



# ECONOMIC AND DEMOGRAPHIC TRENDS IMPACTING STATE POLICY AND PROGRAMS

Damon Terzaghi  
Senior Director, NASUAD  
August 29, 2019

# NASUAD Overview



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- National association that represents state agencies providing LTSS and other services and supports to older adults and people with disabilities
  - 56 members (50 states, District of Columbia, 5 territories)
- Led by a board of directors comprised of state agency officials
- Provides direct technical assistance, research, regulatory and policy analysis to states
- Facilitates state-to-state information sharing via teleconferences/webinars, e-mail surveys, policy committees, and national conferences
- Educates and advocates for state agency interests in front of Congress and the Federal government

# Study Methodology

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- Two separate, parallel web-based surveys of state agencies:
  - ▣ One focused on aging services with emphasis on OAA;
  - ▣ One focused on health and LTSS, with emphasis on Medicaid.
- Survey response rate:
  - ▣ Aging Survey: 51 responses
  - ▣ LTSS Survey: 48 responses
- Review of data:
  - ▣ Comparison to prior reports and other available information sources
  - ▣ Follow-up interviews with state agencies when questions or discrepancies required resolution

# Overall Themes from Survey



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- Theme 1: Abuse, Neglect, and Exploitation Reports Continue to Surge
- Theme 2: Economic Recovery Led to Expenditure Growth but Impact Varies
- Theme 3: As States Reorganize, OAA Funding Continue to Decrease as a Proportion of Agency Budgets
- Theme 4: Funding Increases are Directly Linked to Increases in Services and Not Increased Agency Staffing
- Theme 5: Changing Consumer Preferences are Leading to Differentiated Service Demands
- Theme 6: Medicaid HCBS Enrollment Growth Continues Nationwide
- Theme 7: States are Making Changes to Expand Benefits and Increase Provider Payments
- Theme 8: States are Increasingly Focused on HCBS Quality but Efforts to Pay for Quality Lag

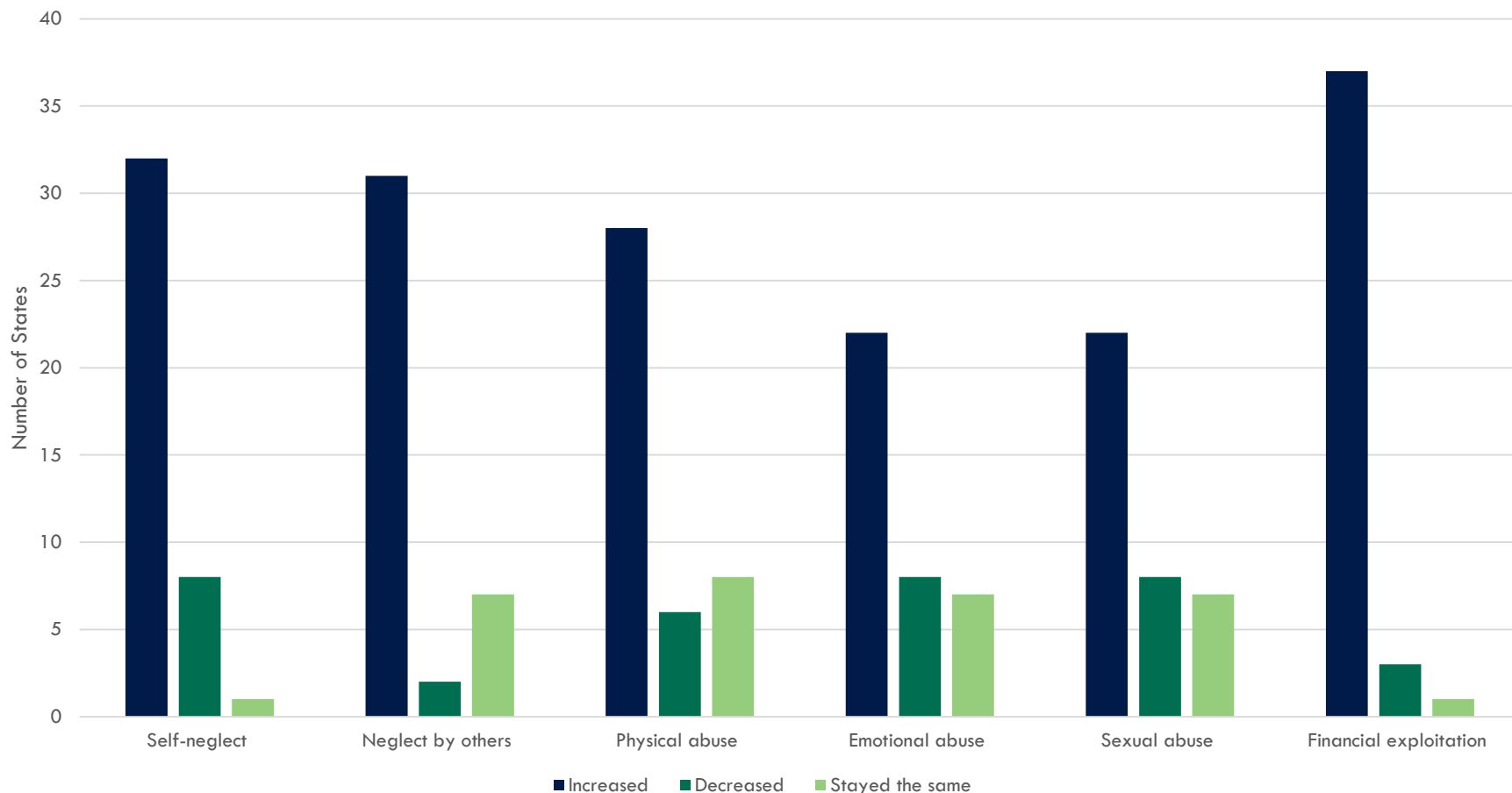
# Theme One

Abuse, Neglect, and Exploitation Reports  
Continue to Surge

# States Continue to See Increases in Abuse, Neglect, and Exploitation

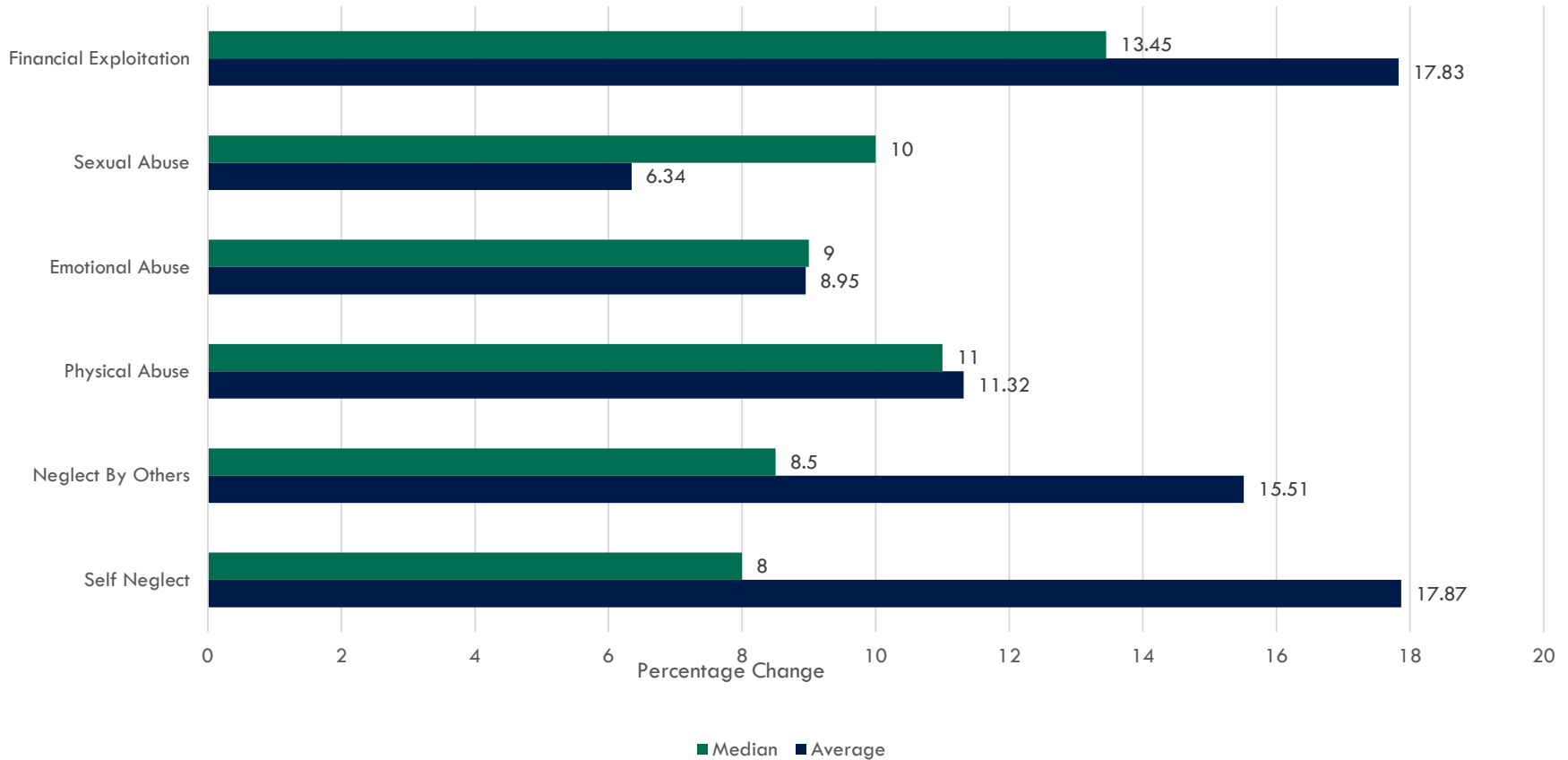
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### States with Changes in Types of Abuse Since 2016



