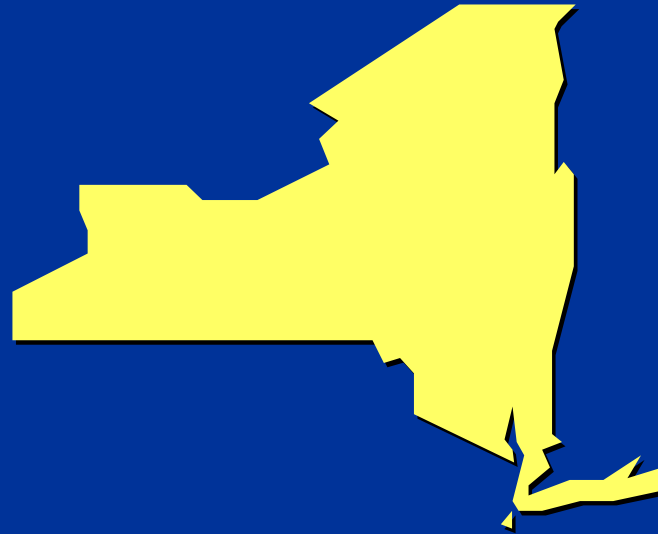


Commission on Health Care Facilities in the 21st Century



Central New York Region Overview

Size of Region

- Largest geographically of the six commission regions
 - 23 counties
 - 19,367 square miles
 - 41% of the state
 - Total population is nearly 3 million
 - 16% of the state

