

PACE Profile

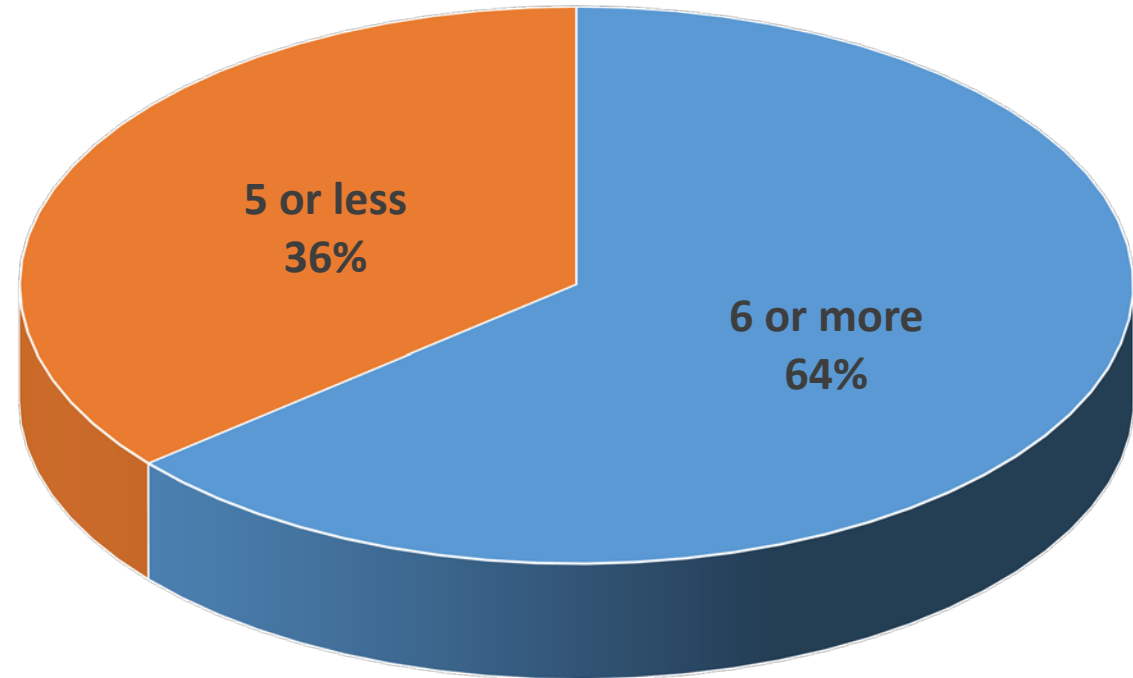
PACE 2.0 Kick-Off Meeting

October 2-3, 2018

What Does the PACE Community Look Like

- Age – Years in Operation
- States
- Sponsorship
- PACE Centers
- Participants Served

