

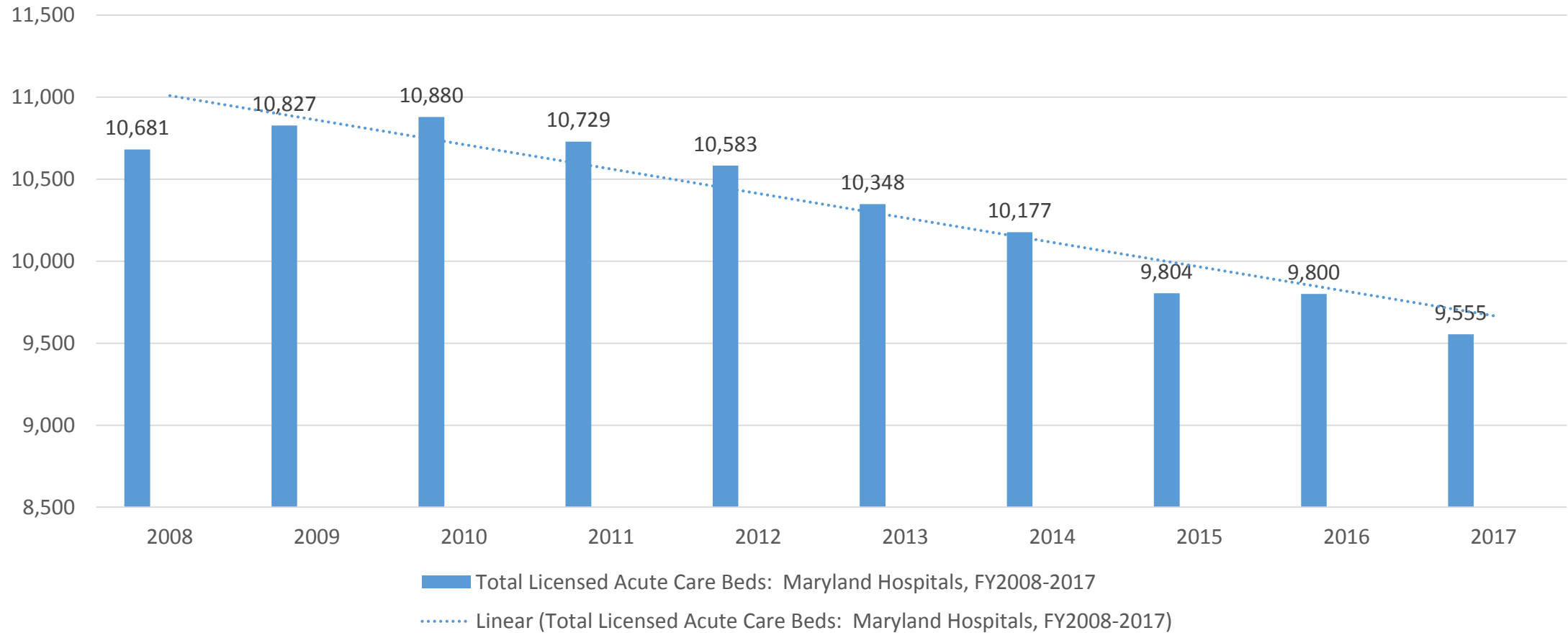


RURAL HEALTH SUMMIT
Health Facilities Capacity and Use
August 30, 2016

Health Care Facilities in Caroline, Dorchester, Kent, Queen Anne's, and Talbot Counties

- Distribution and use of facilities in Caroline, Dorchester, Kent, Queen Anne's and Talbot Counties
- Services regulated through a planning and certificate of need process
 - Acute General Hospitals
 - Nursing Homes
 - Ambulatory Surgery Centers
 - Home Health Agencies
 - Hospice
- Urgent Care Centers

