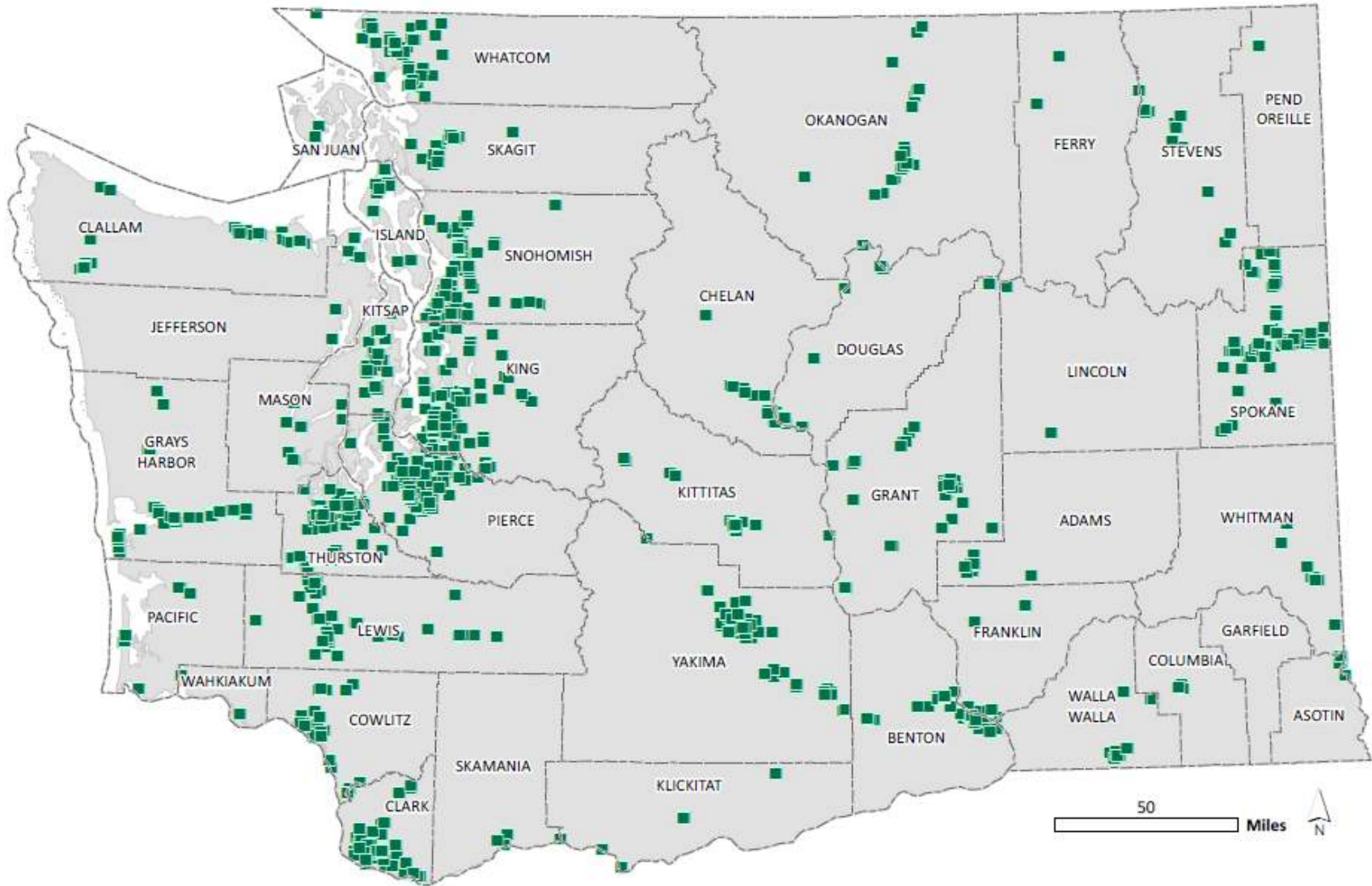
DSHS Licensed Nursing Homes

AS OF SEPTEMBER 16, 2020, TOTAL (Currently Open) = 205



Manufactured/Mobile Home Communities

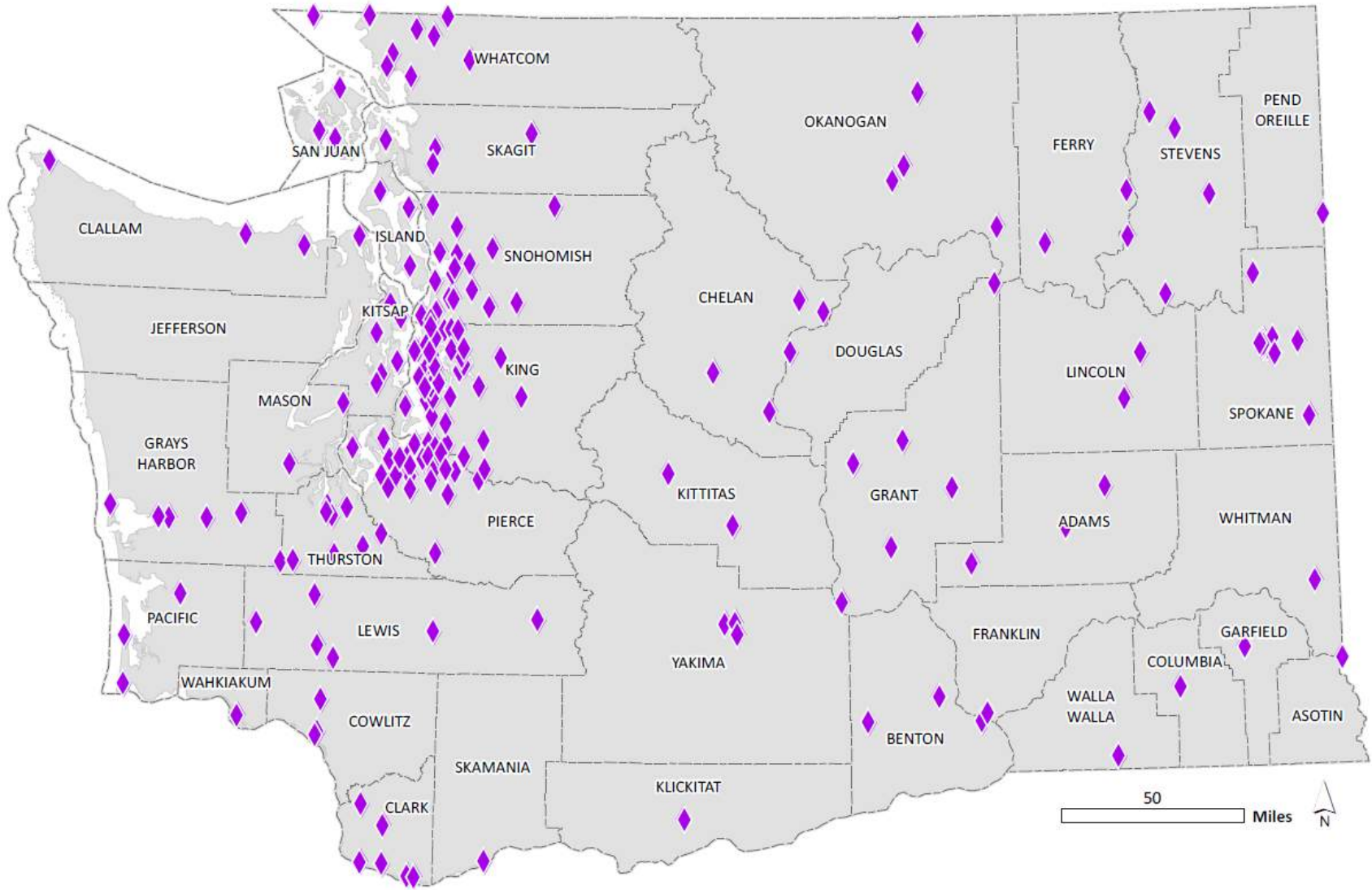
AS OF OCTOBER 2019 WITH KNOWN CLOSURES IN 2020, TOTAL = 1,227 Communities, 64,676 Rental Spaces, 6,158 Vacant Units



