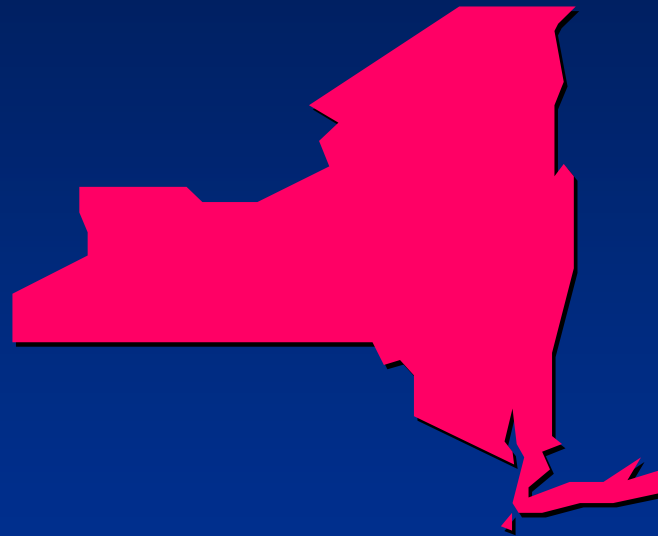


Commission on Health Care Facilities in the 21st Century



**Hudson Valley and Western
Regional Overviews**

Size and Population of Regions

- **Hudson Valley**

- Composed of eight counties
 - 5,998 square miles (13% of the state land area)
- Total population is 2,305,604
 - 12% of the state population

- **Western**

- Composed of eight counties
 - 6,447 square miles (14% of the state land area)
- Total population is 1,572,212
 - 8% of the state population

Population by County

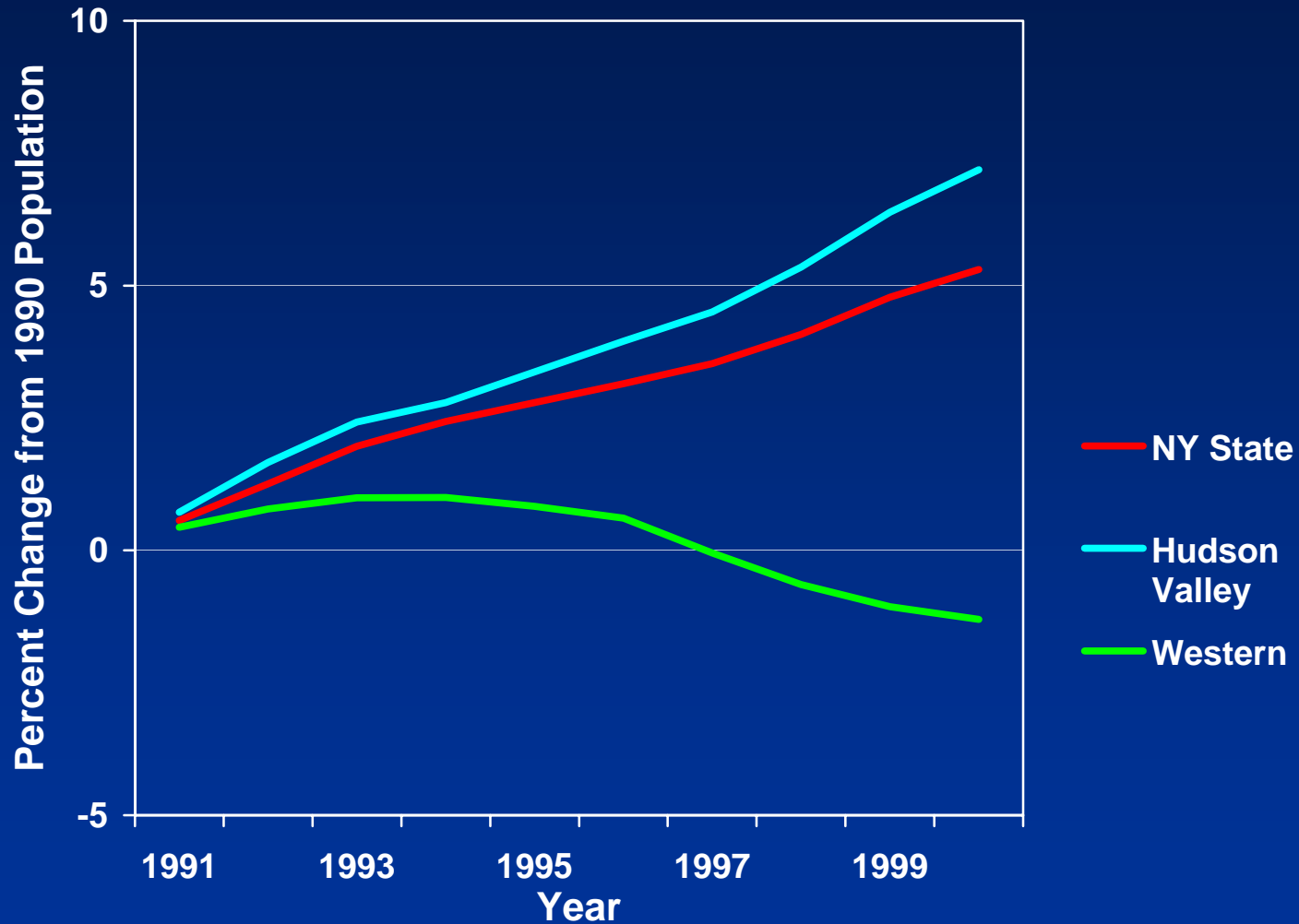
Hudson Valley

County	Population
Westchester	942,444
Orange	370,352
Rockland	293,626
Dutchess	293,395
Ulster	181,779
Putnam	100,570
Sullivan	76,110
Delaware	47,328
Total	2,305,604