Trend in Licensed Acute Care Beds: Maryland 2008-2017



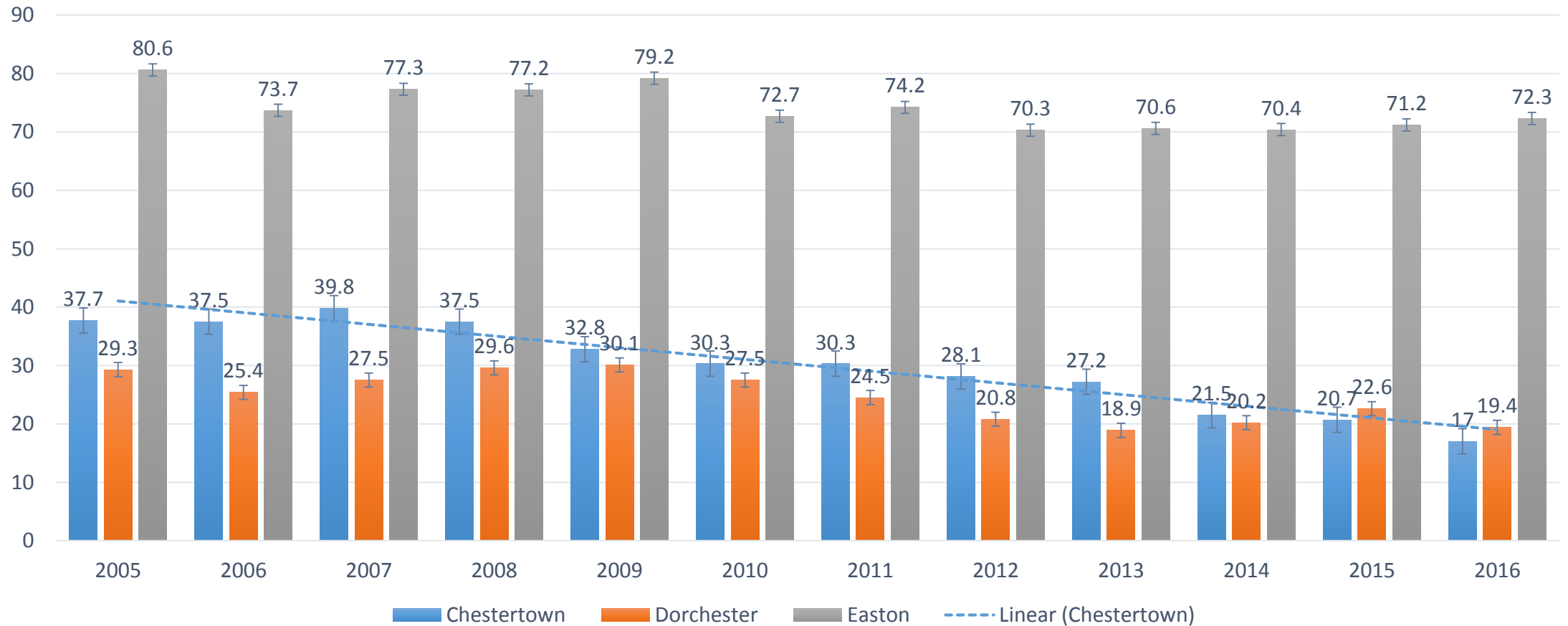
Note: Hospitals in Maryland are licensed for 140 percent of their average daily census from the most recent complete calendar year experience.

