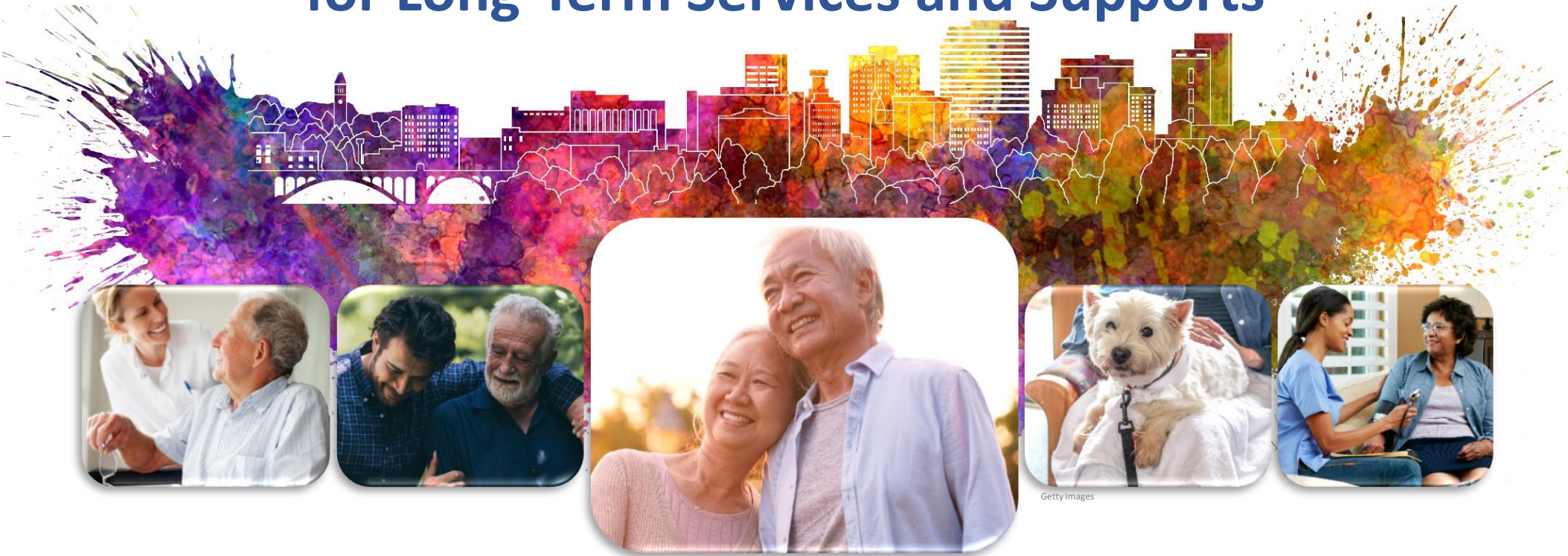


The Demographic Trends Impacting Need for Long-Term Services and Supports



David Mancuso, PhD

Senior Research Scientist, DSHS Research and Data Analysis Division

October 17, 2024

Overview

PART 1

The Impact of the Age Wave

PART 2

Food Insecurity and Housing Challenges for Seniors

APPENDIX

Forecasts of Dementia Prevalence Through 2040

**LTSS Policy Innovations, Changes in Patterns of LTSS Use, and Rebalancing
Social Security and Medicare Data by County**

Medicare Advantage Enrollment Trends

Maps of LTSS Facilities

Supplemental Information



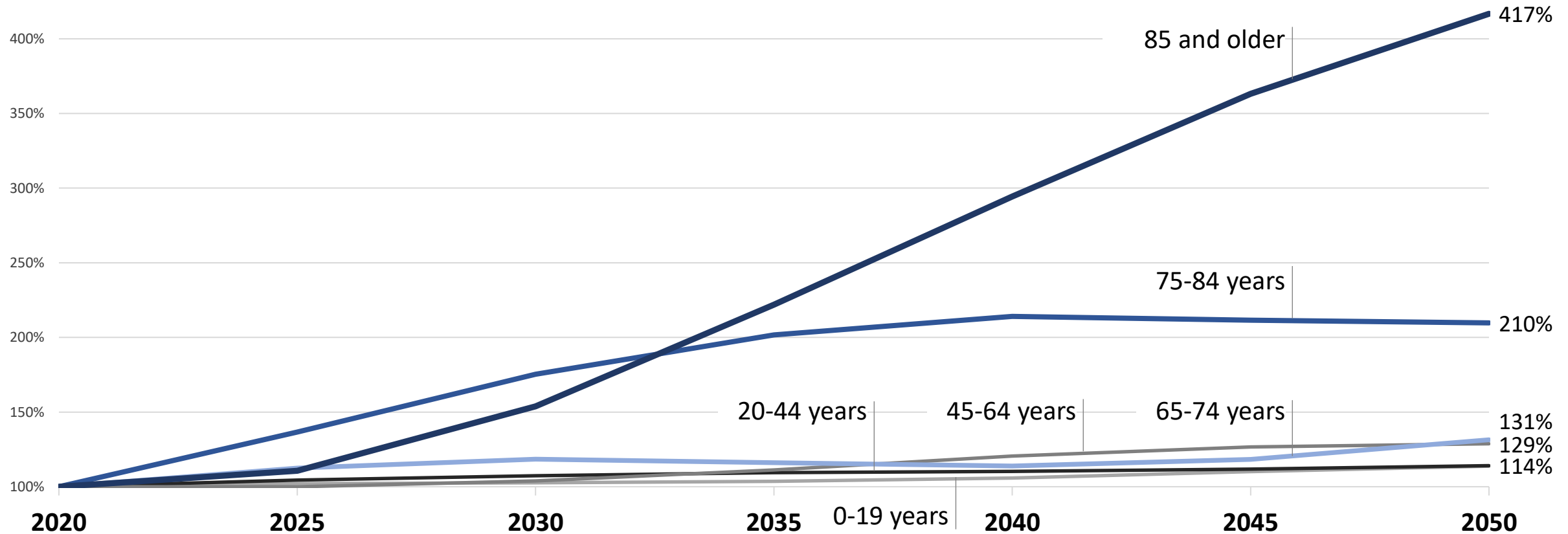
Getty Images

PART 1

The Impact of the Age Wave

The Population of Washingtonians Aged 85+ Will Quadruple from 2025 to 2050

Growth in Washington State Population by Age Range Relative to 2020 Population

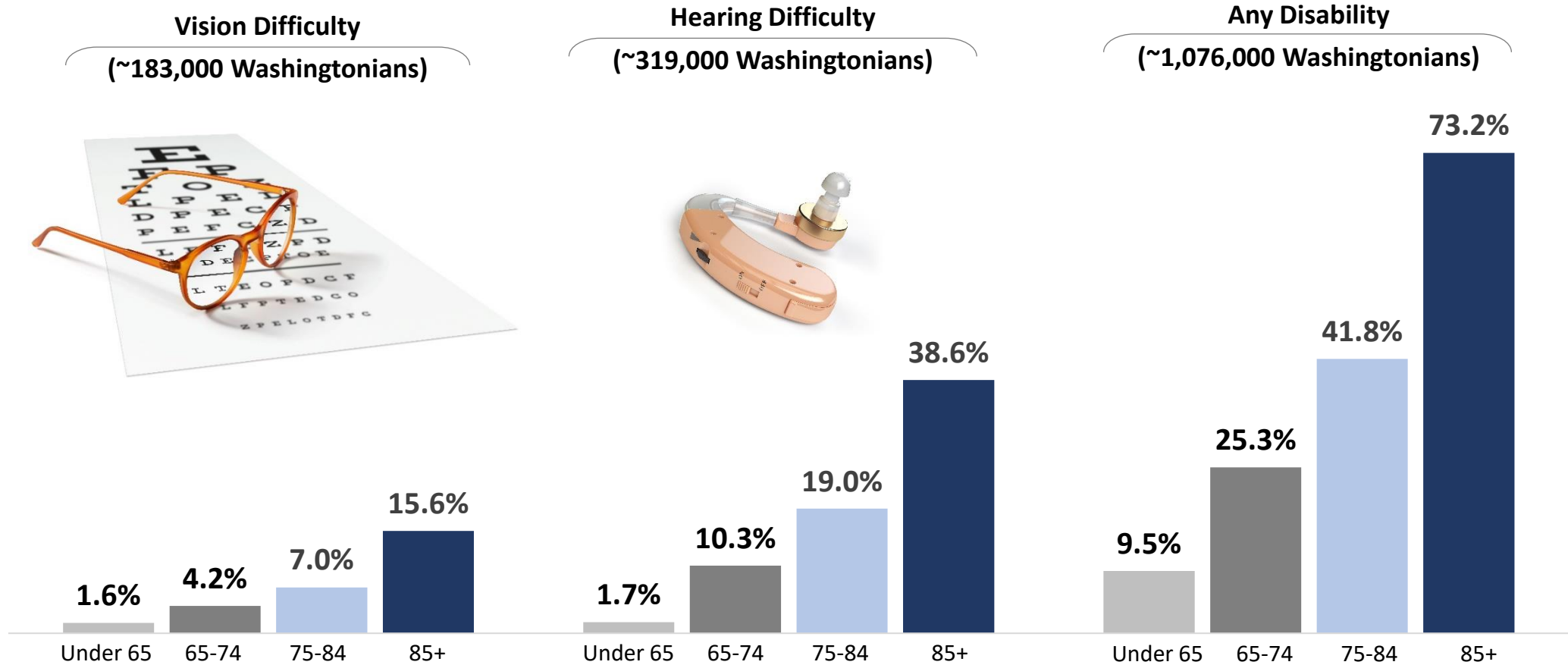


SOURCES: Washington State Office of Financial Management, Statewide Population Forecast, Accessed April 2024.



The Likelihood of Needing Services to Help with Disabilities Increases with Age

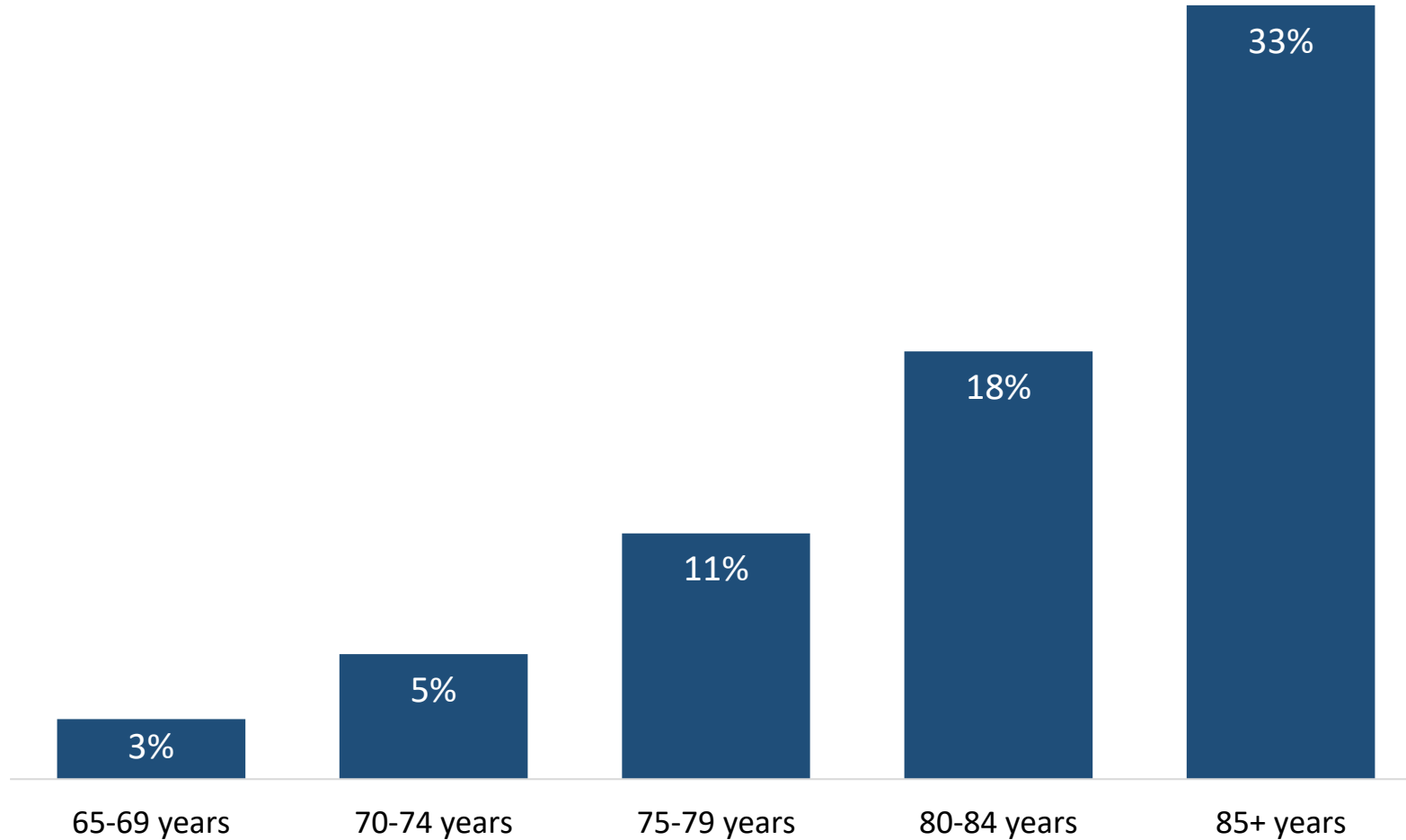
Percent of 2022 Washington State population with . . .



SOURCE: U.S. Census Bureau, 2022 American Community Survey 1-Year Estimates at <https://data.census.gov/cedsci/advanced>, accessed October 10, 2023. Images from Getty/iStock.

The Risk of Dementia Increases with Age

Dementia Prevalence Among Washington State Medicare Beneficiaries Ages 65 and Above in 2018

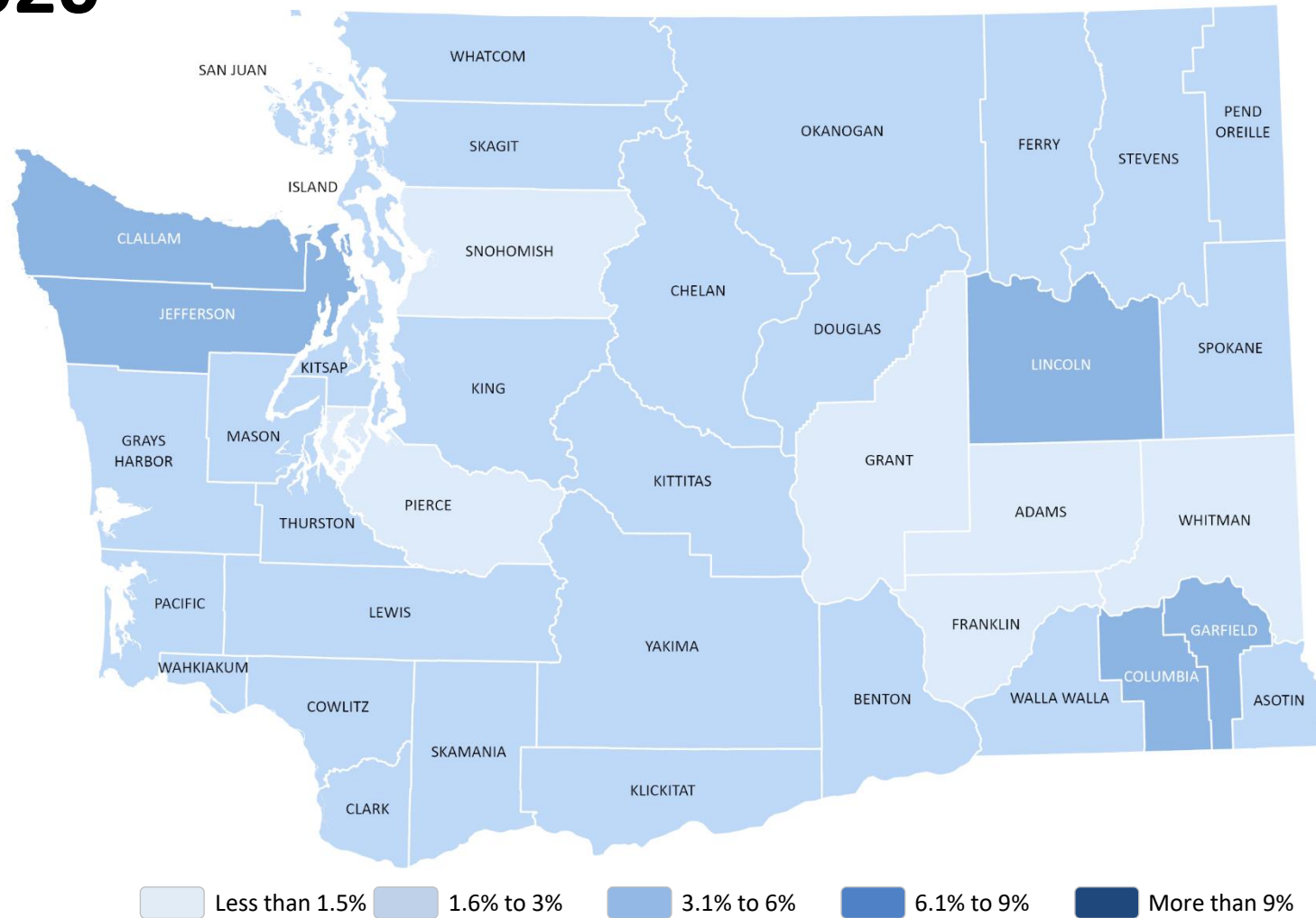


SOURCE: DSHS Research and Data Analysis, Integrated Client Databases.

Persons 85+ as a Percentage of the Total Population

Estimates and Projections by County

2020



Legend: Less than 1.5% (lightest blue), 1.6% to 3% (light blue), 3.1% to 6% (medium blue), 6.1% to 9% (dark blue), More than 9% (darkest blue)

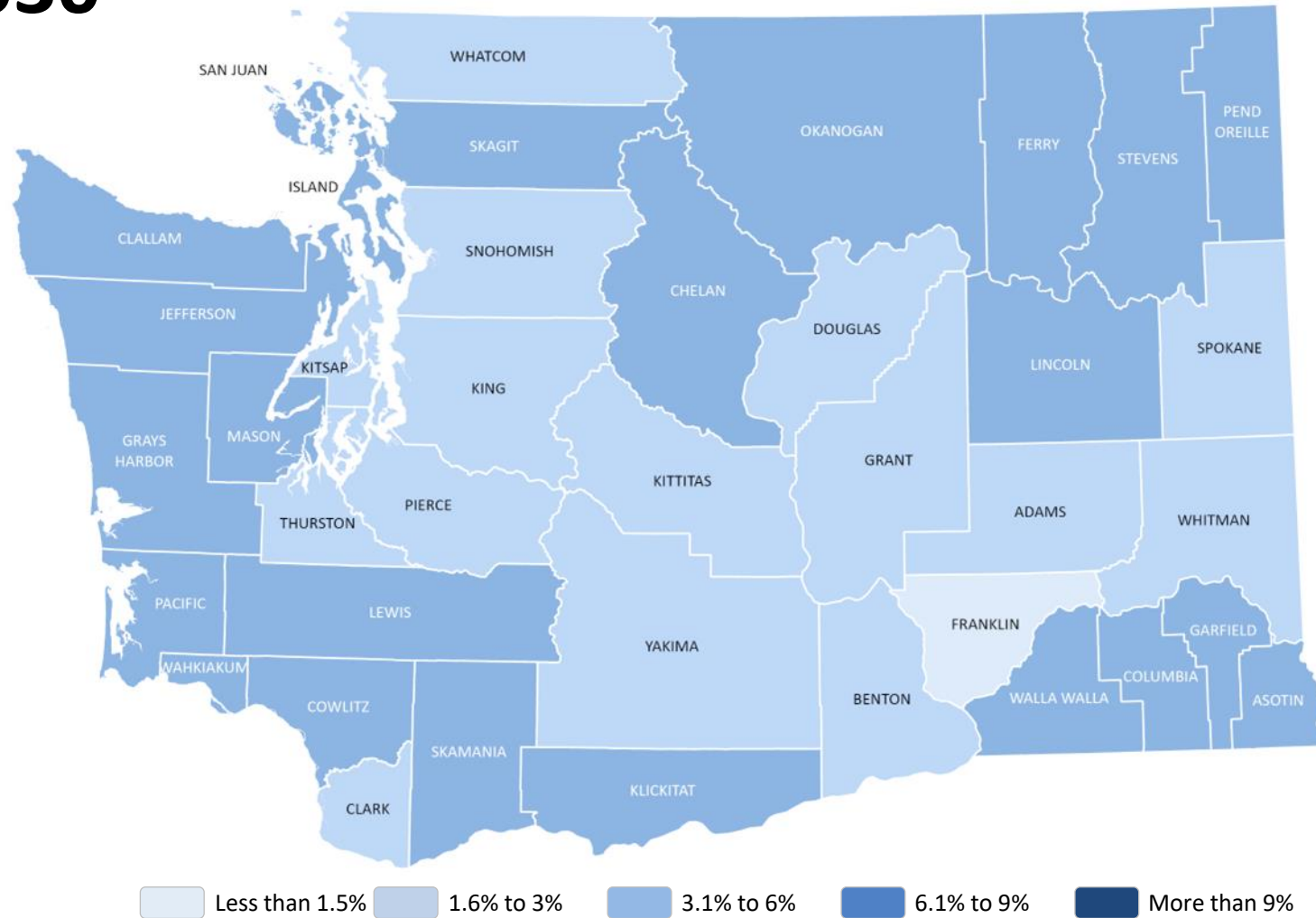
SOURCES: Washington State Office of Financial Management, Forecasting and Research Division. Growth Management Act Population Projections for Counties: 2020 to 2050, February 2023.