Western

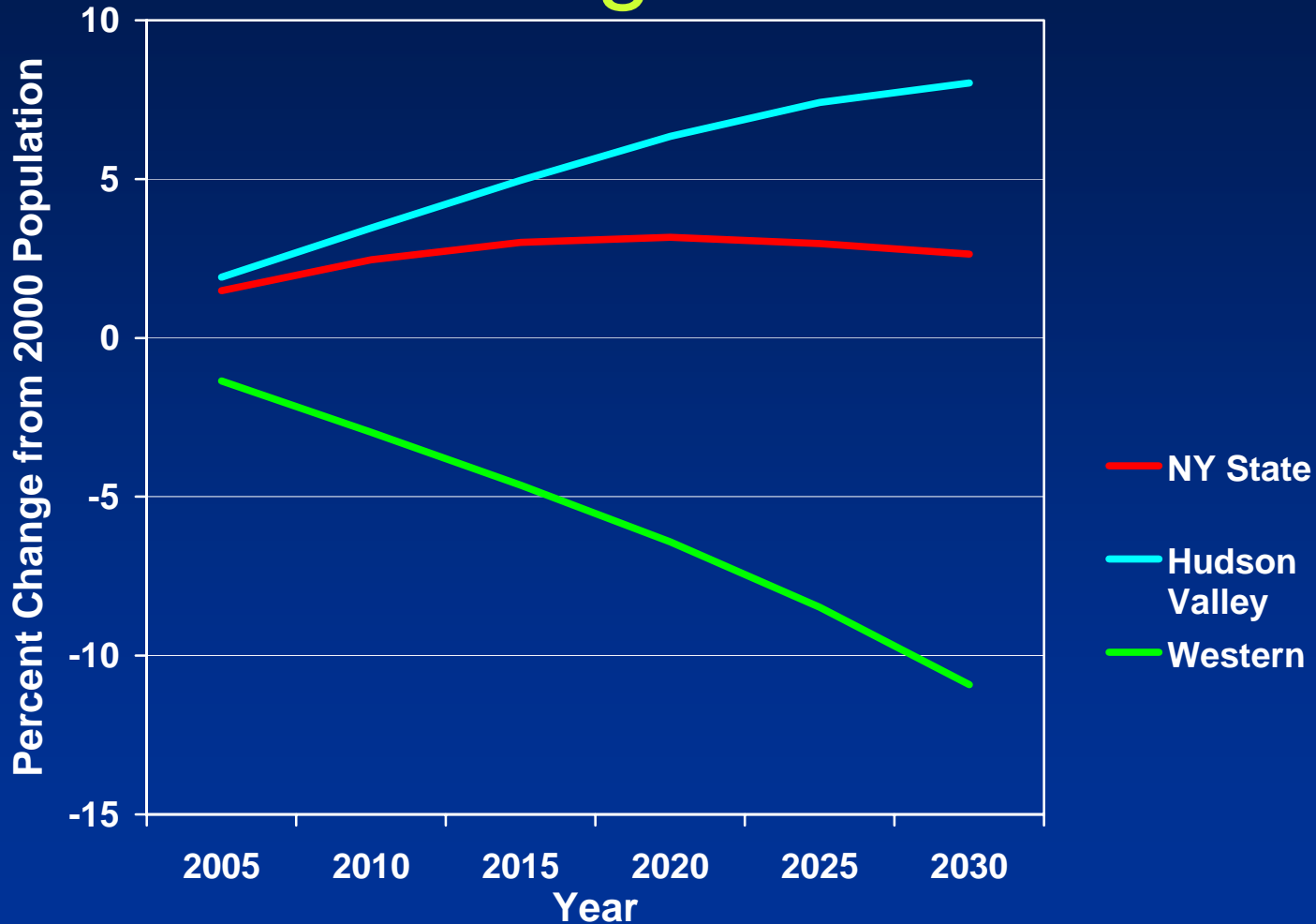
County	Population
Erie	936,318
Niagara	218,060
Chautauqua	137,267
Cattaraugus	83,179
Genesee	59,689
Allegany	50,575
Orleans	44,138
Wyoming	42,986
Total	1,572,212