Source: MHCC analysis of the HSCRC Discharge Data Set

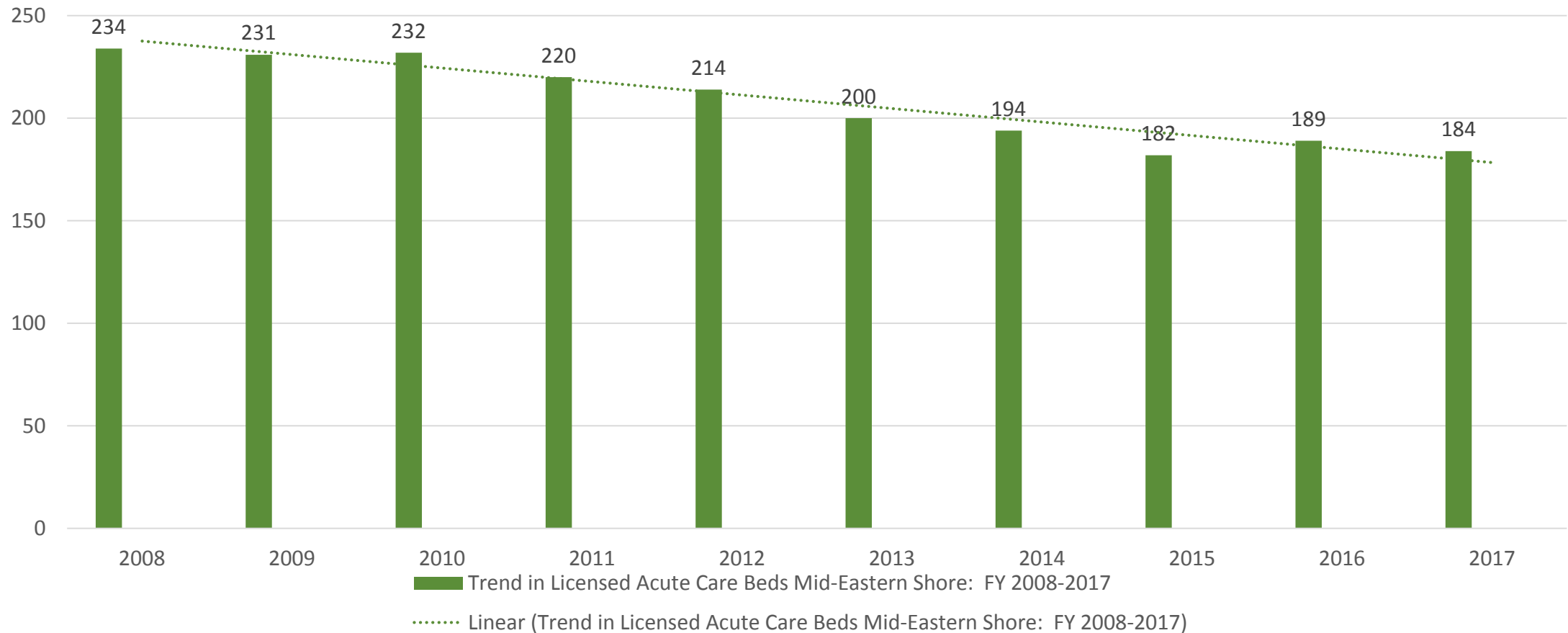
Acute Care General Hospitals: Mid Eastern Shore

County	Hospital	Hospital Beds
Caroline County	None	0
Dorchester County	University of Maryland Shore Medical Center at Dorchester	46
Kent County	University of Maryland Shore Medical Center at Chestertown	26
Queen Anne's County	None	0
Talbot County	University of Maryland Shore Medical Center at Easton	112
		Total: 184

Average Daily Census: UM Shore Medical Centers at Chestertown, Dorchester & Easton



Trend in Licensed Acute Care Beds: Mid-Eastern Shore 2008-2017



Note: Hospitals in Maryland are licensed for 140 percent of their average daily census from the most recent complete calendar year experience

Source: MHCC analysis of the HSCRC Hospital Discharge Data Set

Comprehensive Care Facilities (Nursing Homes)

County	Number of Facilities	Number of Licensed Beds (2015)	Occupancy % (2014)	MHCC Estimated Bed Deficit for the County
Maryland	235	22,199	89.7	-
Caroline	2	187	92.0%	0
Dorchester	2	281	87.6%	0
Kent	3	228	75.7%	0
Queen Anne's	1	120	93.7%	59
Talbot	2	260	90.2%	0
Source: MHCC Inventory of Comprehensive Care Beds-April 15, 2015				

Ambulatory Surgery Centers- 2014

County	Number of Centers	Operating Rooms	Procedure Rooms	Total Cases
Caroline	0	0	0	0
Dorchester	0	0	0	0
Kent	0	0	0	0
Queen Anne's*	3	1	5	2,277
Talbot	4	3	8	11,624

Source: Maryland Health Care Commission (Freestanding Ambulatory Surgical Facilities Licensed by OHCQ as of 7/1/16)

Note: Procedures rooms are suitable for gastrointestinal endoscopy, other closed endoscopic procedures, or certain laser procedures.