Persons 85+ as a Percentage of the Total Population

2030

Estimates and Projections by County



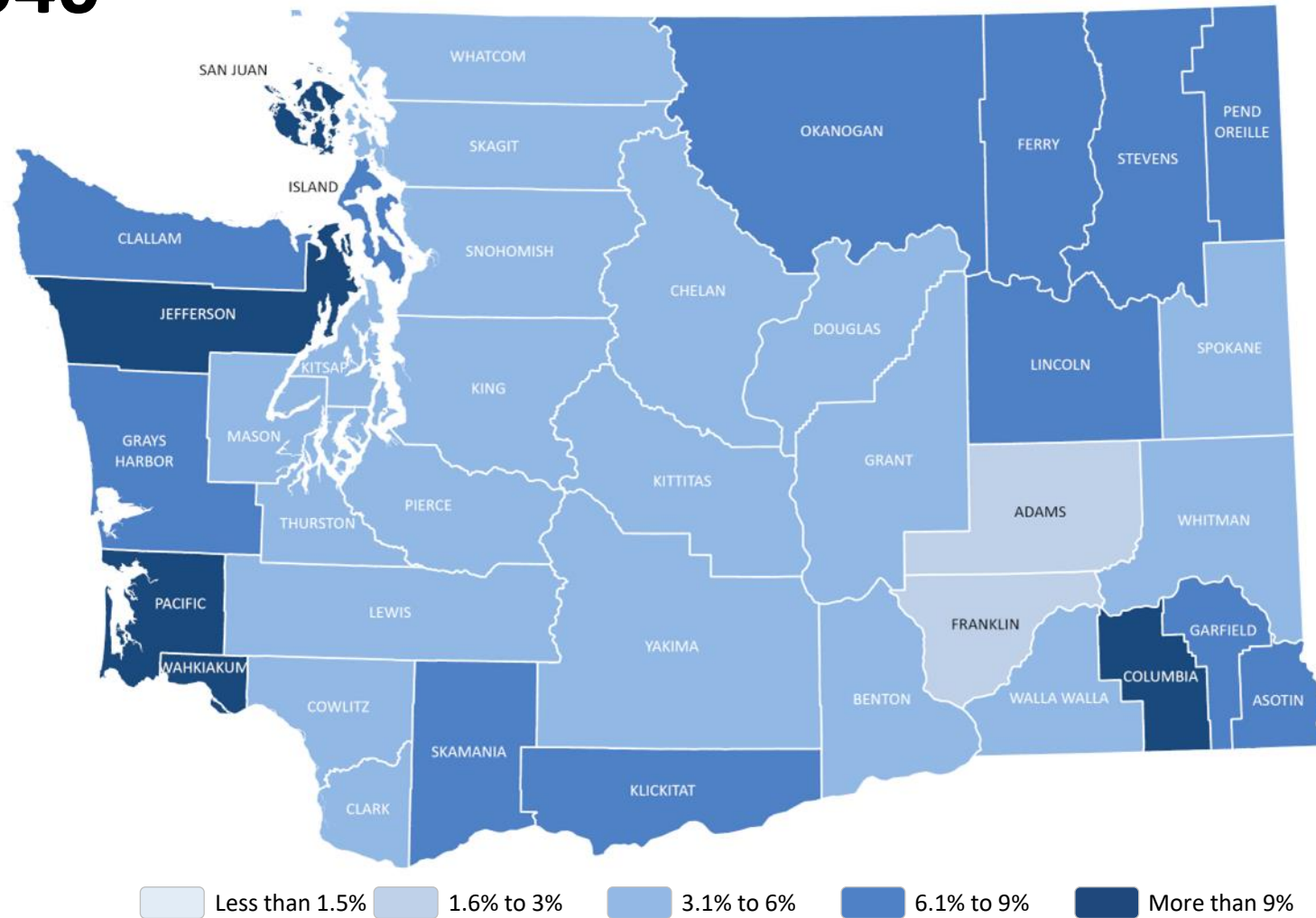
SOURCES: Washington State Office of Financial Management, Forecasting and Research Division. Growth Management Act Population Projections for Counties: 2020 to 2050, February 2023.



Persons 85+ as a Percentage of the Total Population

2040

Estimates and Projections by County



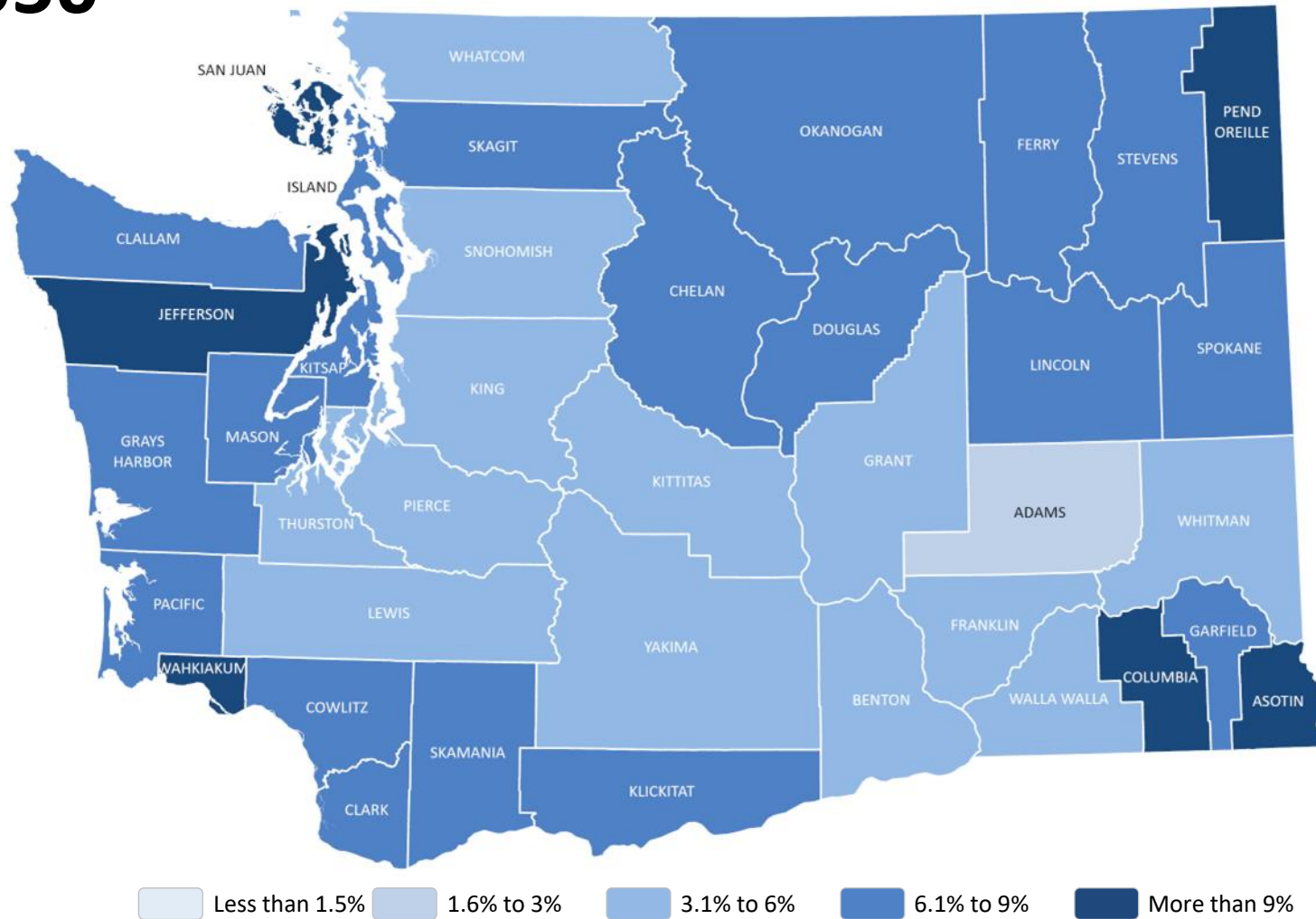
SOURCES: Washington State Office of Financial Management, Forecasting and Research Division. Growth Management Act Population Projections for Counties: 2020 to 2050, February 2023.



Persons 85+ as a Percentage of the Total Population

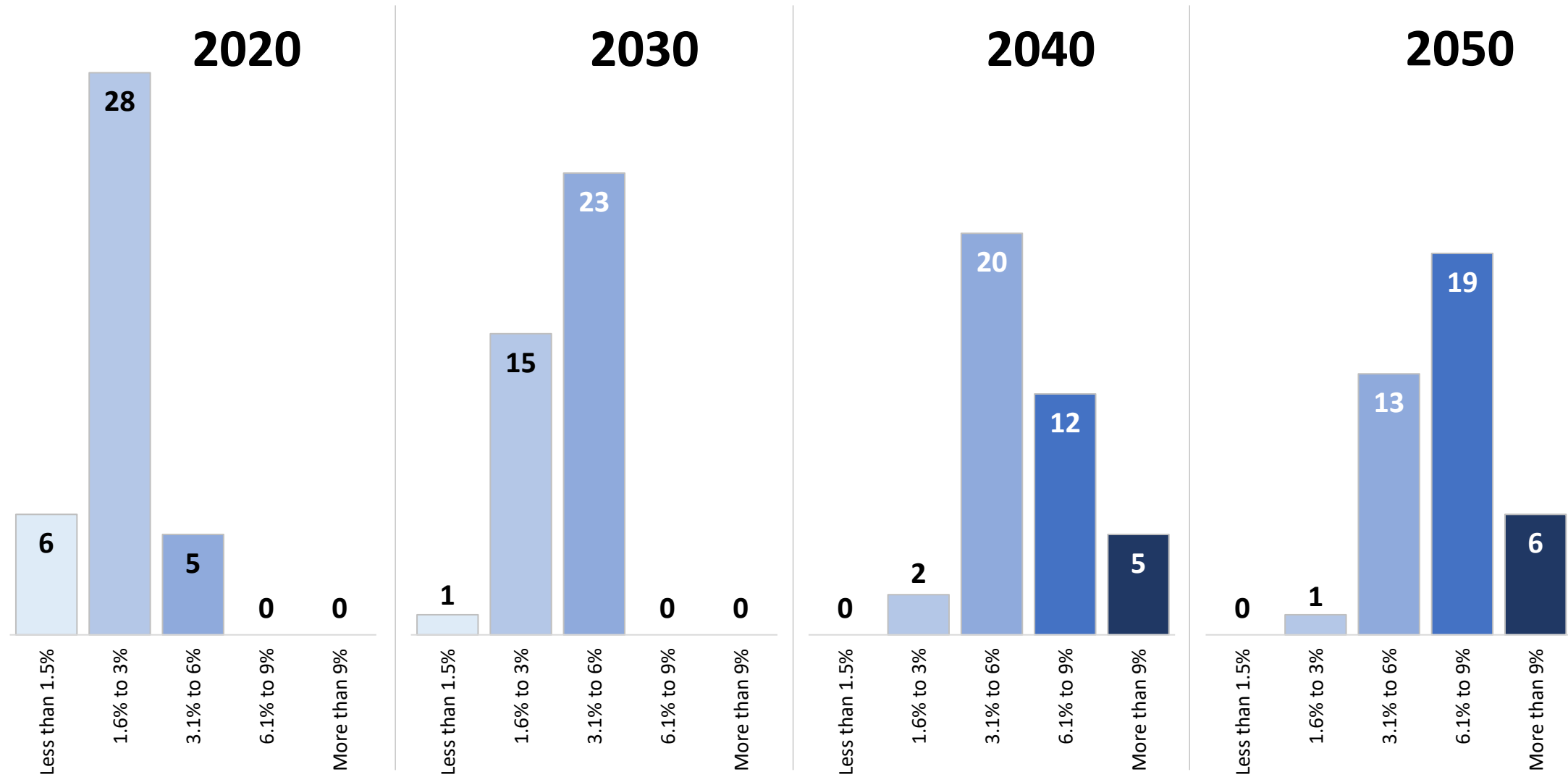
Estimates and Projections by County

2050



SOURCES: Washington State Office of Financial Management, Forecasting and Research Division. Growth Management Act Population Projections for Counties: 2020 to 2050, February 2023.

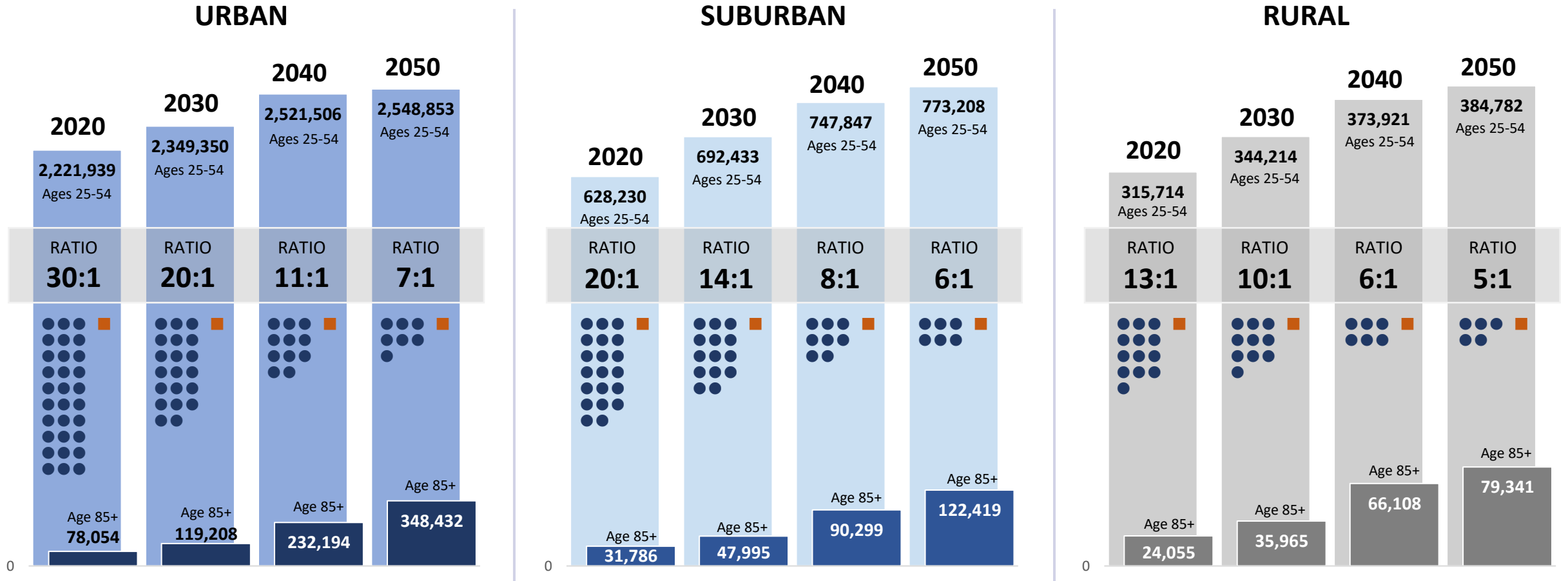
Distribution of Counties by Persons 85+ as a Percentage of Total Population



SOURCES: Washington State Office of Financial Management, Forecasting and Research Division. Growth Management Act Population Projections for Counties: 2020 to 2050, February 2023.



The ratio of persons ages 25 to 54 relative to persons 85 and older will dramatically decrease, and exacerbate current LTSS workforce challenges

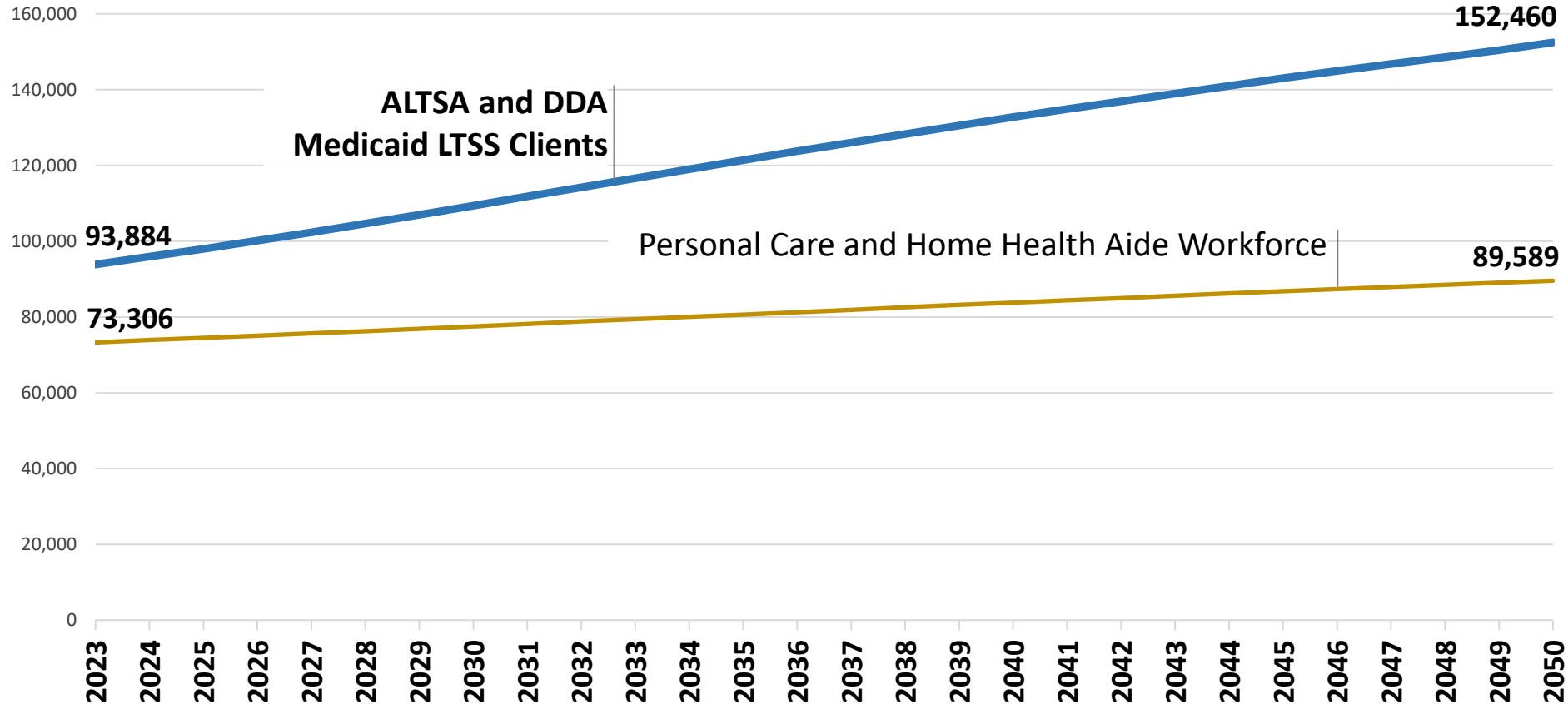


SOURCE: Washington State Office of Financial Management, Forecasting and Research Division. State population forecast.

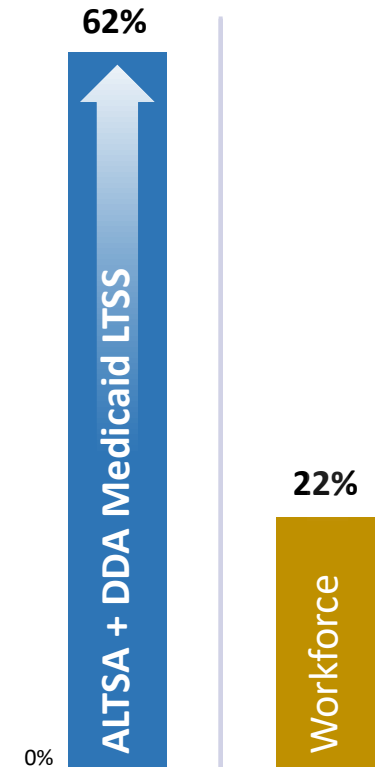
● = Represents all persons aged 25-54
 ■ = Represents individuals aged 85+



Medicaid LTSS Caseload and Statewide Workforce Forecasts



Percent Increase in 2050 Relative to 2023



SOURCE: Washington State Department of Social and Health Services, Facilities, Finance, and Analytics Administration, Research and Data Analysis Division, April 2024..