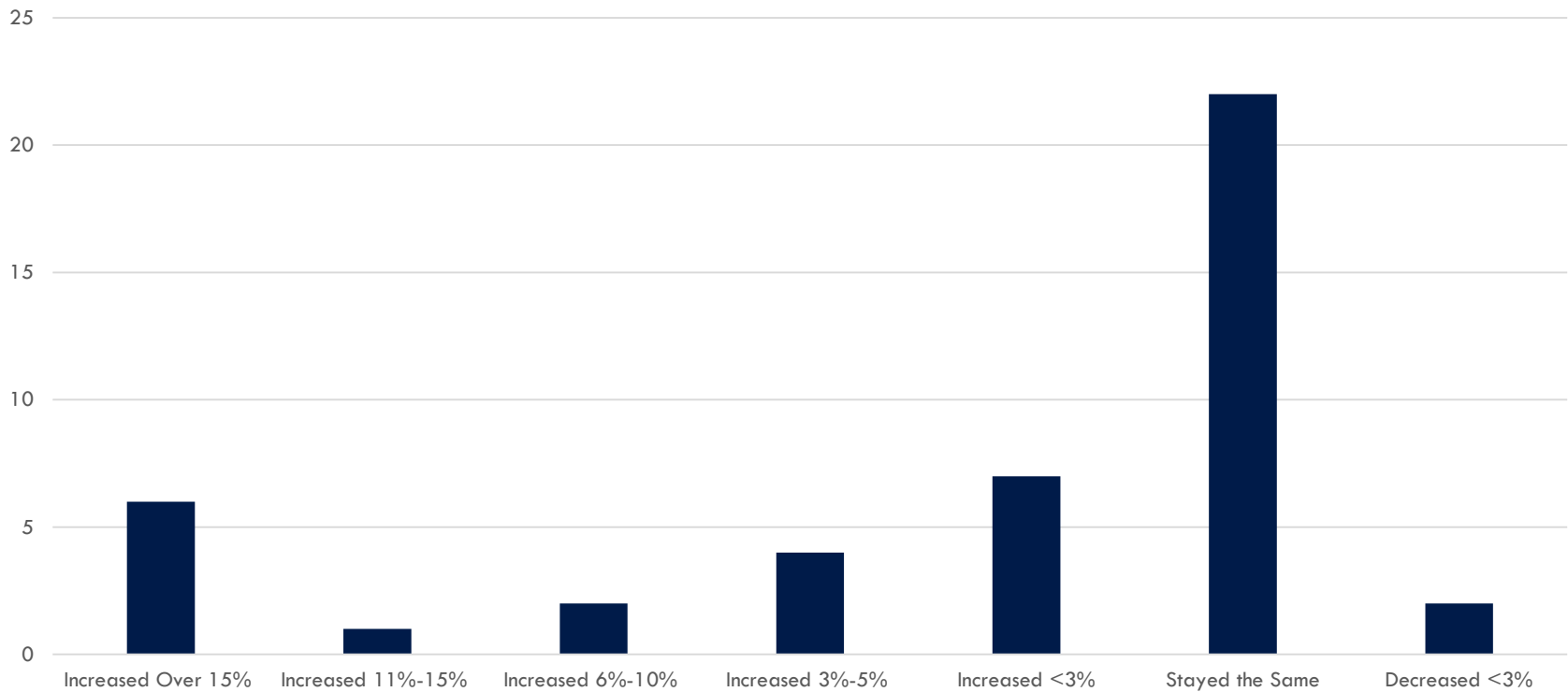
# State-Reported Average Change

### State Reported Change in Types of APS Reports



# States Investing in APS to Combat Trends

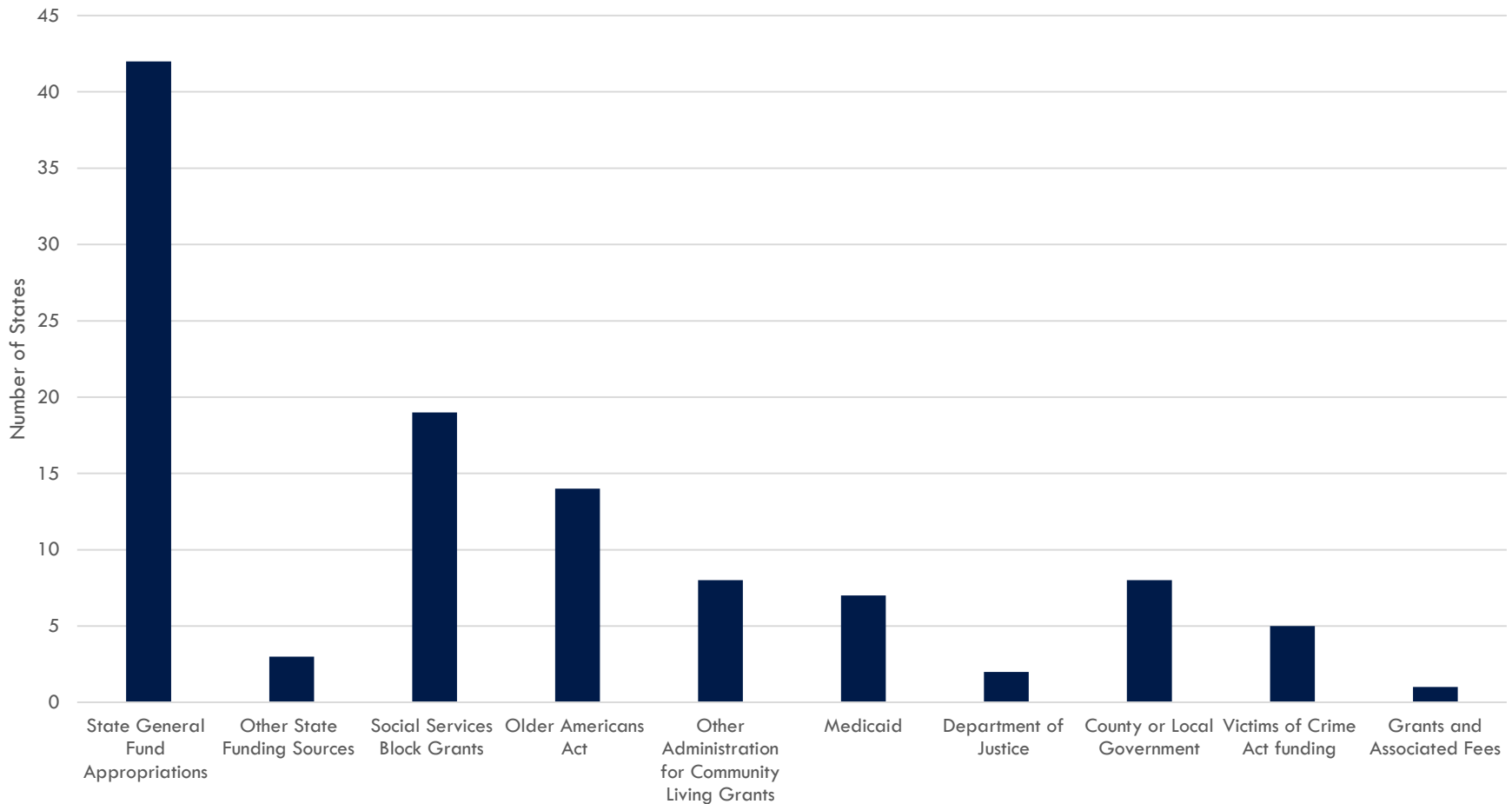
Change in APS Funding Since 2017





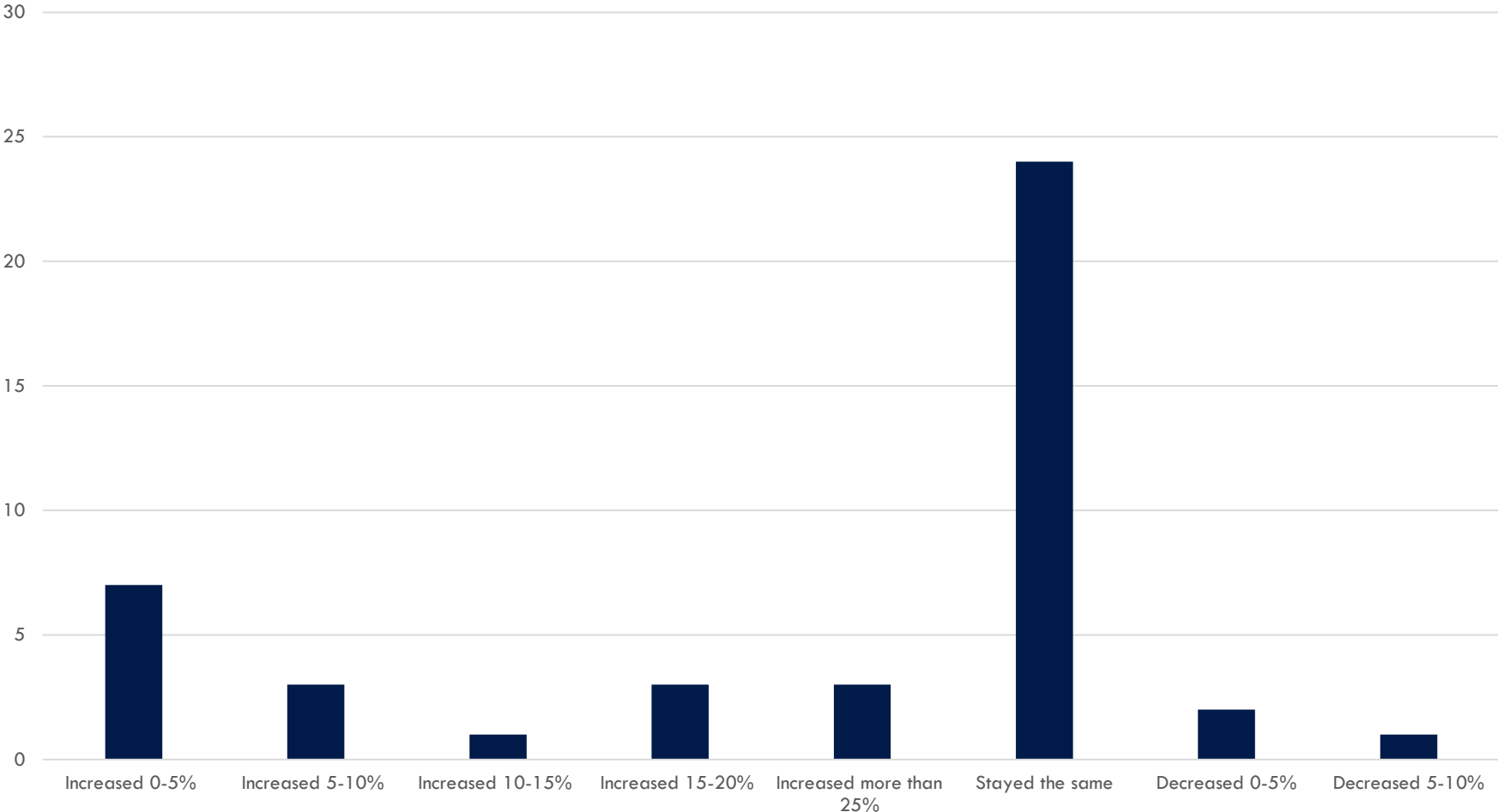
# Multiple Funding Sources Support APS

APS Funding Sources



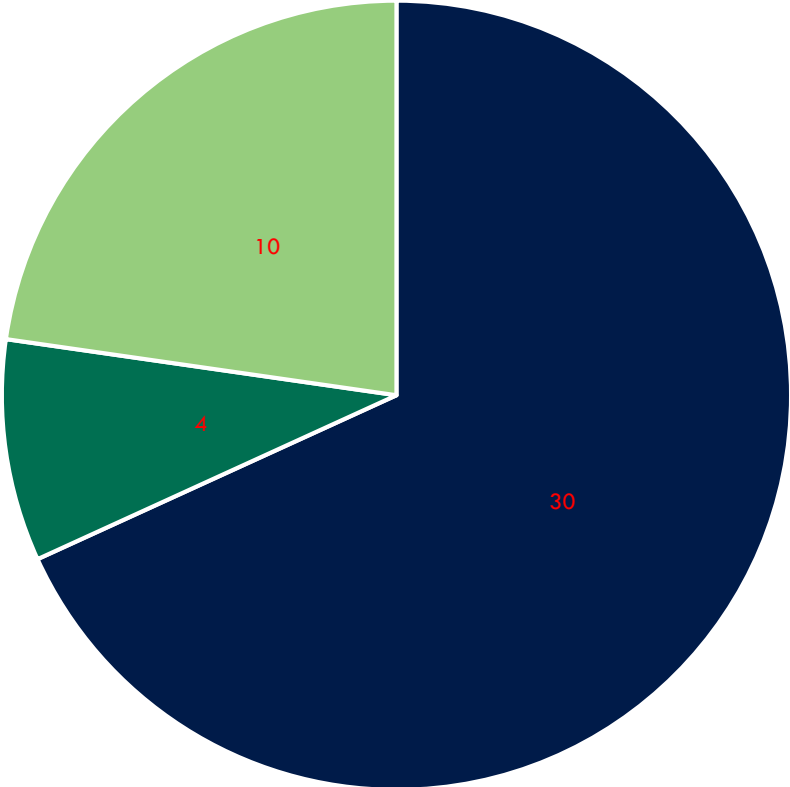