Small ASCs are common in Maryland. A one OR ASC does not require a CON, but a CON is required for two OR or larger ASCs. Caroline has no ambulatory surgery capacity either from freestanding ASCs or a hospital outpatient department. Ambulatory surgery is provided exclusively by Shore Health hospitals in Dorchester and Kent.

*University of Maryland Shore Surgery Center of Queenstown opened in December 2014, with 1 operating room and 3 procedure rooms. Information on the total case volume for 2015 is not yet complete.

Hospice Services in 2014

County	Number of Agencies	Hospice Use Rate	African Americans as % of Total Hospice Patients	African American as % of Total 35+ Population
Caroline	1	27%	6%	14%
Dorchester	1	20%	14%	25%
Kent	1	46%	12%	15%
Queen Anne's	1	49%	7%	7%
Talbot	2	37%	7%	12%

Source: Hospice Deaths - MHCC Maryland Hospice Survey (2007-2014); Death Data by Jurisdiction, Maryland Vital Statistics Administration Data (2007-2014). Percentage of Total Deaths of Persons Aged 35 and Older that were Hospice Deaths)

Compass Hospice serves Caroline, Kent, and Queen Anne's. Compass and the Talbot Hospice Foundation serve Talbot. Coastal Hospice serves Dorchester and all of the counties on the Lower Eastern Shore. Most rural counties have lower hospice use than those in urban jurisdictions. African-Americans and other minorities (data not shown) are less likely to use hospice care at the end of life.

Home Health Agency Services

County	Number of Agencies	Market Share of Dominant Agency	Total Patients Served
Caroline	2	62%	683
Dorchester	3	40%	915
Kent	2	99%	454
Queen Anne's	6	53%	833
Talbot	3	46%	1,043

Source: Source: MHCC Maryland HHA Survey (2014)

Home health agencies provide skilled nursing care, physical therapy, speech-language pathology services, and occupational services. Often a home health care agency will also coordinate other transitional care services after hospital discharge. UM Shore Home Care is the dominant agency in Caroline, Dorchester, and Talbot. UM Chester River Home Care is the dominant agency in Kent and Queen Anne's.

Urgent Care Centers: Middle Eastern Shore

County	Number of Urgent Care Centers
Caroline County	2
Dorchester County	2
Kent County	0
Queen Anne's County	1
Talbot County	2
	Plus one expected to open in September, 2016

Urgent care facilities in Maryland are increasing, but are less plentiful on the Eastern Shore, as are retail clinics. Urgent care is not a defined licensure category in Maryland. Typically, an urgent care facility will offer extended and weekend hours. Larger urgent care centers offer x-ray and lab services. Shore Health operates one urgent care facility in collaboration with ChoiceOne, with another planned. Other major urgent care providers such as Patient First and MedStar PromptCare have no offices on the Eastern Shore. In some instances, a primary care practice with open access scheduling and extended hours may offer equivalent or even better access.