SOURCE: Washington State Department of Commerce, Registered Manufactured/Mobile Home Communities in Washington as of October 2019, updated with known closures in 2020. Locations of manufactured/mobile home communities registered with the Department of Revenue accessed October 16, 2020.

Senior Center Locations in Washington State

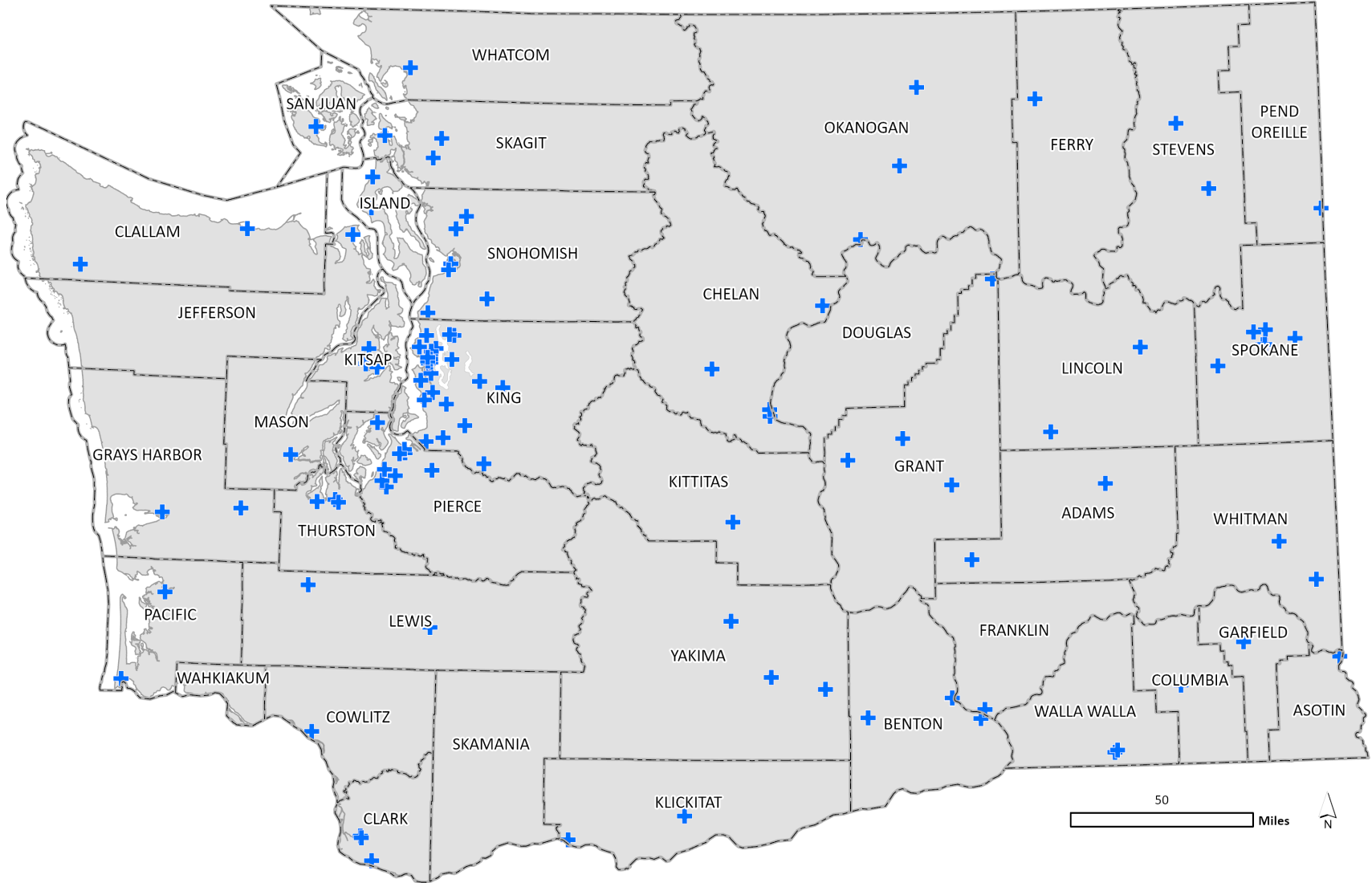
AS OF OCTOBER 20, 2020, TOTAL = 209



SOURCE: Washington State Department of Social and Health Services, Aging and Long-Term Support Administration Home and Community Services, accessed October 17, 2019, online search on October 16-20, 2020, includes King, Pierce, and Snohomish county governments and Washington Care Planning Council.