# APS FTEs Remain Relatively Stable

Change in APS Staffing Since 2016



# ...But Caseloads Grow

Change in APS Worker Caseloads since 2017



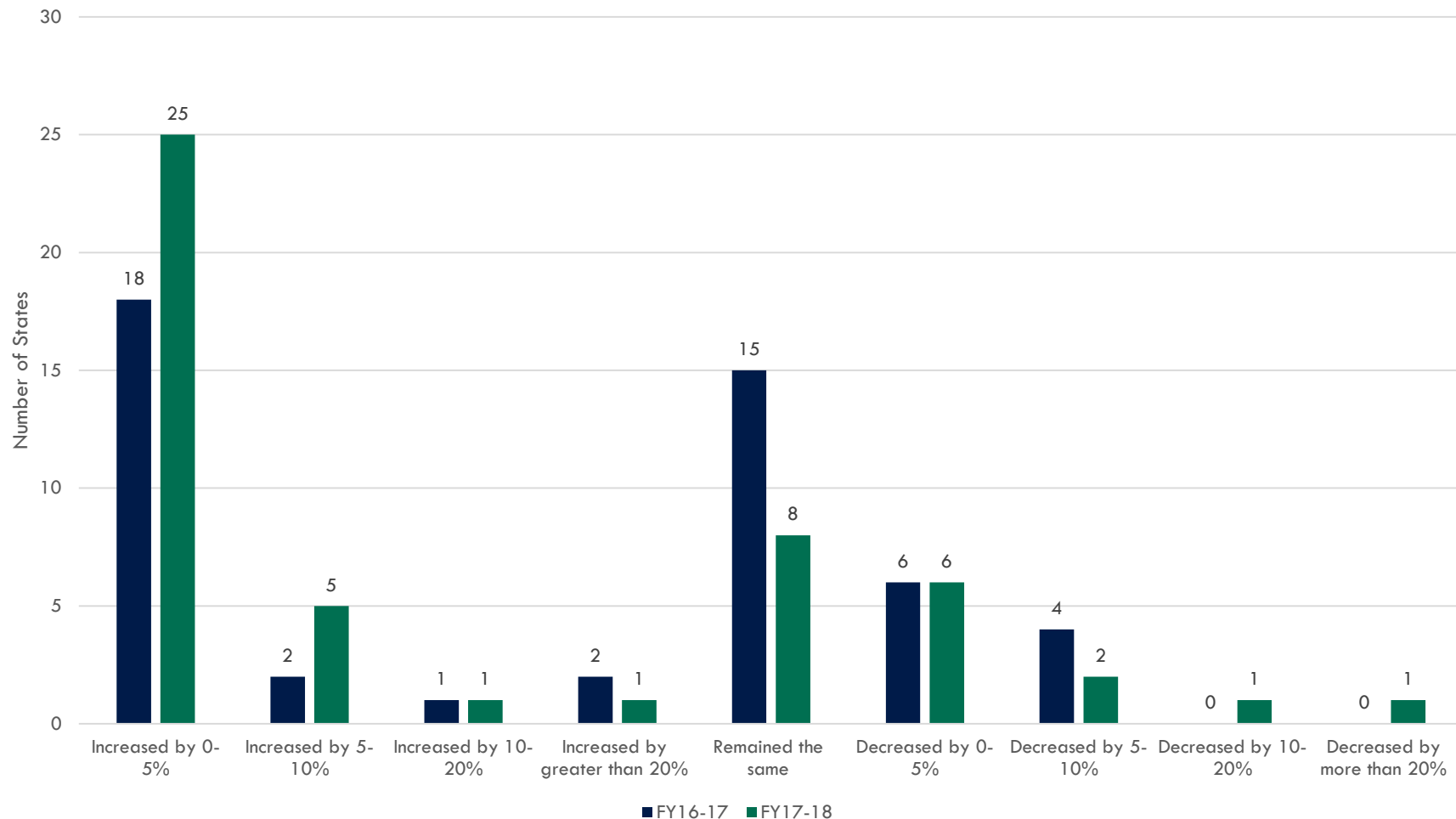
■ Increased ■ Decreased ■ Stayed the same

## Theme Two

Economic Recovery Led to Expenditure Growth  
but Impact Varies

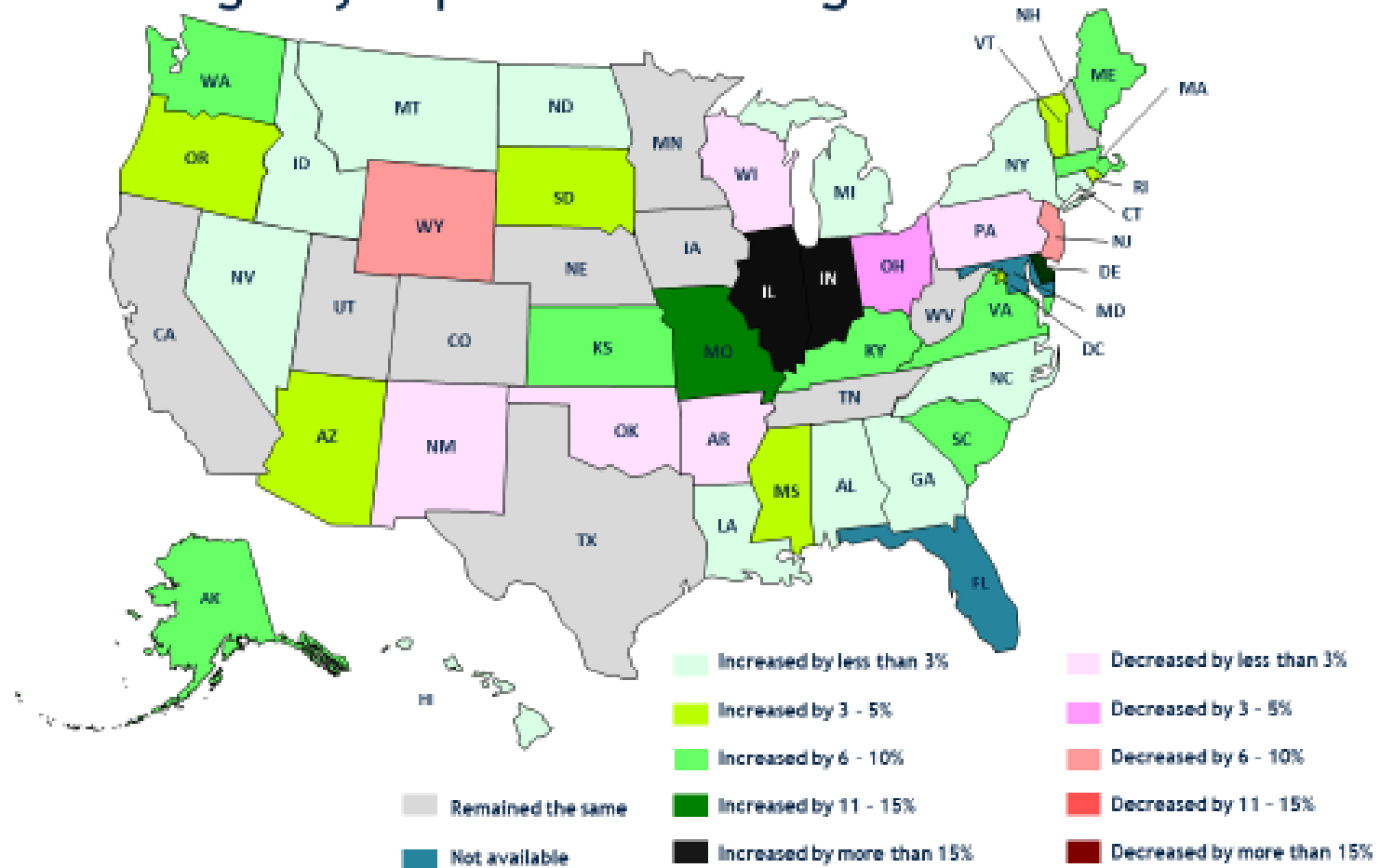
# Economic Growth Leading to State Funding Growth