Takeaways

- Shore Health is the only provider of acute care and the major provider of home health services.
- Nursing home capacity appears sufficient, except for a small gap in Queen Anne's
- Ambulatory surgery options, outside of hospital OPDs, are very limited.
- Hospice services are heavily used in Kent and Queen Anne's, but underutilized elsewhere, especially among African-American populations.
- Urgent care is quite limited

Trend in Licensed Acute Care Beds by County: Maryland, FY 2008 – 2017

Jurisdiction/Region	Hospital	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	Pct Chge 2008- 2017
Allegany County	Western Maryland Regional Medical Center	264	271	262	252	250	234	200	192	195	198	-25.0%
Frederick County	Frederick Memorial Hospital	246	269	274	276	309	298	297	258	233	239	-2.8%
Garrett County	Garrett County Memorial Hospital	34	36	33	31	30	29	26	23	25	27	-20.6%
Washington County	Meritus Medical Center	264	258	260	258	252	245	237	231	223	227	-14.0%
WESTERN MARYLAND TOTAL		808	834	829	817	841	806	760	704	676	691	-14.5%
MONTGOMERY COUNTY TOTAL		1,350	1,396	1,421	1,400	1,410	1,346	1,329	1,268	1,394	1,298	-3.9%
Calvert County	Calvert Memorial Hospital	105	106	98	98	95	95	92	85	77	76	-27.6%
Charles County	Univ. of MD Charles Regional Medical Center	121	129	120	120	124	110	121	115	110	89	-26.4%
St. Mary's County	MedStar St. Mary's Hospital	108	108	103	96	90	90	89	82	91	103	-4.6%
SOUTHERN MARYLAND TOTAL		1,185	1,179	1,149	1,117	1,132	1,073	1,052	991	980	978	-17.5%
Anne Arundel County		571	599	627	645	644	687	704	694	678	663	16.1%
Baltimore City		4,072	4,073	4,110	4,098	3,989	4,000	3,961	3,808	3,744	3,658	-10.2%
Baltimore County		1,237	1,262	1,237	8,841	1,112	1,097	1,077	1,082	1,041	1,009	-18.4%
Carroll County	Carroll Hospital Center	216	218	213	195	189	158	151	147	140	143	-33.8%
Howard County	Howard County General Hospital	219	209	227	238	249	249	253	259	266	264	20.5%
CENTRAL MARYLAND TOTAL		6,574	6,647	6,715	6,639	6,455	6,461	6,420	6,257	6,133	5,992	-8.9%
Cecil County	Union Hospital of Cecil County	105	116	113	113	106	92	85	75	84	83	-21.0%
Dorchester County	Univ. of MD Shore Medical Center at Dorchester	49	54	54	53	52	46	41	39	47	46	-6.1%
Kent County	Univ. of MD Shore Medical Center at Chestertown	62	57	53	47	46	42	41	31	30	26	-58.1%
Somerset County	Edward W. McCready Memorial Hospital	8	9	8	8	9	5	4	4	4	3	-62.5%
Talbot County	Univ. of MD Shore Medical Center at Easton	123	120	125	120	116	112	112	112	112	112	-8.9%
Wicomico County	Peninsula Regional Medical Center	366	362	358	362	363	317	288	275	292	281	-23.2%
Worcester County	Atlantic General Hospital	51	53	55	53	53	48	45	48	48	45	-11.8%
EASTERN SHORE TOTAL		764	771	766	756	745	662	616	584	617	596	-22.0%
Dorchester County	Univ. of MD Shore Medical Center at Dorchester	49	54	54	53	52	46	41	39	47	46	-6.1%
Kent County	Univ. of MD Shore Medical Center at Chestertown	62	57	53	47	46	42	41	31	30	26	-58.1%
Talbot County	Univ. of MD Shore Medical Center at Easton	123	120	125	120	116	112	112	112	112	112	-8.9%
MID EASTERN SHORE TOTAL		234	231	232	220	214	200	194	182	189	184	-21.4%
MARYLAND TOTAL		10,681	10,827	10,880	10,729	10,583	10,348	10,177	9,804	9,800	9,555	-10.5%