Strategies to address the workforce implications of the Age Wave

- ✓ Increase wage and benefit (insurance, retirement, childcare, transportation) compensation for the direct care workforce to help attract and retain workers
- ✓ Leverage tax incentives to encourage workers to enter the long-term care field
- ✓ Expand training and develop career paths to enhance workforce skills and job satisfaction
- ✓ Integrate technology to reduce physical burden on caregivers and improve efficiency (e.g., telehealth, robotics)
- ✓ Encourage community-based models of care and support families and other informal caregivers through training and financial assistance to reduce the reliance on formal care settings
- ✓ Enhance public perception of the value of long-term care jobs to shift perceptions and attract more candidates to the field from other sectors of the economy



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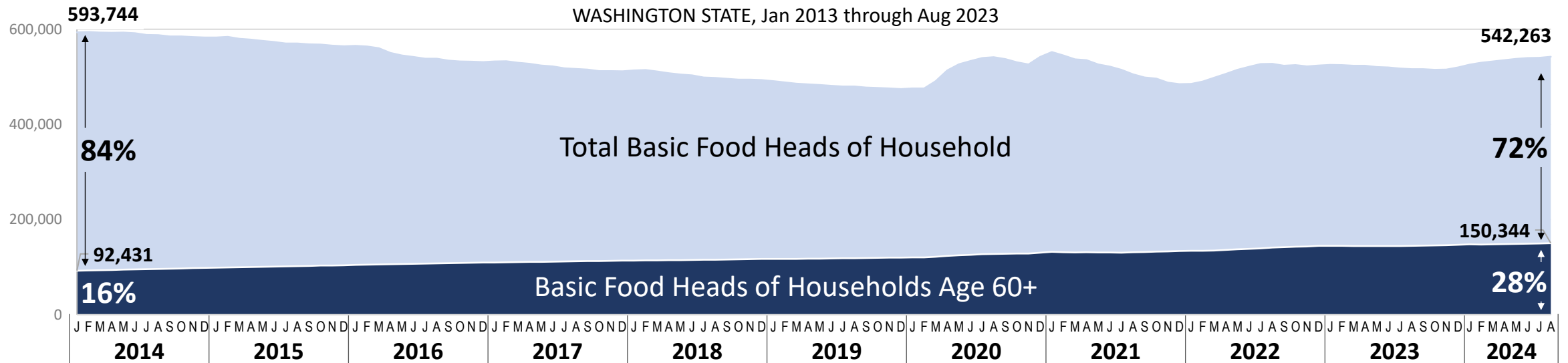
PART 2

Food Insecurity and Housing Instability Among Seniors

Food Insecurity Among Elders in Washington State

- Although food insecurity among seniors in Washington State is lower than the US average based on national survey data, food insecurity impacts a significant number of seniors, with 28 percent of Basic Food (SNAP) households in Washington State headed by persons aged 60+
- There are currently more than 150,000 households on Basic Food in Washington State headed by persons aged 60+. This is an increase of 63 percent since January 2014, while the overall Basic Food caseload declined by 9 percent over the same time period.

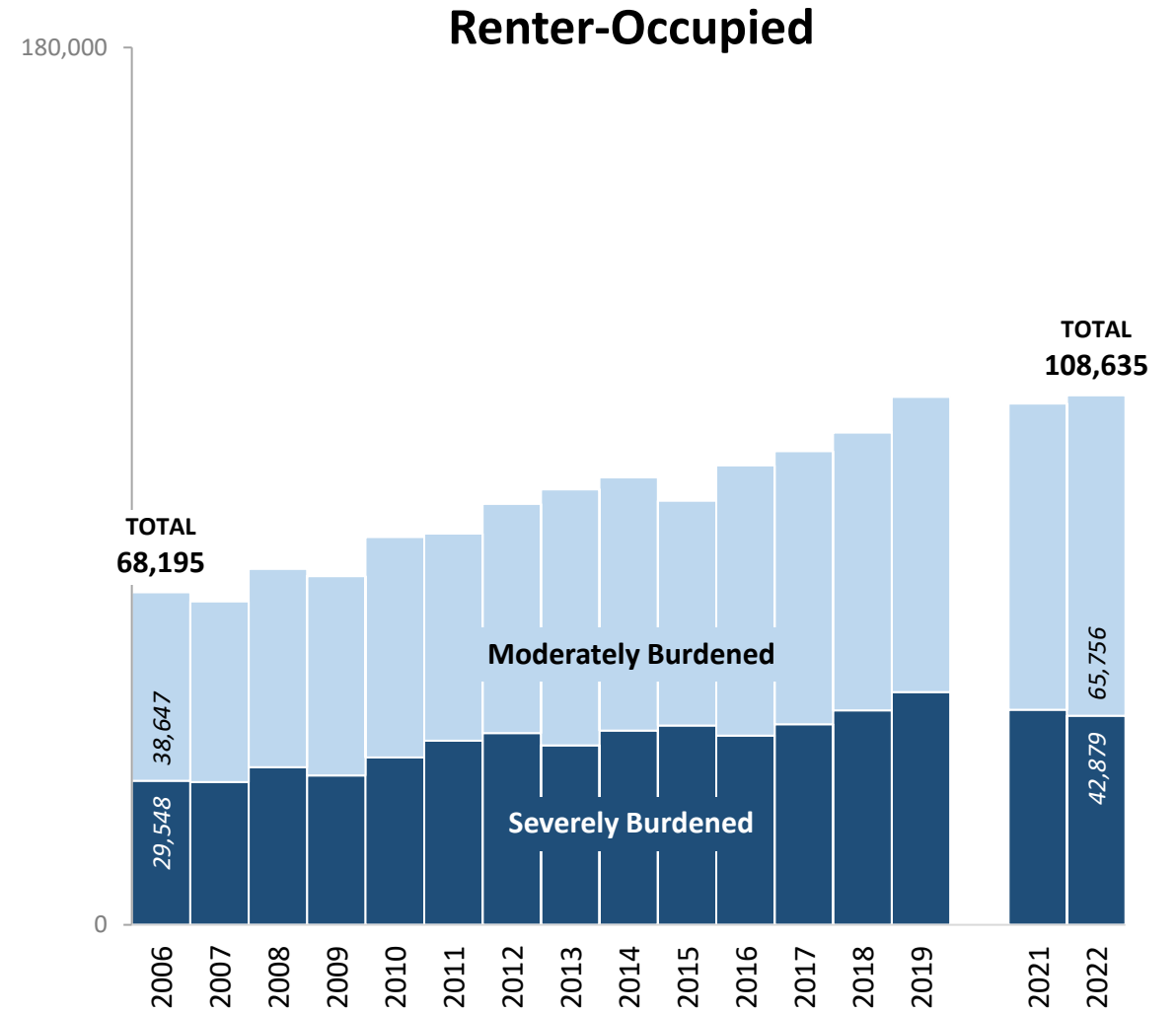
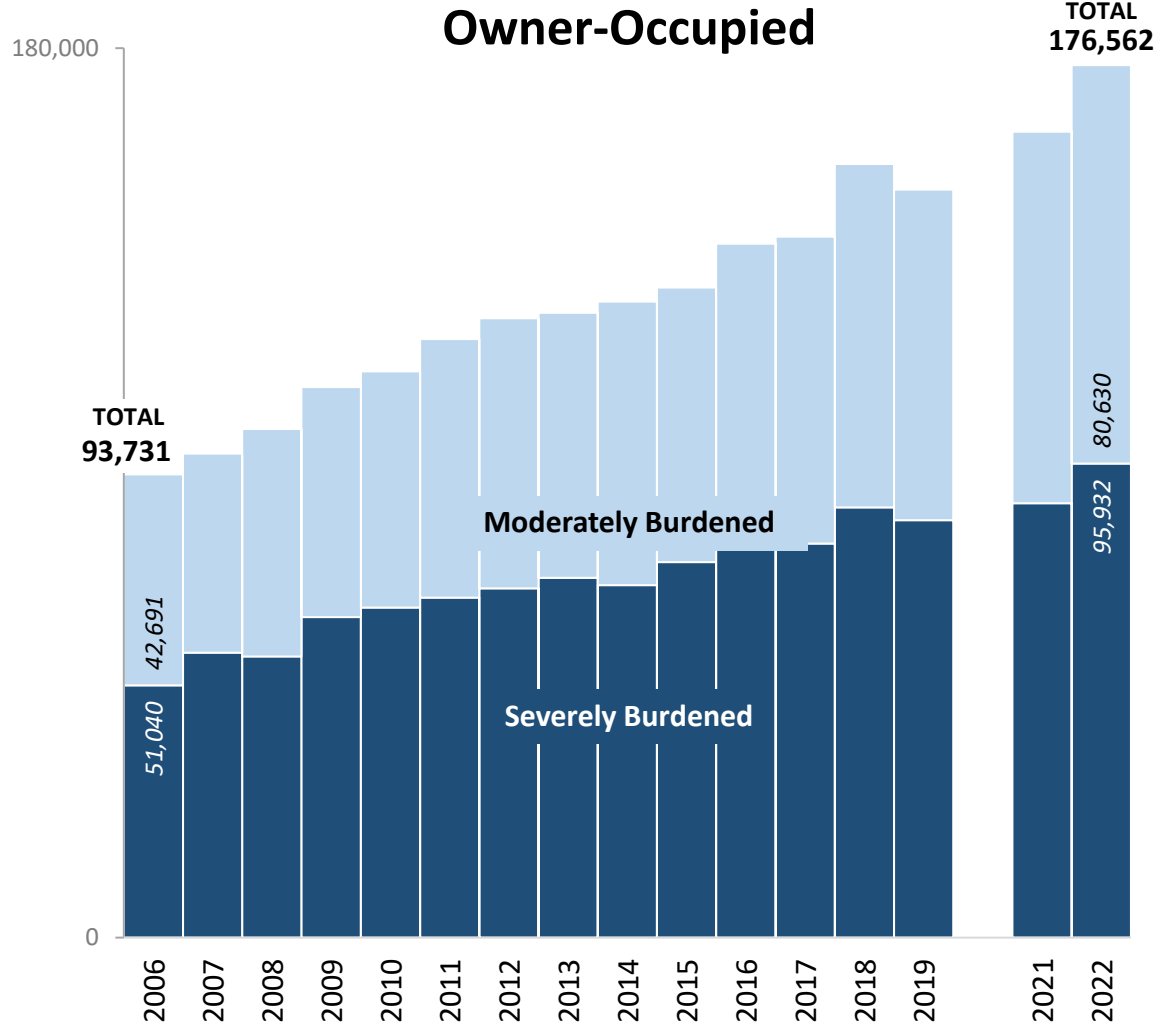
Basic Food Heads of Household Age 60 and Over are Increasing as Percent of the Total



SOURCES: The State of Senior Hunger in 2021 Report prepared for Feeding America by Dr. James Ziliak and Dr. Craig Gundersen <https://www.feedingamerica.org/sites/default/files/2023-04/State%20of%20Senior%20Hunger%20in%202021.pdf>. Basic Food data are derived from the DSHS Economic Services Administration EMAPS Data Web at <http://emaps.esa.dshs.wa.gov/DataWebObj/Default.aspx>.



Number of Cost-Burdened Households, 65+



SAMPLE: Includes householders 65 years old and older

Housing costs: for homeowners, the housing costs include mortgage payments, utilities, real estate taxes, insurance, mobile home costs, and monthly condominium costs. For renters, they include rent and utilities.

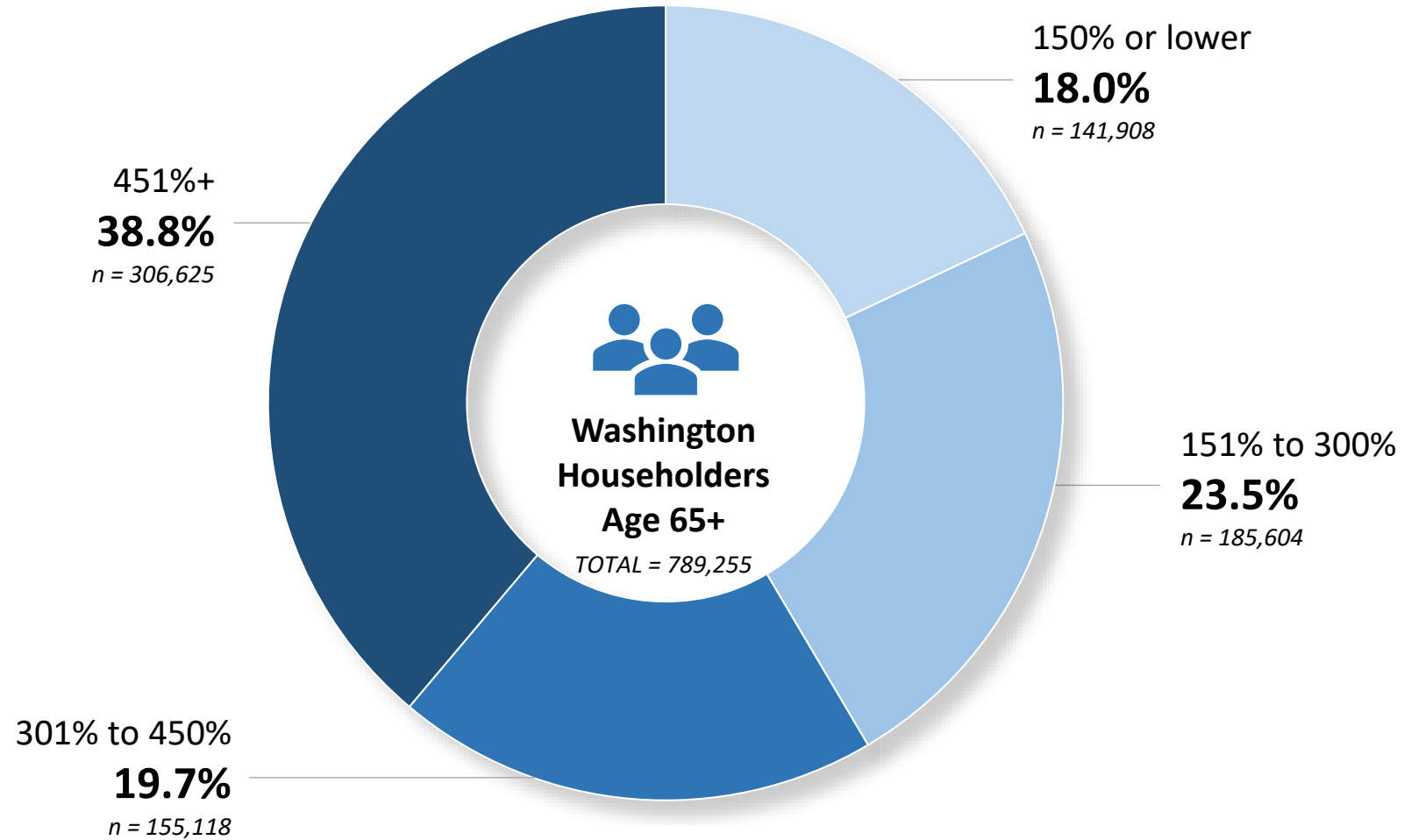
Moderately burdened households spend between 30% to 50% of their income on housing costs. Severely burdened households spend 50% or more of their income on housing costs. Households with non-positive income are assumed severely burdened.

SOURCE: American Community Survey One-Year Public Use Microdata Sample (PUMS). 2020 data not available due to COVID-19.

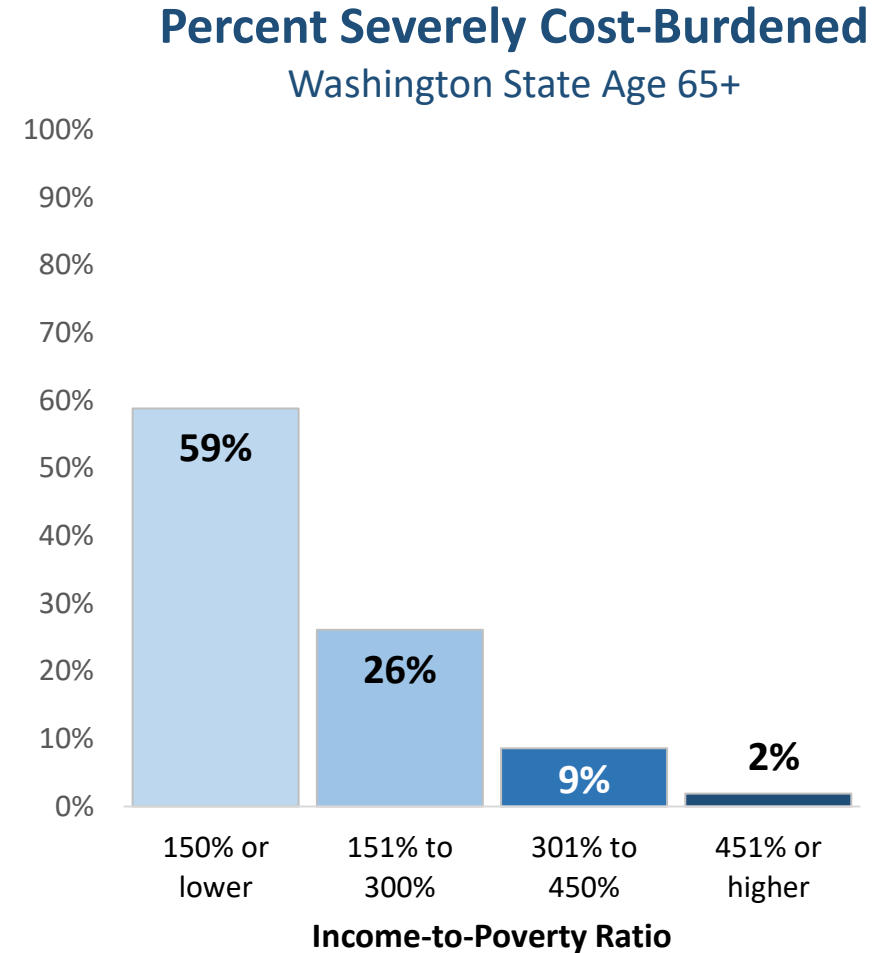
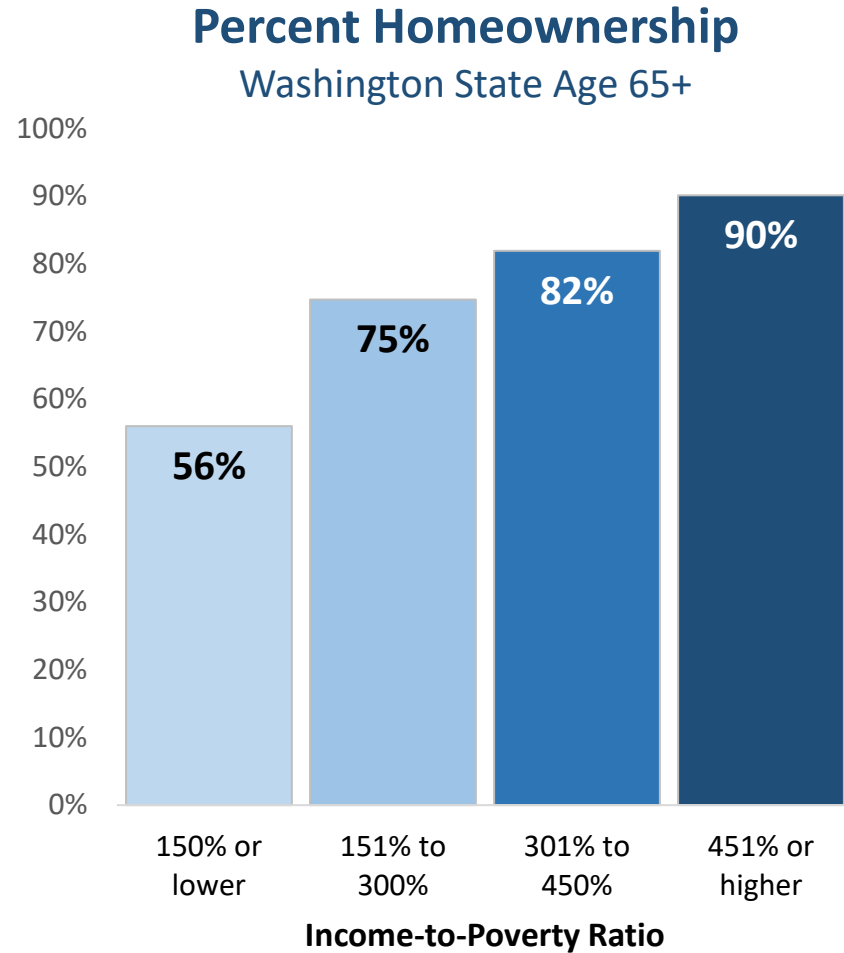
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Senior Householders by Income-to-Poverty Ratio, 2022