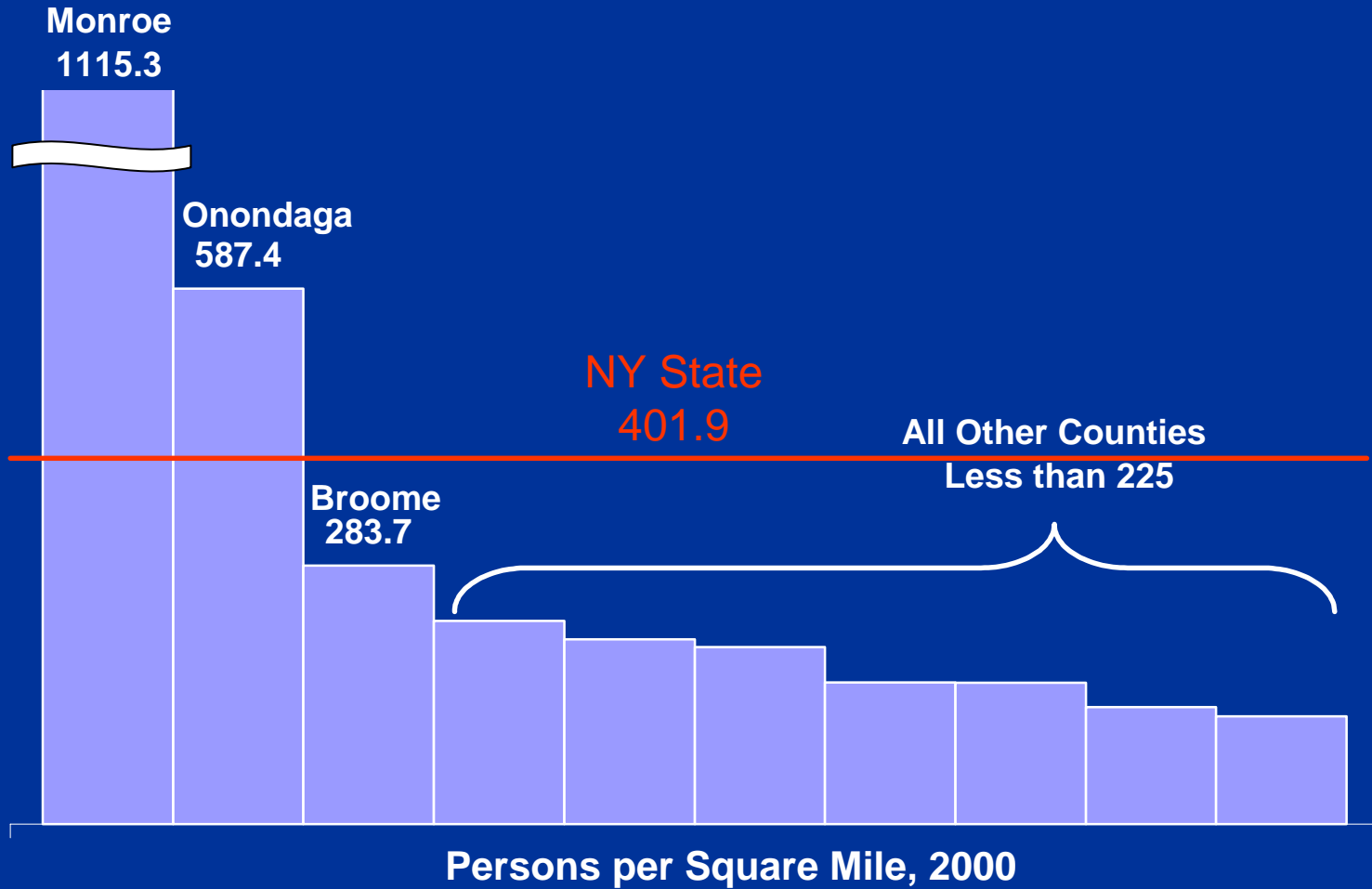
Sub-regions within the Central Region

- **Central** – Cayuga, Cortland, Onondaga and Oswego
- **Finger Lakes** – Livingston, Monroe, Ontario, Seneca, Wayne and Yates
- **Mohawk Valley** – Herkimer, Madison and Oneida
- **North Country** – Jefferson, Lewis and Saint Lawrence
- **Southern Tier** – Broome, Chemung, Chenango, Schuyler, Steuben, Tompkins and Tioga