Population Growth in 90s



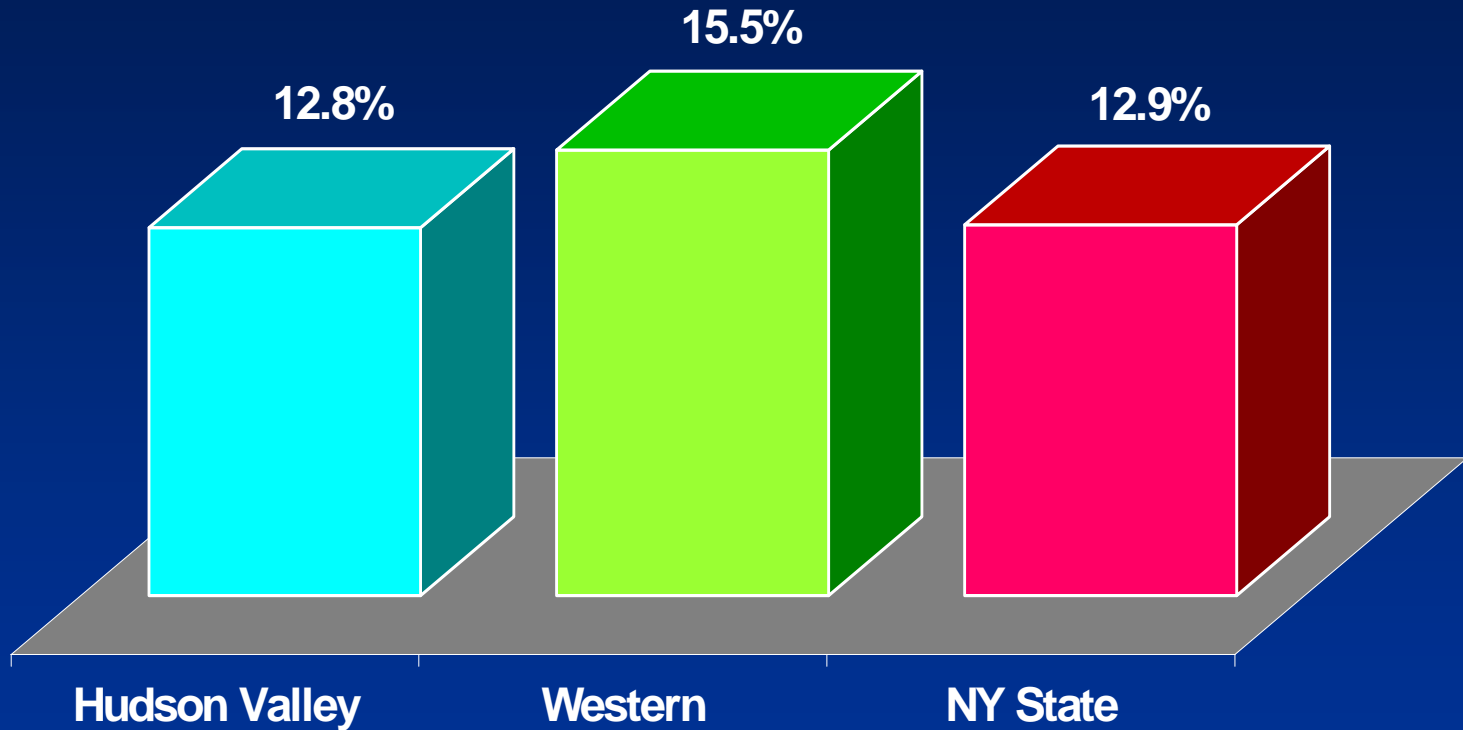
Source: U.S. Census Bureau

Projected Population Growth through 2030



Source: Statewide projections – US Census Bureau
Regional projections – New York Statistical Information System

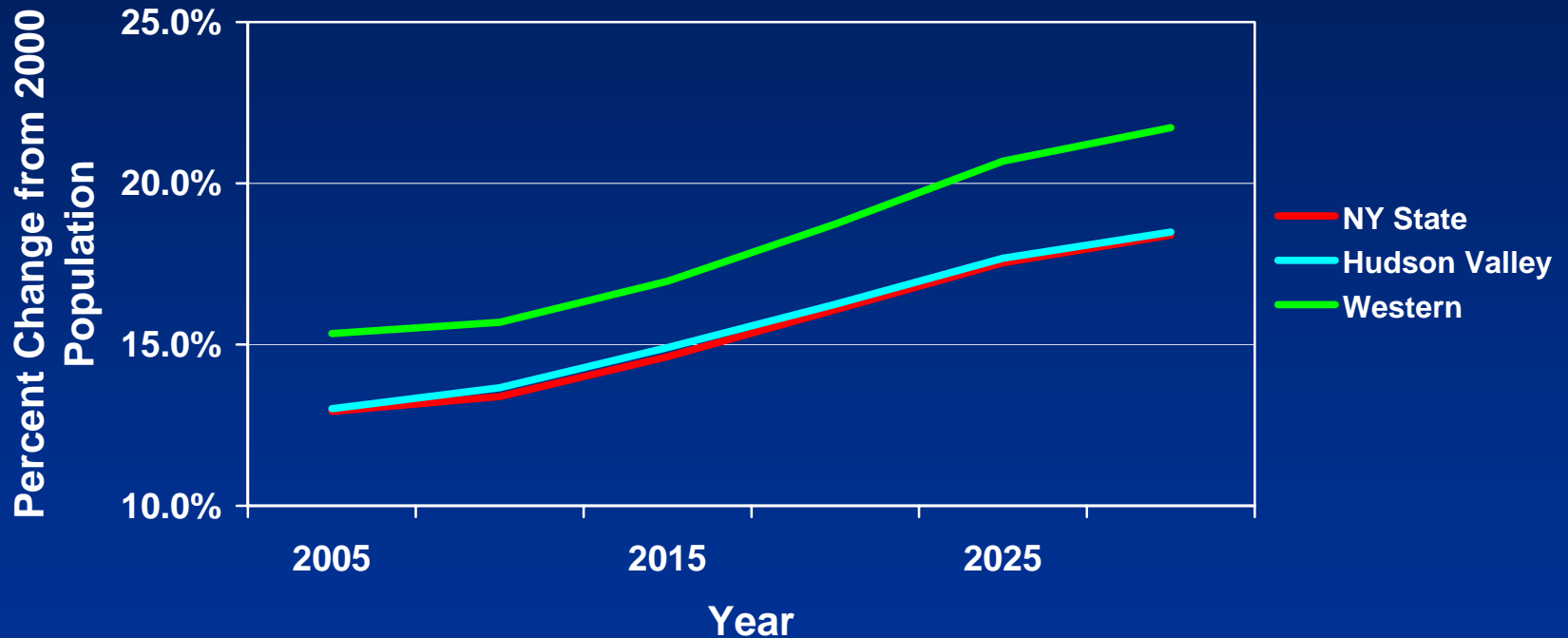
Current 65+ Population



Source: Statewide projections – US Census Bureau
Regional projections – New York Statistical Information System