Change in Year over Year State Only Funding



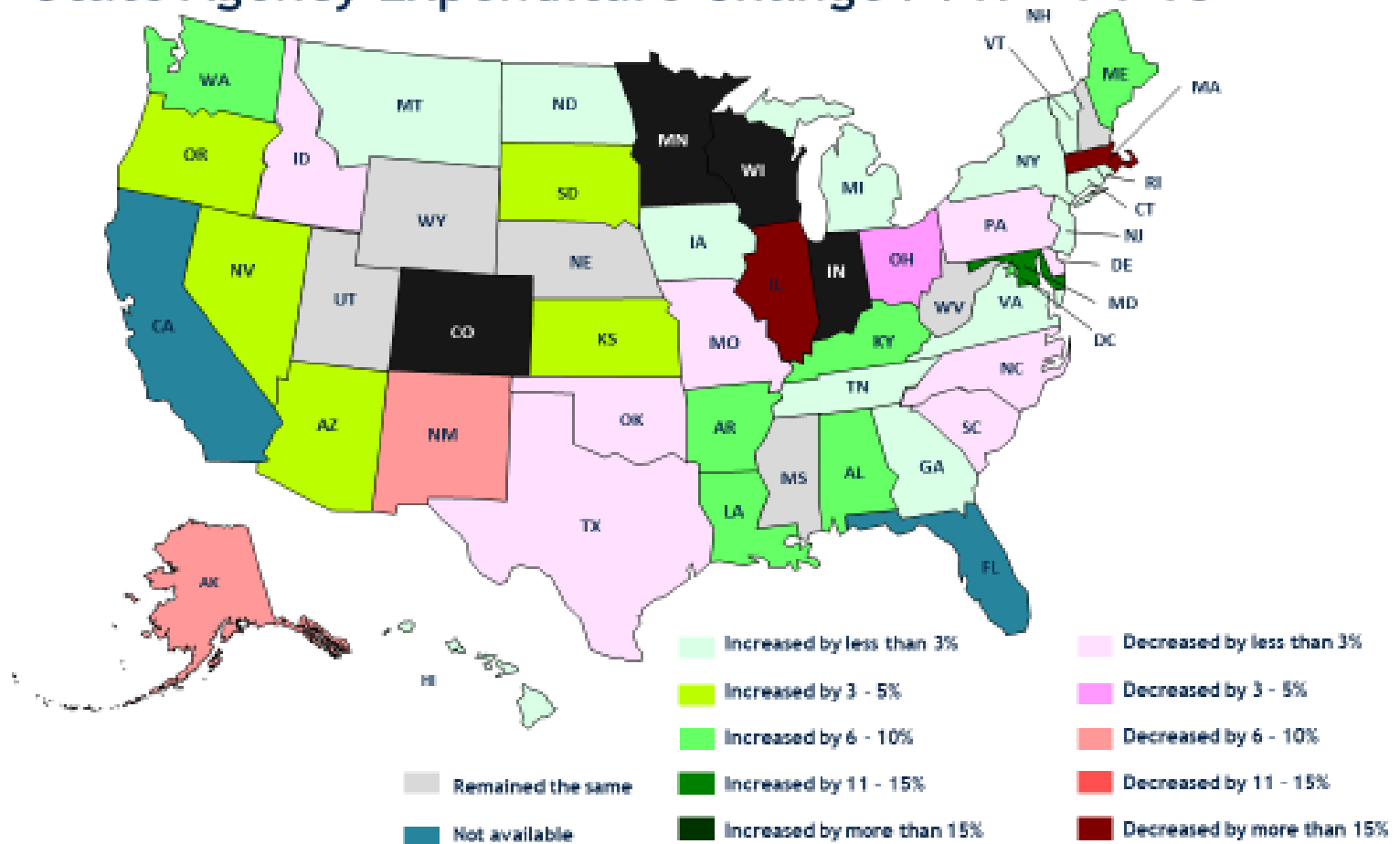
# Agency Expenditure Changes Driven by Policy and Finance

## State Agency Expenditure Change FY16 - FY 17



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## State Agency Expenditure Change FY17 - FY 18



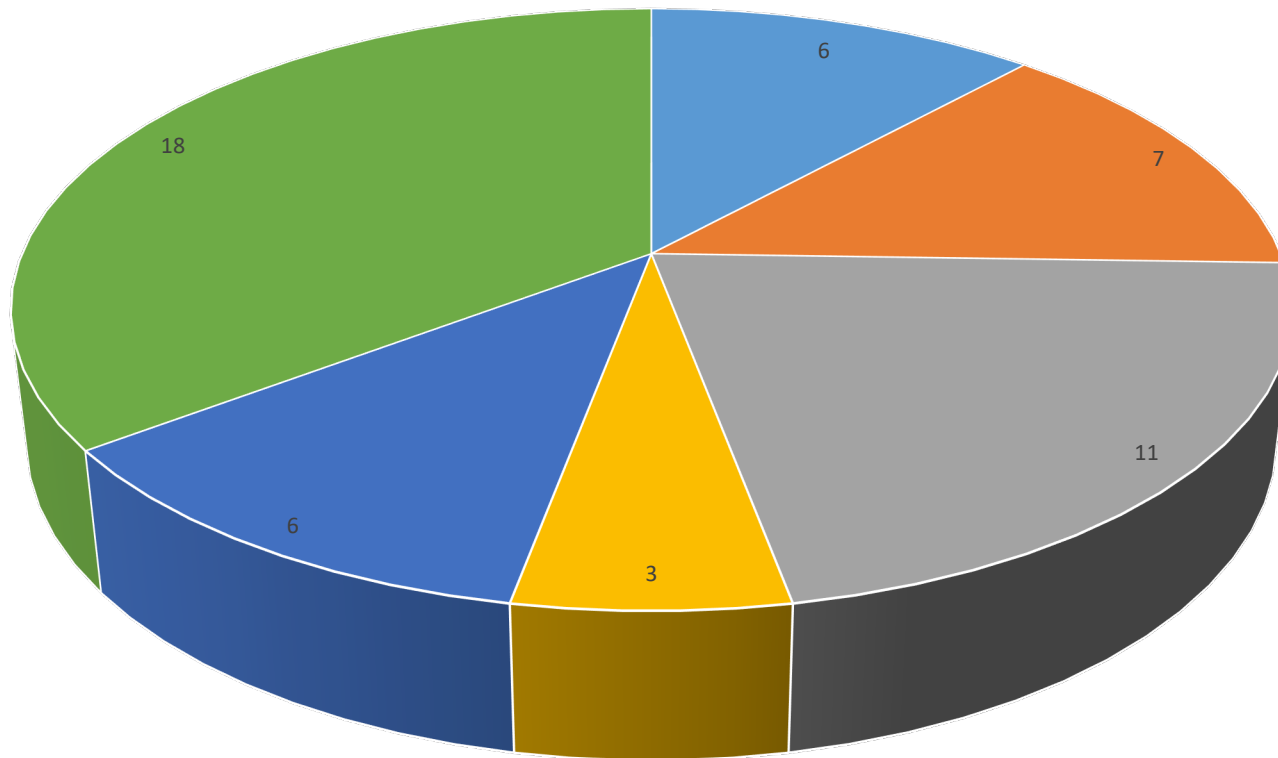
## Theme Three

As States Reorganize, OAA Funding Continue to Decrease as a Proportion of Agency Budgets



# Agencies Have Large, Multi-Faceted Budgets

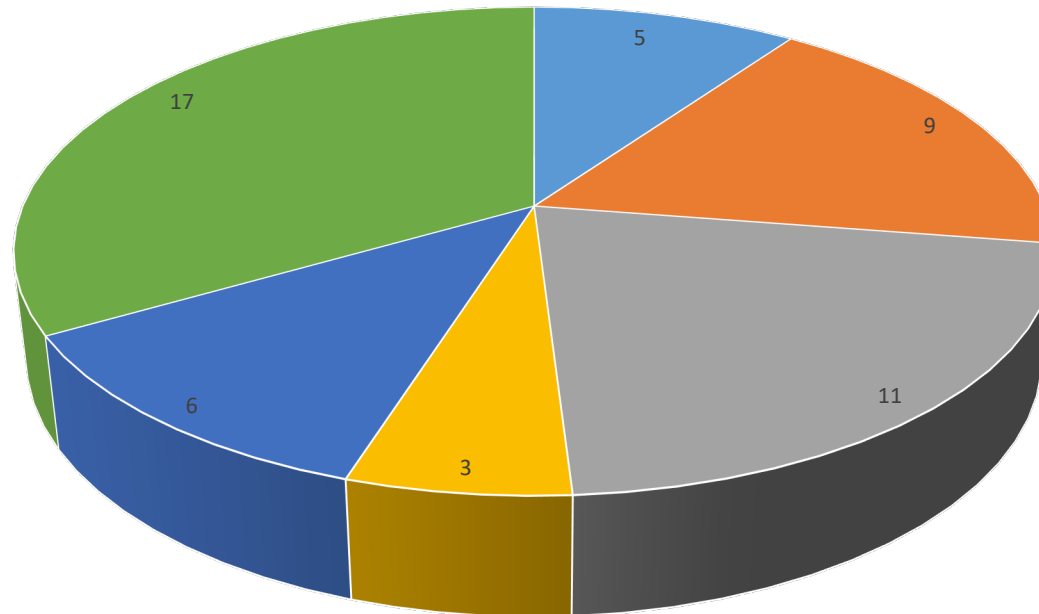
Size of State Agency Budgets FY2017



- Between \$1 and \$25 million
- Between \$25 and \$50 million
- Between \$50 and \$100 million
- Between \$100 and \$150 million
- Between \$150 and \$250 million
- More than \$250 million