Hospital Locations in Washington State

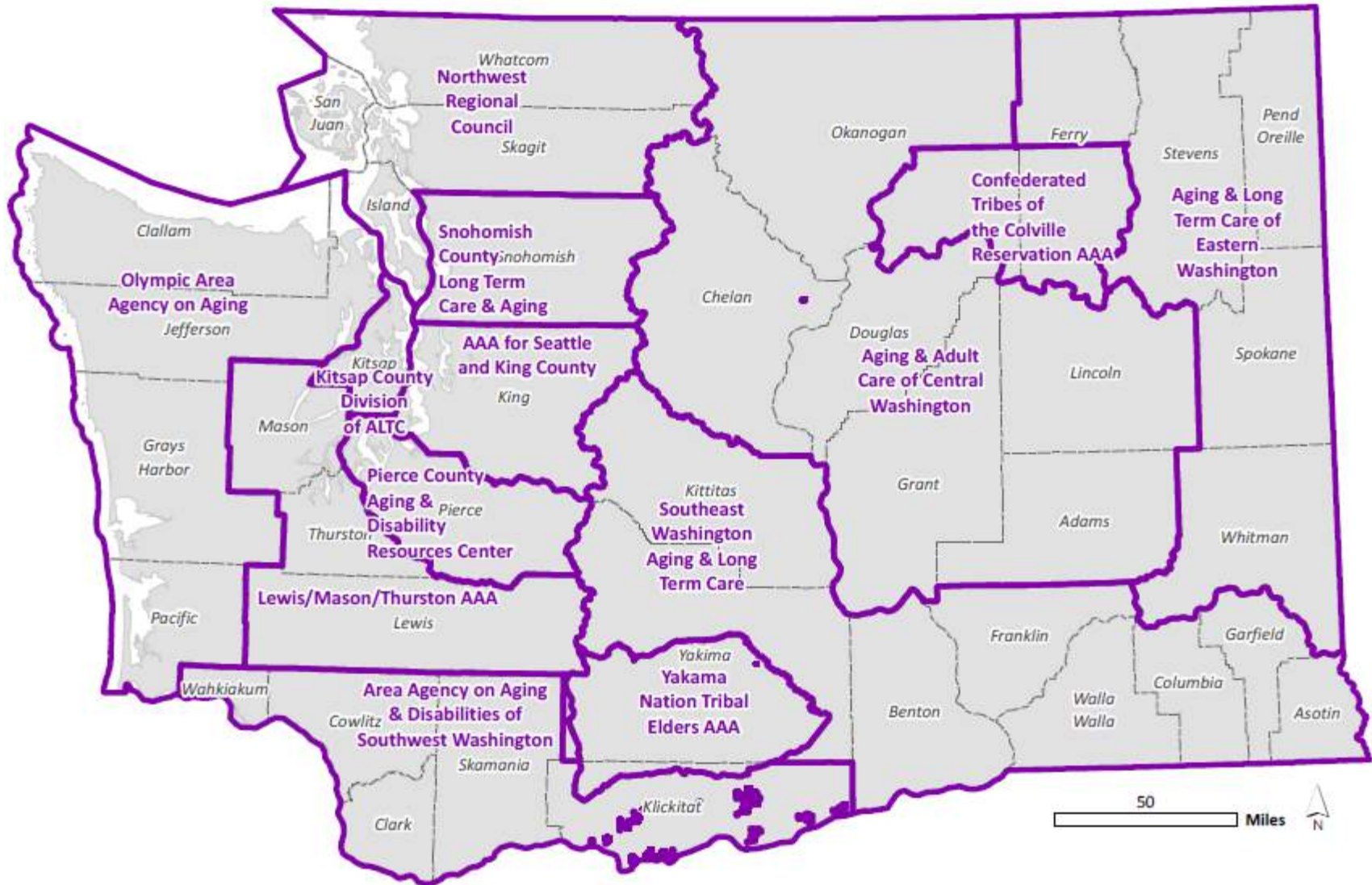
AS OF SEPTEMBER 28, 2021, TOTAL = 117



SOURCE: Washington State Department of Health, accessed September 28, 2021.

Washington Area Agencies on Aging Planning Service Areas

AS OF APRIL 8, 2019



SOURCE: DSHS Enterprise GIS Geospatial Data Library, accessed September 17, 2019.