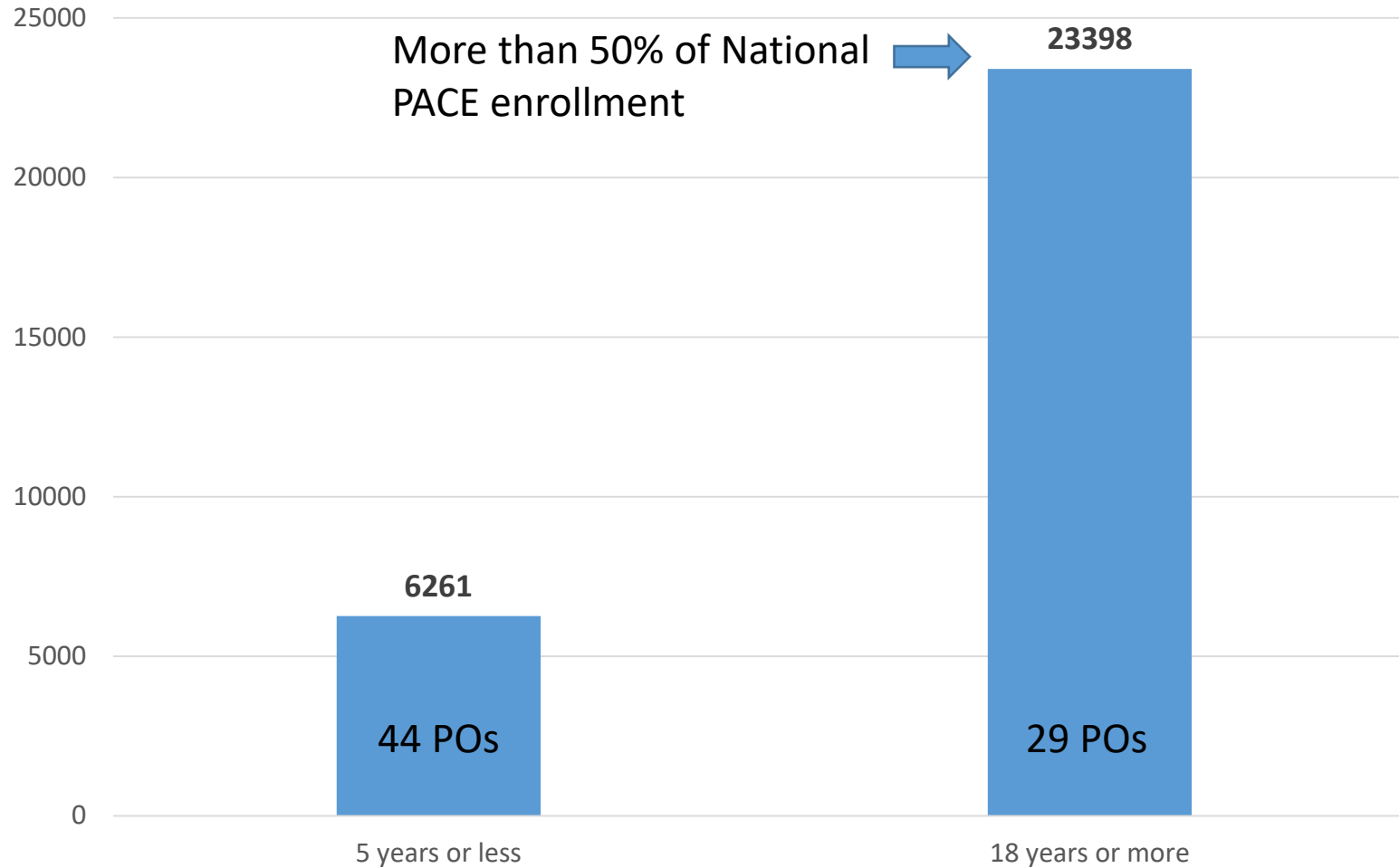
Years in Operation



One in five PACE organizations have been in operation **3** years or less.

Average: 10; Median: 8

Program Age and Participant Enrollment



Enrollment is concentrated in the most mature programs – those in operation 18 years or more (29 POs)