Geographic Diversity



Mix of urban and rural areas

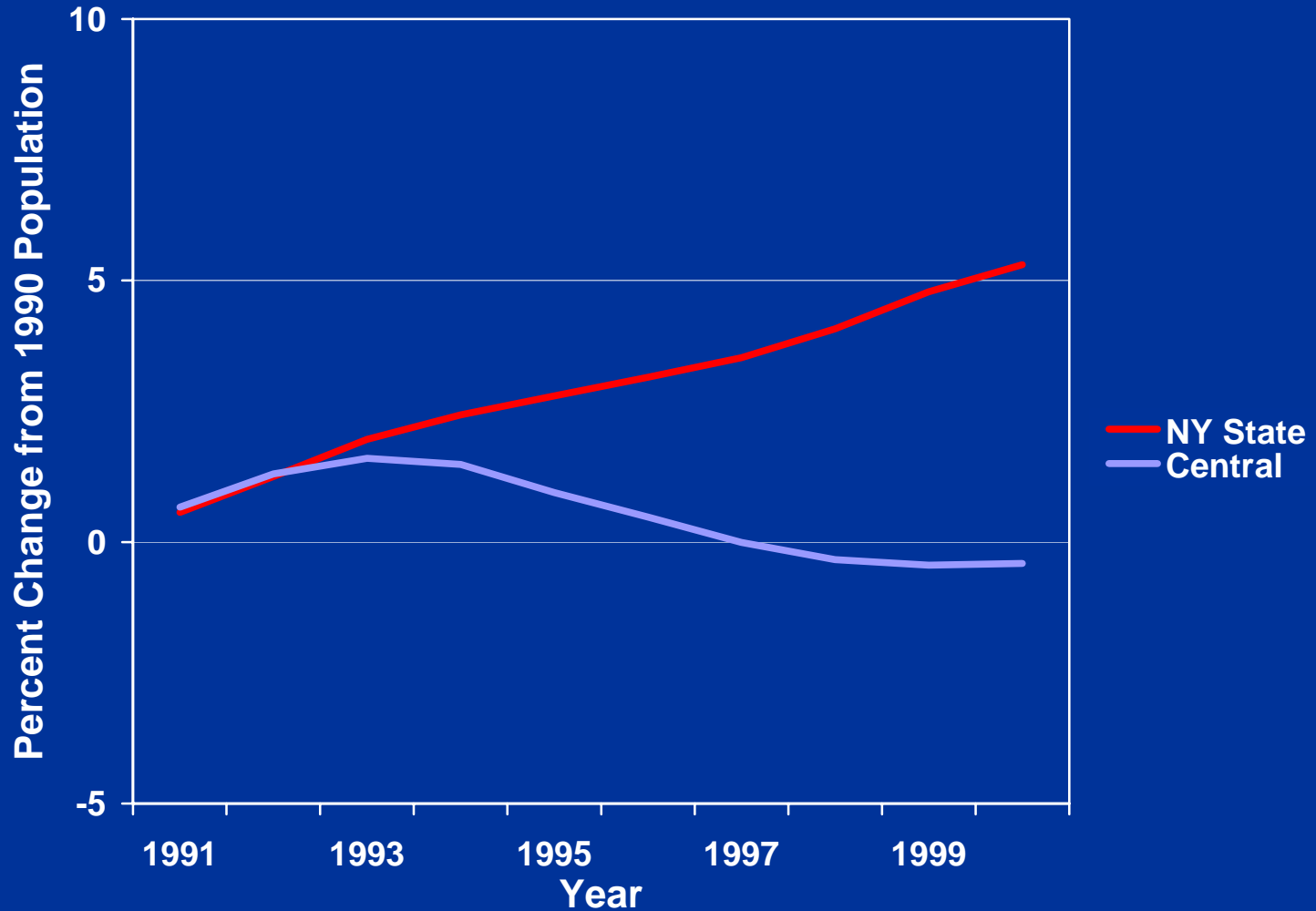


Population by County

County	2004 Population
Monroe	735,177
Onondaga	459,805
Oneida	234,962
Broome	197,696
Oswego	123,776
Jefferson	111,467
St. Lawrence	111,306
Ontario	103,504
Tompkins	100,135
Steuben	98,814
Wayne	93,861
Chemung	89,984