# Agencies Have Large, Multi-Faceted Budgets

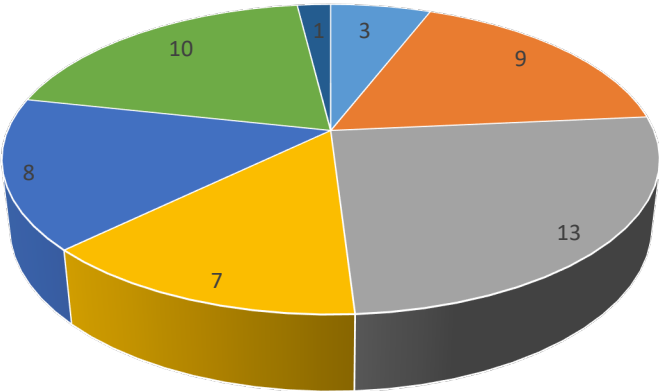
Size of Aging Agency Budgets: FY2018



- Between \$1 and \$25 million
- Between \$25 and \$50 million
- Between \$50 and \$100 million
- Between \$100 and \$150 million
- Between \$150 and \$250 million
- More than \$250 million

# OAA as a Portion of State Agency Budgets

Proportion of Budget that is OAA Funding



- Less than 1%
- Between 1% and 5%
- Between 5% and 15%
- Between 15% and 30%
- Between 30% and 50%
- Between 50% and 75%
- More than 75%

## Theme Four

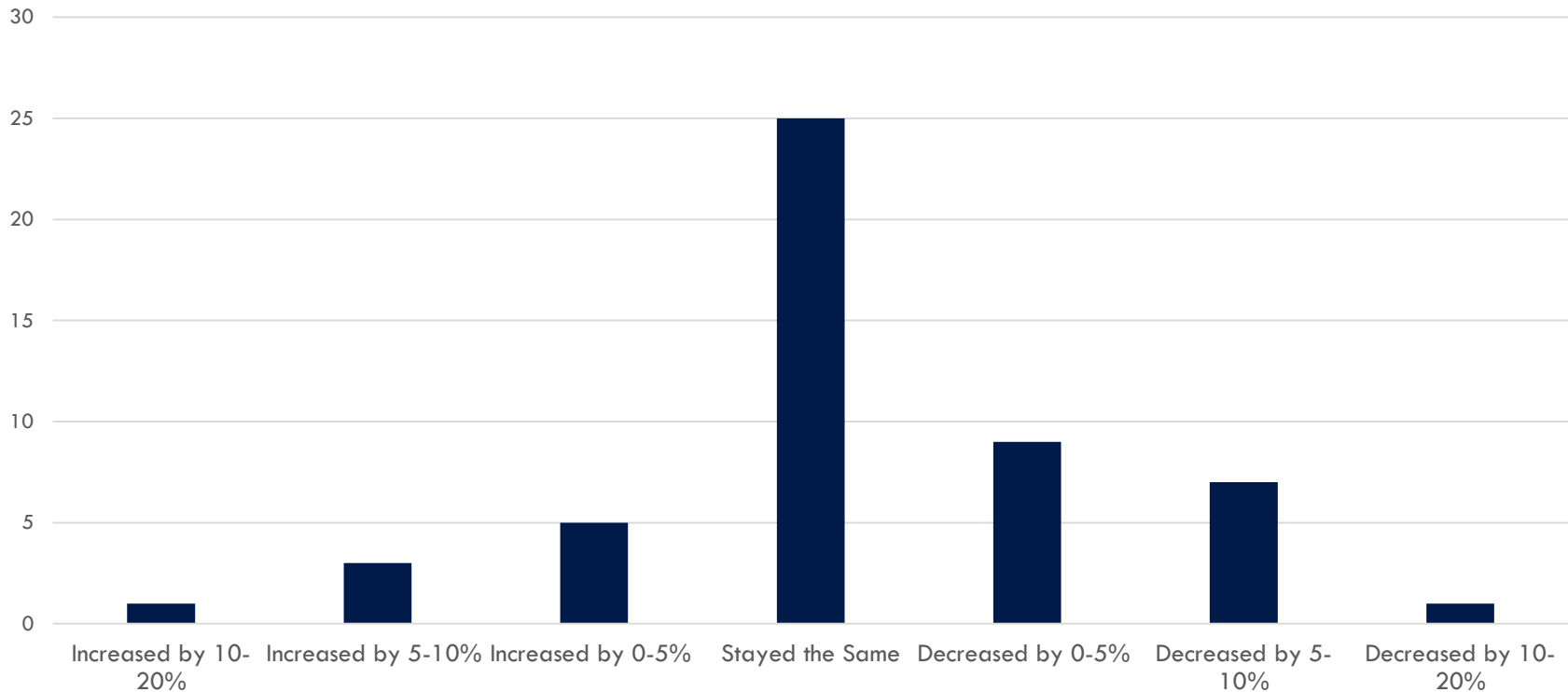
Funding Increases are Directly Linked to  
Increases in Services and Not Increased Agency  
Staffing

# Only 4 States Considering Budget-Related Reductions

Strategies Under Consideration due to Budget Shortfall	Number of States
<b>Administrative Strategies</b>	
Eliminate unfilled staff positions	1
Program restructuring to reduce administrative costs	1
Reorganization of duties	1
Form new partnerships to leverage resources	2
Restructuring service delivery models	1
<b>Program Strategies</b>	
Apply limits to the amount, duration or scope of services	2
Adjust eligibility/limit enrollment	1
Eliminate programs	1
Eliminate services	1
Increase beneficiary cost-sharing	3

# But Not Increasing Administrative Capacity

Change in State Agency FTEs Since 2017



## Theme Five

Changing Consumer Preferences are Leading to Differentiated Service Demands

# Change in Service Demands



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Rank	State Reported Services with Increased Demand	Total Number of States Selecting
1	Adult Protective Services	20
2	Home-Delivered Meals	18
3	Family Caregiver Support	19
4	Transportation	16
5	Aging and Disability Resource Center	12
6	Personal Care Assistance	14



# Change in Service Demands



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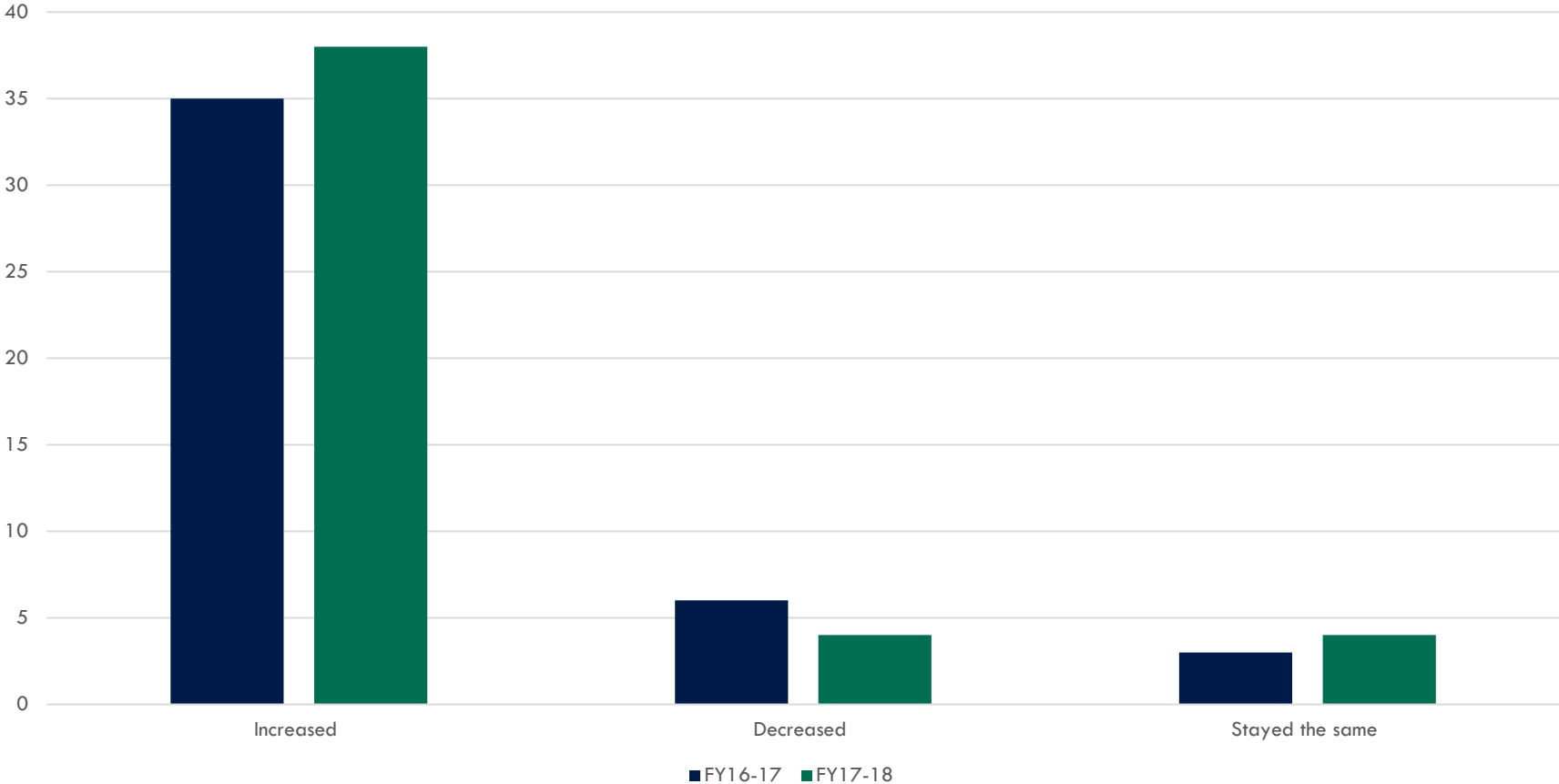
Rank	State Reported Services with Decreased Demand	Total Number of States Selecting
1	Congregate Meals	17
2	Adult Day Social Services	10
3	Adult Day Health Services	9
4	Senior Community Service Employment Program	10
5	Legal Assistance Development	7

