

National Assisted Living Update

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Executive Director



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Who We Are and What We Do

- Federation model
 - **49 NCAL state affiliates**
 - 50 AHCA state affiliates
- Members
 - **281,000+ ALs beds**
 - 1 million SNFs beds
- Voice in Washington
- Leader on Quality

AHCA/NCAL Membership



■ SNF Beds ■ DD Beds ■ AL Beds



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NCAL's Priorities



Workforce



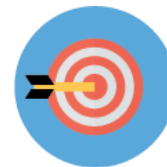
COVID-19
Recovery



Protect state-
based regulation
of assisted living



Protect Medicaid
for HCBS



Increase
participation in
quality & data
solutions

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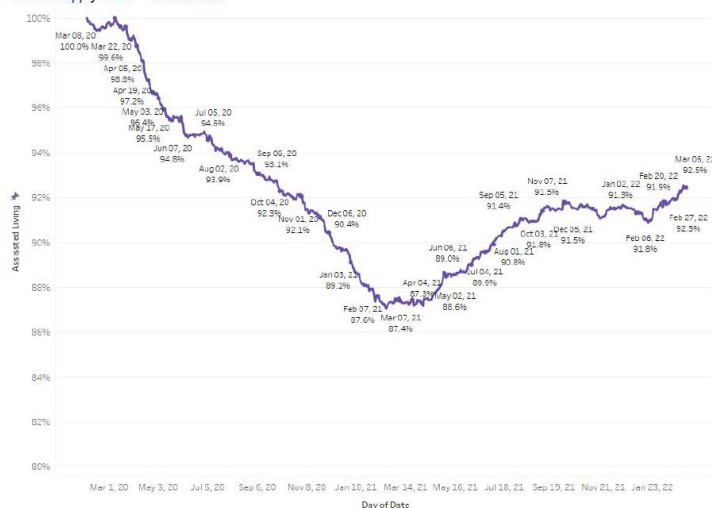
COVID Impact on Census since 02/01/20 - Assisted Living

As of March 6, 2022, census counts for Assisted Living are **down 7.5% since February 1, 2020**. The average decline in Assisted Living is less than Skilled Nursing has shown for the same time period. Natural resident turnover is slower in Assisted Living.

We are working to increase the sample size of Assisted Living locations. At this time, **Assisted Living conclusions should be evaluated as directional, not absolute.**

Assisted Living - Census % to 2/1/2020 Baseline

Direct Supply DSSI -- Confidential



Direct Supply DSSI -- Confidential

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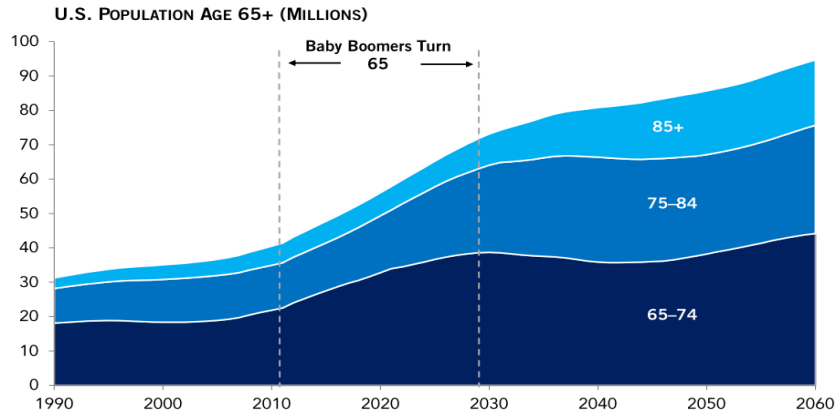


Demographics Indicate Potential



PETER G.
PETERSON
FOUNDATION

The elderly population is growing rapidly and living longer



SOURCES: U.S. Census Bureau, National Intercensal Estimates; 2016 Population Estimates, June 2017; and 2017 National Population Projections, September 2018.

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PGPF.ORG

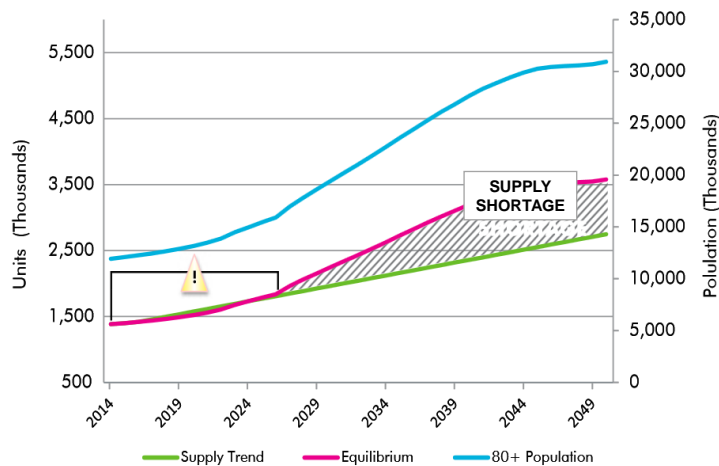
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But Maybe Not Until 2025