Homeownership and Housing Cost Burden by Income Level in 2022, 65+



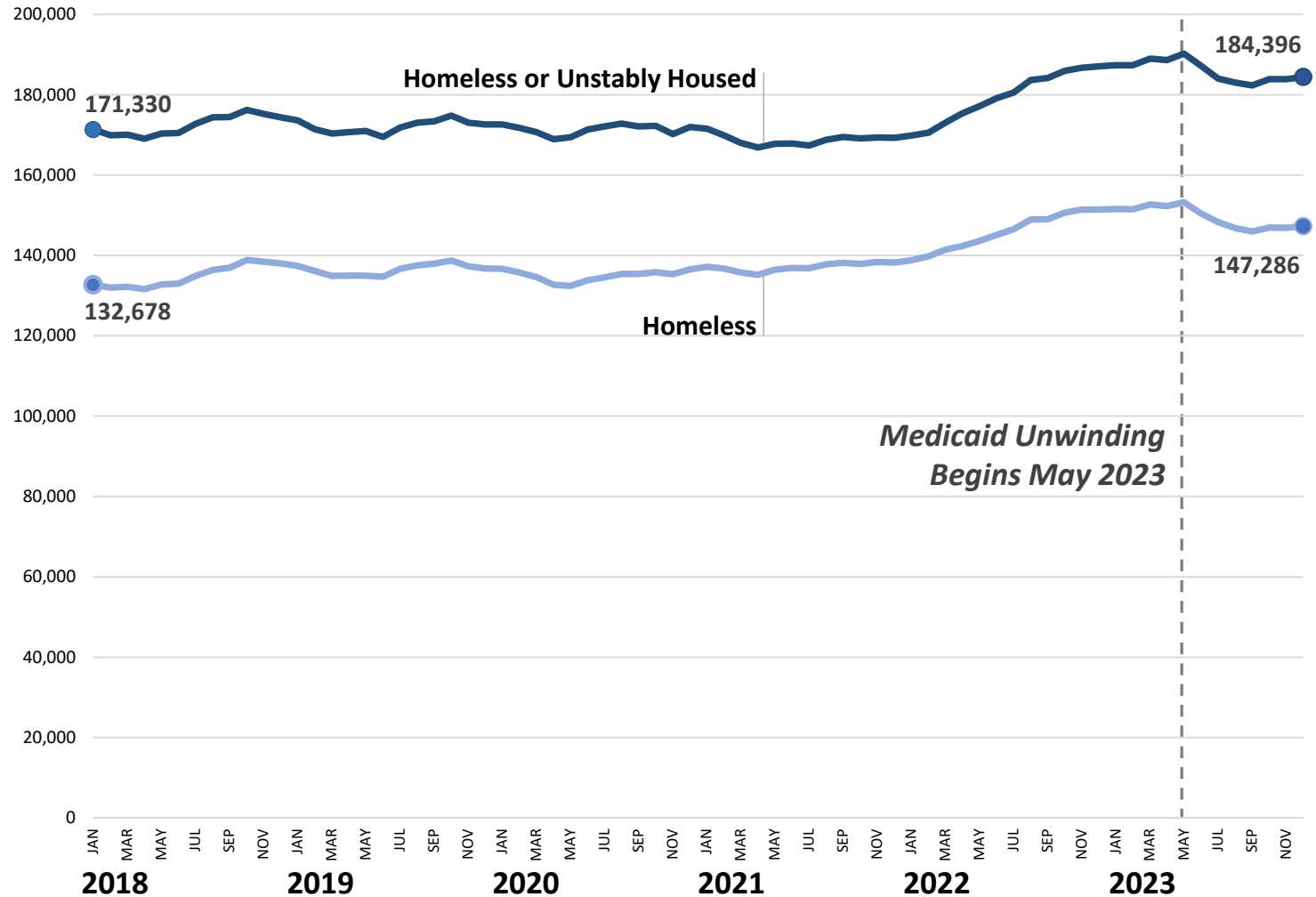
SAMPLE: Includes householders 65 years old and older

Housing costs: for homeowners, the housing costs include mortgage payments, utilities, real estate taxes, insurance, mobile home costs, and monthly condominium costs. For renters, they include rent and utilities. Moderately burdened households spend between 30% to 50% of their income on housing costs. Severely burdened households spend 50% or more of their income on housing costs. Households with non-positive income are assumed severely burdened.

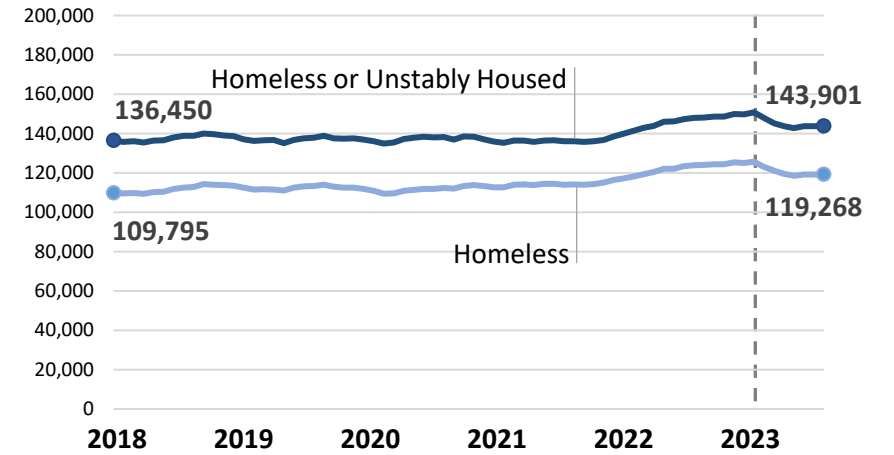
SOURCE: 2022 American Community Survey One-Year Public Use Microdata Sample (PUMS).



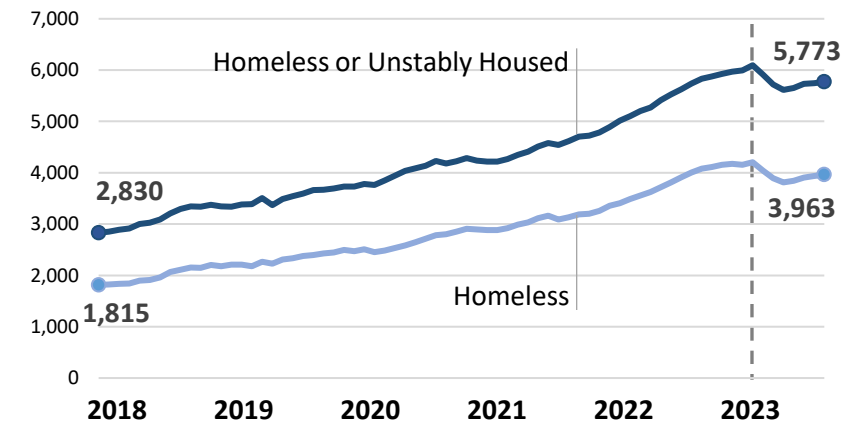
Homeless or Unstably Housed, All Ages



Homeless or Unstably Housed Adults, 18 to 64



Homeless or Unstably Housed Adults, 65+



Homelessness. Includes clients identified as homeless based on: 1) client living arrangement (Homeless without Housing, Emergency Shelter, Domestic Violence Shelter, Inappropriate Living Situation) from the Automated Client Eligibility System (ACES); 2) address information in ACES indicating that a youth was homeless (e.g., a youth's address was "homeless"); 3) housing service information recorded in the Homeless Management Information System (HMIS); or 4) medical claims with a homelessness diagnosis code ("Z590") from ProviderOne.

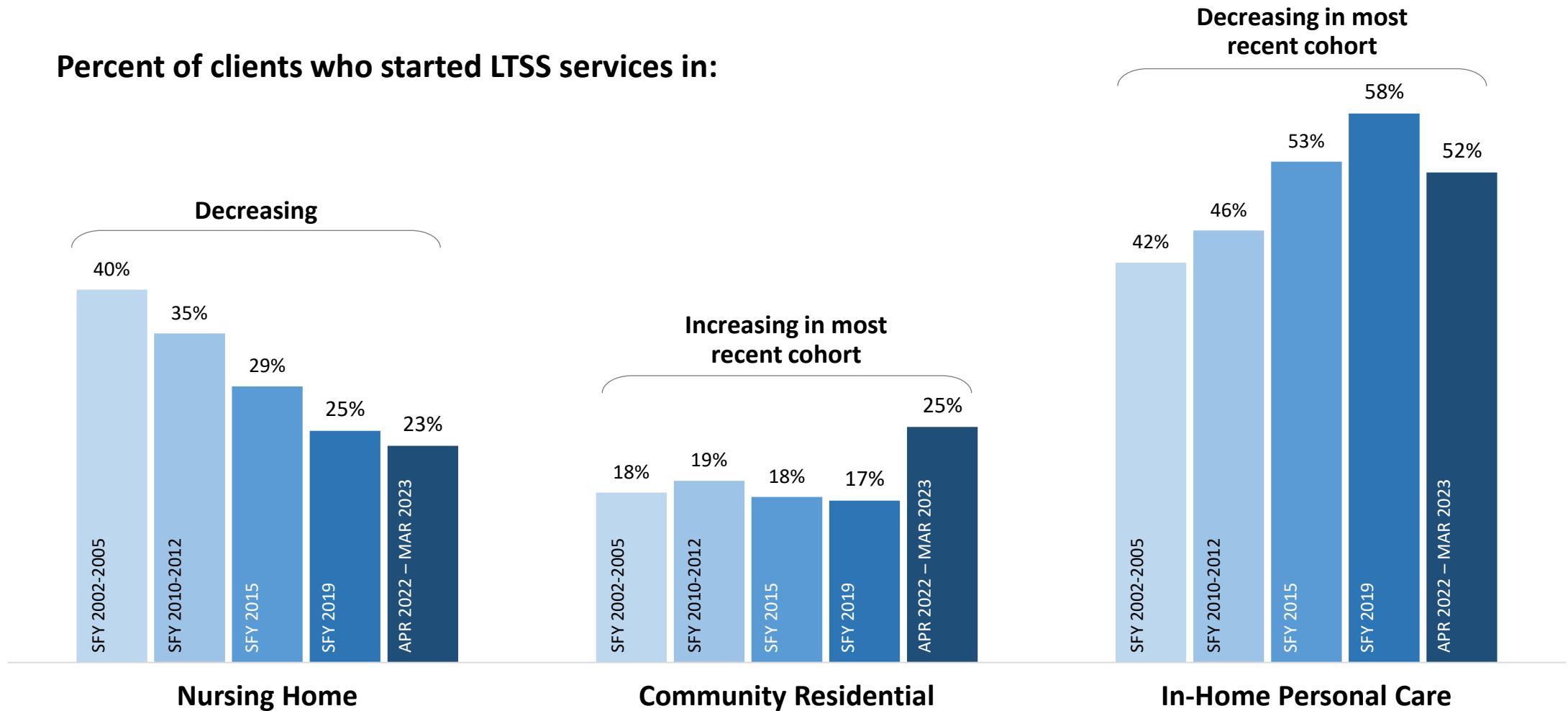
Unstably Housed or Homeless. Includes clients identified as homeless based on the preceding definition OR who were "Homeless with Housing" based on ACES living arrangement data or came into contact with the Department of Commerce's Coordinated Entry system as recorded in HMIS.



Initial Service Modality Is Increasingly In-Home Personal Care

Comparison of cohorts starting LTSS services in SFYs 2002-05, 2010-12, 2015, 2019, and the 12 months ending March 2023

Percent of clients who started LTSS services in:



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



Prevalence of Homelessness Among Seniors Is Relatively Low, But Growing Rapidly

- **Seniors are increasingly facing moderate to severe housing cost burdens**
- **The number of homeless seniors identifiable through participation in public health and human service program participation doubled from 2018 to 2023**
- There is significant regional variation in housing instability and homelessness driven by regional differences in housing affordability
- Mental health needs and substance use disorders are significant risk factors for homelessness at the individual level
- **The Medicaid LTSS delivery system has become an increasingly important resource for housing supports**



Getty Images

Appendix Supplemental Information



Getty Images

Dementia Prevalence and Forecasts

Measuring Dementia Prevalence Using Statewide Medicare Data

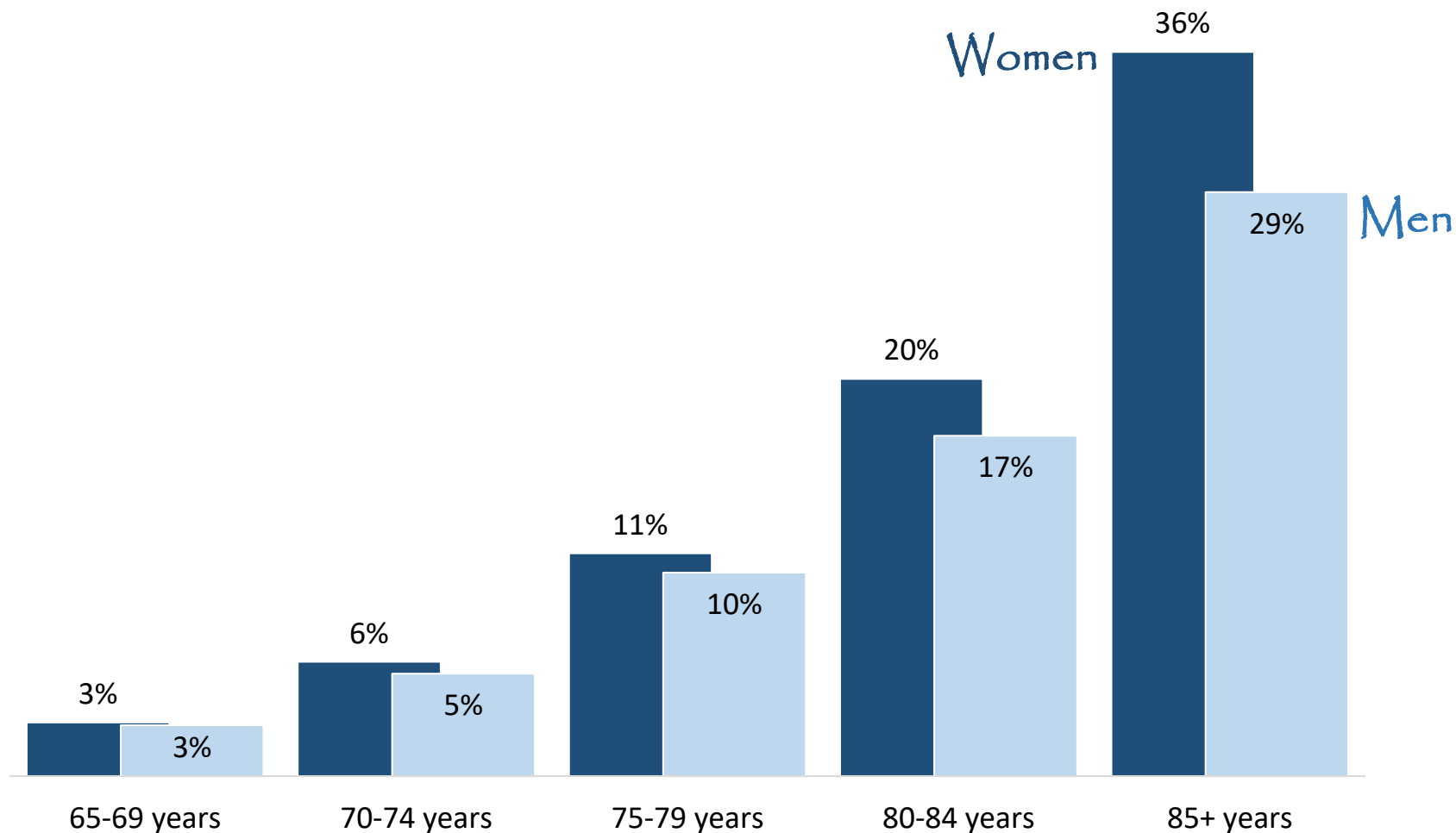
- Dementia prevalence is estimated for CY 2018 Washington State Medicare beneficiaries based on the presence of dementia-related diagnoses in available Medicare claims spanning the 2013 to 2018 time period
- Dementia is defined broadly to include Alzheimer's and related dementia diagnoses (vascular dementia, unspecified dementia, etc.)
- Measuring prevalence using the actual health service experiences of several hundred thousand Washington State Medicare beneficiaries supports more detailed direct prevalence estimates for groups that are often underrepresented in survey data
- Long-term forecasts of dementia prevalence are based on observed prevalence rates for Washington State Medicare beneficiaries and detailed OFM forecasts of state population change through 2040

Additional Measurement Details

- Prevalence estimates were derived from the experience of approximately 675,000 Washington State fee-for-service (FFS) Medicare beneficiaries with at least 6 months of FFS Medicare enrollment in both CY 2017 and CY 2018
- All diagnosis fields recorded on Medicare inpatient, nursing facility, home health, hospice, and carrier claims were scanned to identify indicators of dementia
- Dementia was indicated by the presence of at least one of a specified set of diagnoses over the six-year period spanning 2013 to 2018
- Dementia code set is available upon request

Dementia Prevalence Rates Are Somewhat Higher for Women

Among 2018 Washington State Medicare Beneficiaries Age 65+

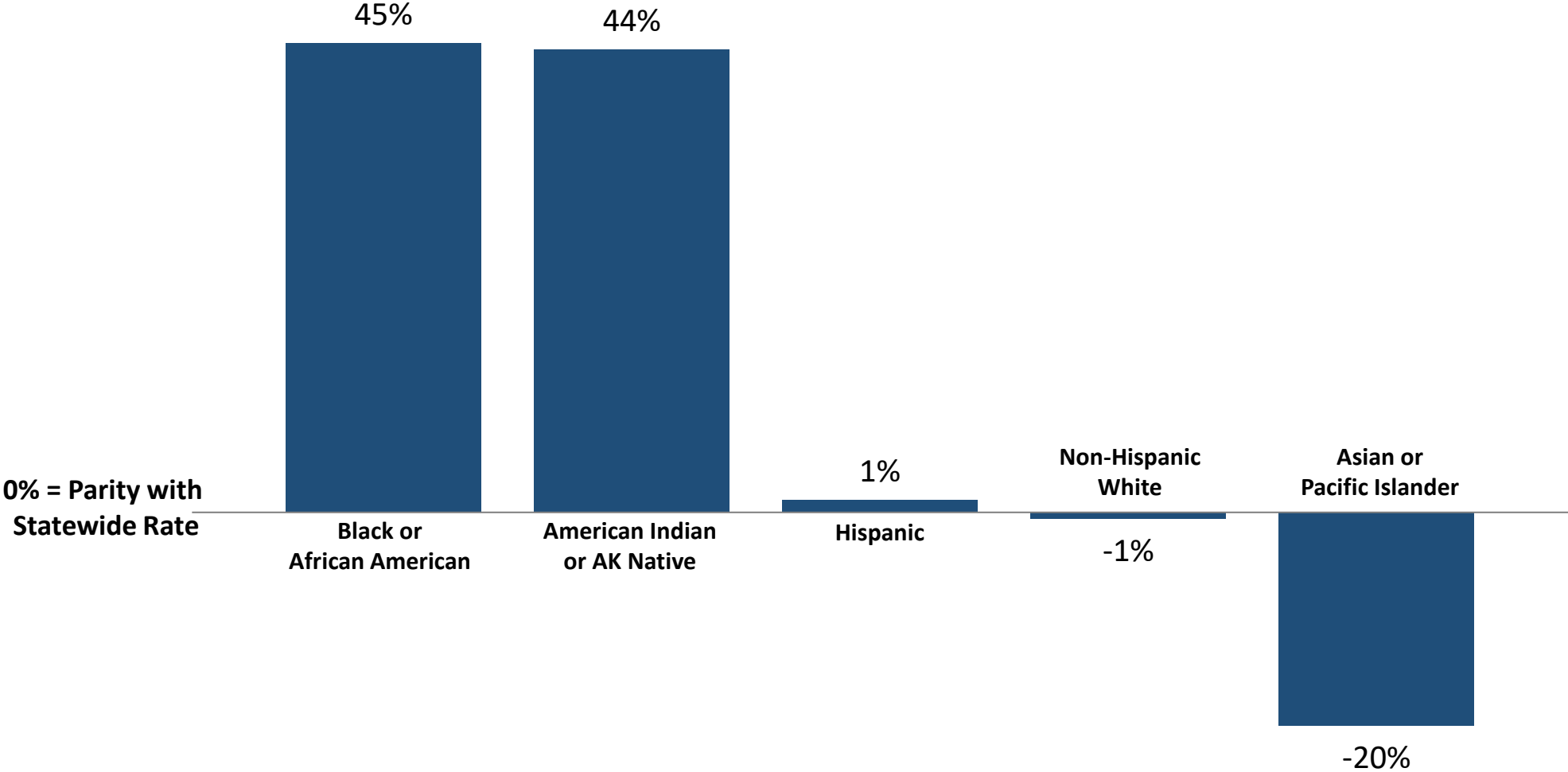


SOURCE: DSHS Research and Data Analysis, Integrated Client Databases.