Program Age Varies By State

“Youngest” States – Average Age 5 or less

- IN
- WY
- NE
- DE
- OK
- AL
- AR
- NC

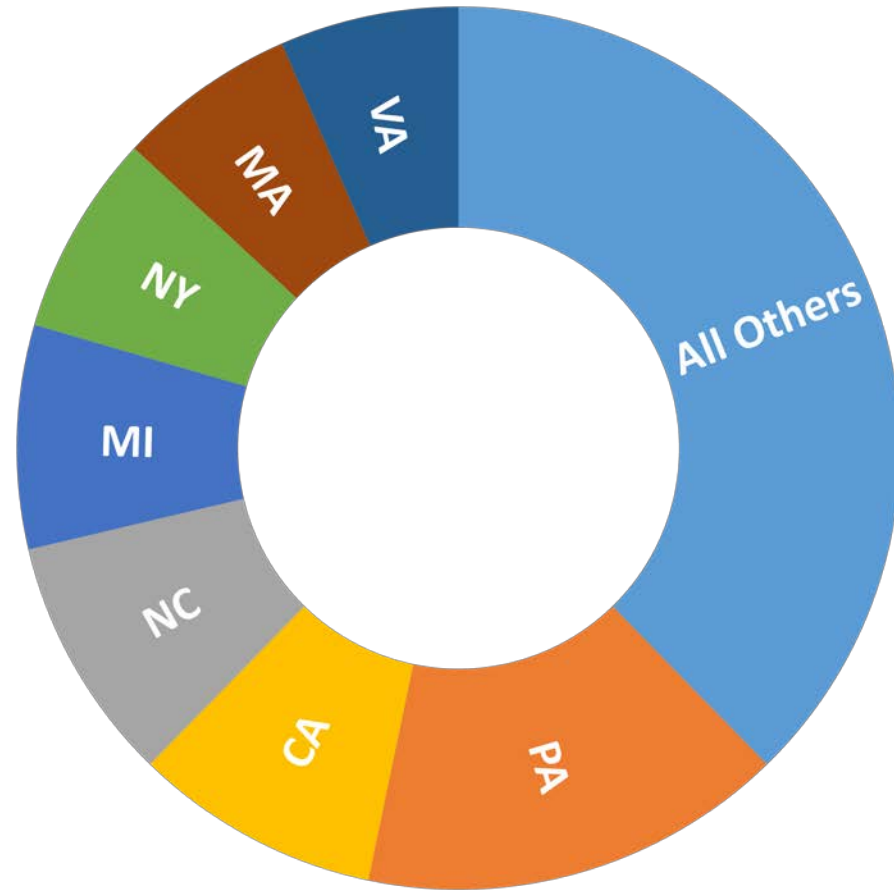
“Most Mature” States – Solo Program, 19 years +