## Theme Six

Medicaid HCBS Enrollment Growth Continues  
Nationwide

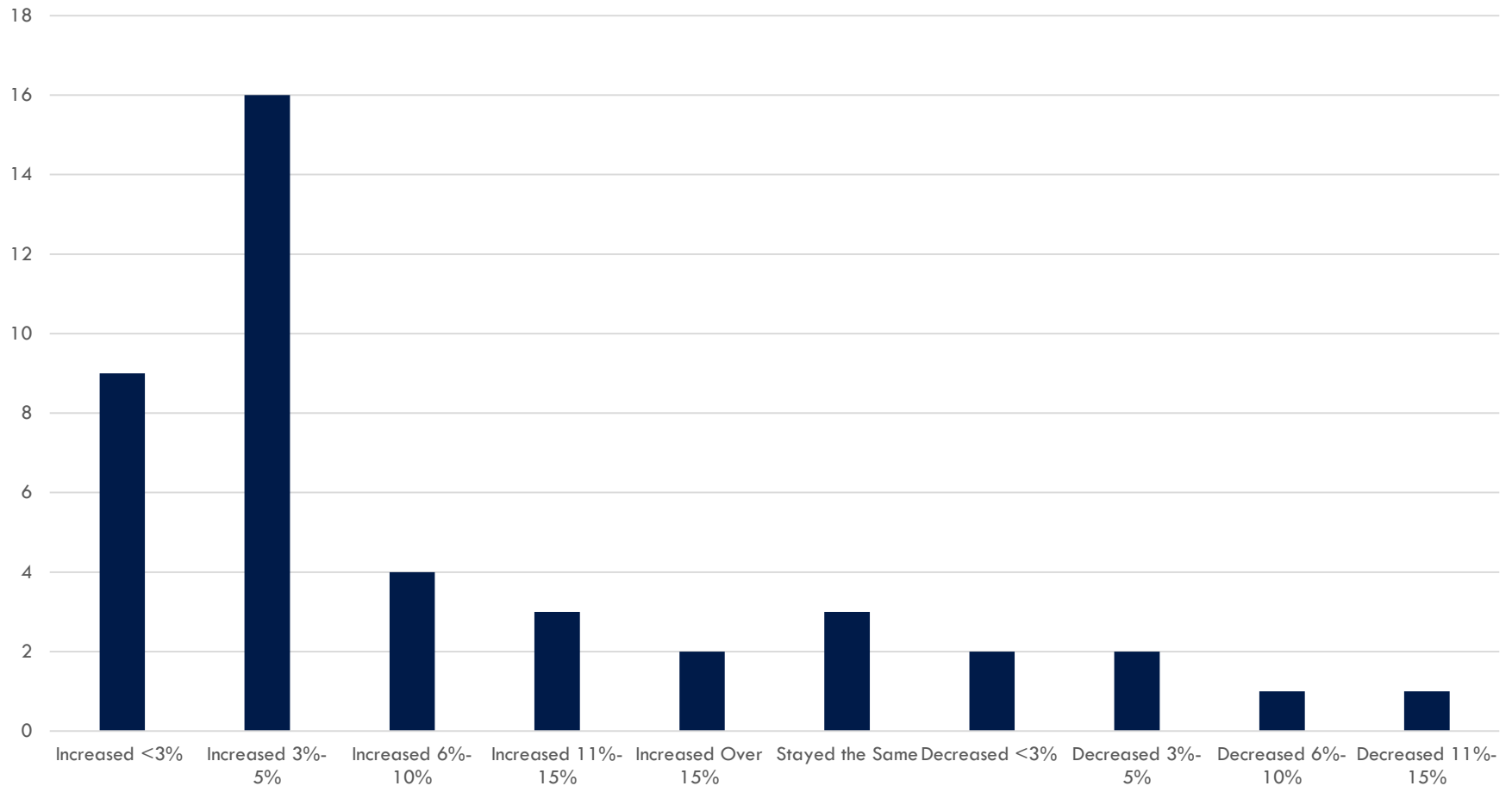
# HCBS Enrollment Continues to Increase

Change in Medicaid HCBS Enrollment



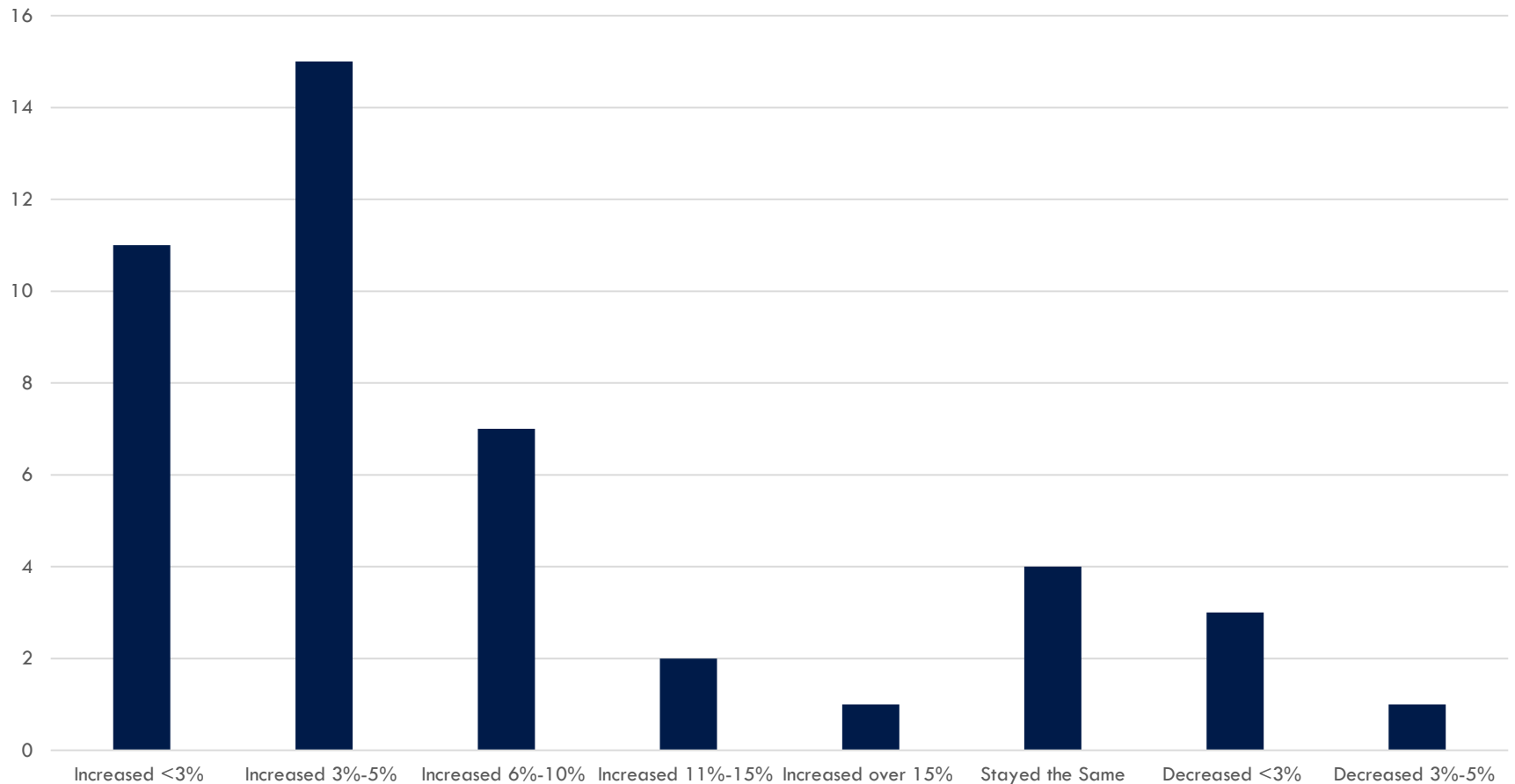
# Percent Change in Enrollment

Change in HCBS Enrollment FY2016-2017