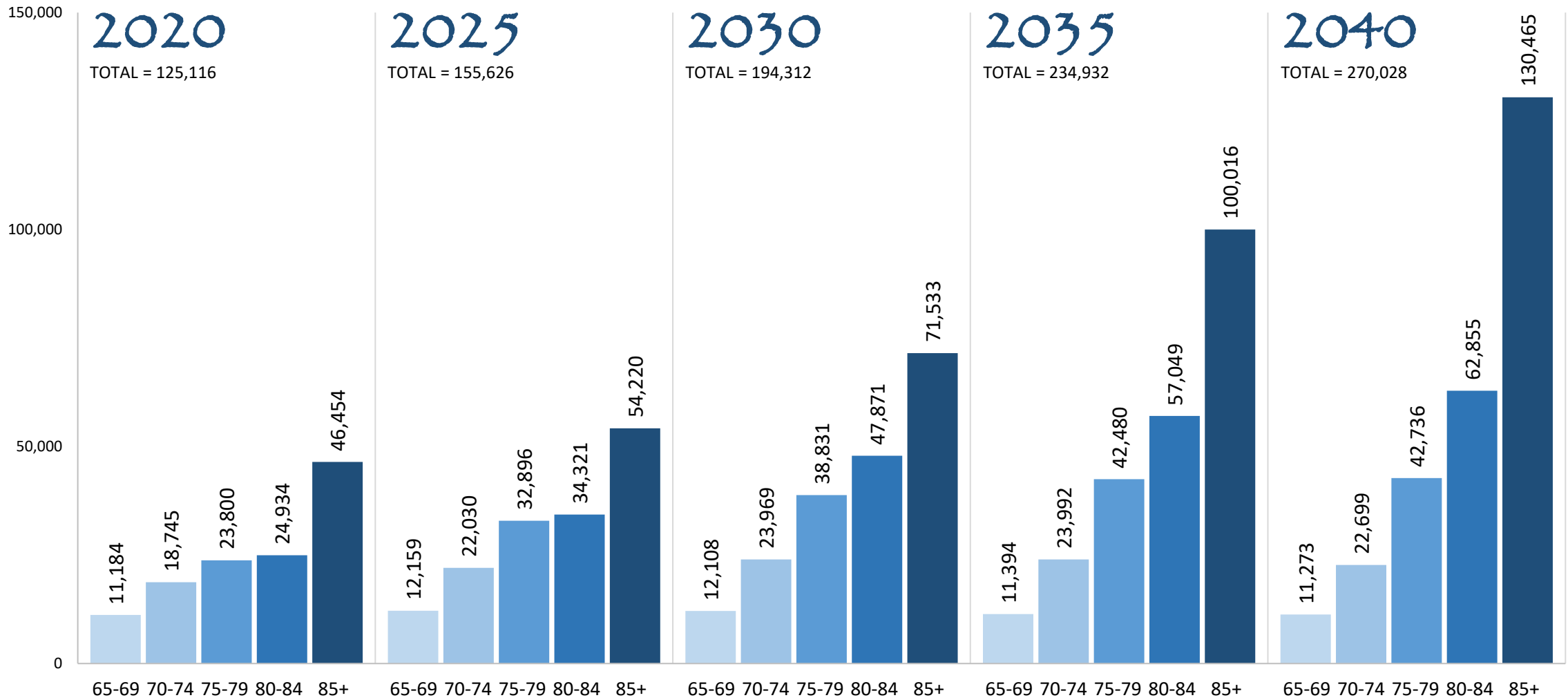
Dementia Risk Is Higher Among Black and American Indian Medicare Beneficiaries

Dementia Prevalence Relative to Statewide Rate Among CY 2018 Washington State Medicare Beneficiaries Aged 65 to 74



Forecast Number of Persons with Dementia

Among Washington State Residents Age 65+

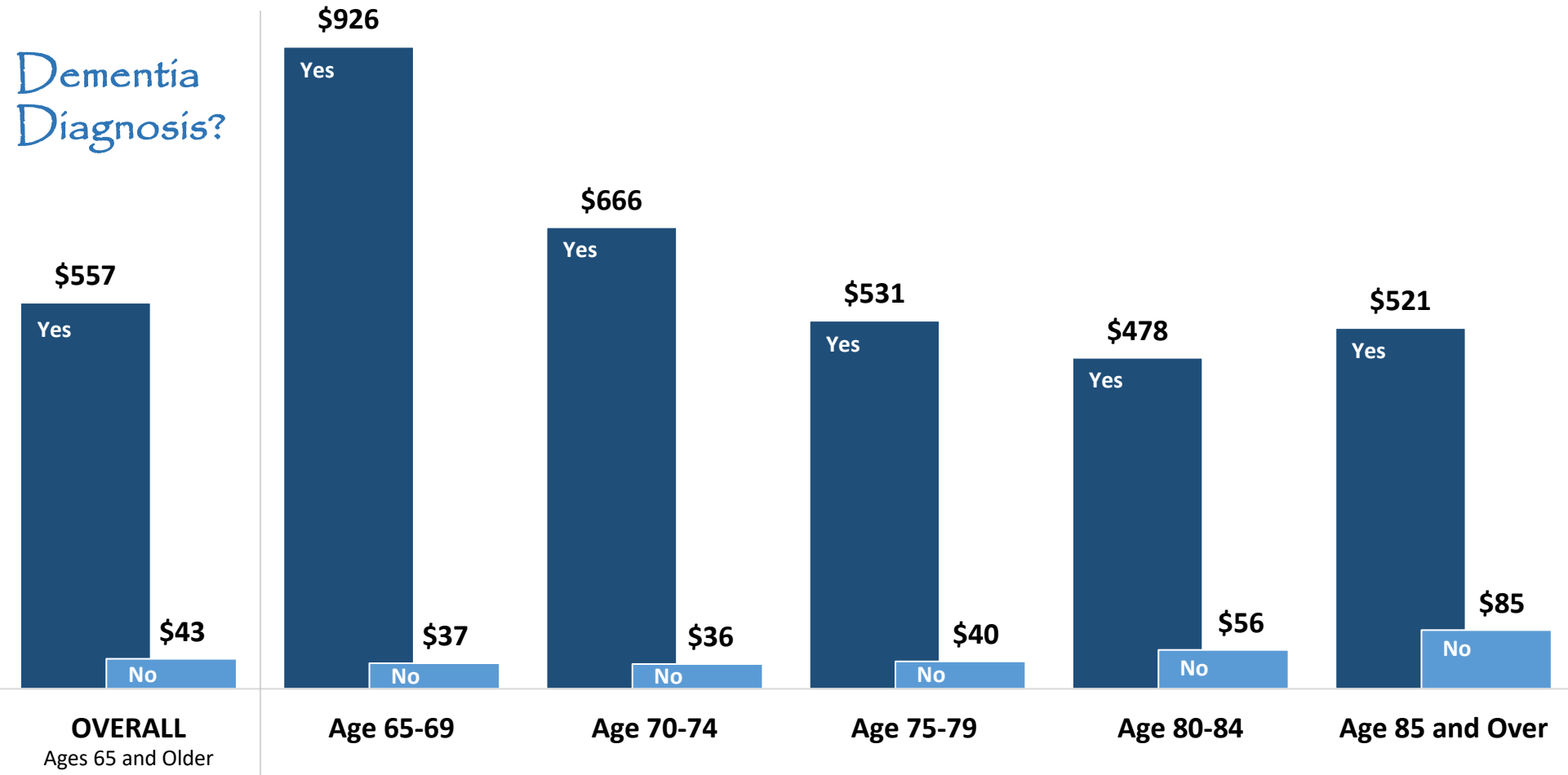


SOURCE: Long-term forecasts of dementia prevalence are based on observed prevalence rates for Washington State Medicare beneficiaries and detailed OFM forecasts of state population change through 2040.



Medicaid Long Term Services and Supports Expenditure

Per Member Per Month, Ages 65 and Older, CY 2018 Washington State Medicare Beneficiaries



NOTES: Medicare and Medicaid Long Term Services and Support expenditures among CY 2018 fee-for-service Medicare beneficiaries Age 65+ with 6+ months of Medicare enrollment, including beneficiaries who were not dually eligible for Medicaid.

SOURCE: DSHS Integrated Client Databases Maintained by the Research and Data Analysis Division.





Getty Images

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

LTSS Program Initiatives Supporting Rebalancing

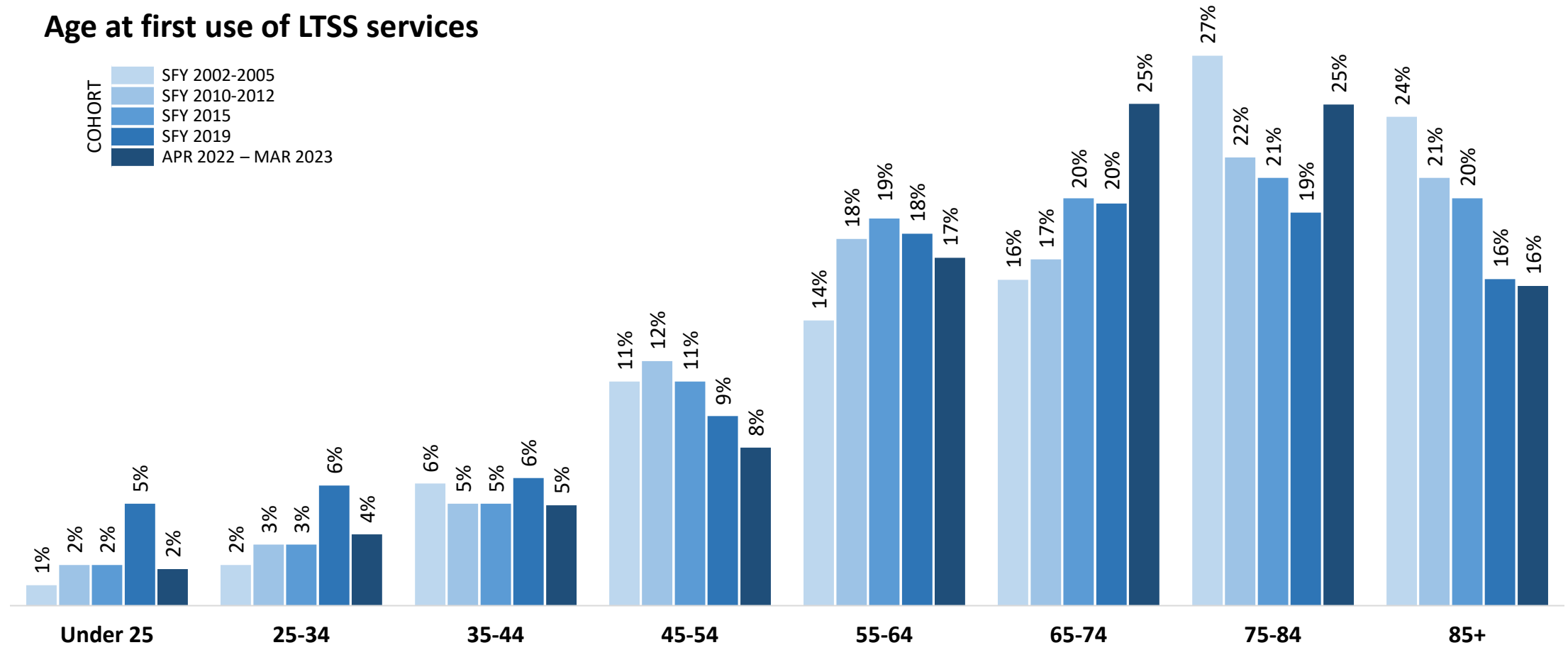
40 years of innovation!



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 the 12 months ending March 2023

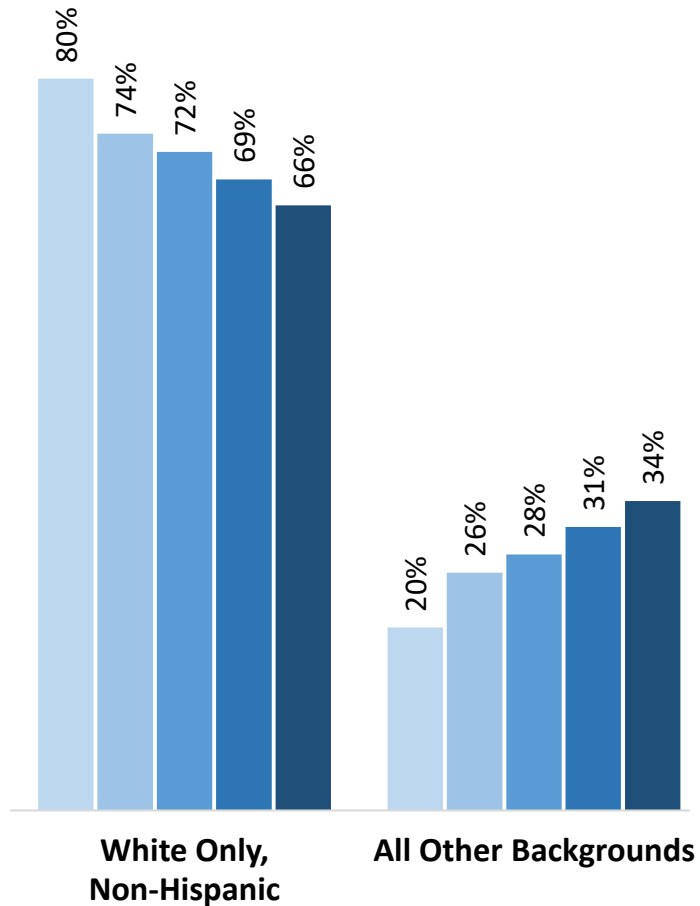
Age at first use of LTSS services



Increasing Diversity of Medicaid LTSS Clients Over Time

Comparison of cohorts starting LTSS services in SFYs 2002-05, 2010-12, 2015, 2019, and the 12 months ending March 2023

Race/Ethnicity

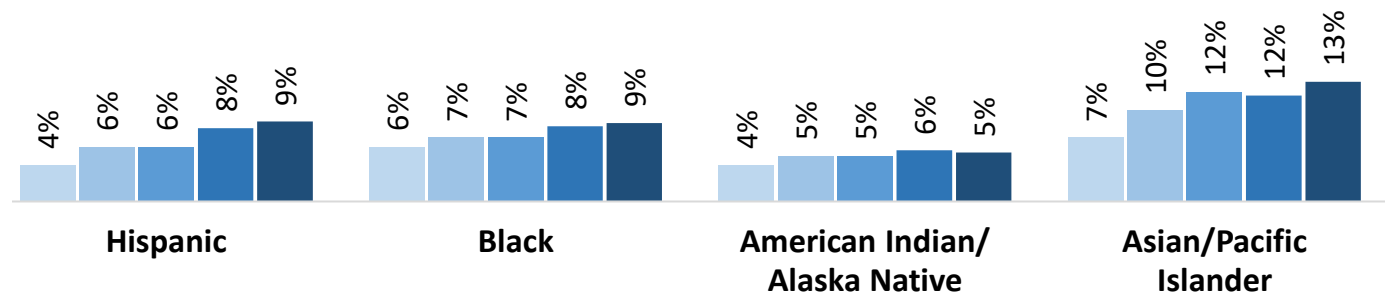


DETAIL

NOTE: Categories are not mutually exclusive.

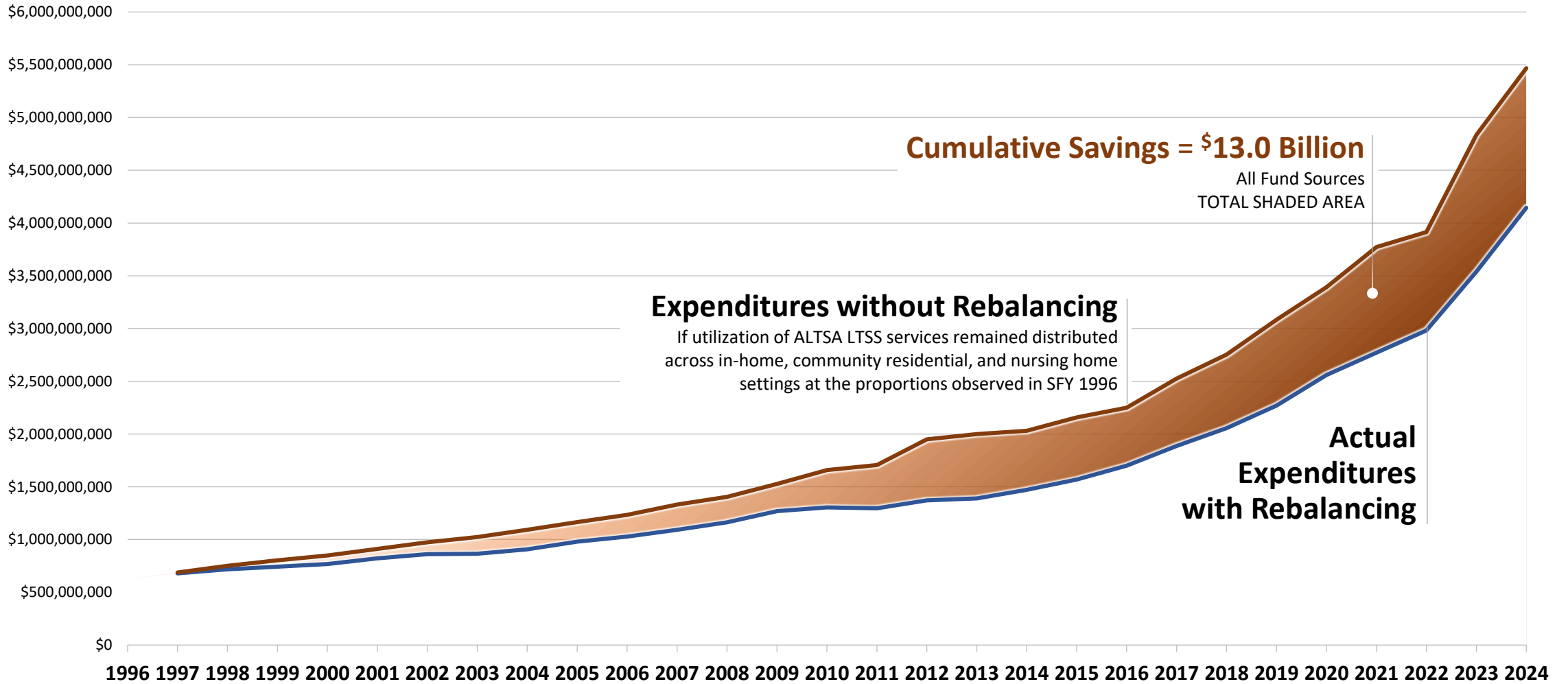


► **Increased share of LTSS entrants are American Indian/ Alaska Native, Asian, Black, and/or Hispanic**



AL TSA Long-Term Services and Supports Rebalancing Savings

Annual AL TSA LTSS Service Expenditures* • All Fund Sources • Cumulative Savings SFY 1997—SFY 2024



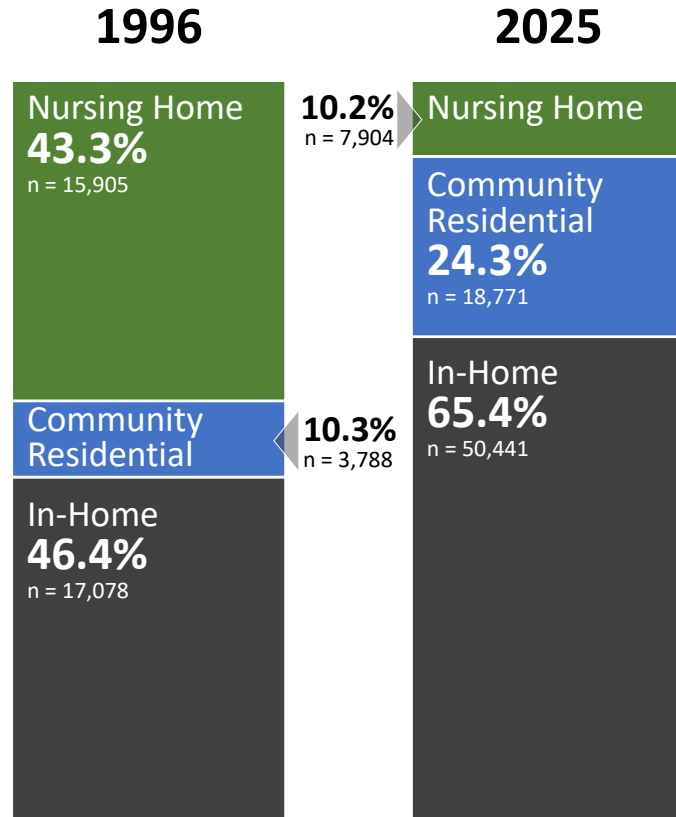
NOTES: In-scope services for this analysis include AL TSA in-home personal care services, community residential services, and nursing home services. Estimated rebalancing savings include acuity adjustments to per capita expenditures to reflect the expected lower average acuity of clients who would have been served in in-home or community residential settings in the absence of rebalancing.

LTSS Rebalancing Financial Impact Methodology

- Calculate the percentage distribution of ALISA LTSS clients across major service modalities in SFY 1996: In-home Personal Care, Adult Family Homes, Assisted Living, Adult Residential Care, and Nursing Homes
- Simulate the **caseloads** that would have been experienced by major modality if percentage distribution of LTSS caseloads across modalities over the SFY 1997-2024 period had remained the same as experienced in SFY 1996
- Simulate the **expenditures** that would have been experienced by applying actual SFY 1997-2024 per capita nursing home costs and estimated in-home and community residential per cap costs that maintain the same cost-relativity to nursing home costs as observed in SFY 2024. This has the effect of significantly lowering simulated in-home and community residential per cap costs, relative to actual per cap costs, reflecting the expectation that a lower acuity population would have been served in HCBS settings in the absence of rebalancing.
- Compare the total costs of the simulated caseload distribution to the actual and forecast total LTSS costs incurred over the SFY 1997-2024 period. The difference comprises the estimated savings (all funds).