- TN
- NM
- OH
- MD
- WA
- WI
- OR

MA is “most mature” multiprogram state with an average of 18

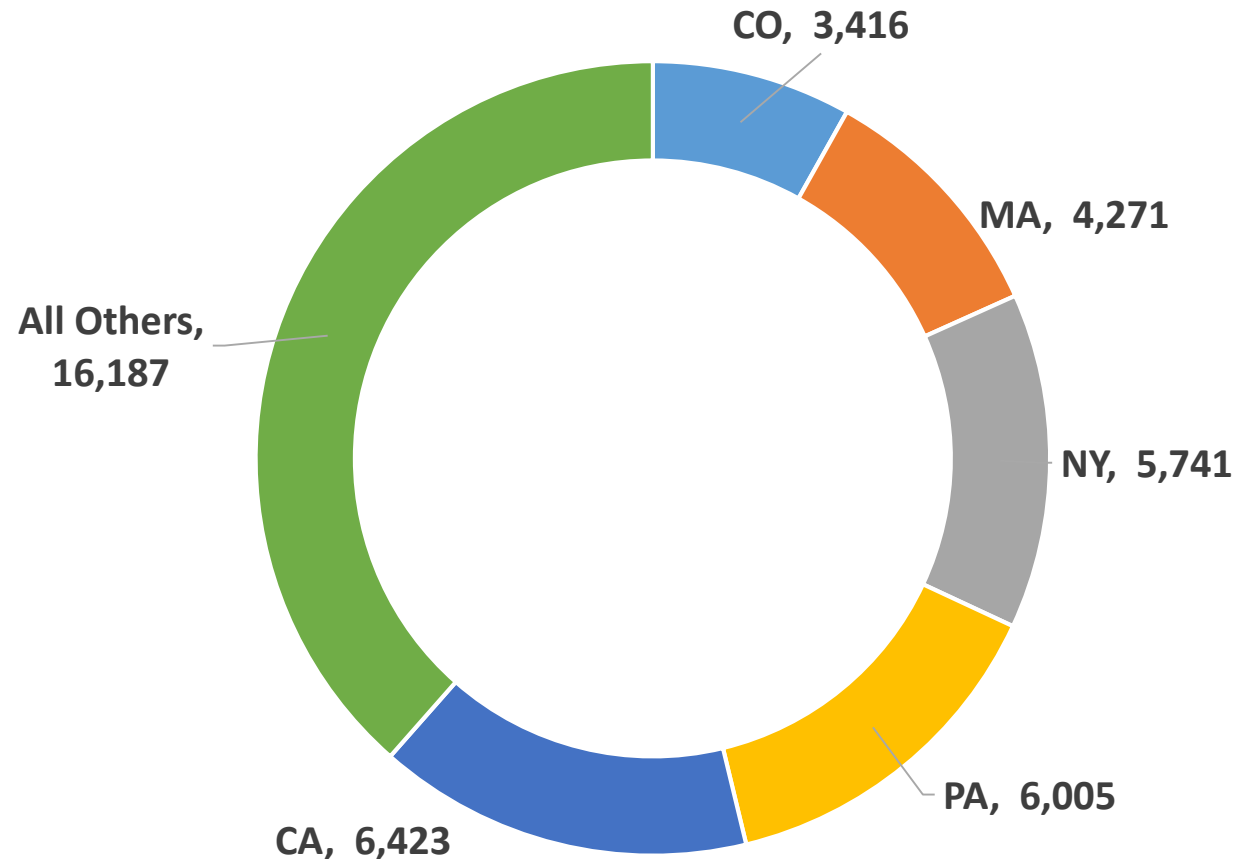
Program Concentration by State

- Six of the 32 states account for just over 60% of all PACE organizations
- Pennsylvania has 19 POs
- 13 states have one PO



Enrollment Concentration by State

- 5 states have enrollment of 3,000+
- They account for 61% of national enrollment (42,043 participants)
- 10 states have enrollment of less than 300