Supply vs. Demand



Source: Claritas, NIC

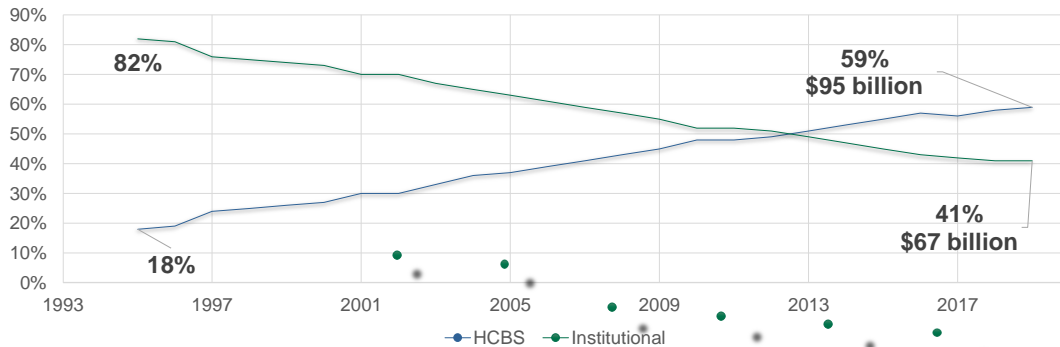
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Medicaid: Continuous Shift to HCBS

Medicaid HCBS Expenditures as a Percentage of Total Medicaid LTSS Expenditures, FY 1996-2019

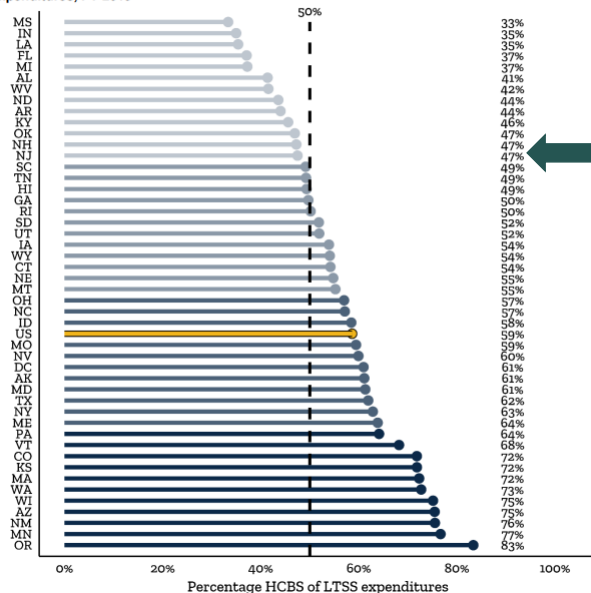


Source: Medicaid Expenditures for Long-Term Services and Supports in FY 2019

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Figure IV.3. State ranking of Medicaid HCBS expenditures as a percentage of total Medicaid LTSS expenditures, FY 2019



← New Jersey 47%

40 States have
committed to expanding
HCBS in 2022

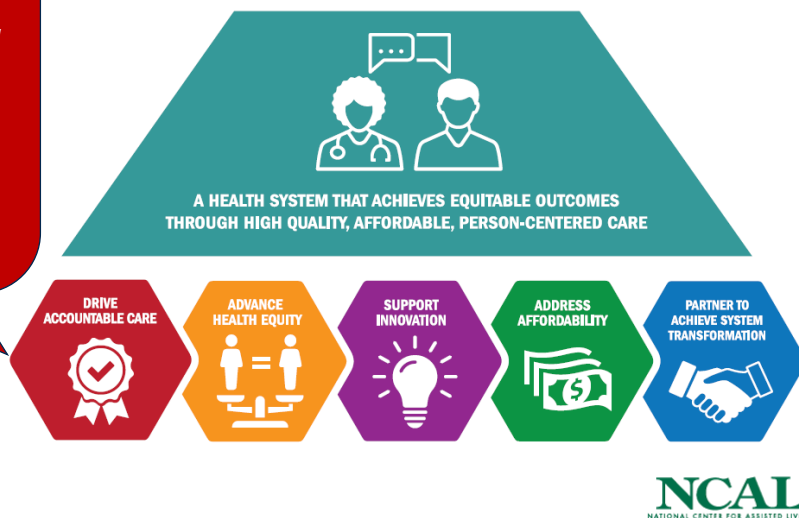
Source: Medicaid Expenditures for Long-Term Services and Supports in FY 2019

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CMS Innovation Center's Strategic Objectives

All Medicare fee-for-service beneficiaries will be in a care relationship with accountability for quality and total cost of care by 2030.