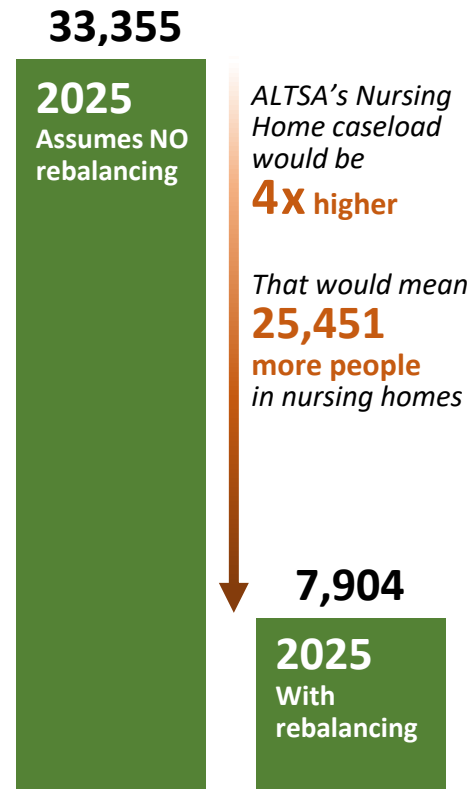
Building Home- and Community Based LTSS Options

AL TSA Caseload: Then and Now



Reduced Nursing Facility Use

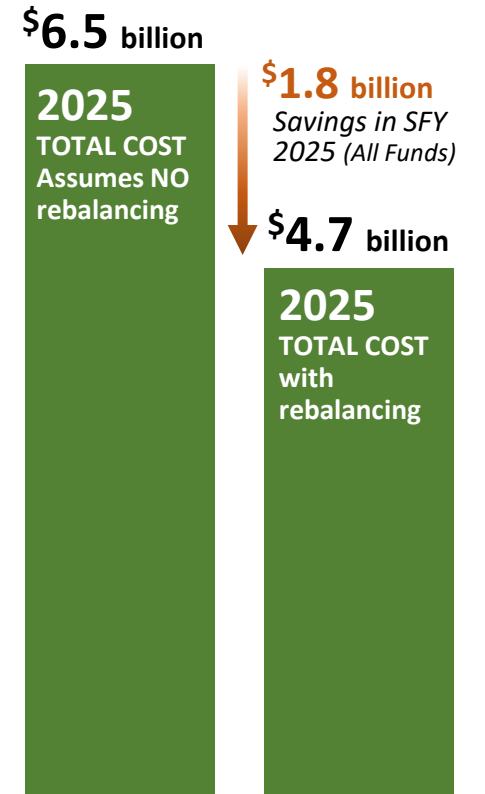
“With” and “Without” Rebalancing



Forecast SFY 2025 average monthly caseload.

Cost Savings

“With” and “Without” Rebalancing



Estimated AL TSA LTSS service expenditures with and without rebalancing. Rebalancing assessed relative to SFY 1996 LTSS utilization patterns, All Funds.

SOURCE: Washington State Department of Social and Health Services, Facilities, Finance, and Analytics Administration, Research and Data Analysis Division, April 2024.

Medicare and Social Security Recipients

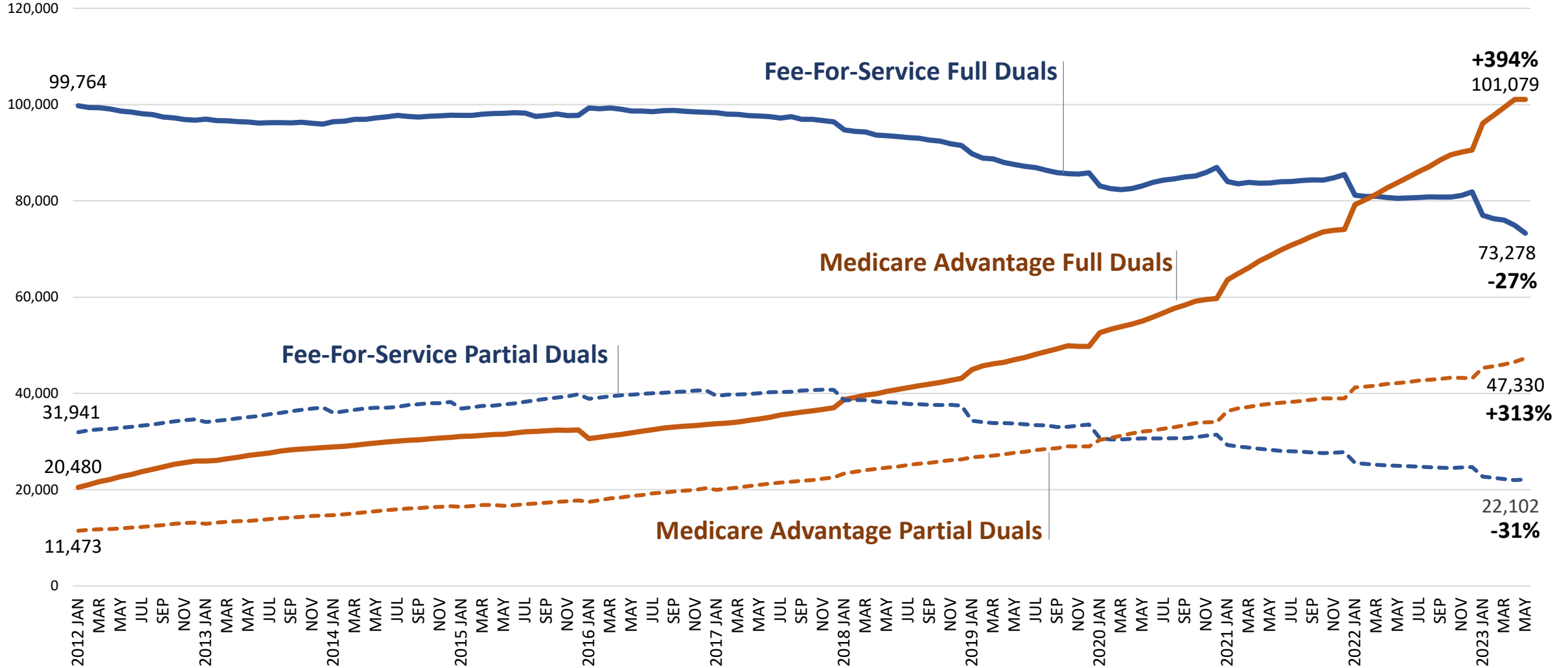
	Medicare ¹ (May 2023)		Social Security ² (December 2022)	
	Total (All Beneficiaries)	Prescription Drug	Total (All Categories)	Age 65 and Older
Washington	1,511,447	1,108,442	1,428,764	1,171,028
Adams	2,806	2,121	2,760	2,140
Asotin	6,763	5,087	6,975	5,415
Benton	40,068	30,149	39,260	31,265
Chelan	19,506	15,192	18,880	15,830
Clallam	28,964	20,758	28,140	24,085
Clark	101,937	80,538	96,310	79,275
Columbia	1,344	964	1,330	1,060
Cowlitz	28,139	22,585	28,825	22,275
Douglas	9,067	7,042	8,930	7,485
Ferry	2,465	1,633	2,605	2,060
Franklin	12,102	9,039	12,095	9,165
Garfield	738	525	695	575
Grant	17,779	13,563	18,030	14,005
Grays Harbor	21,957	15,458	22,395	17,155
Island	26,275	17,912	24,860	21,770
Jefferson	14,850	10,801	13,815	12,445
King	349,437	264,482	307,735	263,460
Kitsap	63,552	38,269	57,870	48,185
Kittitas	10,242	7,224	9,725	8,205
Klickitat	6,902	4,788	6,770	5,530
Lewis	22,597	16,919	23,035	17,910
Lincoln	3,562	2,527	3,605	2,885
Mason	19,374	12,891	19,275	15,565
Okanogan	11,921	8,514	11,765	9,540
Pacific	9,034	6,522	9,210	7,570
Pend Oreille	4,496	3,206	4,685	3,670
Pierce	167,468	115,154	161,330	127,600
San Juan	6,705	5,269	6,030	5,550
Skagit	34,718	26,024	33,500	28,305
Skamania	2,970	2,085	2,930	2,395
Snohomish	144,553	110,363	134,085	110,575
Spokane	117,019	87,998	113,745	88,650
Stevens	14,274	10,262	14,500	11,350
Thurston	67,446	42,051	65,420	52,830
Wahkiakum	1,732	1,284	1,695	1,360
Walla Walla	14,431	10,464	14,080	11,665
Whatcom	52,148	40,343	48,980	41,170
Whitman	6,737	4,349	6,545	5,255
Yakima	45,365	34,086	46,345	35,800



SOURCES: ¹<https://data.cms.gov/summary-statistics-on-beneficiary-enrollment/medicare-and-medicaid-reports/medicare-monthly-enrollment/data>
² https://www.ssa.gov/policy/docs/statcomps/oasdi_sc/

Medicare Advantage Plans Have Rapidly Gained Market Share

Medicaid and Medicare Full Dual and Partial Dual Eligibles, January 2012 – May 2023



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



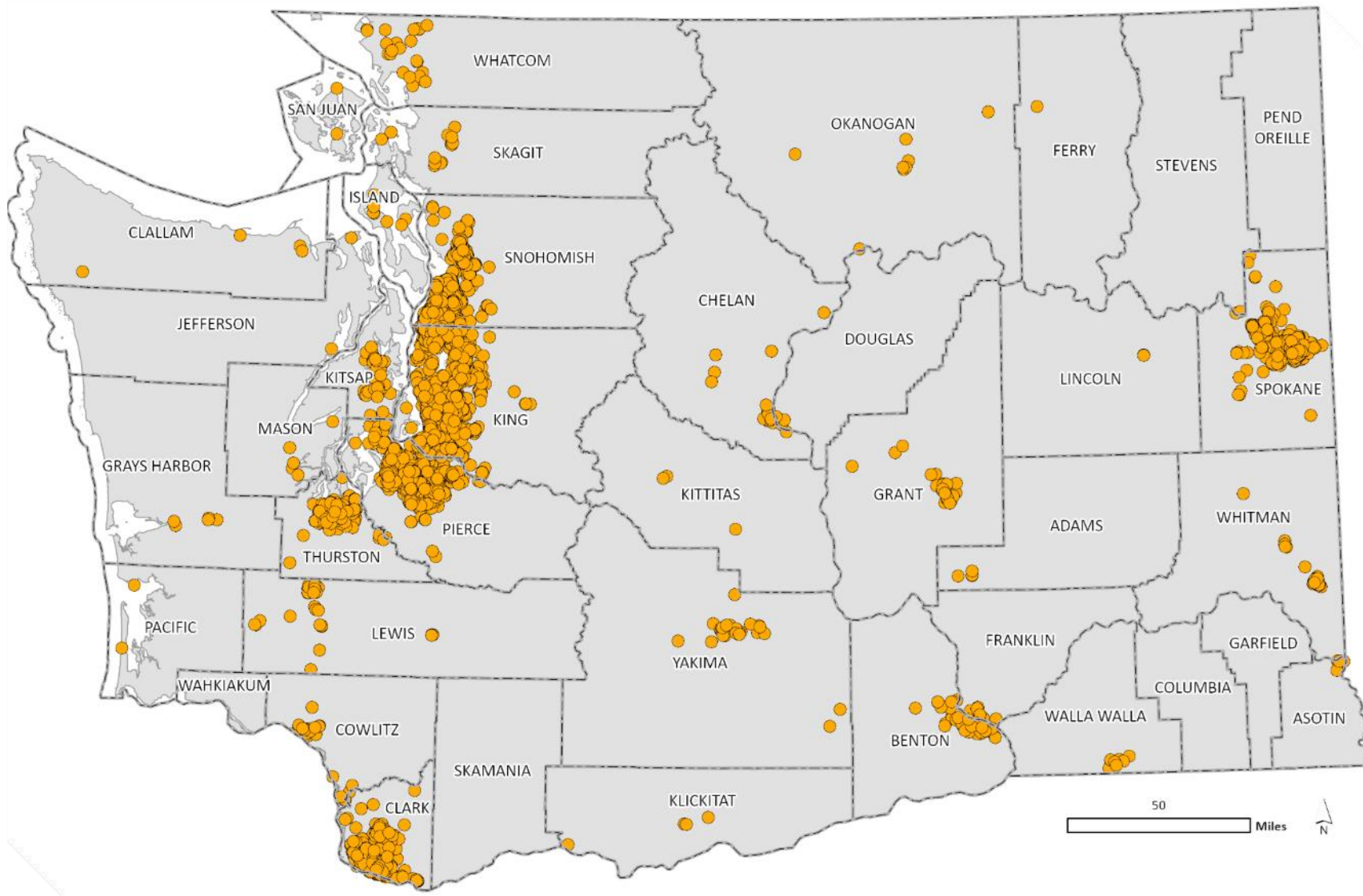


Getty Images

DSHS Facility Maps

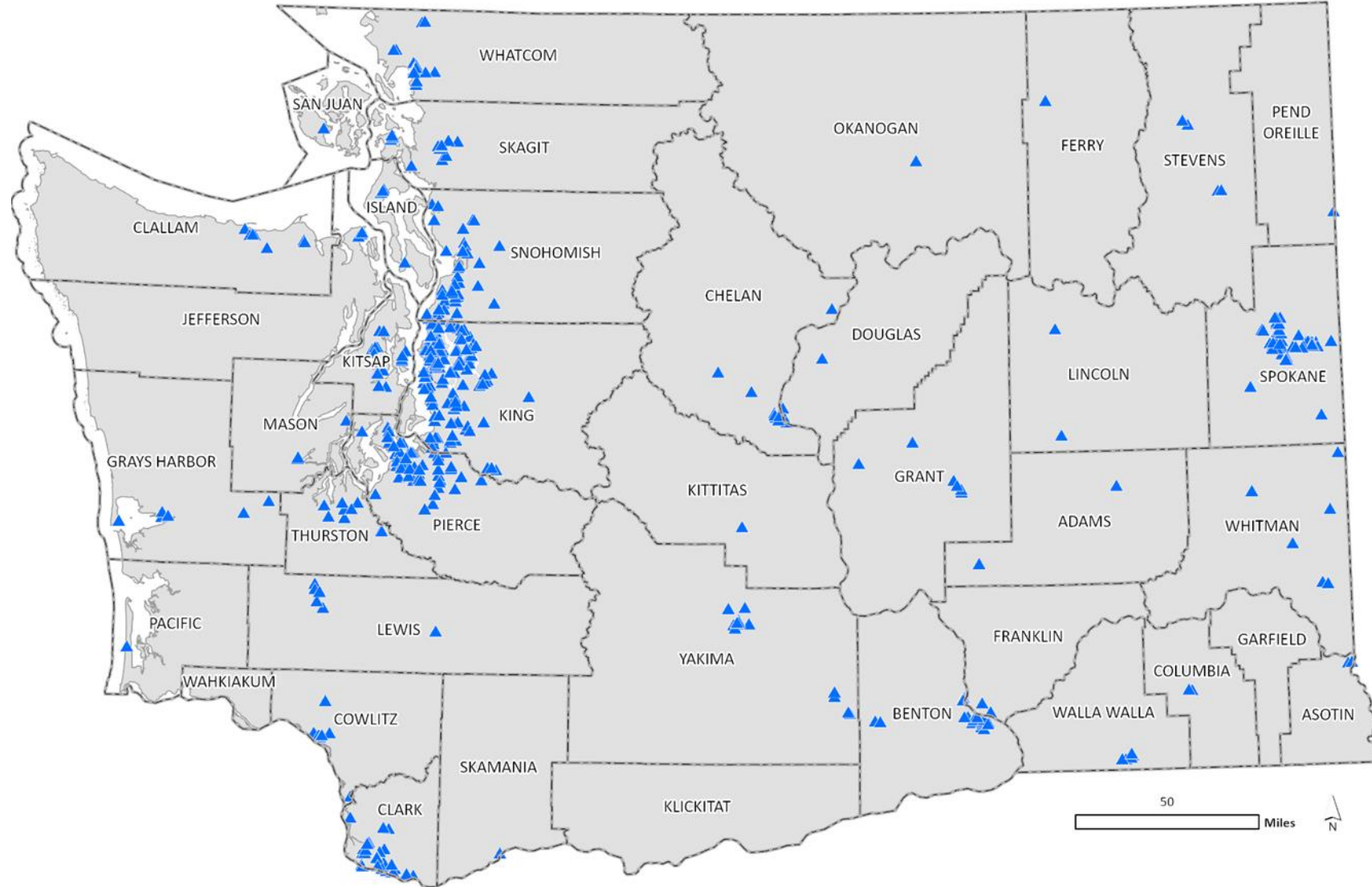
DSHS Licensed Adult Family Homes

As of August 14th, 2024, TOTAL = 4,960



DSHS Licensed Assisted Living Facilities

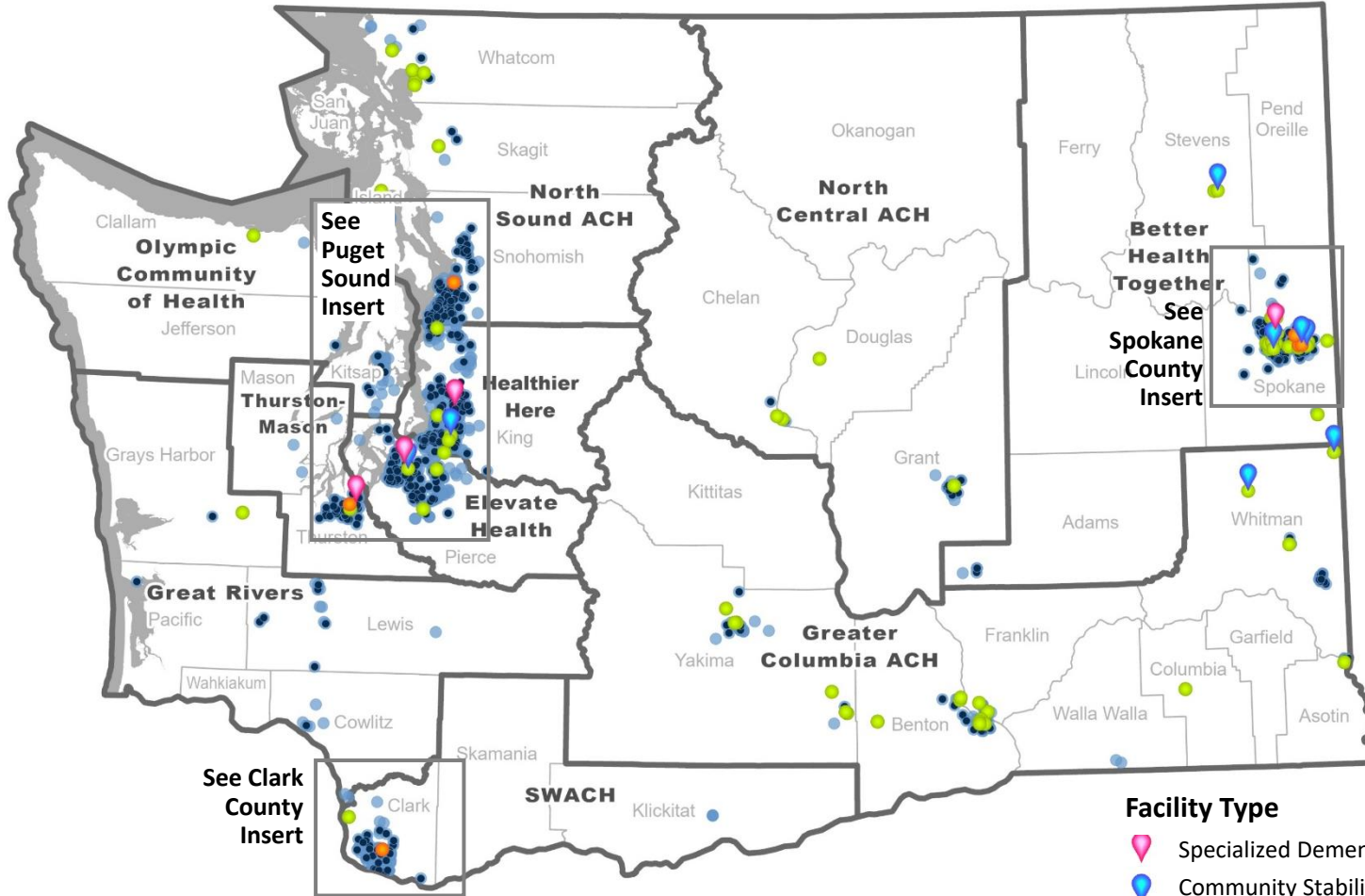
As of August 14th, 2024, TOTAL = 555



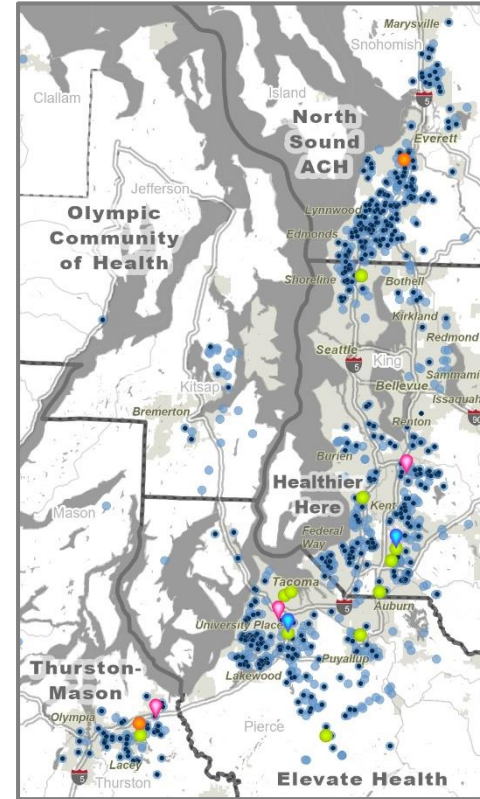
SOURCE: DSHS Enterprise GIS Geospatial Data Library, accessed August 14th, 2024. Includes Assisted Living, Adult Residential Care, Enhanced Adult Residential Care, Expanded Community Services, Dementia Care, and No Contract.