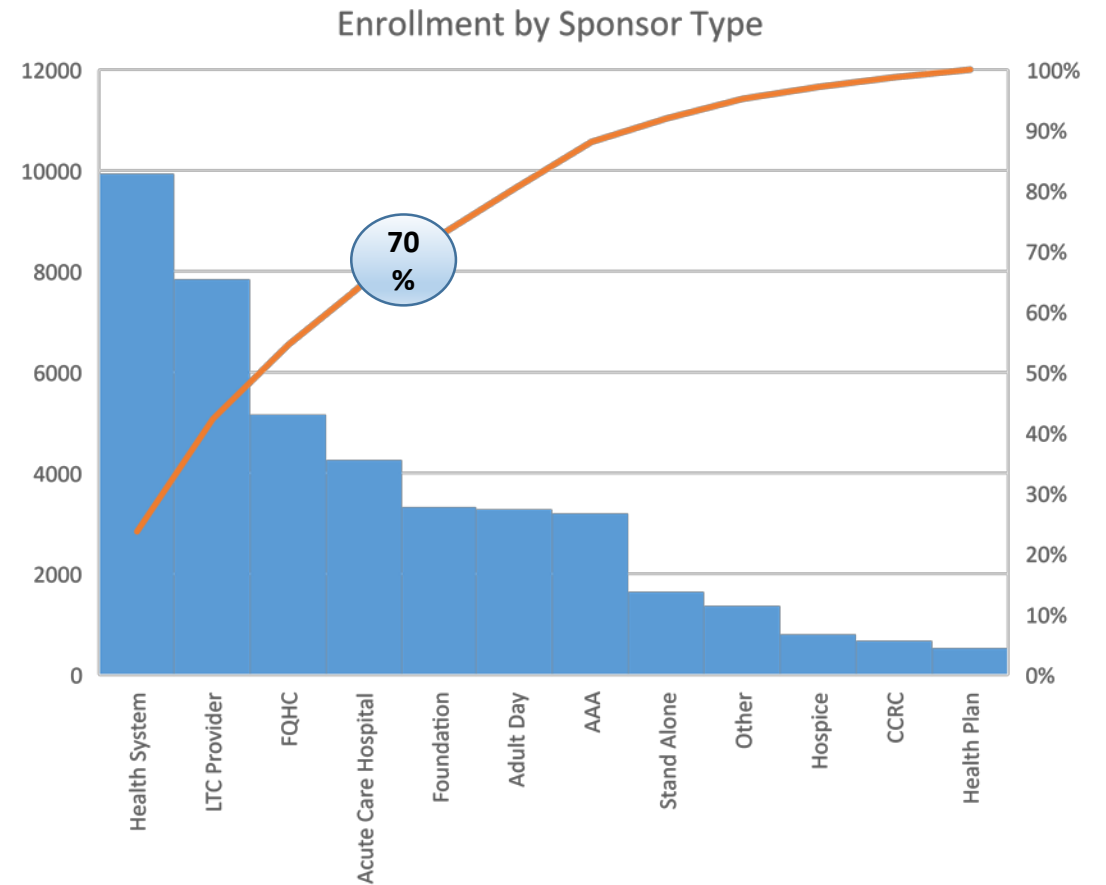
PACE Organizations - Sponsor Types

- LTC providers are the largest sponsor type; followed closely by Health Systems
- Almost 1 in 6 PACE organizations is a stand alone entity
- 5 PACE organizations are sponsored by partnerships
- The 7 FQHC sponsored POs are in 3 states (MA, CA and NC); in OK, an FQHC is partnered with a Health System



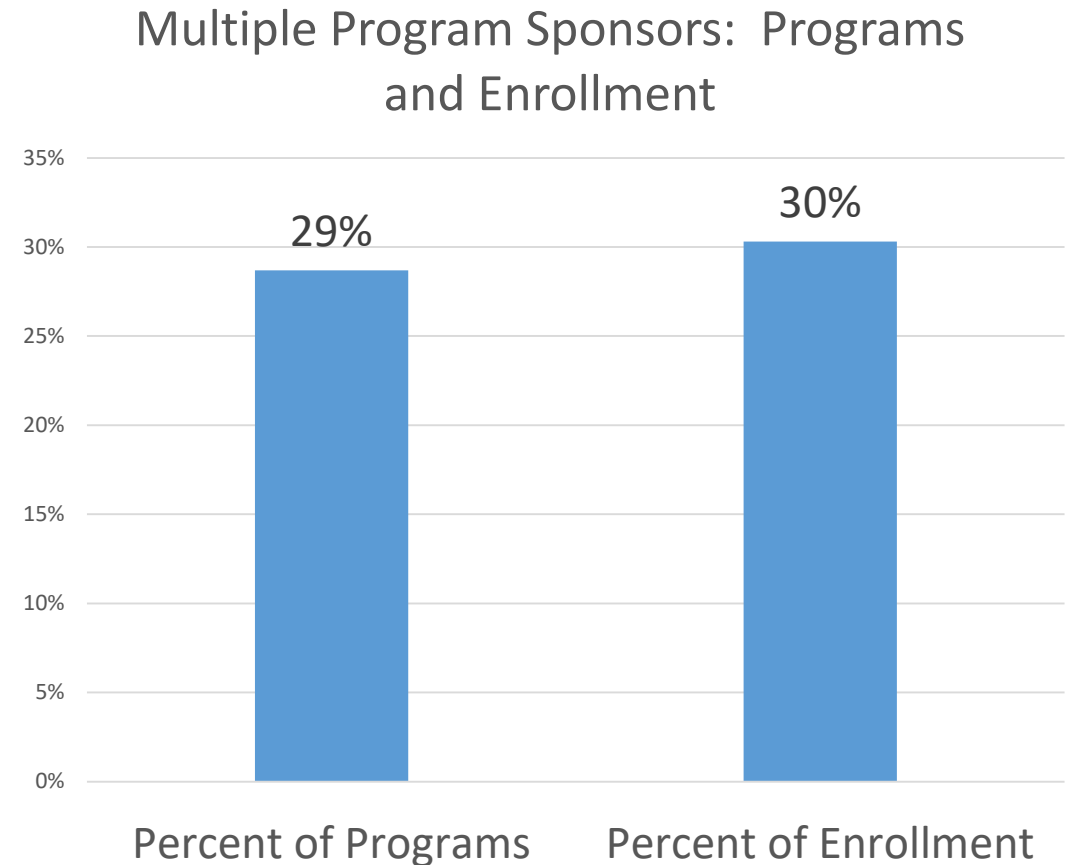
Participants Served

- Enrollment is concentrated in the 4 largest types of sponsors
- These four sponsor types account for 70% of enrollment
- FQHCs make up 12% of enrollment, though they represent only 6% of all PACE organizations