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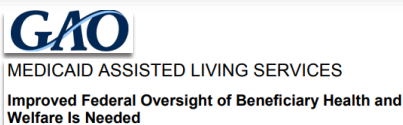
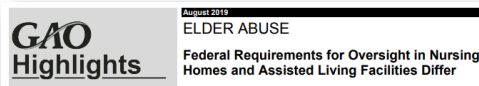


Hill Outlook

Assisted living residents among those highlighted in Justice Department annual elder fraud report

- Federal licensing legislation unlikely, but other avenues should be watched:

- Elder abuse/neglect
- Medicaid oversight
- Emergency preparedness
- Dementia care



The New York Times

U.S. Pays Billions for 'Assisted Living,' but What Does It Get?

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Risk of Federal Regulation

- Minimal. Increased possibility of indirect impact through other regulatory agencies i.e. HCBS Settings Rule
- Other avenues should continue to be watched:
 - Infection Control and Prevention
 - Emergency preparedness
 - Dementia care
 - Medicaid oversight
 - Elder abuse/neglect



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OSHA

- OSHA Focused Inspections in Hospitals, Nursing Homes and Assisted Living Communities
 - Three Month Period: March 9 – June 9, 2022
 - Prior COVID-19 related citations or complaints
- OSHA will be looking for:
 - Correction of prior citation/complaints
 - Recording and Reporting
 - Personal Protective Equipment
 - Respiratory Protection
 - Employee Exposure
 - COVID-19 Log
 - COVID-19 Reporting



Assisted living providers to face additional pandemic-related scrutiny from OSHA



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Risk Management

- Increasing liability costs
 - Falls
 - Pressure Ulcers
- Rising Acuity
 - Discharge and Transfer
 - Level of Care
 - Quality of Care
 - Licensure
- Granny Cams
- Medical Marijuana
- Emergency Preparedness
- Sexual Consent



McKnight's
Long-Term Care News

NEWS

Assisted living claims cost outpaces that of SNFs: report

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Increasing State Requirements

- The majority of states have made some update to their AL licensing in the last few years; change varies widely
 - Infection Prevention and Control
 - Staffing requirements (e.g., minimum training)
 - Admission and Retention Requirements
 - Medication management
 - Dementia care

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NCAL's Plan

- Continue to monitor all committees/key members of Congress with potential threats to assisted living
- Continue our political and lobbying activity
 - Educate members of Congress about AL
 - Develop relationships
 - Reinforce our quality message
- Coordinate with other stakeholders



NEWS
Senior living tells White House it knows all too well what it's like to fight pandemic without funding

TIME

HEALTH
Contract Nurse Agencies Are Making Big Money in the Age of COVID-19. Are They 'Exploiting' the Pandemic?



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NCAL's Policy Work

- Assisted Living State Regulatory Review
 - Includes citations and contact info for state licensure officials
- Medicaid Advocacy
 - HCBS Settings Rule
 - Affordable Assisted Living
- Population Health Management
 - AHCA/NCAL Population Health Innovation Center



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21st Century Long-Term Care Caucus

- AHCA/NCAL seeking to find a Congressional bi-partisan caucus to identify solutions that impact our sector and the patients we care for.
- Co-chairs: Rep. Mary Gay Scanlon (D-PA) and Brian Steil (R-WI)
- Anticipate briefings and sessions on issues such as strengthening the workforce, enhancing quality of life, and fair and equitable reimbursement system.
- Once Caucus is formed, AHCA/NCAL will be notifying you on how to encourage your Member of Congress to join the caucus.



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Get Involved

- Looking for NCAL members to become involved with media throughout 2022
- AHCA/NCAL staff will contact you with proactive and reactive media opportunities
- Will provide talking points and support as appropriate
- Send contact information and subject expertise to Abby Barreto – abarreto@ahca.org



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Congressional Briefing

June 6-7, 2022

“Hyatt Regency Washington on Capitol Hill”

- Attend briefings and gain understanding of Congress and AHCA/NCAL's goals
- Hear insights from Members of Congress, Administration officials, and Washington experts
- Meet with elected officials and policy makers
 - Build relationships with Members of Congress
 - Shape public policy
 - Network with peers



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**IMPROVING LIVES by
DELIVERING SOLUTIONS for
QUALITY CARE**

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