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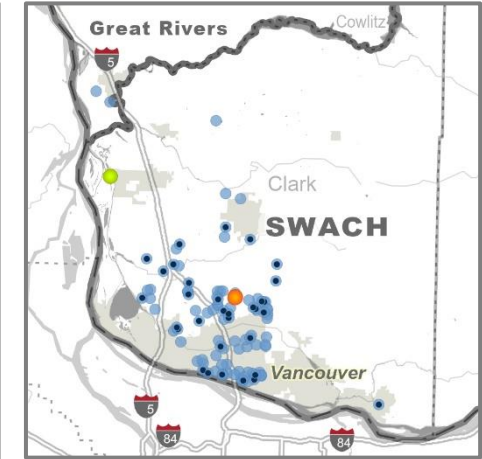
AL TSA Specialized Contract Facilities with Behavioral Supports



Puget Sound Insert



Clark County Insert



Spokane County Insert

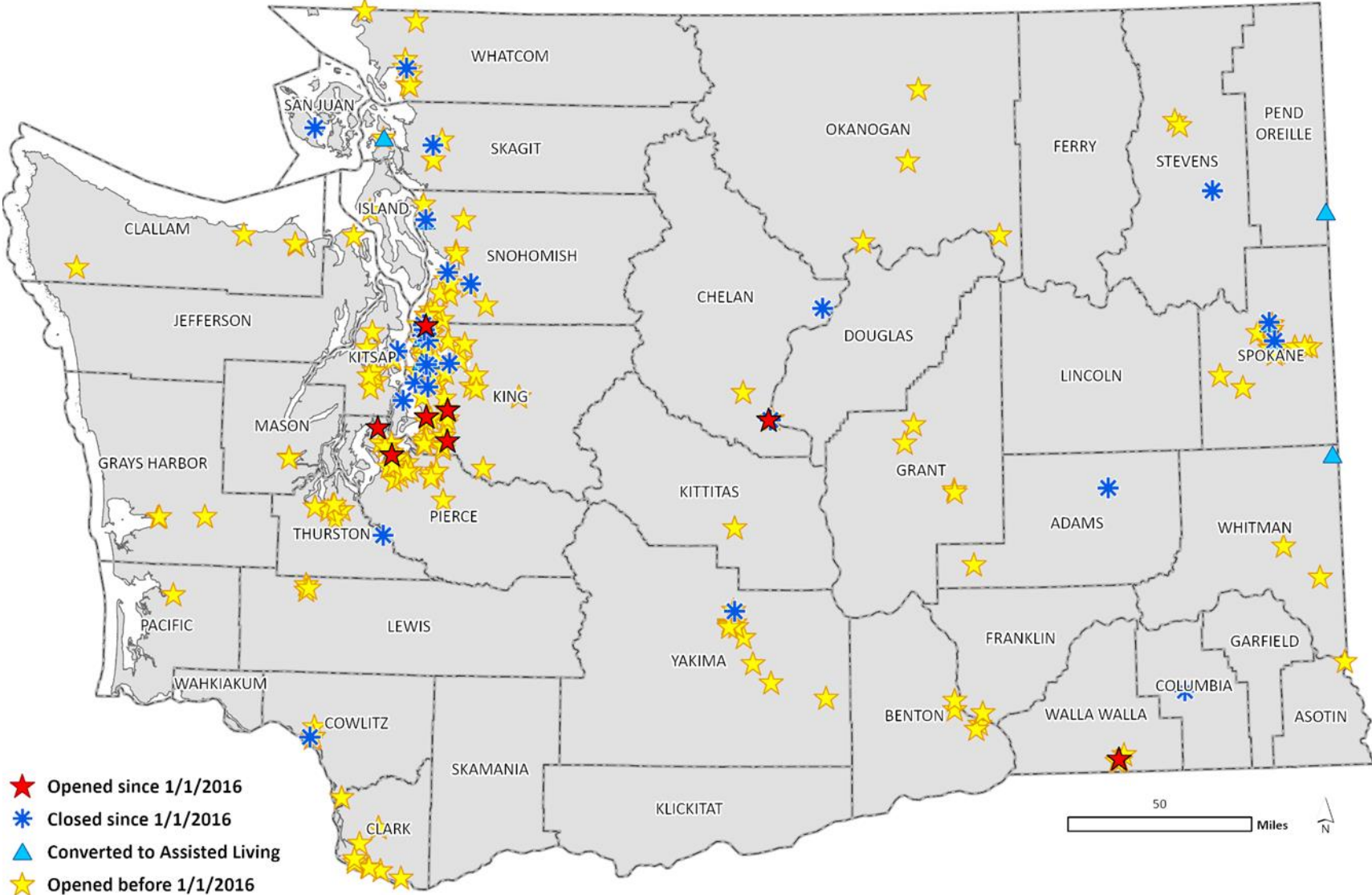


Facility Type

- 📍 Specialized Dementia Care Program Plus (SDCP+)
- 📍 Community Stability Supports (CSS)
- 📍 Enhanced Services Facility (ESF)
- 📍 Assisted Living Facility • Expanded Community Services (ALF ECS)
- Adult Family Home • Specialized Behavior Supports (AFH SBS)
- Adult Family Home • Expanded Community Services (AFH ECS)
- HCA Medicaid Purchasing Regions

DSHS Licensed Nursing Homes

As of September 20, 2024, TOTAL (Currently Open) = 199

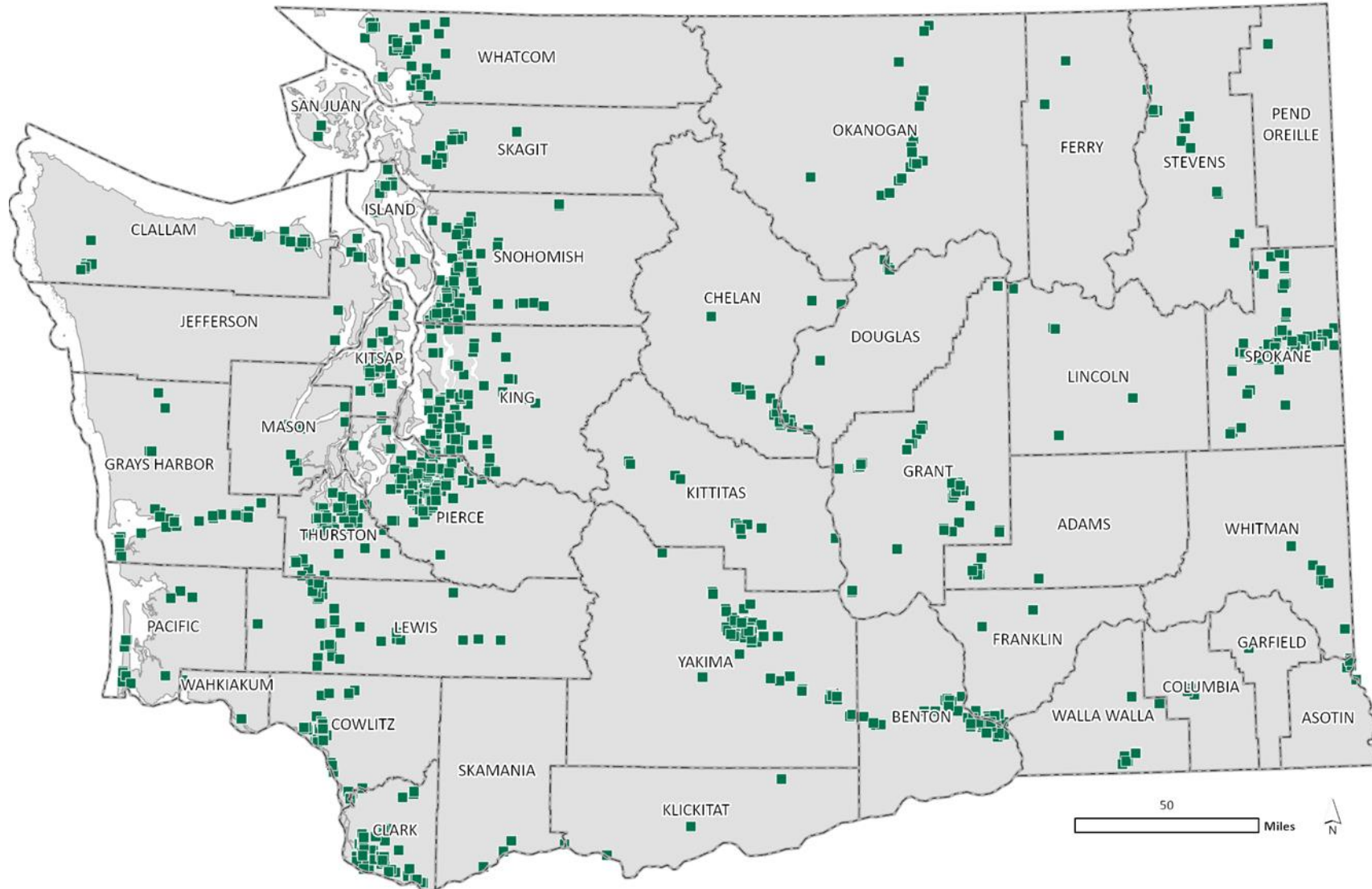


SOURCE: DSHS Enterprise GIS Geospatial Data Library, accessed September 20, 2024.

DSHS | Facilities, Finance, and Analytics Administration | Research and Data Analysis Division • OCTOBER 2024

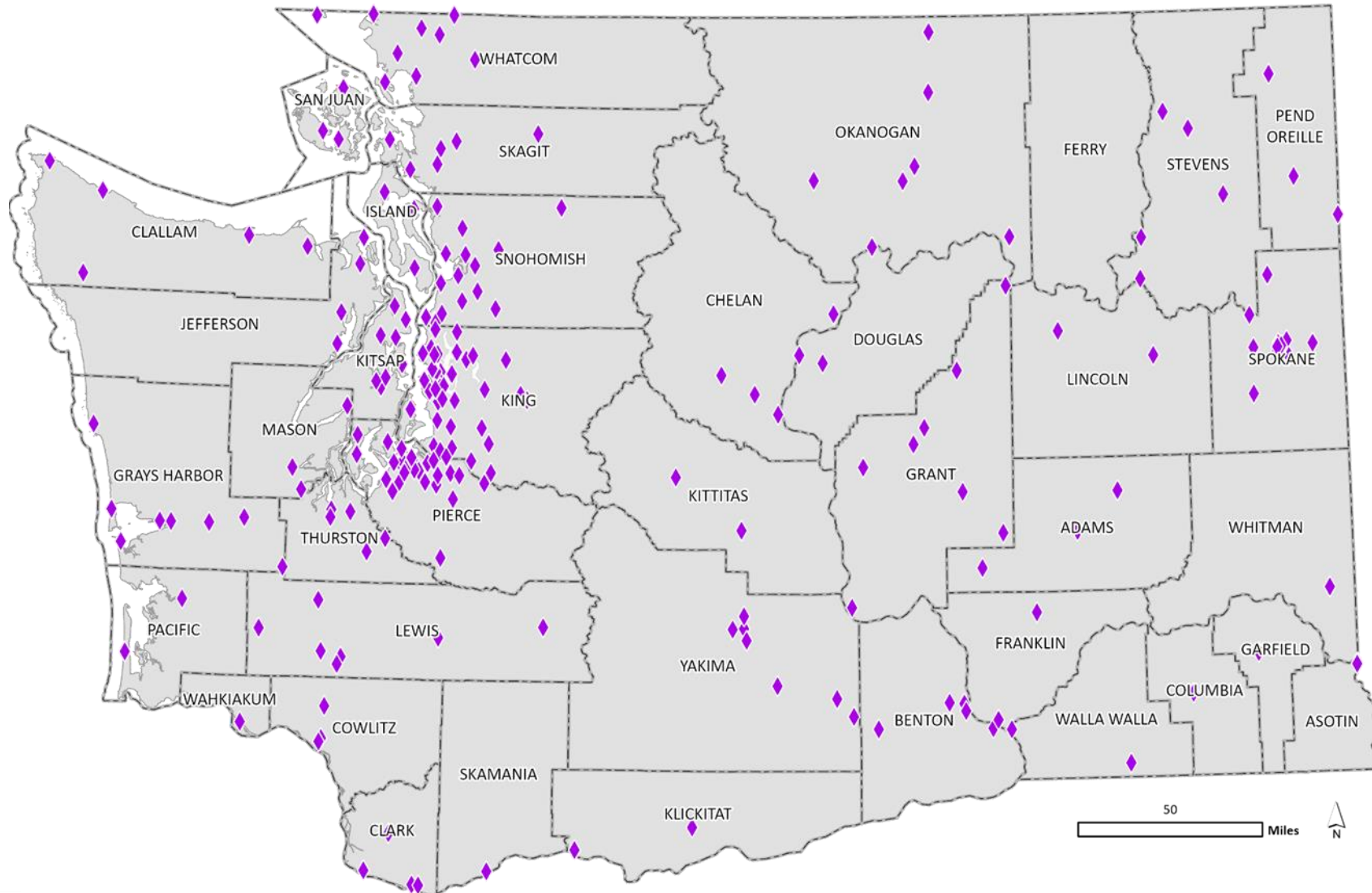
Manufactured/Mobile Home Communities

AS OF July 31, 2024, TOTAL = 1,199 Communities, 67,603 Rental Spaces, 7,664 Vacant Units



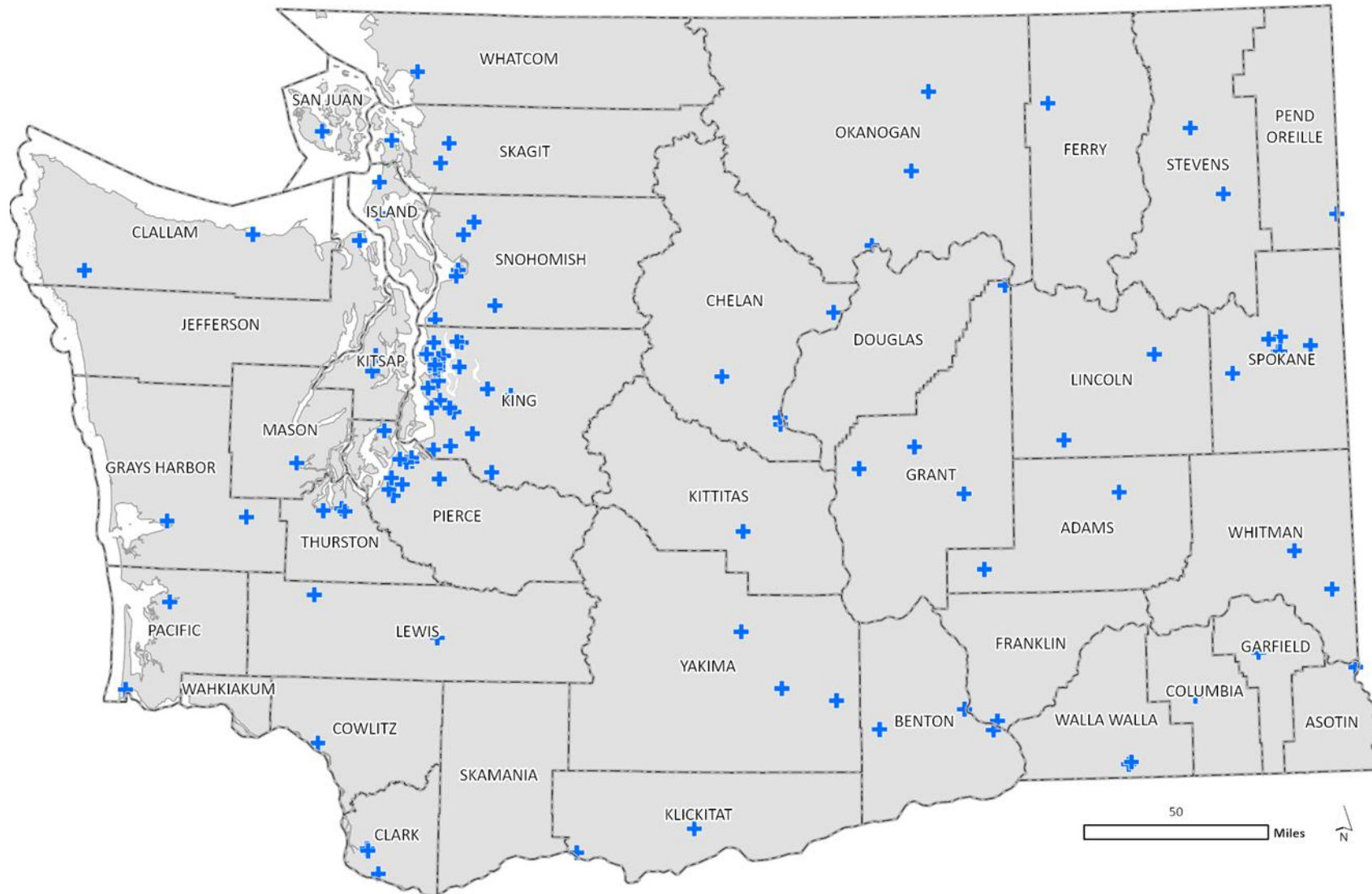
Senior Center Locations in Washington State