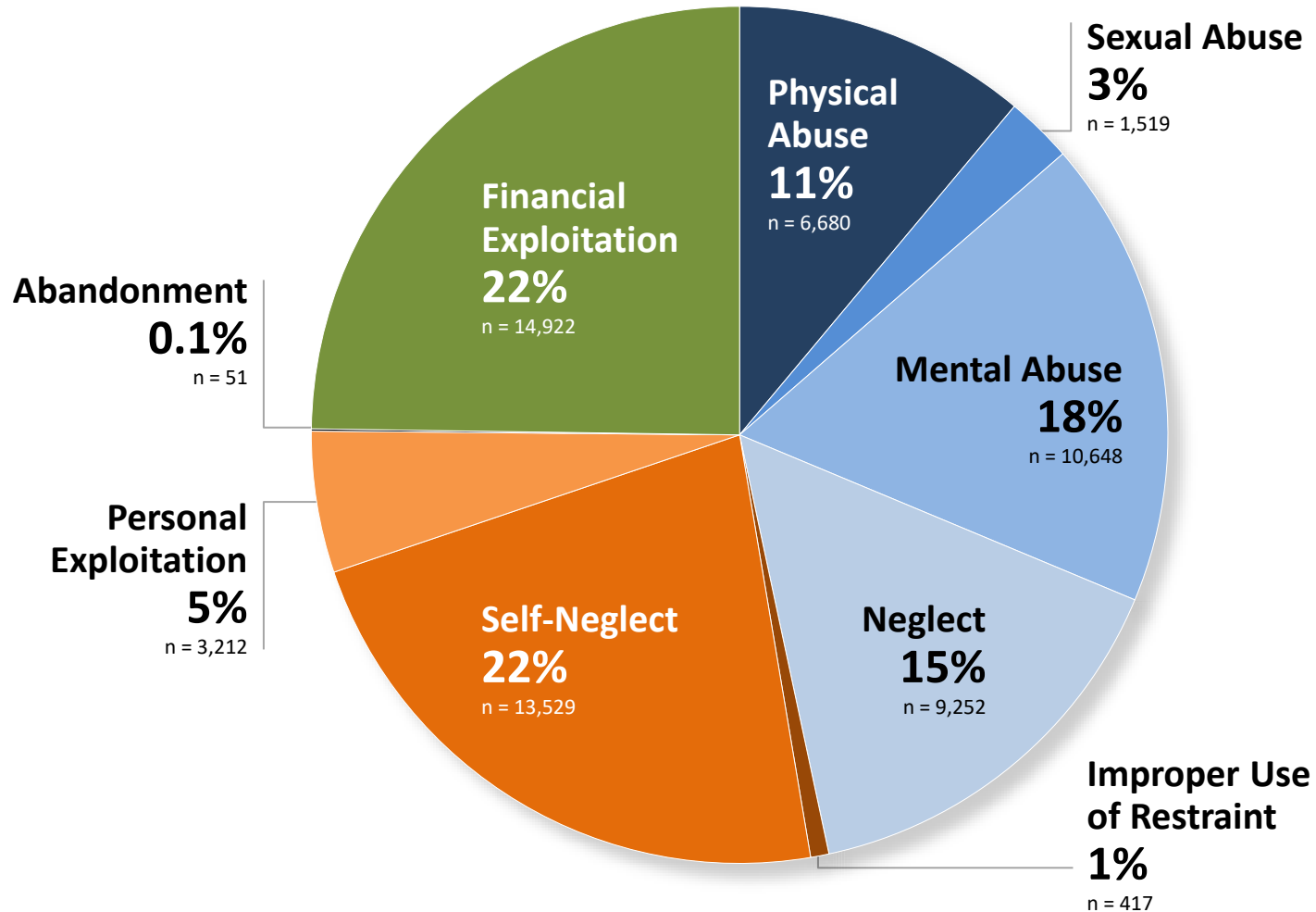


Facts About Older Adult Oral Health

- **Lack of dental insurance.** Many older Americans do not have dental insurance because the federal Medicare program does not cover routine dental care.
- **Untreated tooth decay.** Nearly all adults (96%) aged 65 years or older have had a cavity; 1 in 5 have untreated tooth decay.
- **Gum disease.** About 2 in 3 (68%) adults aged 65 years or older have gum disease.
- **Tooth loss.** Nearly 1 in 5 of adults aged 65 or older have lost all of their teeth. Having missing teeth or wearing dentures can affect nutrition, because people without teeth or with dentures often prefer soft, easily chewed foods instead of foods such as fresh fruits and vegetables.
- **Oral cancer.** Cancers of the mouth (oral and pharyngeal cancers) are primarily diagnosed in older adults; median age at diagnosis is 62 years.
- **Chronic disease.** People with chronic diseases such as arthritis, diabetes, heart diseases, and chronic obstructive pulmonary disease (COPD) may be more likely to develop gum (periodontal) disease, but they are less likely to get dental care than adults without these chronic conditions.

AL TSA Adult Protective Services Investigated 60,232 Allegations in 2020

CALENDAR YEAR 2020



NOTE: A single investigation may cover multiple allegations.

SOURCES: CY 2020 allegations investigated data from TIVA2 DataMart. Tabulations prepared by Libby Schmit.