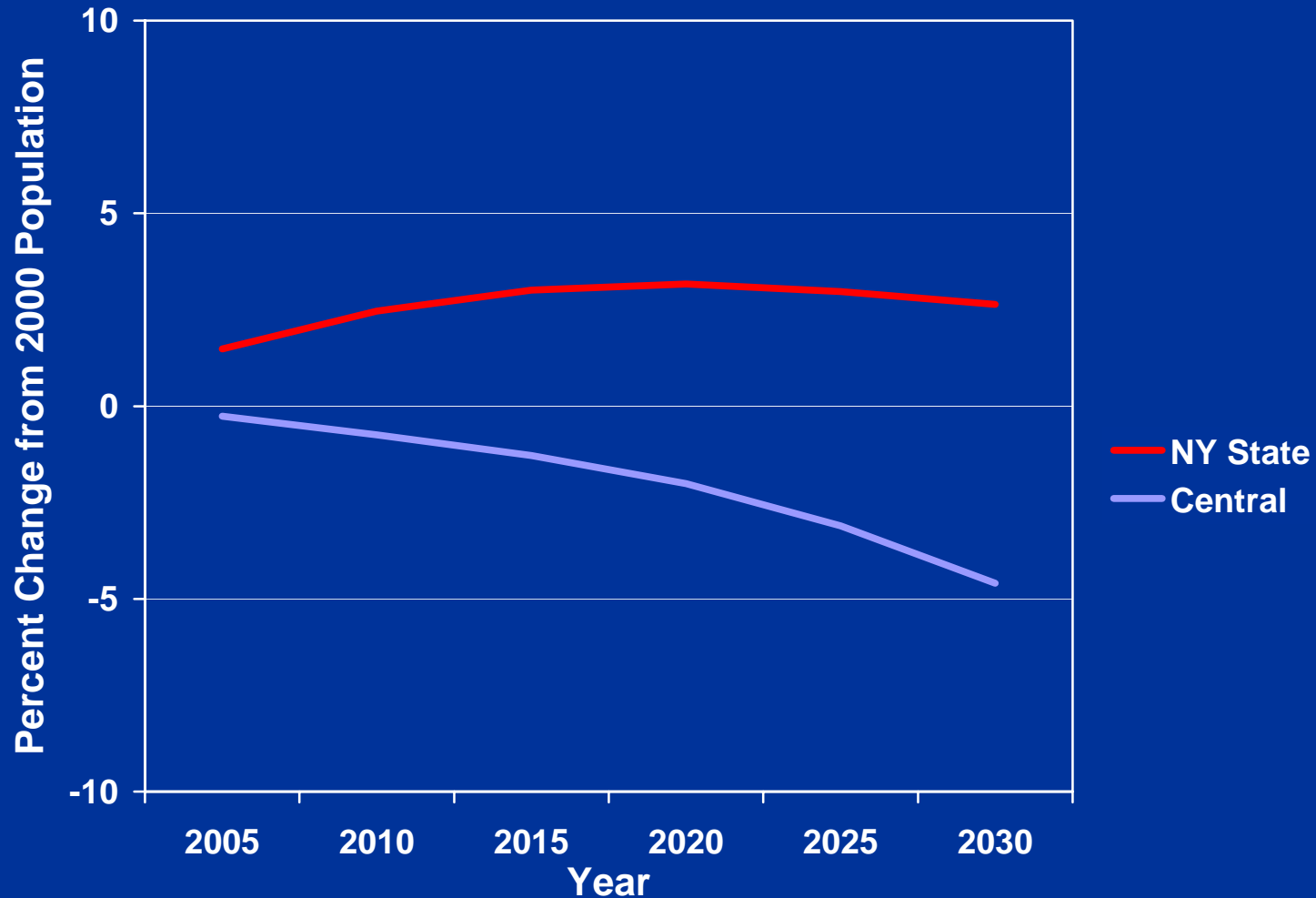
County	2004 Population
Cayuga	81,916
Madison	70,407
Livingston	64,819
Herkimer	63,858
Chenango	51,861
Tioga	51,535
Cortland	49,006
Seneca	35,075
Lewis	26,564
Yates	24,669
Schuyler	19,505
Total	2,999,702

During the 1990s, Central Region population remained flat



Source: U.S. Census Bureau

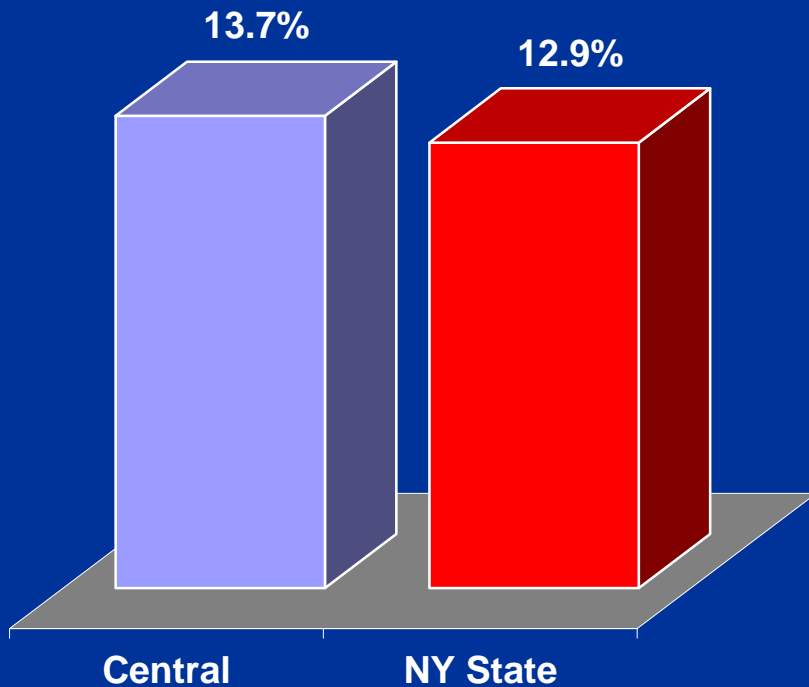
Central Region population is expected to decline