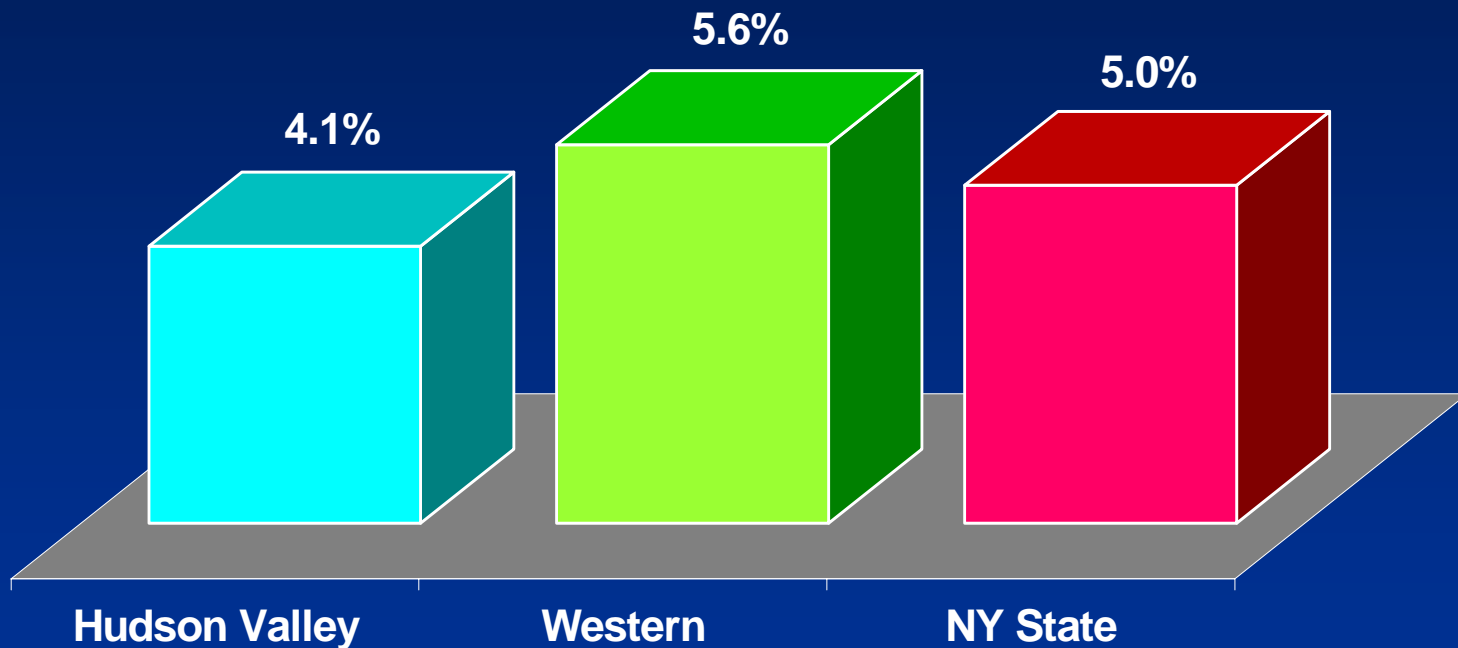
65+ Population Projections to 2030

65+ Population Growth to 2030



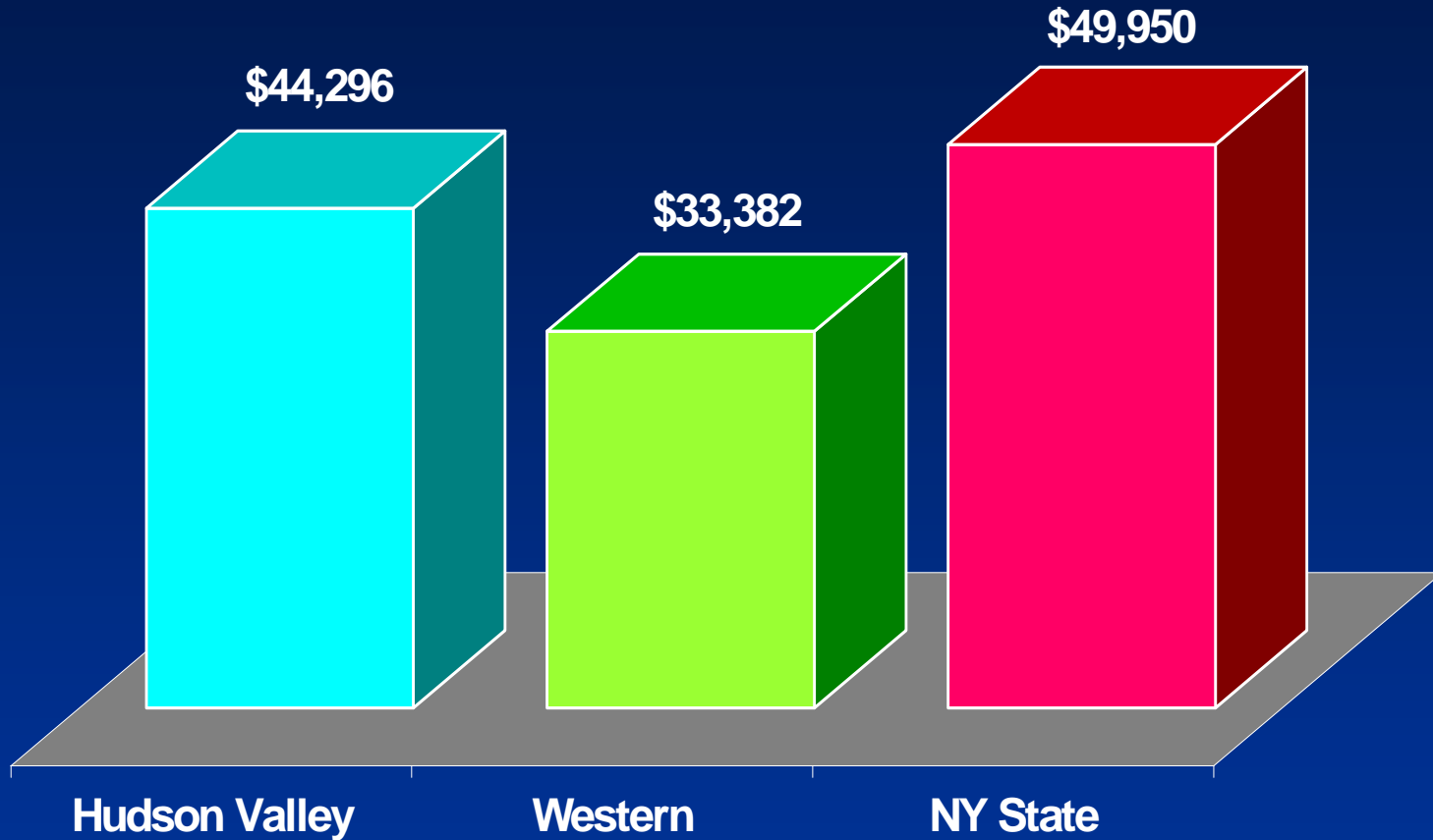
Source: Statewide projections – US Census Bureau
Regional projections – New York Statistical Information System