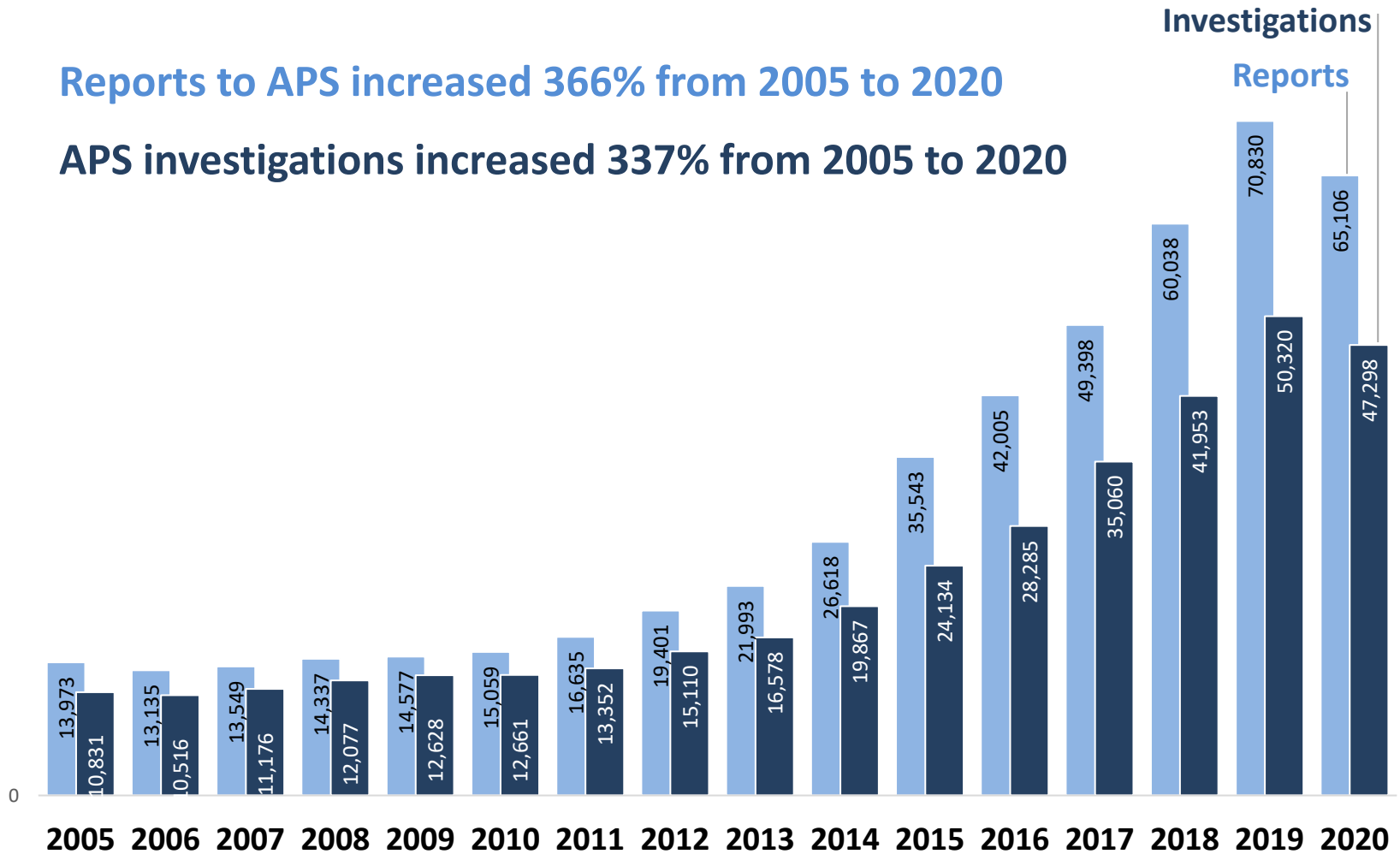


Transforming lives

ALTA Adult Protective Services Reports and Investigations Are Up More than Three-Fold Over the Past 15 Years

Reports to APS increased 366% from 2005 to 2020

APS investigations increased 337% from 2005 to 2020



NOTE: A single investigation may cover multiple allegations.

SOURCES: March 2014 – December 2015 APS Automated System. January 2016 – April 2019 TIVA 1059 report. May 2019 – December 2020 TIVA2 DataMart. Tabulations prepared by Libby Schmit.