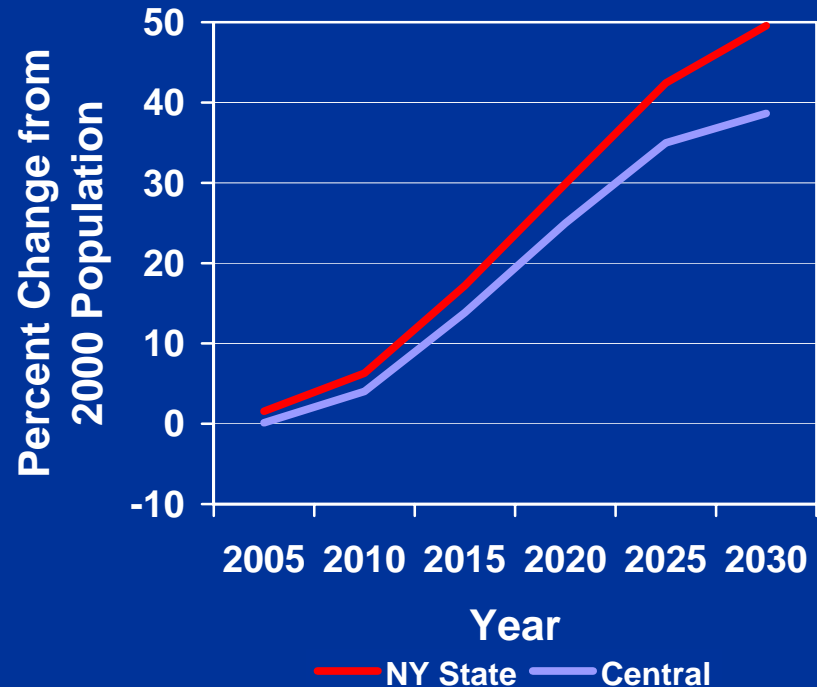
Source: Statewide projections – US Census Bureau
Regional projections – New York Statistical Information System

Age of Central Region Population

65+ Population in 2000



65+ Population Growth to 2030



Elderly population varies throughout the region

	65+ Population	
County	2005	2030
Broome	15.8%	20.0%
Onondaga	14.1%	20.9%
Monroe	12.8%	18.9%
Tompkins	9.1%	12.6%
Yates	15.2%	21.5%

Source: New York Statistical Information System

Unemployment and Uninsured rates lower than statewide averages

	Central	NY State
Unemployment	5.5%	5.8%
Average Wage	\$34,753	\$49,950
Uninsured	10.6%	14.1%

Sources: Average Wage and Unemployment from NYS Department of Labor (CEW) 2004 estimates, Uninsured from US Census Bureau (SAHIE) 2000 estimate

Central Region Demographic Summary

- Region is large and diverse
- Differences require a sub-regional approach
- Must consider factors such as geography and climate
- Population is expected to decrease
- Population is aging at same rate as state
- Insurance coverage is relatively broad