# Percent Change in Enrollment

Change in HCBS Enrollment FY2017-2018

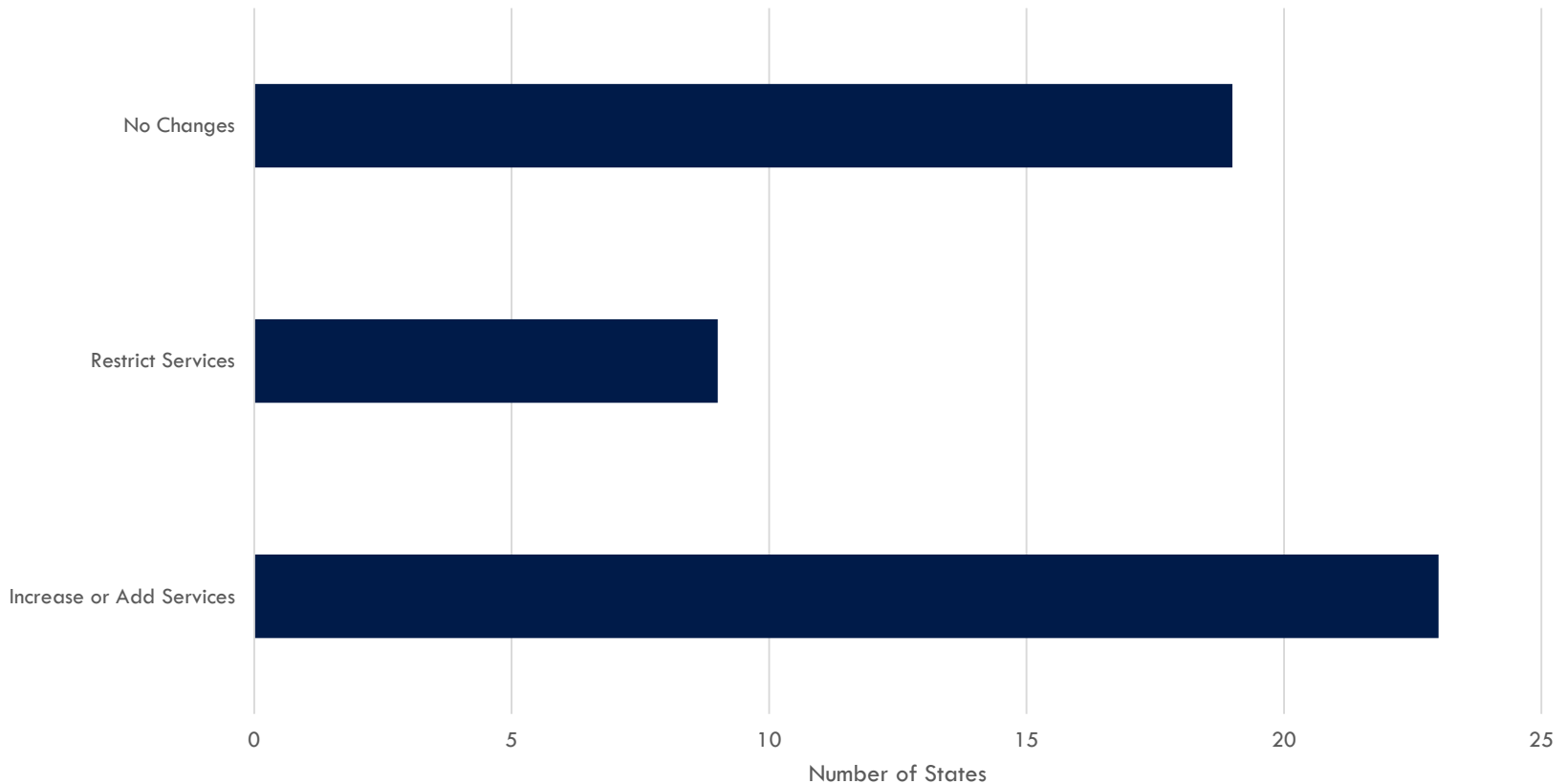


# Theme Seven

States are Making Changes to Expand Benefits  
and Increase Provider Payments

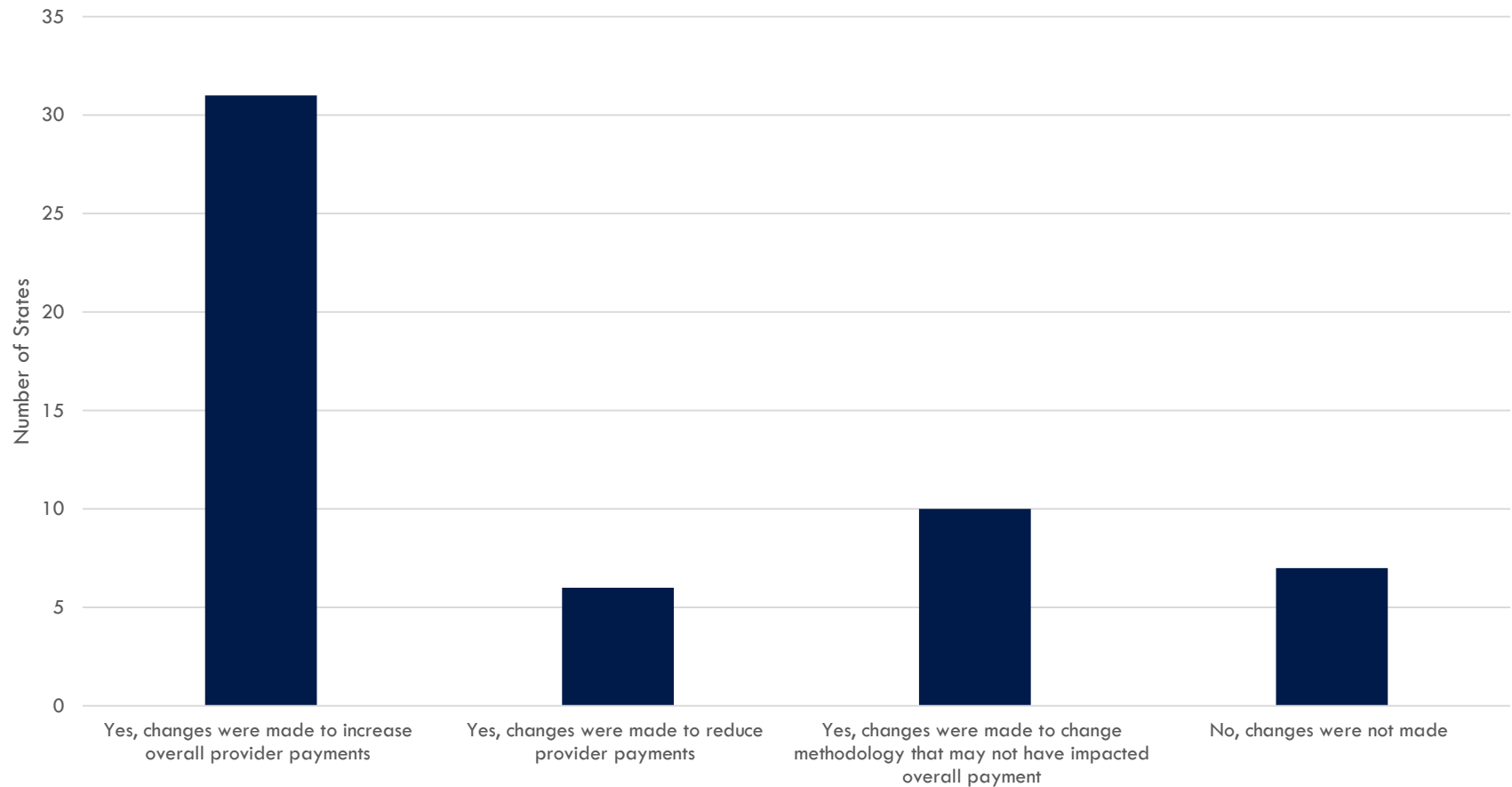
# Nearly Half of States Increased or Added HCBS Services