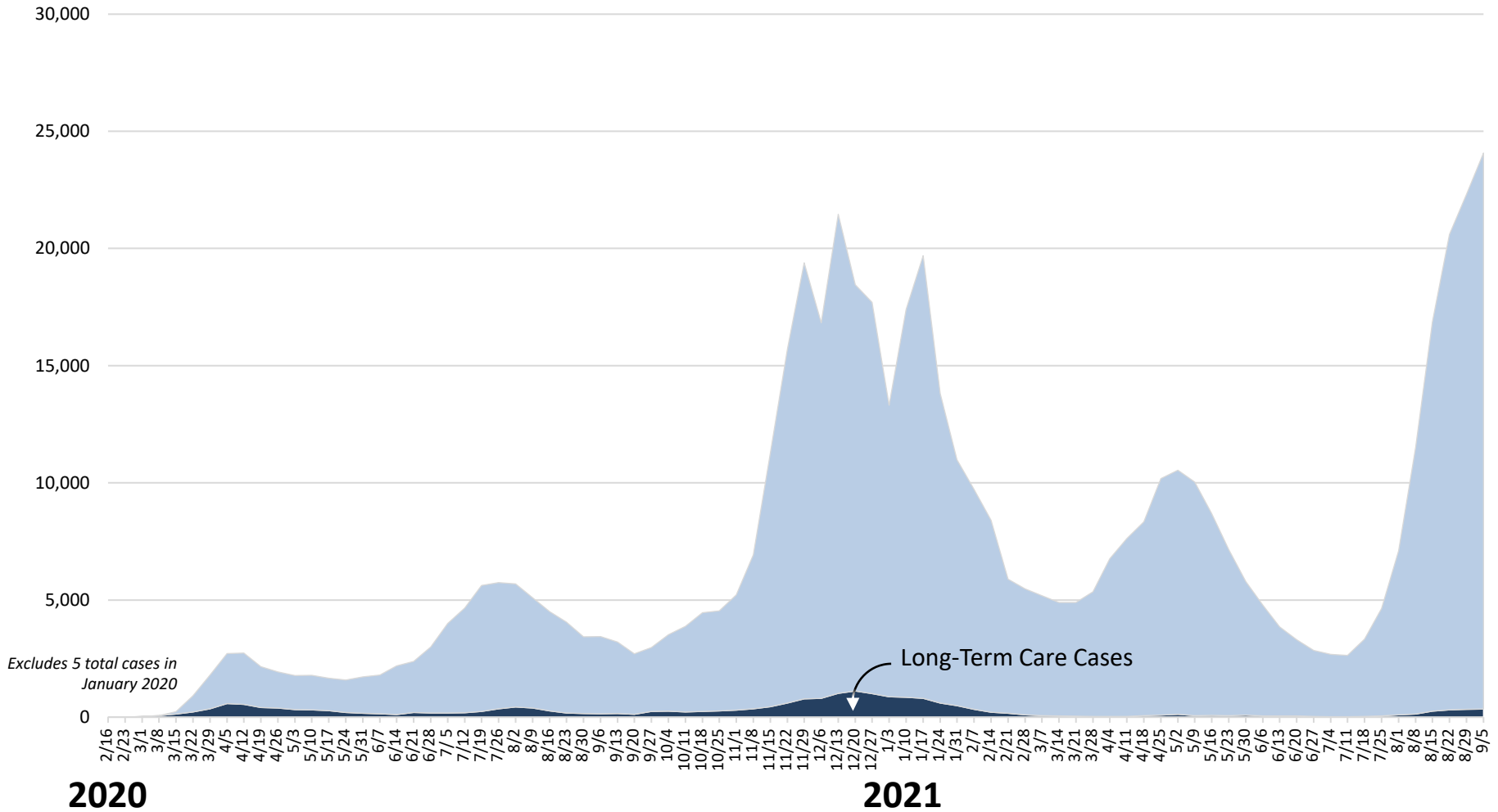


Transforming lives

New COVID Cases in Washington State

FEB 2, 2020 – SEP 5, 2021 WITH REPORTING TWO-WEEK LAG • OVERALL PERCENTAGE IN LTC FACILITIES = 3.6%

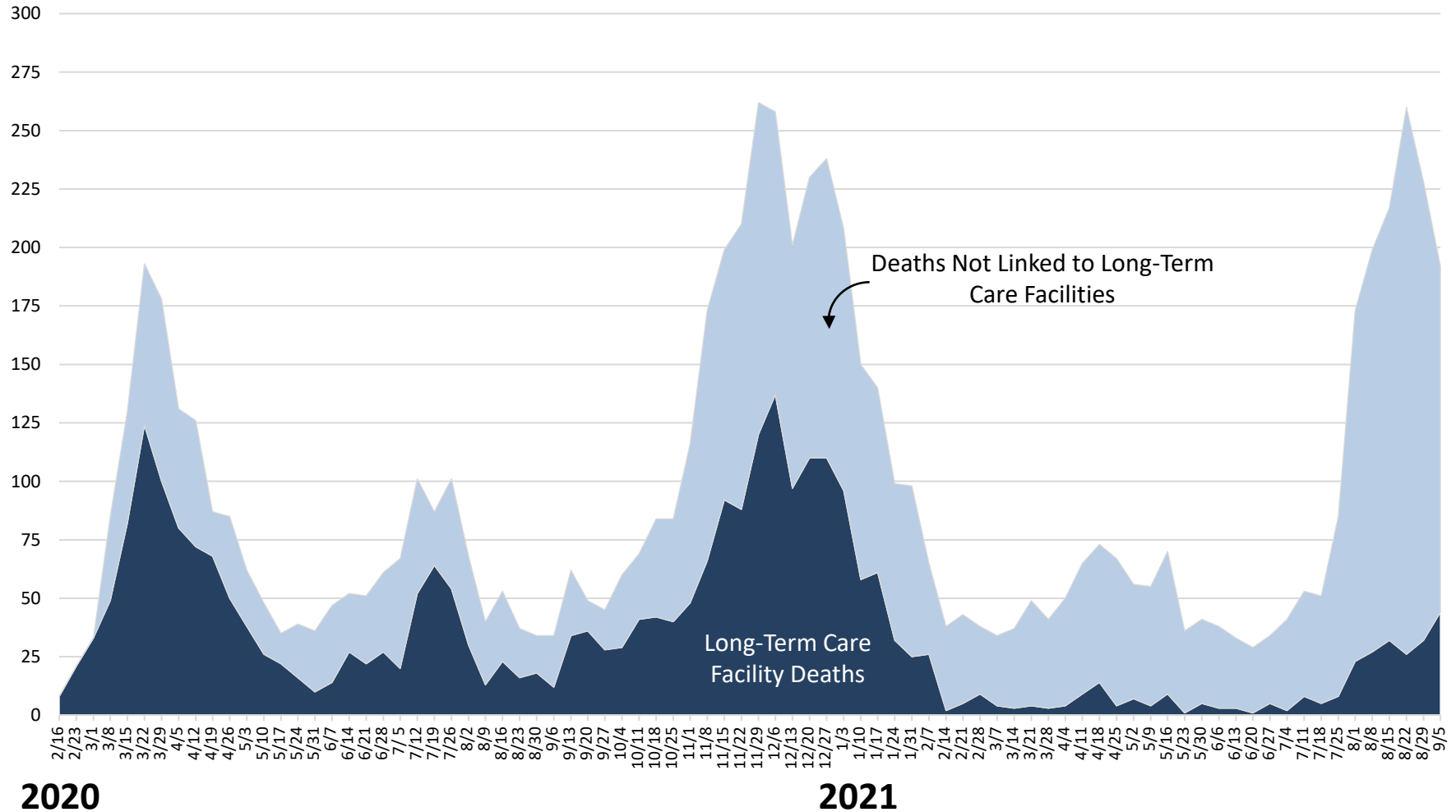
SOURCE: DOH CORONAVIRUS DASHBOARD AND LONG-TERM CARE REPORT (<https://www.doh.wa.gov/Emergencies/COVID19/DataDashboard>)



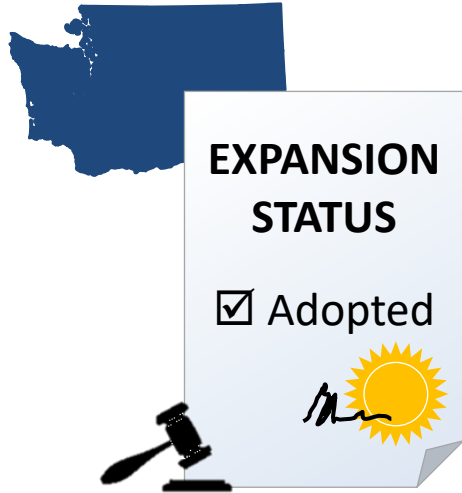
COVID Deaths in Washington State

FEB 16, 2020 – SEP 05, 2021, WITH THREE-WEEK REPORTING LAG • OVERALL PERCENTAGE AT LTC FACILITIES = 38.0%

SOURCE: DOH CORONAVIRUS DASHBOARD AND LONG-TERM CARE REPORT (<https://www.doh.wa.gov/Emergencies/COVID19/DataDashboard>)