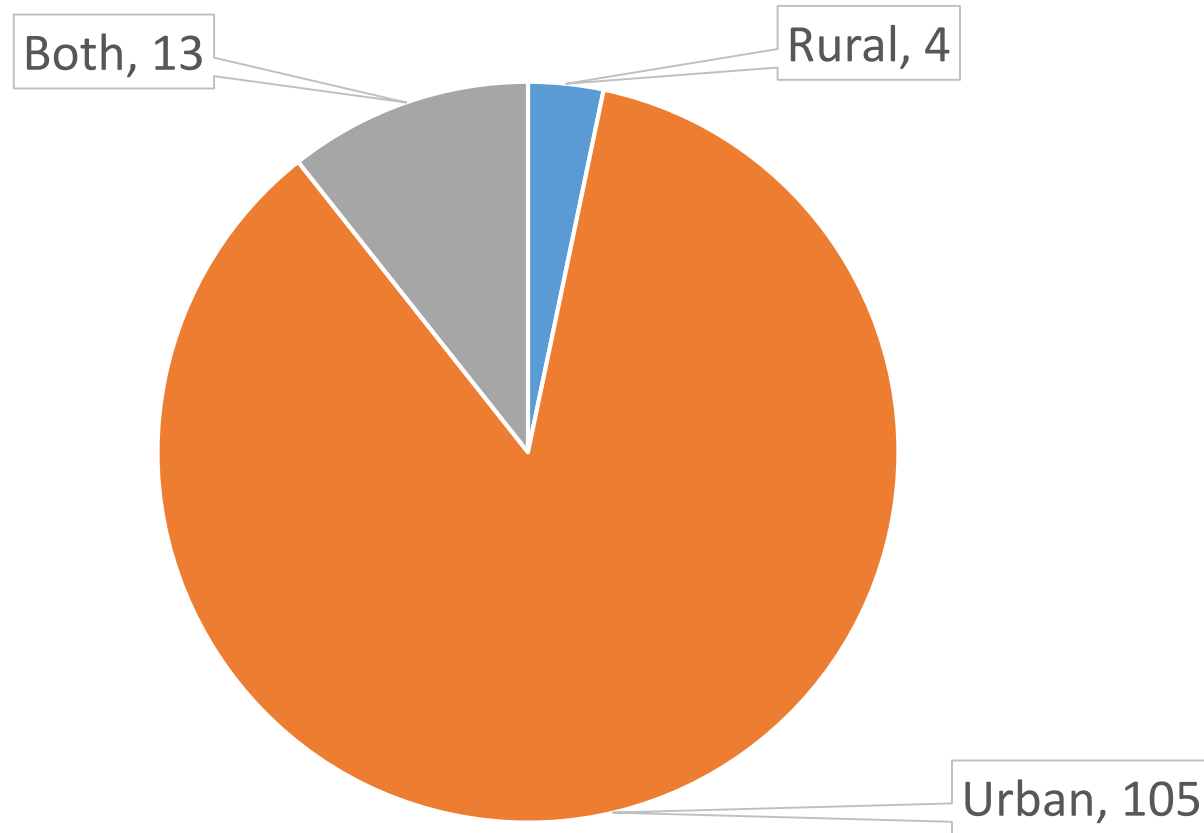


Multi-Program Sponsorship

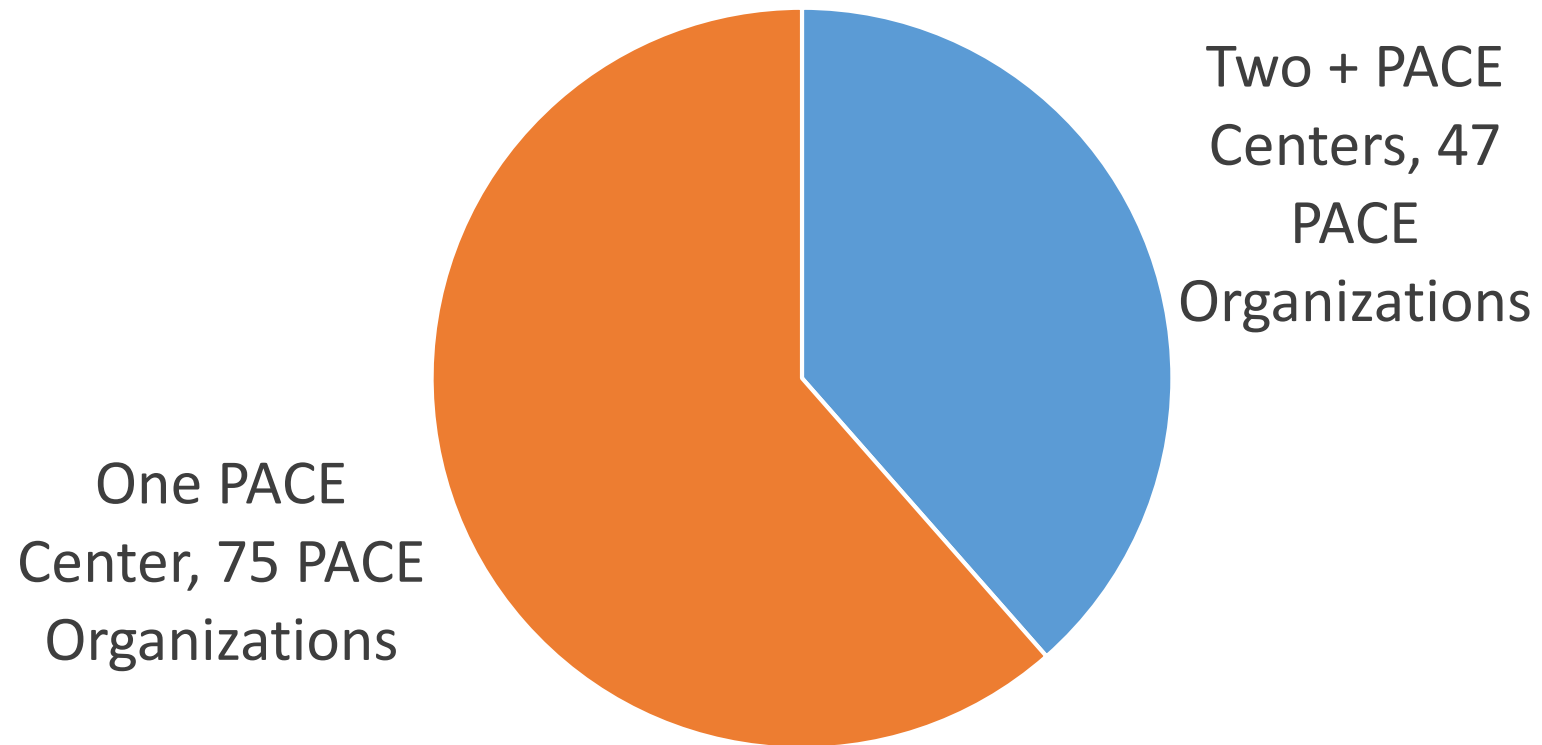
- There are 8 Multi-Program Sponsors ; operating 35 POs
- There are 87 single program sponsors
- Multi-Program sponsors range from 2 to 13 programs
- Multi-Program Sponsors' Enrollment is proportionate with their number of programs