Capabilities of Maryland Rural Hospitals 2016

		Beds		Beds by Service Type					Specialized Services			
Jurisdiction/Reg.	Hospital	Licensed Beds	Physical Capacity	Med Surg	Psych	OB	Neonatal	Pediatrics	PCI	Cardiac	Trauma (Level)	Primary Stroke
Allegany County	Western Maryland Regional Medical Center	198	250	168	19	9	20	2	x	x	III	x
Frederick County	Frederick Memorial Hospital	239	315	180	21	27	60	5	x			x
Garrett County	Garrett County Memorial Hospital	27	45	24	0	2	12	1				
Washington County	Meritus Medical Center	227	258	188	18	17	41	14	x		III	x
Calvert County	Calvert Memorial Hospital	76	126	60	9	6	12	1				x
Charles County	Univ. of MD Charles Regional Medical Center	89	144	73	0	12	15	4				x
St. Mary's County	MedStar St. Mary's Hospital	103	129	73	12	12	16	6				x
Carroll County	Carroll Hospital Center	143	197	96	20	20	25	7	x			x
Harford County	Univ. of MD Harford Memorial Hospital	85	128	59	26	0	0	0				x
	Univ. of MD Upper Chesapeake Medical Center	170	195	159	0	10	10	1	x			x
	<u>Total:</u> Harford County	255	323	218	26	10	10	1				x
Cecil County	Union Hospital of Cecil County	83	104	64	11	5	12	3				x
Dorchester County	Univ. of MD Shore Medical Center at Dorchester	46	80	22	24	0	0	0				
Kent County	Univ. of MD Shore Medical Center at Chestertown	26	40	25	0	0	0	1				
Somerset County	Edward W. McCready Memorial Hospital	3	26	0	0	0	0	0				
Talbot County	Univ. of MD Shore Medical Center at Easton	112	150	87	0	17	18	8				x
Wicomico County	Peninsula Regional Medical Center	281	380	241	12	20	28	8	x		III	x
Worcester County	Atlantic General Hospital	45	62	45	0	0	0	0	x	x		x

History of General Hospital Supply in Maryland - 1980 to present

	Inventory Change	State General Hospital Supply
1980		53 general hospitals
1982	Homewood-North opens in Baltimore City	54 general hospitals
1985	Provident and Lutheran close-replaced by Liberty in Baltimore City	53 general hospitals
1988	Parkwood closes in Clinton (Prince George's Co.)	52 general hospitals
1991	Fort Washington opens in Fort Washington (Prince George's Co.)	53 general hospitals
1992	Homewood-North and Homewood-South close in Baltimore City	51 general hospitals
1993	Atlantic General opens in Berlin (Worcester Co.) Leland Memorial closes in Riverdale (Prince George's Co.)	51 general hospitals
1994	Frostburg closes in Frostburg (Allegany Co.)	50 general hospitals
1999	Children's, Church, and Liberty close in Baltimore City	47 general hospital
2010	Memorial of Cumberland and Braddock close-replaced by Western Regional in Cumberland (Allegany Co.)	46 general hospitals
2014	Holy Cross Germantown opens in Germantown (Montgomery Co.)	47 general hospitals

Ambulatory Surgery Centers in Rural Maryland

Maryland Freestanding Ambulatory Surgery Facilities, CY 2014					
Region	Jurisdiction	Facilities	Operating Rooms	Procedure Rooms	Total Cases
	Allegany County	6	5	8	10,514
	Frederick County	17	12	28	32,861
	Garrett County	0	0	0	0
Western Maryland	Washington County	10	13	18	36,282
	Calvert County	6	3	6	6,293
	Charles County	12	6	25	21,327
Southern Maryland	St. Mary's County	5	5	4	8,439
	Anne Arundel County	38	33	63	82,427
	Carroll County	9	6	13	18,106
Central Maryland	Harford County	17	12	19	28,361
	Caroline County	0	0	0	0
	Cecil County	4	4	6	6,519
	Dorchester County	0	0	0	0
	Kent County	0	0	0	0
	Queen Anne's County	2	0	2	2,277
	Somerset County	0	0	0	0
	Talbot County	4	3	8	11,624
	Wicomico County	10	12	17	19,357
	Eastern Shore	Worcester County	1	0	1