Medicaid in Washington State



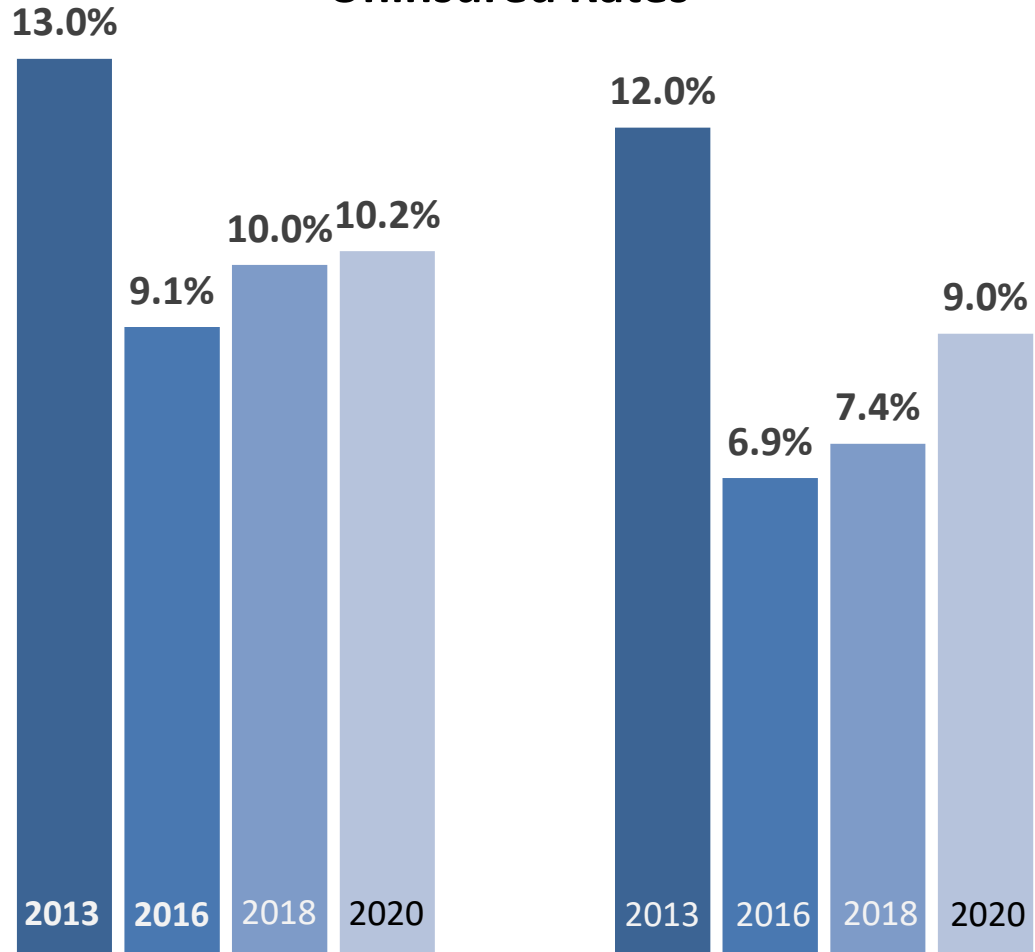
Adults in Expansion Group



678,200

Dec 2020

Uninsured Rates



United States

Washington

Medicaid in Washington State

In Washington, Medicaid Covers:



1 in 6 adults
AGES 19-64



2 in 5 children
BIRTH THROUGH 18 YEARS



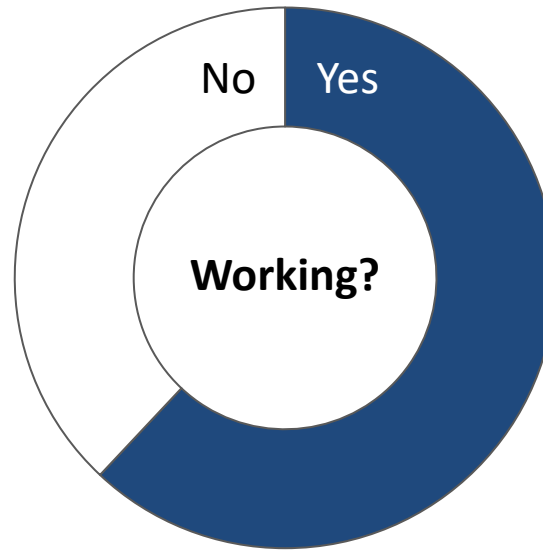
3 in 5 nursing home residents
ALL AGES



1 in 2 with disabilities
ALL AGES

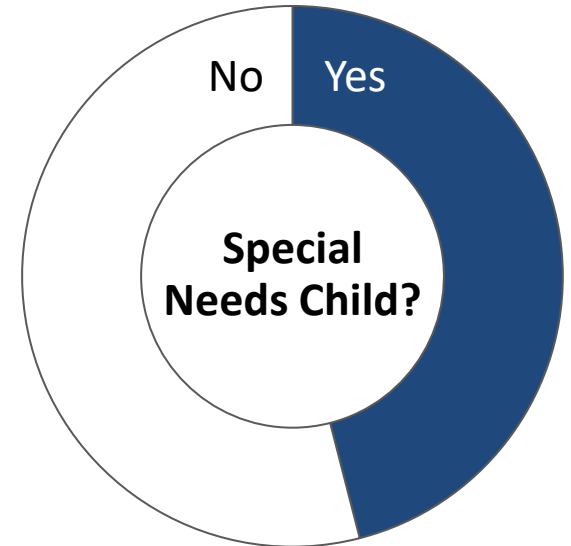


1 in 6 Medicare beneficiaries
ALL AGES



62%
of adult Medicaid
enrollees are working
in Washington

46%
of children with special
health care needs are
covered by Medicaid in
Washington



Medicaid in Washington State

Washington Medicaid Enrollees and Expenditures

MEDICAID ENROLLEES

86%

Adults and Children

14%

Elderly and Disabled



MEDICAID EXPENDITURES

60%

Adults and Children

40%

Elderly and Disabled



Many People Rely on Medicaid-Paid LTSS Services for an Extended Period of Time

Distribution of LTSS Recipients by Number of Months of Service Use

SFY 2002-2005 Cohort (followed through June 2015)*

1-12 months 35%	13-24 months 14%	25-36 months 10%	37-48 months 8%	49-60 mo. 6%	60 months or more 27%
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Over 1 year = **66%**

Over 2 years = **51%**

Over 3 years = **41%**

Over 4 years = **33%**

Over 5 years = **27%**

- ▶ *Half of LTSS clients received services for more than 2 years*
- ▶ *Includes use of in-home personal care, community residential, and nursing home services*