Service Area Types – Rural and Urban

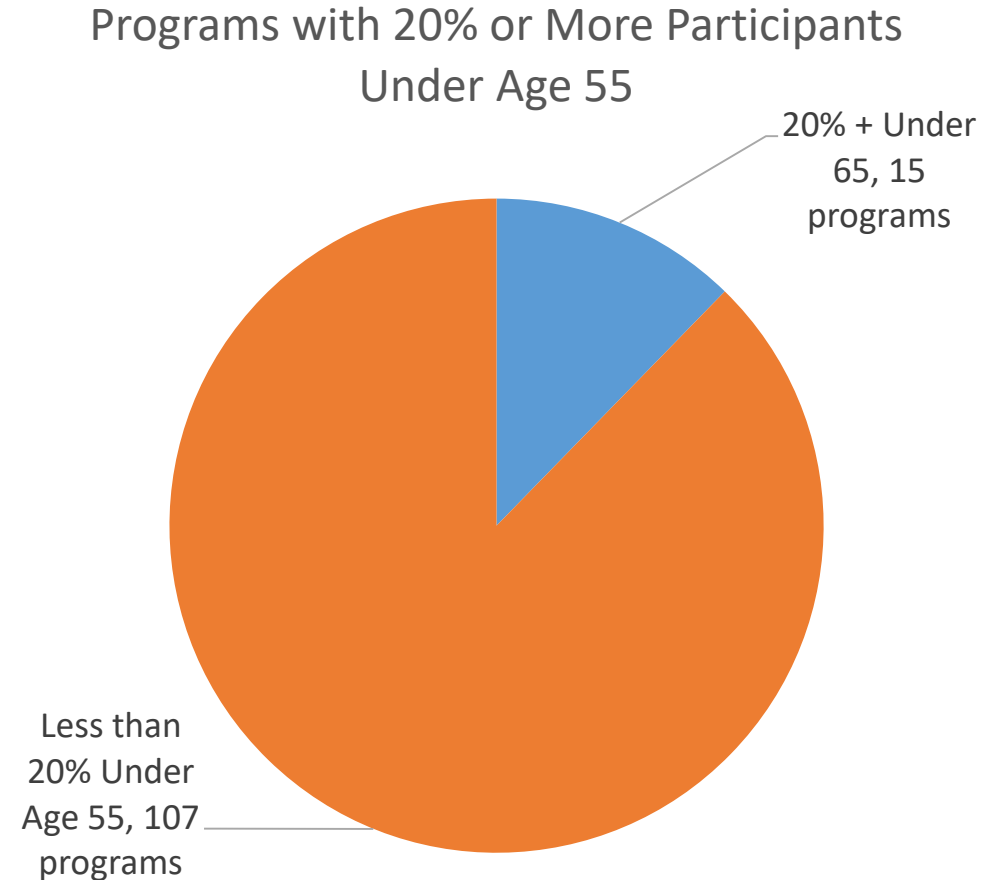


PACE Operations: PACE Centers



Age of Participants Served

- On average, 15% of participants served are aged 55-64
- For 15 PACE Organizations, more than 1 in 5 participants are age 55-64



The PACE Community is Diverse

- Single Programs and Multi-Programs
- Multiple Program States and Single Program States
- Focus on the Aged and Growing Younger Enrollment Group (55-64)
- Large enrollment and Small enrollment
- Urban and Rural
- Sponsoring Organization Type/Other Lines of Business

PACE Trends – States

- Most states have had PACE for 5+ years
- 3 new states since 2012: WY, NE, IN
- 1 state ended PACE (since 2012): MO
- Single PACE organizations in 13 States
 - 7 of these have some of the longest operating programs (18+ years)
 - Two are recent PACE states – WY, NE

PACE Trends - Sponsorship

- 12 of the 35 programs sponsored by a multi-program organization began operations in the last 5 years
- 10 For-Profit Programs
 - 4 are conversions
 - 6 continued from Demonstration
- Wide range of PACE sponsoring organizations by type
 - Many still stand-alone
 - FQHCs growing
- Emergence of partnerships

PACE Trends - Growth

- PACE organization growth has averaged 8 per year, since 2007
- More recently (2014-2016), PACE growth is increasingly driven by program expansion:
 - 23 new programs
 - 39 SAEs/PACE Centers
- Enrollment growth is accelerating
 - Since 2014, PACE enrollment has grown by 3,463 people per year
 - Between 1997 and 2014, enrollment grew at a rate of 1,925 people per year