Hospice Utilization

Percentage of Total Deaths of Persons Aged 35 and Older that were Hospice Deaths

Region	2007	2008	2009	2010	2011	2012	2013	2014
State of Maryland	31%	33%	35%	38%	39%	42%	42%	43%
Central Maryland								
Anne Arundel	40%	41%	45%	47%	47%	51%	52%	49%
Baltimore City	21%	28%	26%	24%	25%	32%	31%	25%
Baltimore Co.	37%	38%	44%	49%	54%	56%	54%	56%
Carroll	43%	48%	50%	50%	53%	54%	52%	50%
Harford	34%	33%	36%	42%	41%	49%	47%	51%
Howard	38%	36%	40%	41%	42%	60%	49%	49%
Eastern Shore								
Caroline	31%	22%	28%	27%	18%	24%	22%	27%
Cecil	37%	44%	32%	50%	54%	54%	46%	46%
Dorchester	20%	18%	16%	19%	19%	18%	22%	20%
Kent	20%	27%	28%	33%	31%	36%	34%	46%
Queen Anne's	31%	37%	43%	42%	44%	47%	40%	49%
Somerset	22%	32%	25%	26%	38%	39%	32%	25%
Talbot	32%	33%	34%	37%	39%	39%	46%	37%
Wicomico	30%	37%	36%	43%	44%	43%	45%	46%
Worcester	27%	27%	32%	36%	42%	46%	42%	40%
National Capital								
Prince George's	20%	23%	22%	24%	22%	26%	26%	28%
Montgomery	36%	36%	39%	43%	43%	45%	47%	47%
Southern Maryland								
Calvert	31%	38%	33%	37%	35%	37%	37%	37%
Charles	24%	28%	22%	29%	29%	30%	33%	29%
St. Mary's	45%	43%	36%	43%	47%	48%	41%	47%
Western Maryland								
Allegany	19%	20%	21%	19%	22%	24%	18%	22%
Frederick	30%	26%	30%	34%	34%	37%	47%	46%
Garrett	27%	23%	28%	27%	30%	25%	25%	23%
Washington	30%	32%	33%	34%	38%	44%	48%	57%

Source: Hospice Deaths - MHCC Maryland Hospice Survey (2007-2014); Death Data by Jurisdiction, Maryland Vital Statistics Administration Data (2007-2014)
 *Percentage of Total Deaths of Persons Aged 35 and Older that were Hospice Deaths)

Hospice use among African-American Patients

Jurisdiction	2014 Jurisdictional Use Rate	Proportion of Hospice Patients who are African-American, 2014	Proportion of Total 35+ Population that is African-American	Total 35+ population
Allegany	0.22	2.8%	6.0%	42,059
Anne Arundel	0.49	15.0%	14.8%	300,930
Baltimore City	0.25	56.6%	64.8%	307,632
Baltimore County	0.56	21.7%	24.2%	452,816
Calvert	0.37	10.8%	13.5%	50,533
Caroline	0.27	6.2%	13.7%	18,175
Carroll	0.5	2.8%	3.3%	97,126
Cecil	0.46	5.0%	5.8%	56,871
Charles	0.29	28.4%	41.1%	81,219
Dorchester	0.2	14.1%	24.8%	19,507
Frederick	0.46	4.9%	8.0%	132,425
Garrett	0.23	0%	0.5%	18,182
Harford	0.51	6.8%	11.4%	139,631
Howard	0.49	12.2%	17.2%	166,017
Kent	0.46	12.2%	14.8%	12,122
Montgomery	0.47	13.7%	16.9%	559,018
Prince George's	0.28	59.7%	68.6%	455,805
Queen Anne's	0.49	6.7%	6.7%	29,804
Somerset	0.25	26.4%	31.7%	13,490
St. Mary's	0.47	12.8%	13.8%	56,402
Talbot	0.37	6.9%	11.8%	24,666
Washington	0.57	2.8%	8.3%	84,168
Wicomico	0.46	14.0%	22.8%	50,915
Worcester	0.4	11.4%	11.6%	33,649
MARYLAND	0.43	21.0%	28.5%	3,202,462