As of OCTOBER 2024, TOTAL = 244



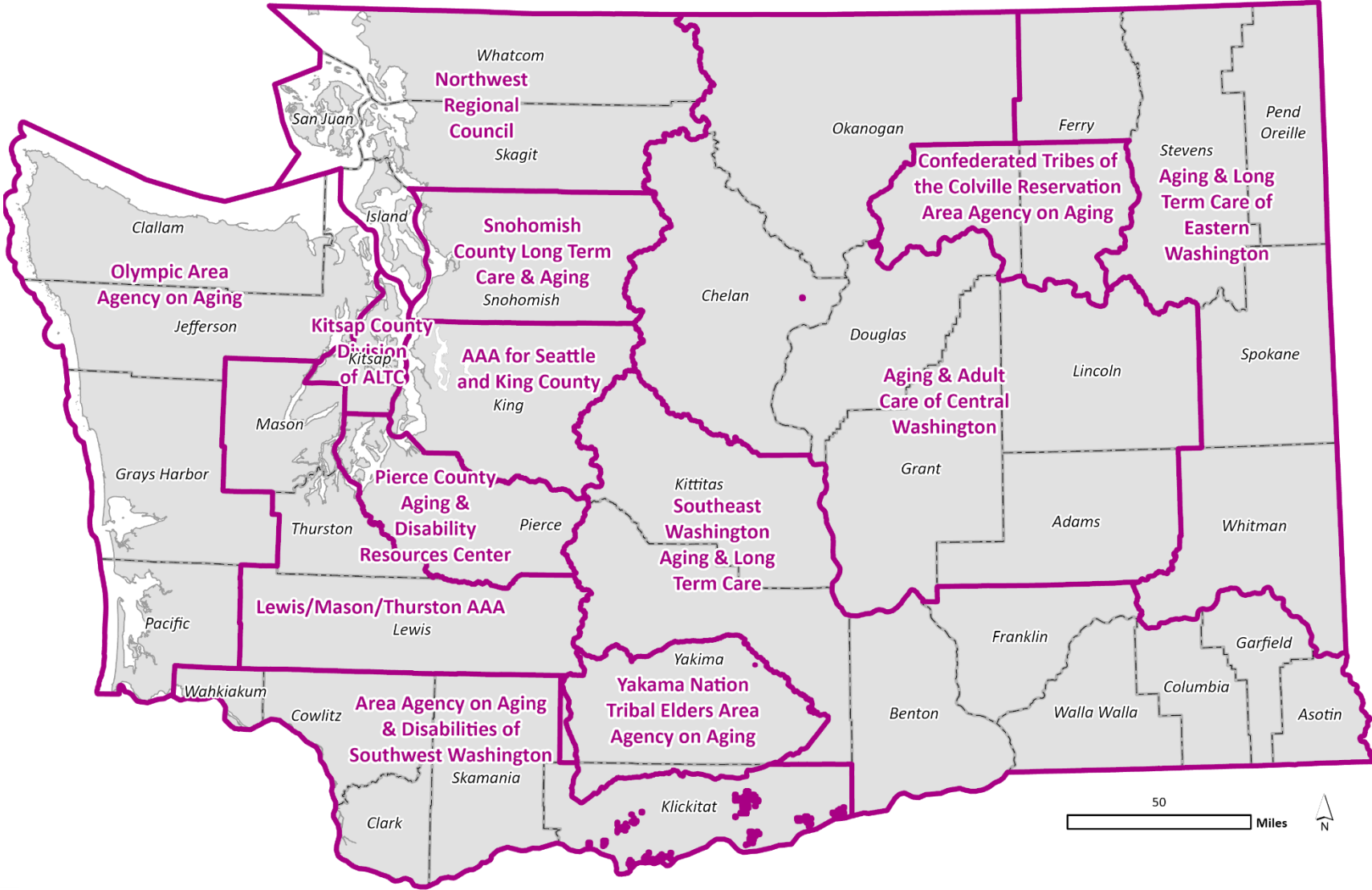
Hospital Locations in Washington State

As of August 14th, 2024 TOTAL = 117



Washington Area Agencies on Aging Planning Service Areas

As of August 14th, 2024





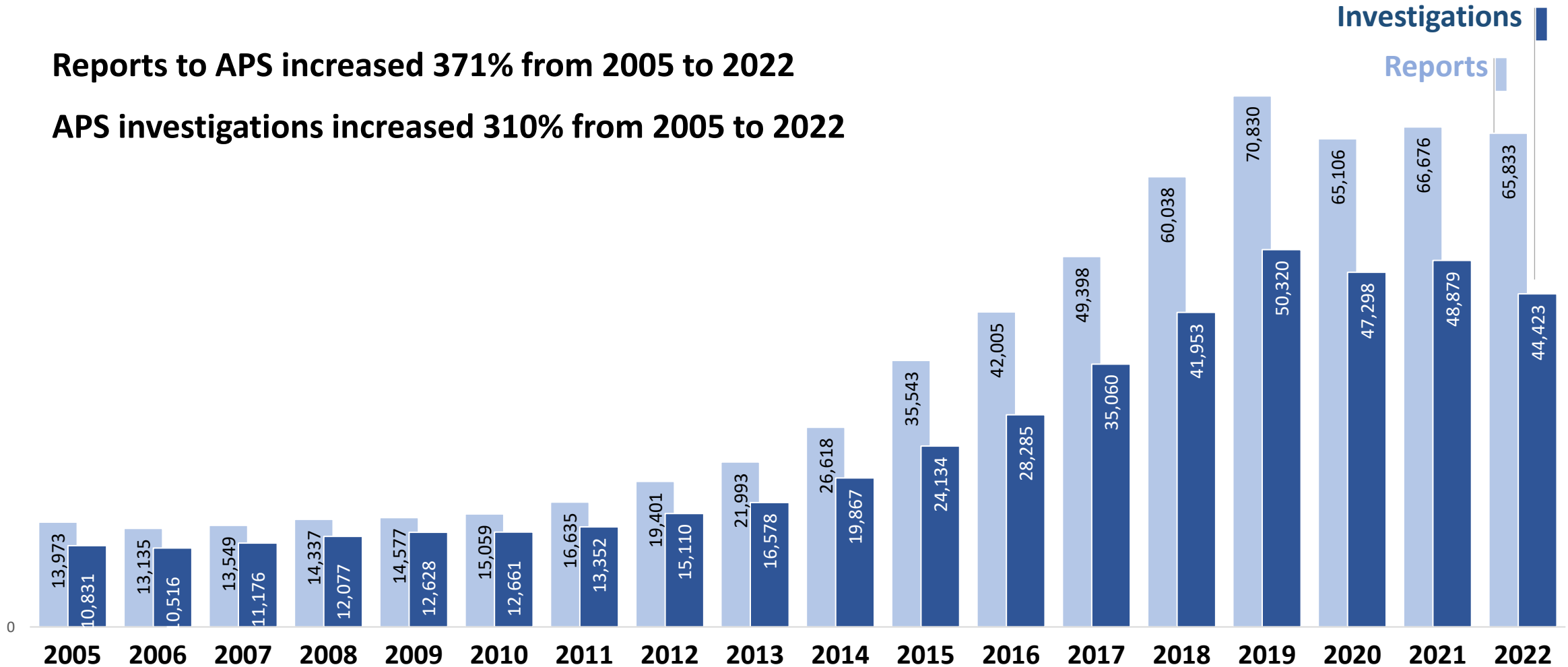
Getty Images

Supplemental Information

AL TSA Adult Protective Services Reports and Investigations Are Up More than Three-Fold Over the Past 17 Years

Reports to APS increased 371% from 2005 to 2022

APS investigations increased 310% from 2005 to 2022



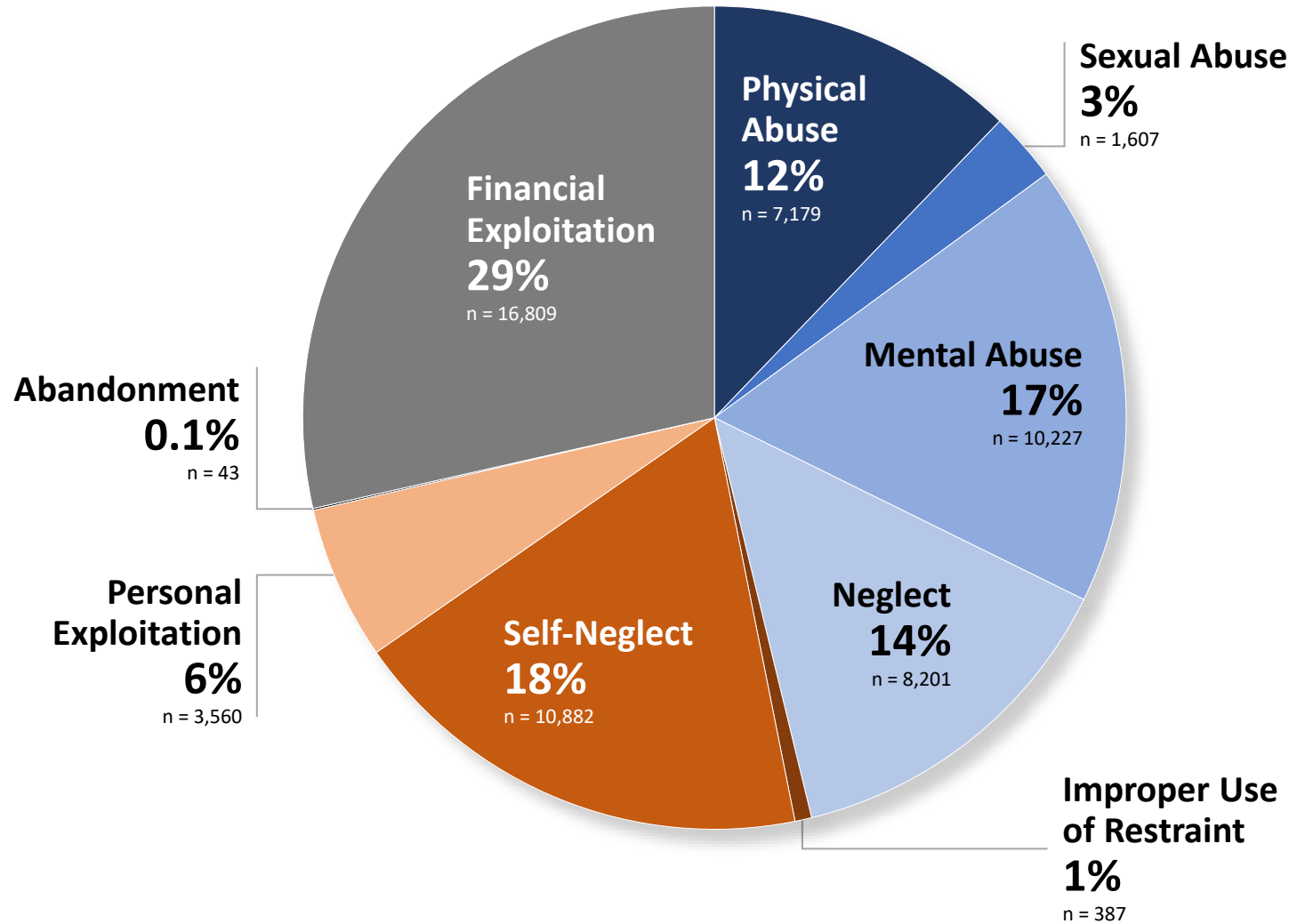
NOTE: A single investigation may cover multiple allegations.

SOURCES: March 2014 – December 2015 APS Automated System. January 2016 – April 2019 TIVA 1059 report. May 2019 – December 2022 TIVA2 DataMart. Tabulations prepared by AL TSA-APS.

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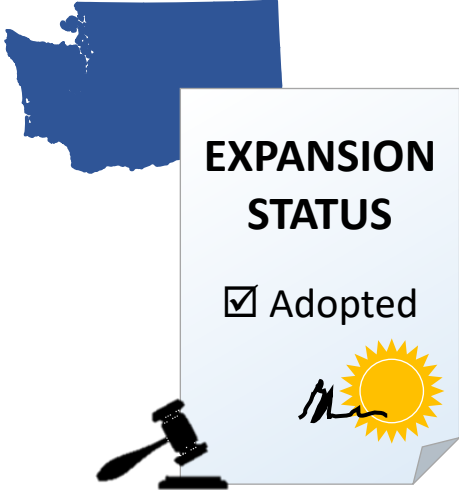
AL TSA Adult Protective Services Investigated 58,895 Allegations in 2022

CALENDAR YEAR 2022



NOTE: A single investigation may cover multiple allegations.
SOURCES: CY 2022 allegations investigated data from TIVA2 DataMart. Tabulations prepared by AL TSA-APS.

Medicaid in Washington State



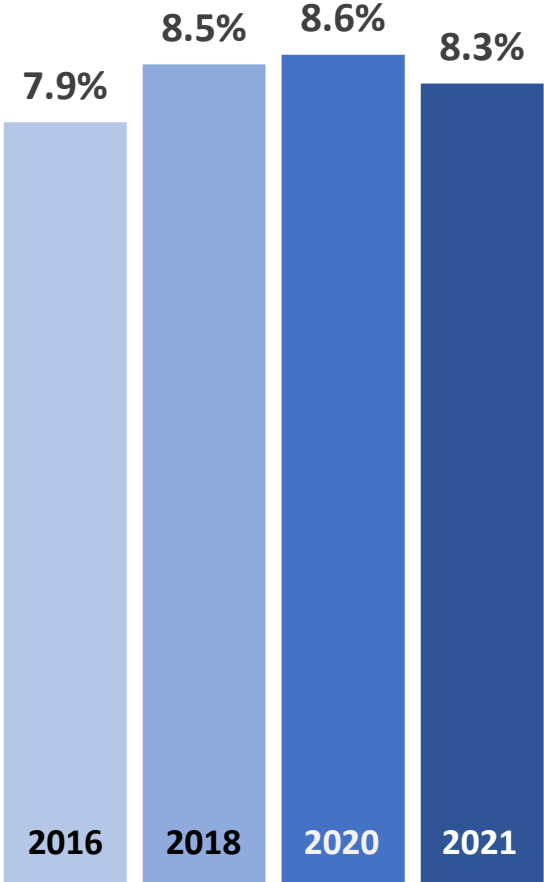
Adults in Expansion Group



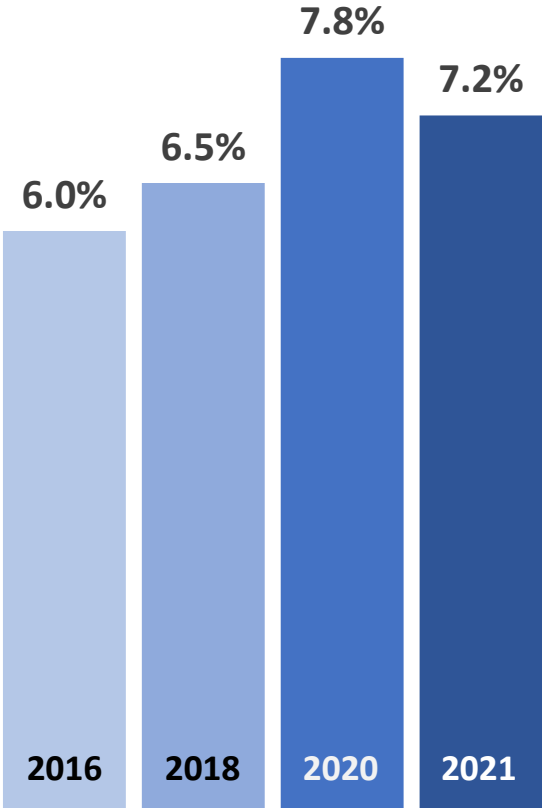
822,263

September 2022

Total Population 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



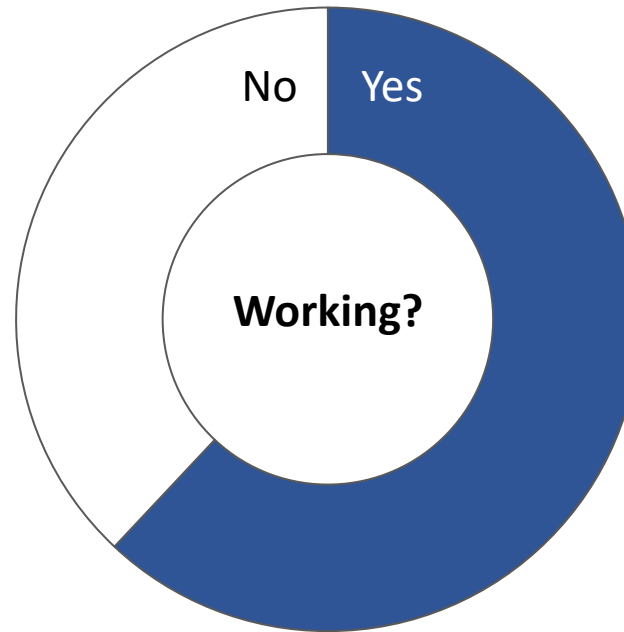
3 in 5 nursing home residents
ALL AGES



1 in 2 with disabilities
ALL AGES

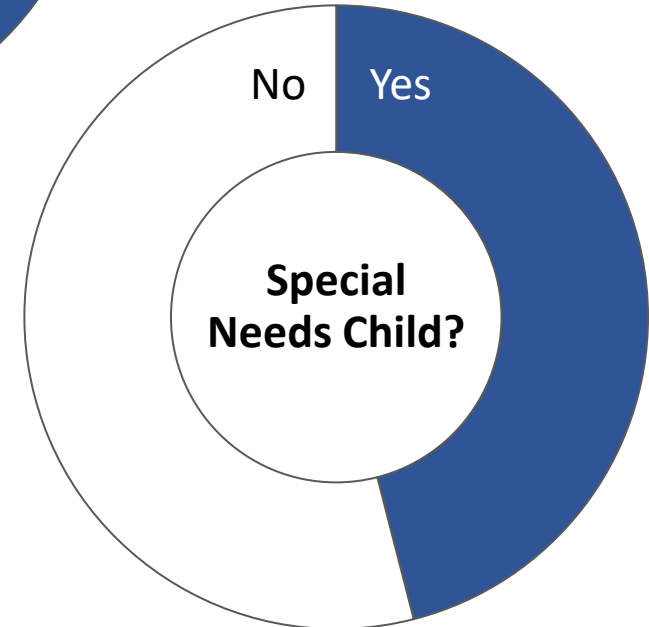


1 in 6 Medicare beneficiaries
ALL AGES



62%
of adult Medicaid enrollees
are working in Washington

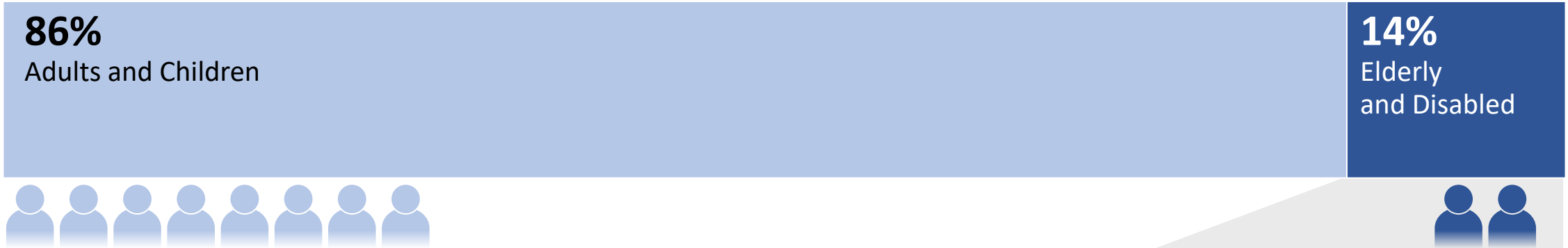
46%
of children with special health
care needs are covered by
Medicaid in Washington



Medicaid in Washington State

2019 Washington Medicaid Enrollees and Expenditures

MEDICAID ENROLLEES



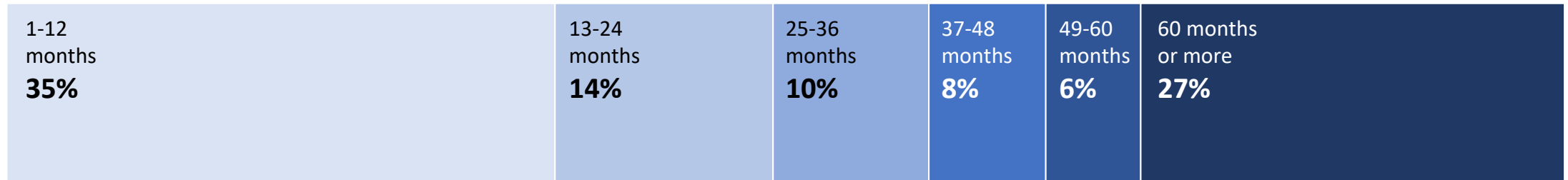
MEDICAID EXPENDITURES



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)*



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*



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.

Washington State Broadband Office

October 2020 Update:
Broadband Accessibility and Digital Equity

Russ Elliott

DIRECTOR, WASHINGTON STATE BROADBAND OFFICE

OCTOBER 15, 2020

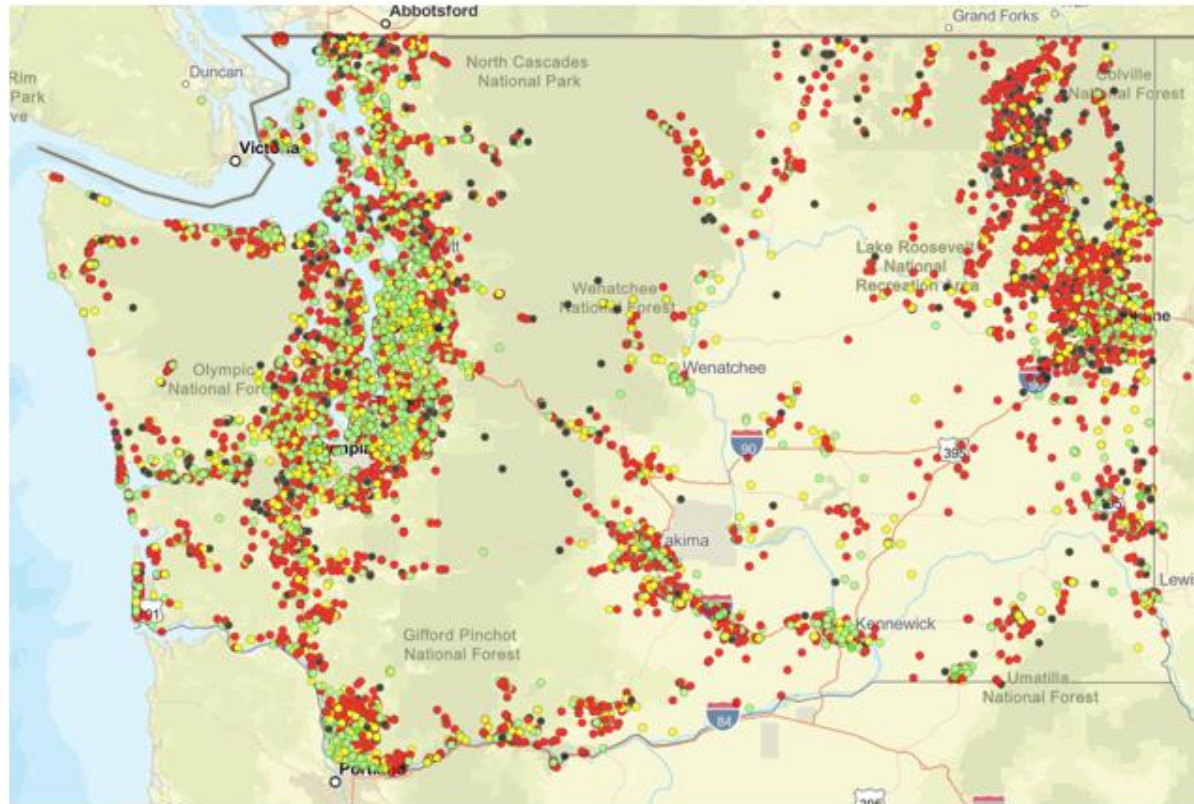


Washington State
Department of
Commerce

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