Central Region Hospitals

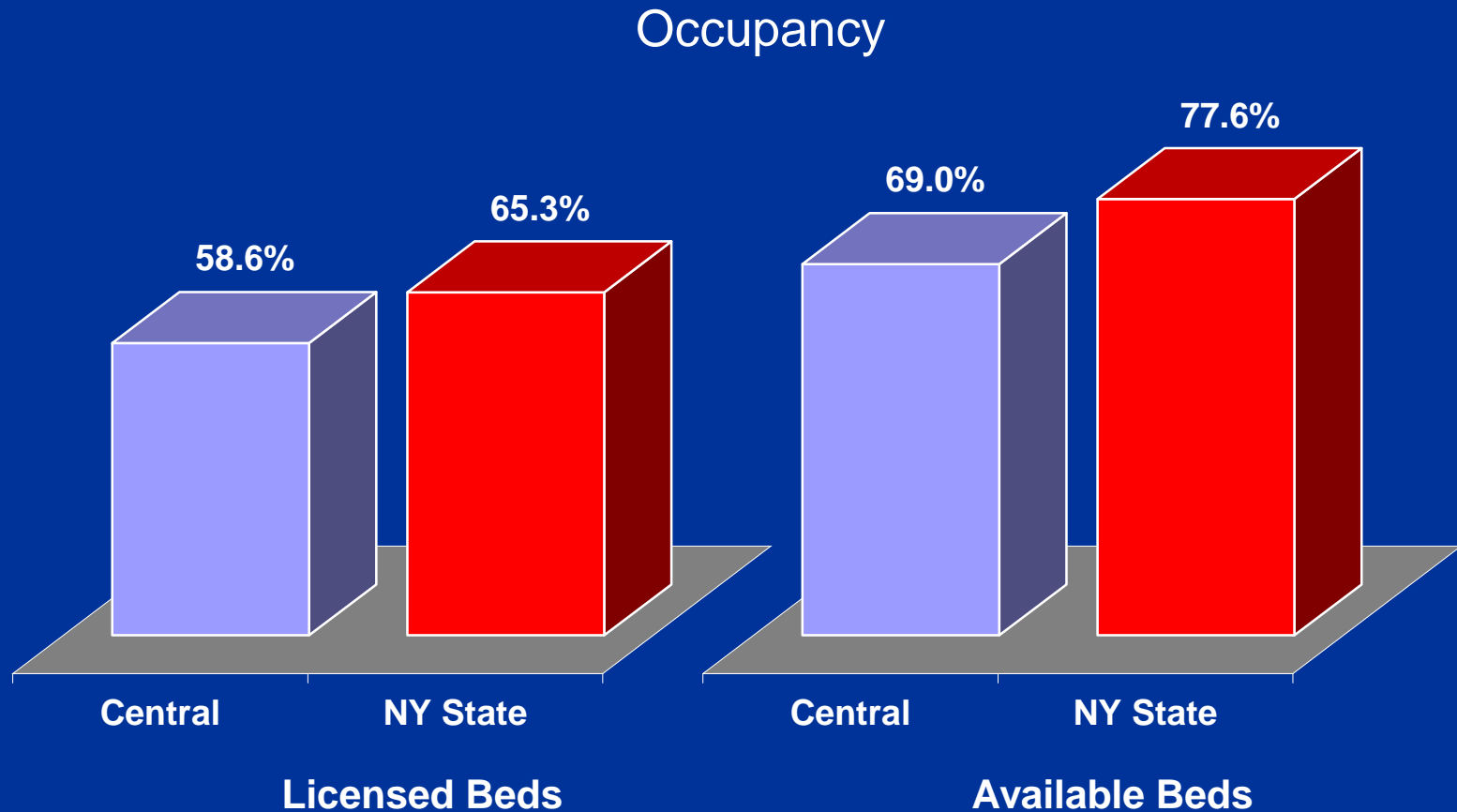
- 48 Acute Care Hospitals
 - 5 Critical Access Hospitals (CAH)
 - 7 Sole Community Hospitals (SCH)
- 8,438 Licensed Beds
- 7,600 Available Beds
- 49,156.5 FTEs in Hospitals

Hospitals by County

County	Hospitals	CAH	SCH
Monroe	7	--	--
Onondaga	4	--	--
Oneida	4	--	--
Broome	3	--	--
Oswego	2	--	--
Jefferson	3	1	1
St. Lawrence	5	1	4
Ontario	3	--	--
Tompkins	1	--	--
Steuben	3	--	--
Wayne	1	--	--
Chemung	2	--	--

County	Hospitals	CAH	SCH
Cayuga	1	--	--
Madison	2	--	--
Livingston	1	--	--
Herkimer	1	1	--
Chenango	1	--	--
Tioga	--	--	--
Cortland	1	--	1
Seneca	--	--	--
Lewis	1	--	1
Yates	1	1	--
Schuyler	1	1	--
Total	48	5	7