Changes to Benefits since FY2016



# Over Half Increased Provider Payments

### State Reimbursement Changes



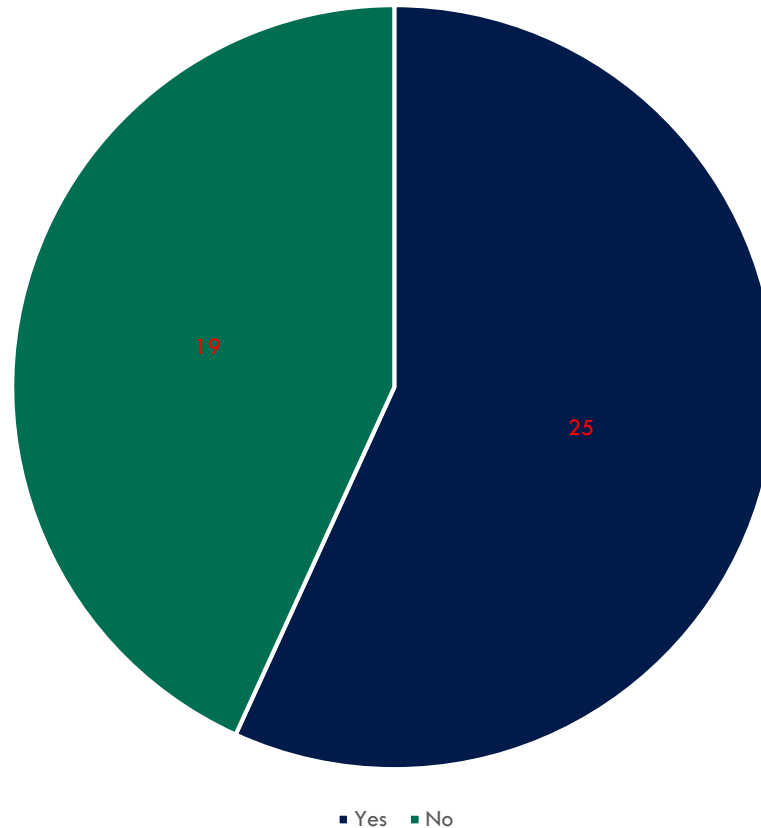


## Theme Eight

States are Increasingly Focused on HCBS Quality  
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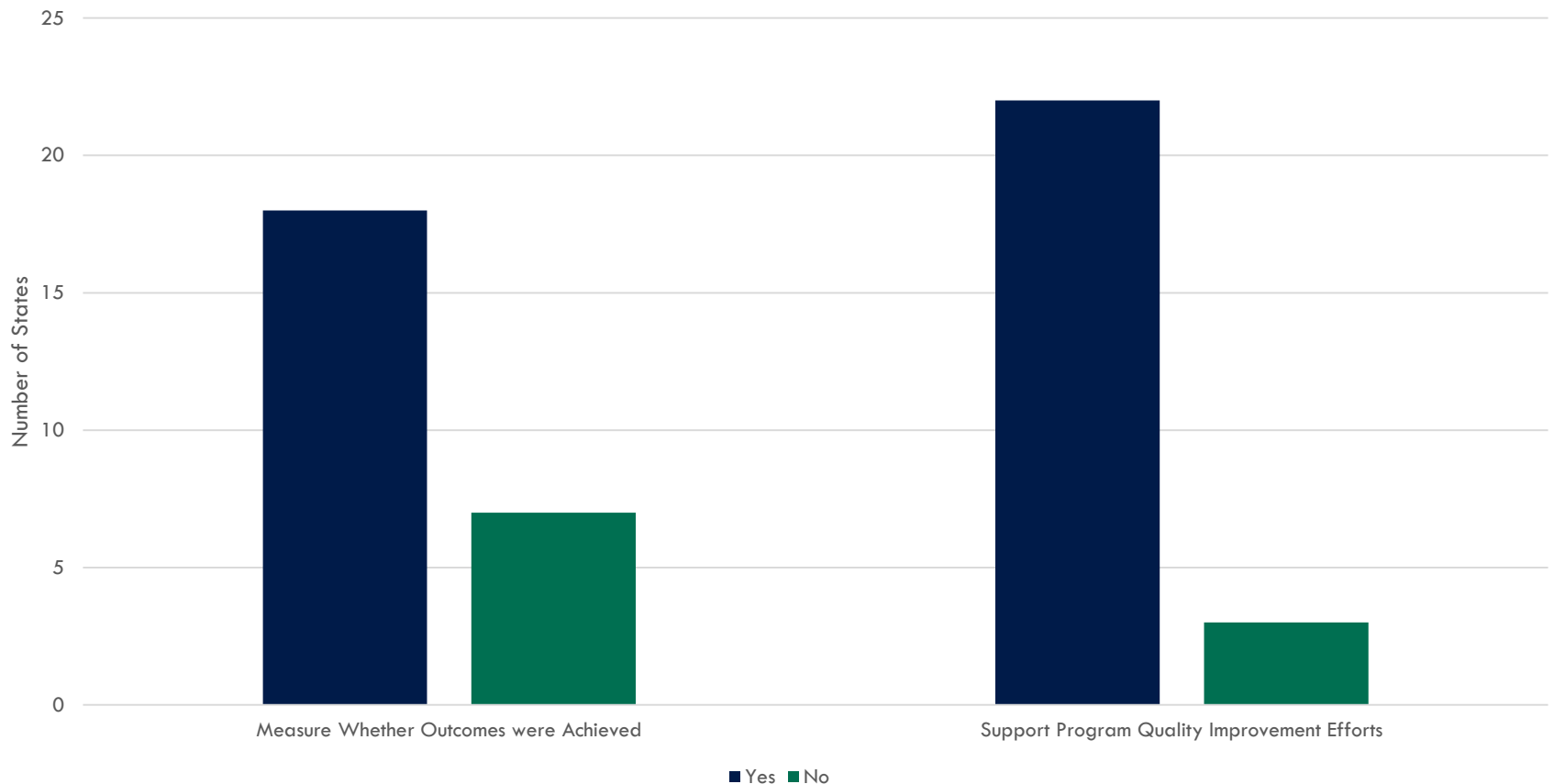
# Quality of Life Goals are an Emerging Part of Planning

LTSS Assessment Tools that Capture Quality of Life Goals



# Opportunities to Expand Use of Information Collected

Data Used for the Following Purposes



# Closing Thoughts

# Finances Are Good, but Warning Signs Remain

- Revenue collections have increased and state aggregate expenditures have also grown;
- Program enrollment has placed pressure on aging, disability, and LTSS programs;
- There has not been a corresponding national growth in state employee workforce to offset the loss of administrative infrastructure that occurred during the economic downturn;
- Overall network is stabilized by the strong economy but faces significant threats from any future downturn that may occur.



**For additional information:**

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# Trends from the States: Promising Practices and Emerging Innovations in Long-Term Services and Supports

Wendy Fox-Grage  
Senior Strategic Policy Advisor  
AARP Public Policy Institute



# Long-Term Services and Supports Solutions

Discover state innovations in long-term services and supports. It's time to pick up the pace of change!

[www.longtermscorecard.org](http://www.longtermscorecard.org)





# Strengthening No Wrong Door

How seven No Wrong Door Systems—sometimes called Aging and Disability Resource Centers—are promoting person- and family-centered practice.

AARP PUBLIC POLICY INSTITUTE

MARCH 2017

Long-Term Services and Supports Scorecard  
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How four highly ranked or significantly improved states reduced the risk of long-term nursing home care after a hospitalization.

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# Expanding Self-Direction

How four states used innovative strategies to develop and expand self-directed services programs, coordinate and personalize service options, promote stakeholder engagement and outreach, and implement training programs for individuals to self-direct their long-term services and supports.

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# Helping People with Mobility Needs Access Transportation

How mobility managers in five states are being transportation coordinators for older adults, people with disabilities, veterans, and other members of the riding public.

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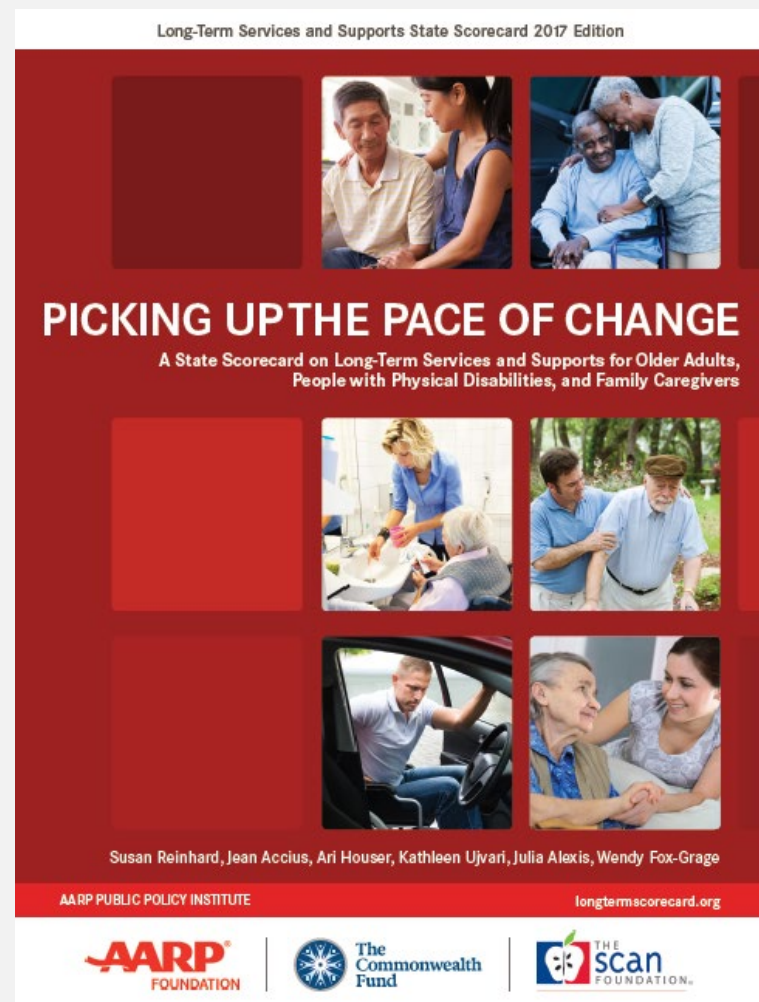


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- Promising Practices in Affordable Housing and Services (Leading Age)







Missouri Experience  
**AARP**  
Scorecard



# Overall Ranking

## Missouri

### State Rankings



Overall: **27**



Affordability and Access: **4**



Choice of Setting and Provider: **10**



Quality of Life & Quality of Care: **43**



Support for Family Caregivers: **47**

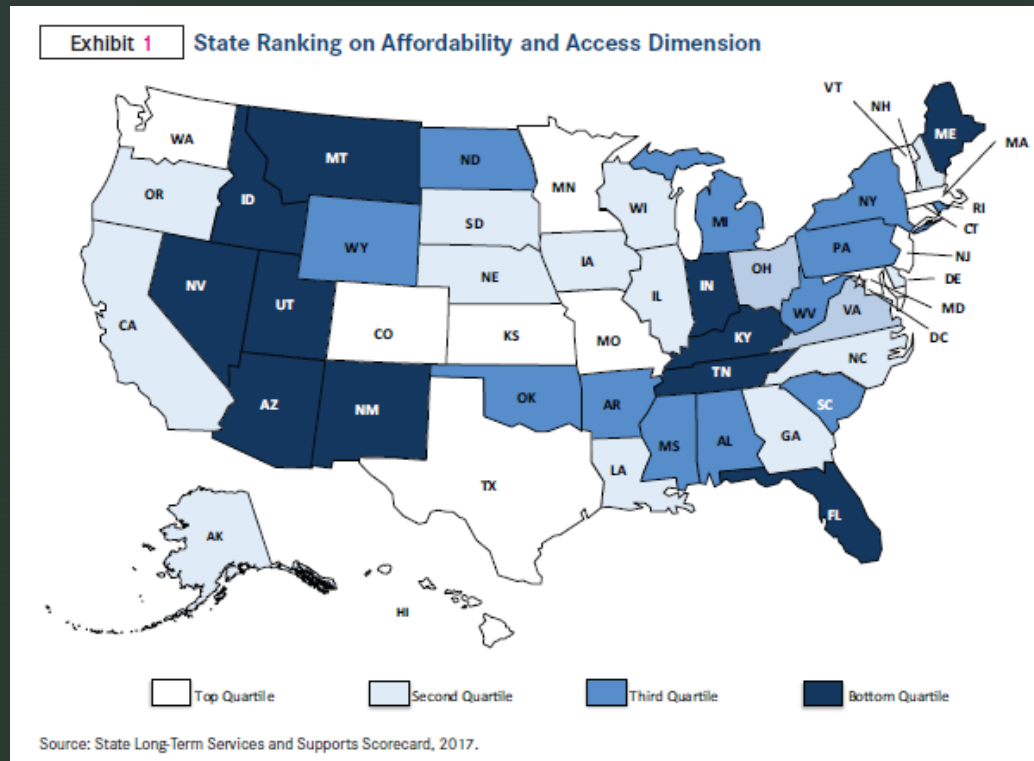


Effective Transitions: **37**

Percent of nursing home residents with low care needs

Baseline Scorecard		2017 Scorecard				
Data Year	State Rate	Data Year	State Rate	All States Median	Best State Rate	Rank
2012	22.2%	2014	23.7%	11.2%	4.1%	49

# Choice of Setting and Provider



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