Unemployment Rates in Regions



Source: NYS Department of Labor (CEW) March 2006 estimates

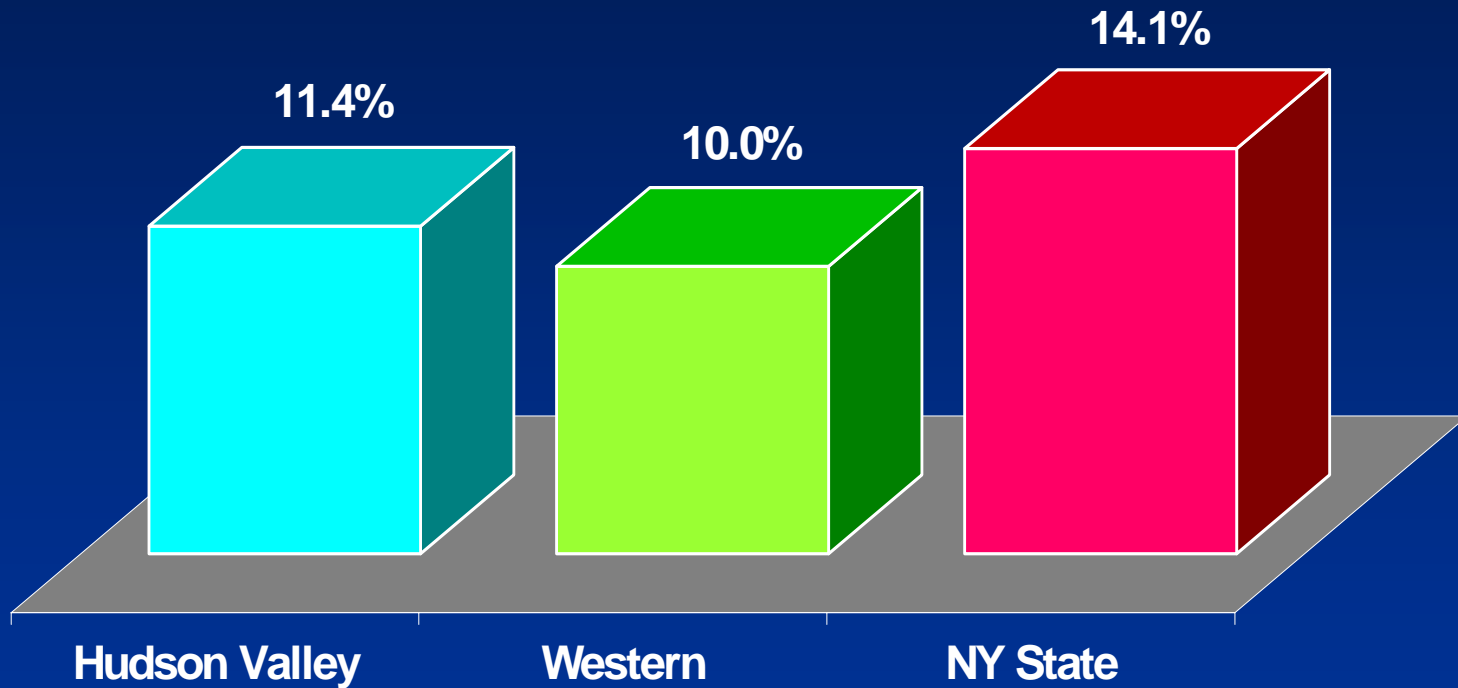
Average Wage in Regions



Source: NYS Department of Labor (CEW) 2004 estimates

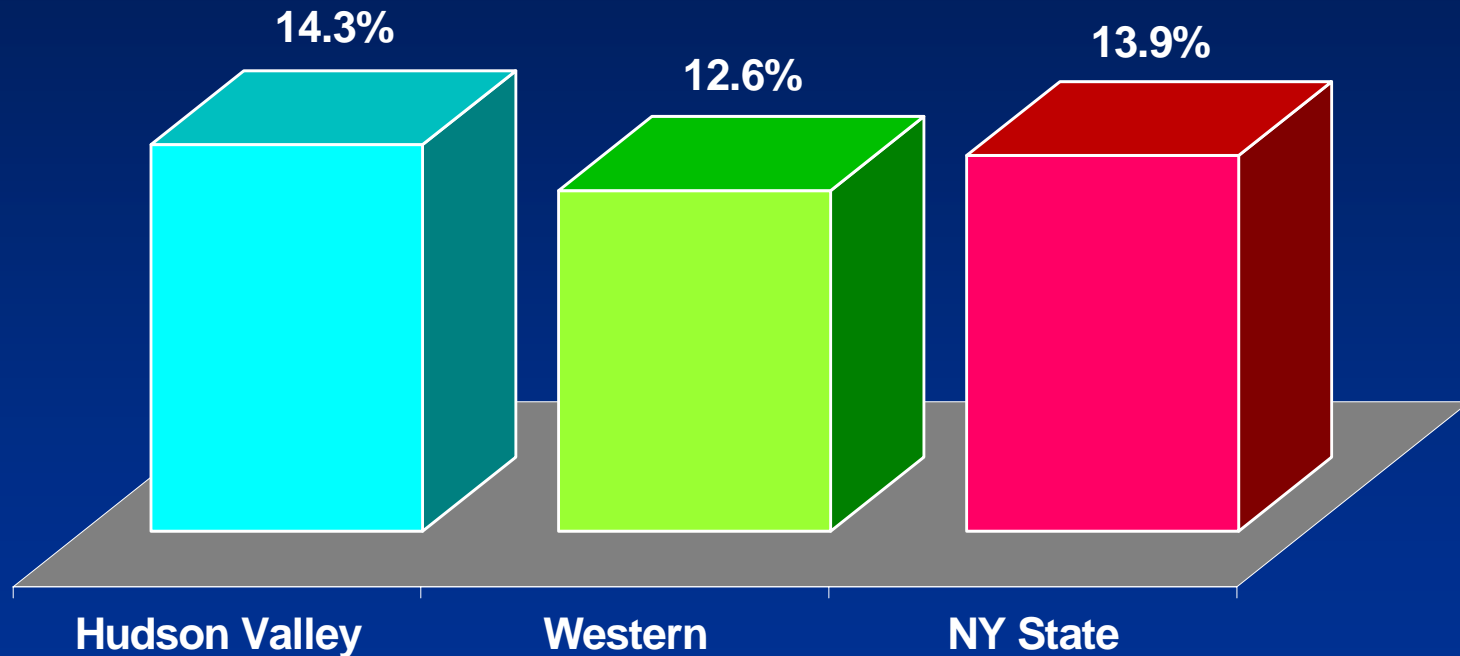
Uninsured in Regions

All Ages



Source: Uninsured from US Census Bureau (SAHIE) 2000 estimate

Health Care Share of Employment



Source: NYS Department of Labor (CEW) 2005 Q2 estimates

Hudson Valley Hospitals

- 39 Acute Care Hospitals
 - 7,179 Licensed Beds
 - 6,008 Available Beds
- 257,355 Discharges
- 29,700.2 FTEs in Hospitals

Source: 2004 SPARCS and ICR

Western Hospitals

- 29 Acute Care Hospitals
 - 4,956 Licensed Beds
 - 4,256 Available Beds
- 174,681 Total Discharges
- 23,934.0 FTEs in Hospitals

Source: 2004 SPARCS and ICR

Hospitals by County

Hudson Valley

County	Hospitals	CAHs
Westchester	16	--
Orange	6	--
Rockland	4	--
Dutchess	3	--
Ulster	3	1
Putnam	1	--
Sullivan	2	1
Delaware	4	3
Total	39	5