Occupancy rates are lower than statewide averages



Source: 2004 SPARCs and ICR

Hospital Financials

Region	Counties	2004 Operating Margin	2004 Operating Margin Percent
Rochester	Chemung, Livingston, Monroe, Ontario, Schuyler, Steuben, Wayne, Yates	\$49.9	2.1%
Central NY	Broome, Cayuga, Cortland, Herkimer, Jefferson, Lewis, Madison, Oneida, Onondaga, Oswego, St. Lawrence, Tompkins	\$52.5	1.9%
Statewide		(\$127.1)	-0.3%

Source: HANYS analysis Hospital 2004 Financial Statements

Note: 213 Hospitals Reporting throughout NY State, no statement from Chenango County in Central Region

Central Region Hospital Closures in the past decade

Year	Name	County
2003	Myers Community Hospital	Wayne
2001	Genesee Hospital	Monroe
1999	St. Mary's Hospital	Monroe
1997	Samaritan Medical Center – Stone Street Division	Jefferson
1996	Mohawk Valley General	Herkimer

Central Region Nursing Homes

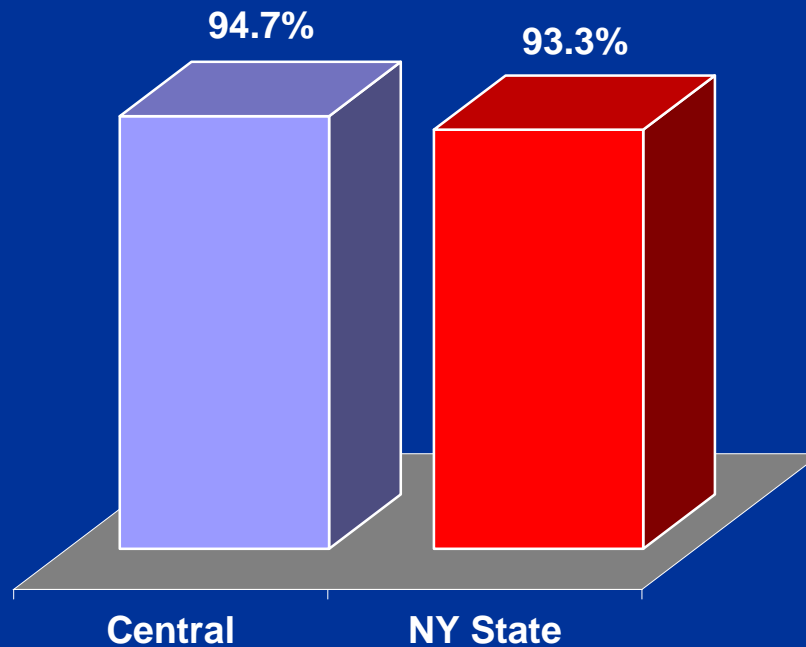
- 156 Licensed facilities
- 22,287 licensed nursing home beds
- 3,779 low acuity residents in nursing home beds
- \$1.3B annual operating expenses in 2002

Nursing Homes by County

County	Nursing Homes
Monroe	34
Onondaga	14
Oneida	19
Broome	9
Oswego	6
Jefferson	5
St. Lawrence	9
Ontario	6
Tompkins	5
Steuben	6
Wayne	4
Chemung	5

County	Nursing Homes
Cayuga	5
Madison	4
Livingston	4
Herkimer	5
Chenango	5
Tioga	2
Cortland	3
Seneca	2
Lewis	1
Yates	2
Schuyler	1
Total	156

Central Region Nursing Home Occupancy



Source: 2003 RHCFC Cost Reports

Nursing Home Closures

Year	Name	County
2003	Wesley on East, LTD	Monroe
2003	Potsdam Nursing Home	St Lawrence