Washington State Broadband Office

October 2020 Update:
Broadband Accessibility and Digital Equity

Russ Elliott

DIRECTOR, WASHINGTON STATE BROADBAND OFFICE

OCTOBER 15, 2020



Washington State
Department of
Commerce

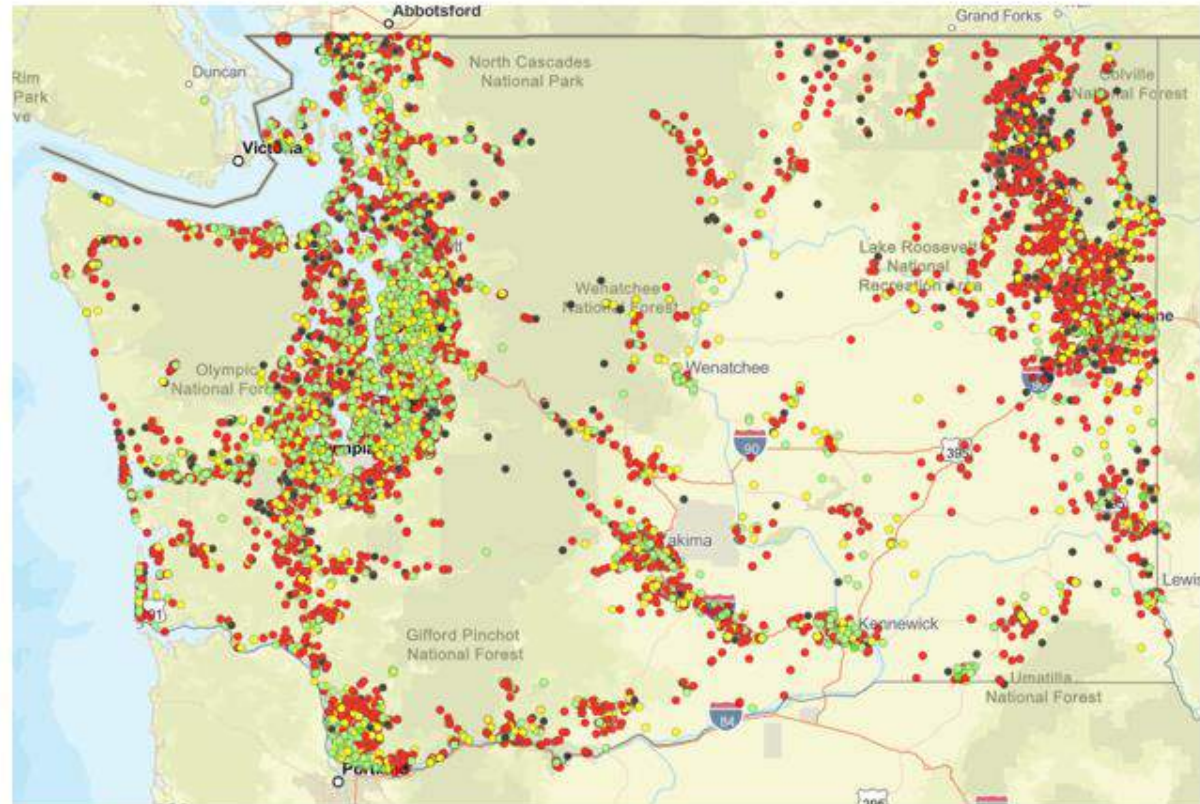


Transforming lives

Statewide Broadband Survey

October 8, 2020

- **27,045** Respondents
- **93% (25,240)** Have broadband
- **37% (9,981)** Less than 10 Mbps download
- **7% (1,805)** No access
- **= 44% Unserved** (less than 10 Mbps download)

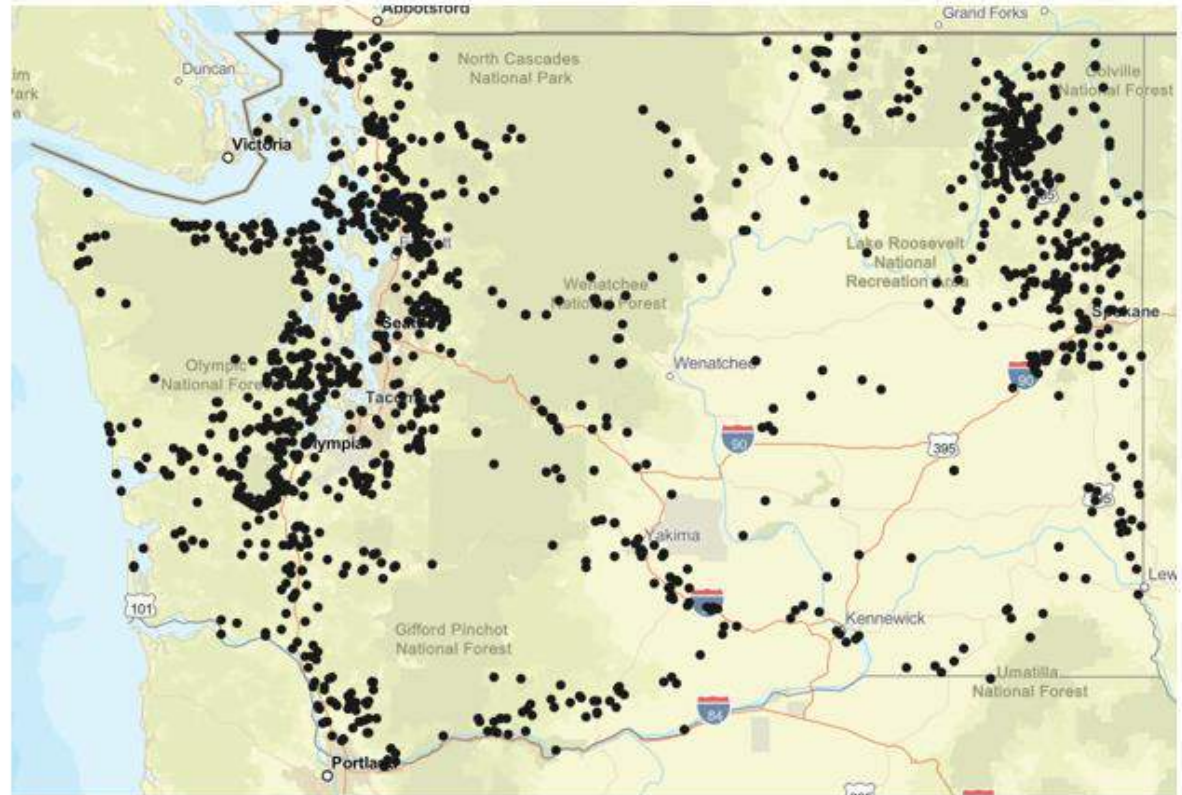


No Broadband Access

Respondents can select multiple answers

October 8, 2020 (1836)

- Not available in area 49%
- No access 47%
- Too expensive 8%
- Don't know how to get 0.7%
- Don't have a computer 0.6%
- Can't use a computer 0.05%
- Worried about privacy 0.05%
- Don't need it/not interested
- Physical challenges
- Use public wifi instead



LTSS Rebalancing Financial Impact Methodology

- Calculate the percentage distribution of ALISA LTSS clients across major service modalities in SFY 1999: In-home Personal Care, Adult Family Homes, Assisted Living, Adult Residential Centers, and Nursing Homes
- Simulate the **caseloads** that would have been experienced by major modality if percentage distribution of LTSS caseloads across modalities over the SFY2000-2020 period had remained the same as experienced in SFY 1999
- Simulate the **expenditures** that would have been experienced by applying actual SFY 2000-2020 per capita costs by service modality to the simulated caseload distribution
- Compare the total costs of the simulated caseload distribution to the actual and forecast total LTSS costs incurred over the SFY 2000-2020 period
- The difference comprises the estimated savings (all funds)