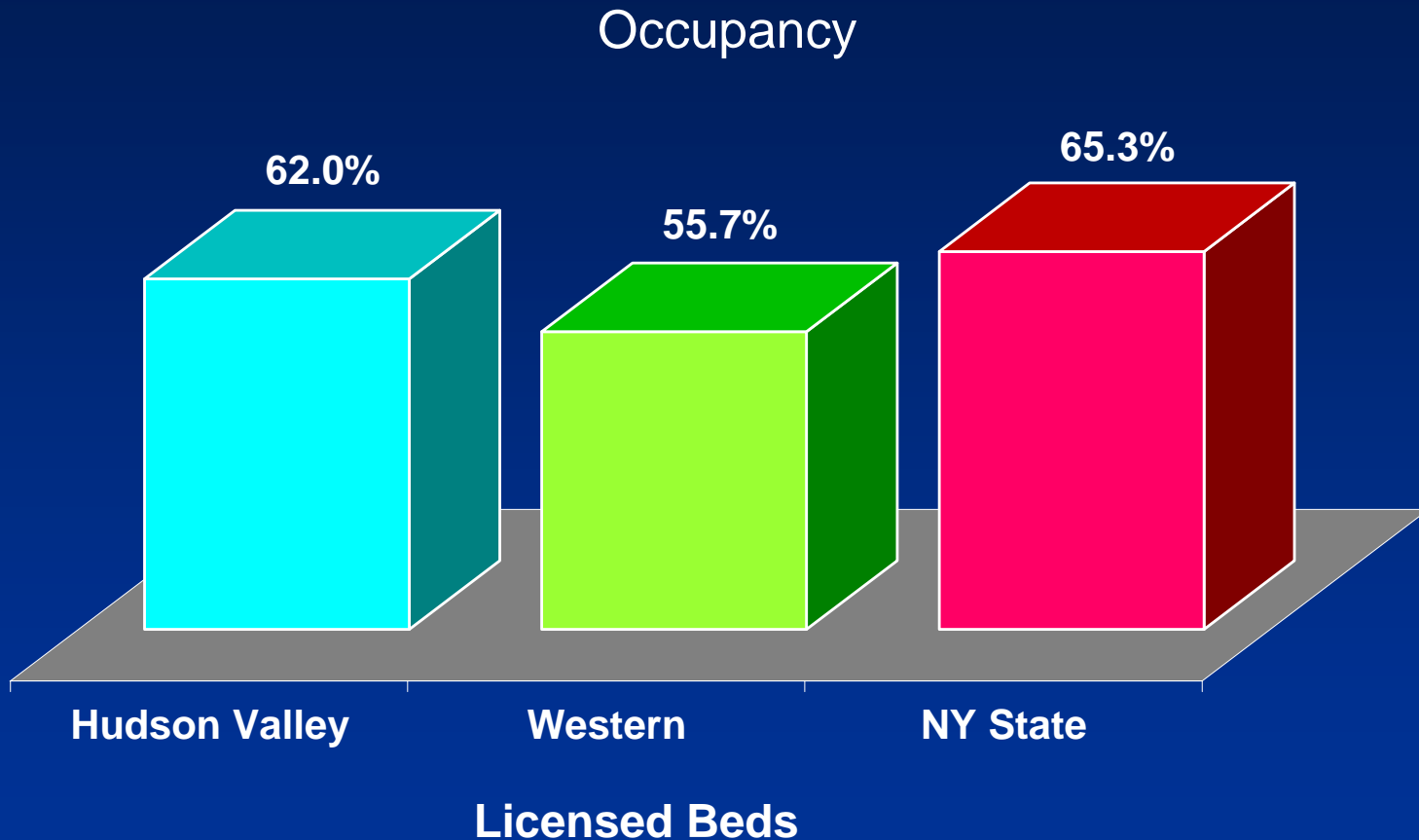
Western

County	Hospitals	CAHs
Erie	11	--
Niagara	5	--
Chautauqua	5	--
Cattaraugus	2	--
Genesee	2	--
Allegany	2	1
Orleans	1	--
Wyoming	1	--
Total	29	1

Major Hospital Systems

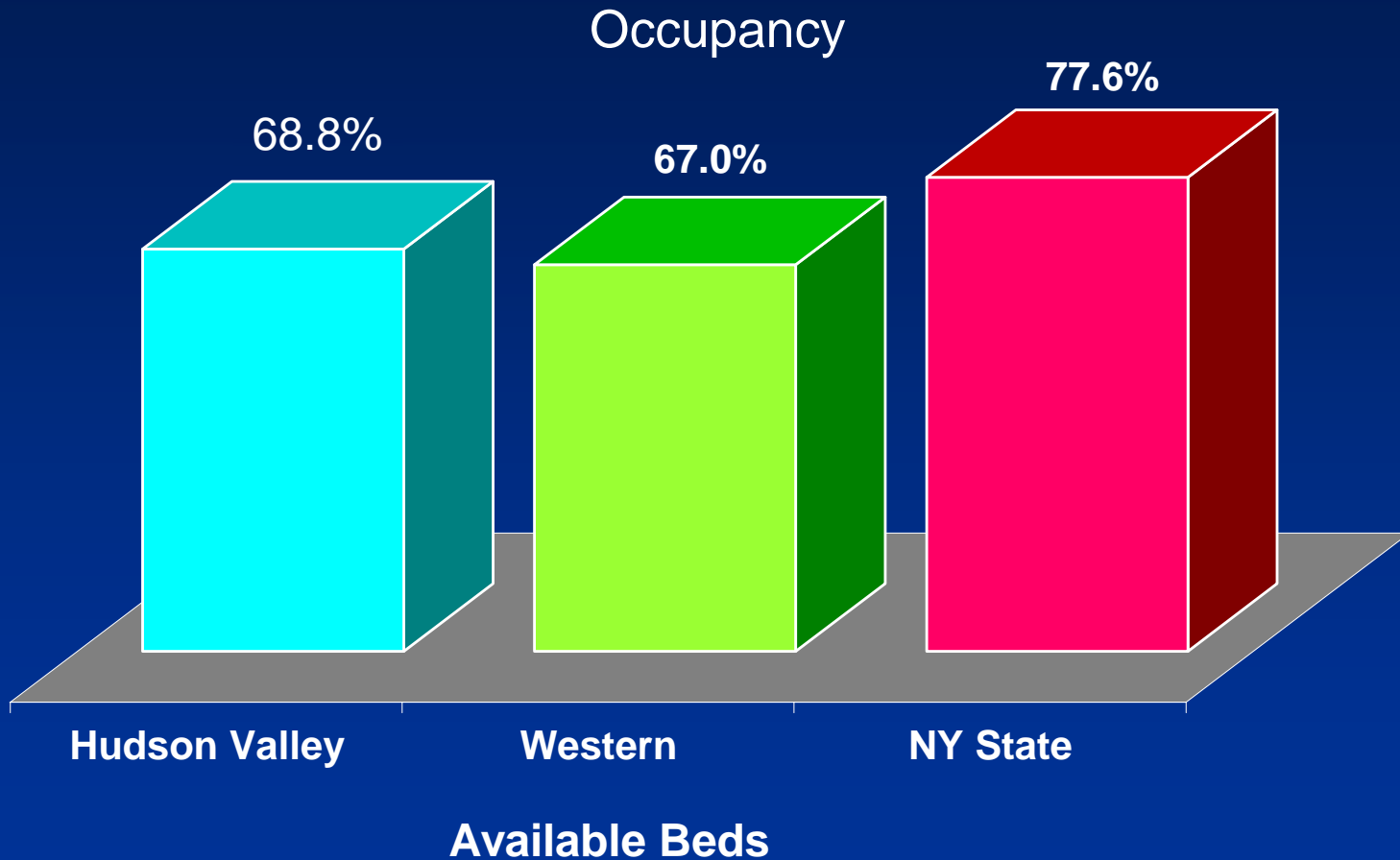
Hudson Valley	Hospitals
Pinnacle Healthcare	6
Stellaris	4
Western	
Kaleida Health	5
Catholic Health System	4

Licensed Bed Occupancy Rates



Source: 2004 SPARCS

Available Bed Occupancy Rates



Source: 2004 ICR

Hospital Financial Margins

Region	Counties	2004 Operating Margin (millions)	2004 Operating Margin Percent
Northern Metropolitan	Dutchess, Orange, Putnam, Rockland, Sullivan, Ulster, Westchester	- \$18.4	- 0.5%
Western	Allegany, Cattaraugus, Chautauqua, Erie, Genesee, Niagara, Orleans, Wyoming	- \$26.7	- 1.2%
Statewide		-\$127.1	-0.3%

Source: HANYS analysis Hospital 2004 Financial Statements

Note: 213 Hospitals Reporting statewide

Hospital Closures

Year	Name	Region
2005	New York United Hospital	HV
2003	St. Agnes Hospital	HV
1996	Julia Butterfield Memorial	HV
1995	Westchester Medical Center – Mental Retardation Institute	HV

Hospital Closures

Year	Name	Region
2001	Olean General Hospital*	Western
1999	Our Lady of Victory Hospital of Lackawanna	Western
1998	Columbus Community Hospital	Western
1998	Salamanca	Western

* Consolidated at one site still in operation.