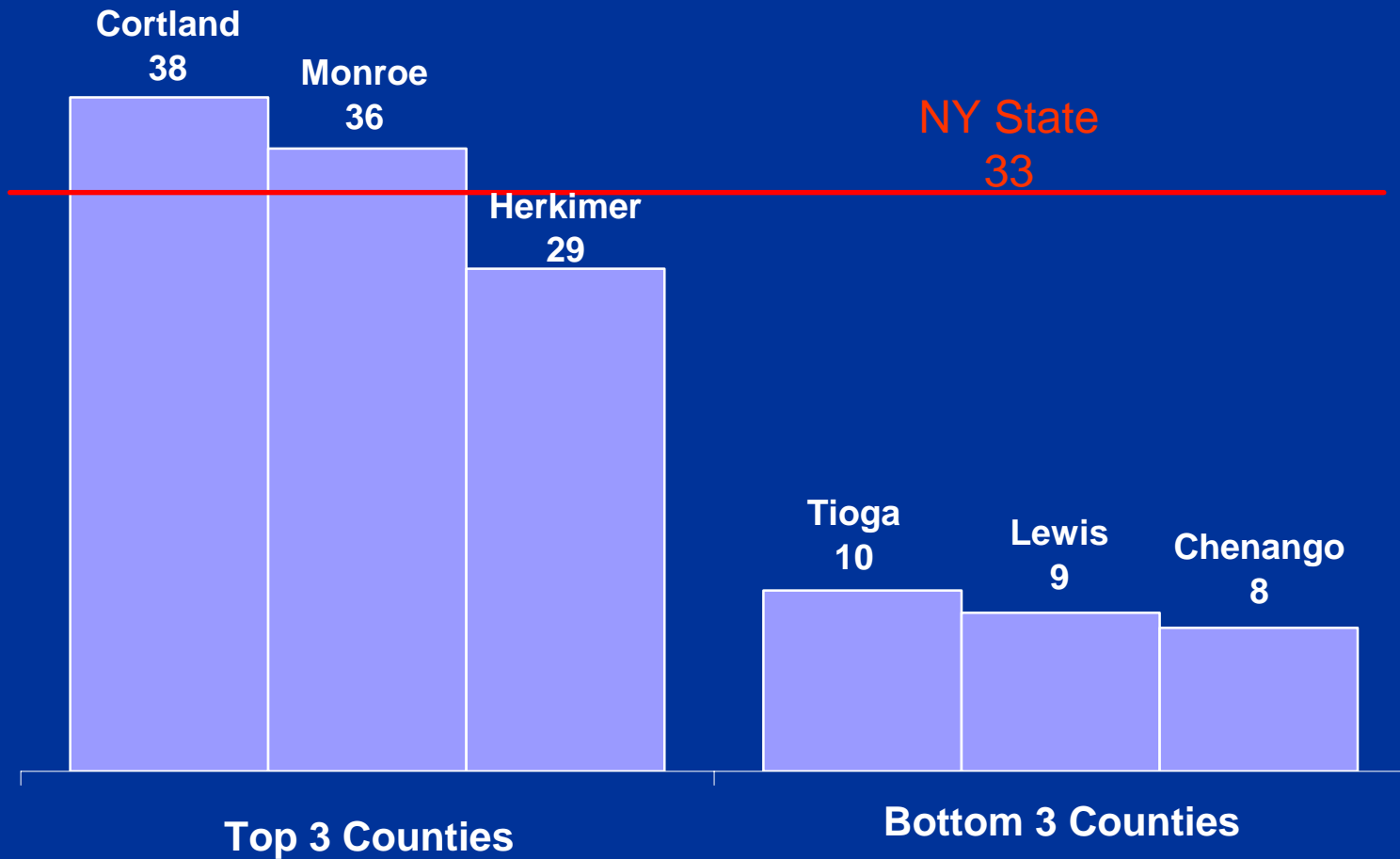
Central Region

Other Long Term Care

- 1,161 adults day health care “slots”
- 3,805 long-term home health care “slots”
- 3 managed long-term care programs
- 7,171 supportive housing units
 - nearly 4,700 adult care facility beds
 - 629 Medicaid assisted living beds,
 - 304 CCRC units, and
 - over 1,500 assisted living units pending

Non-Institutional Services in the Central Region

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



Questions?