Hudson Valley Nursing Homes

- 94 licensed facilities, with 15,055 nursing home beds
- Overall occupancy of 91.5% in 2003
 - Ranges from over 99.6% to 47.2%
- 1,995 low-acuity residents in nursing home beds; some can be cared for in less restrictive settings
- \$1.1B annual operating expenses in 2002

Western Nursing Homes

- 84 licensed facilities, with 11,835 nursing home beds
- Overall occupancy of 94.5% in 2003
 - Ranges from over 100% to 52.4%
- 1,642 low-acuity residents in nursing home beds; some can be cared for in less restrictive settings
- \$700M annual operating expenses in 2002

Nursing Homes by County

Hudson Valley

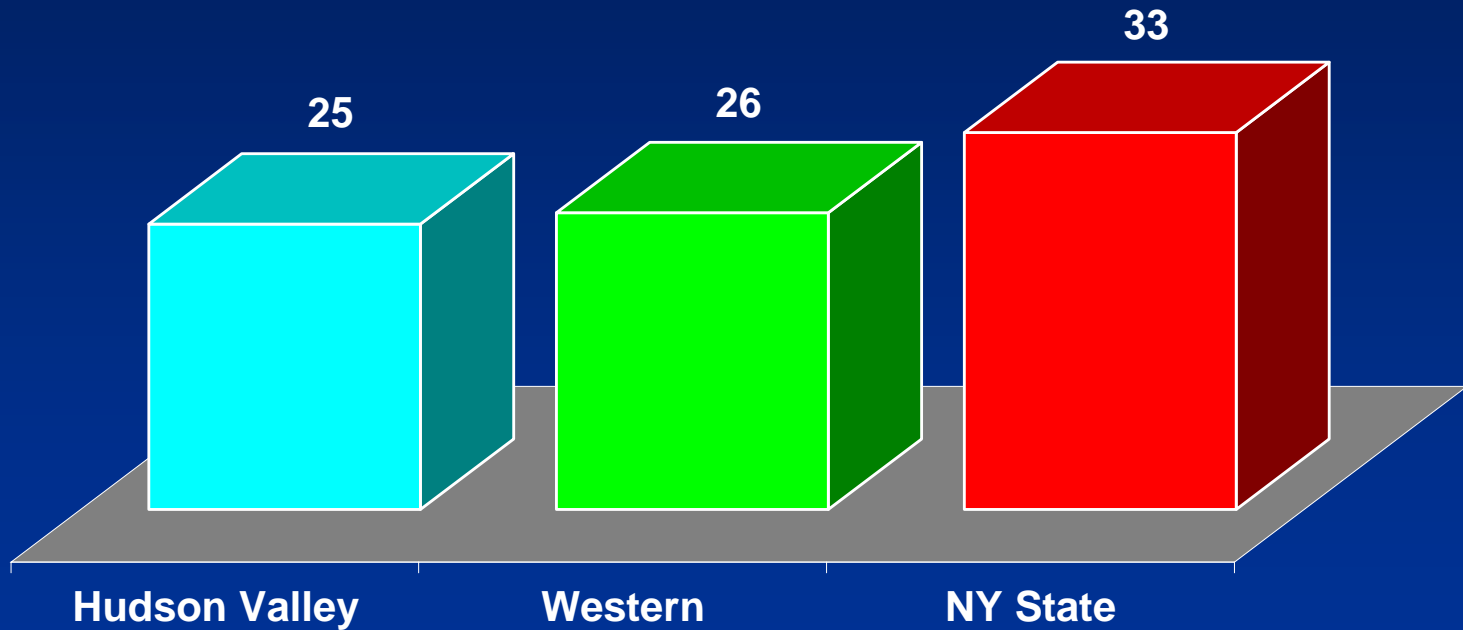
County	Nursing Homes
Westchester	44
Orange	10
Rockland	10
Dutchess	13
Ulster	7
Putnam	2
Sullivan	4
Delaware	4
Total	94

Western

County	Nursing Homes
Erie	44
Niagara	12
Chautauqua	9
Cattaraugus	6
Genesee	4
Allegany	4
Orleans	3
Wyoming	2
Total	84

Supply of Non-institutional Services

Non-Institutional Supply of LTC slots per 1000/65+



Nursing Home Closures

Year	Name	Region
2005	New York United Hospital Medical Center Skilled Nursing Pavilion	Hudson Valley
2004	Hutton Nursing Home	Hudson Valley
2003	Bethel Methodist Home	Hudson Valley

Nursing Home Closures

Year	Name	Region
2004	Manor Oak Skilled Nursing Facilities Inc – Chautauqua County	Western
2004	Manor Oak Skilled Nursing Facilities Inc – Erie County	Western
2004	Kresge Residence	Western
2004	St. Luke Manor of Batavia	Western
2003	The Gardens at Manhattan Health and Rehabilitation Center	Western

Nursing Home Closures

Year	Name	Region
2003	Williamsville View Manor	Western
2003	St. Mary's Manor	Western
2003	St. Clare Manor	Western
2003	Manor Oak Skilled Nursing Facilities Inc – Wyoming County	Western
2003	Mt. St. Mary's Long Term Care Facility Inc	Western

Questions?