

State of the Sector

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President & CEO

AHCA[®]
AMERICAN HEALTH CARE ASSOCIATION

NCAL[®]
NATIONAL CENTER FOR ASSISTED LIVING



Industry Trends

Nursing Home Occupancy

Current Average Occupancy

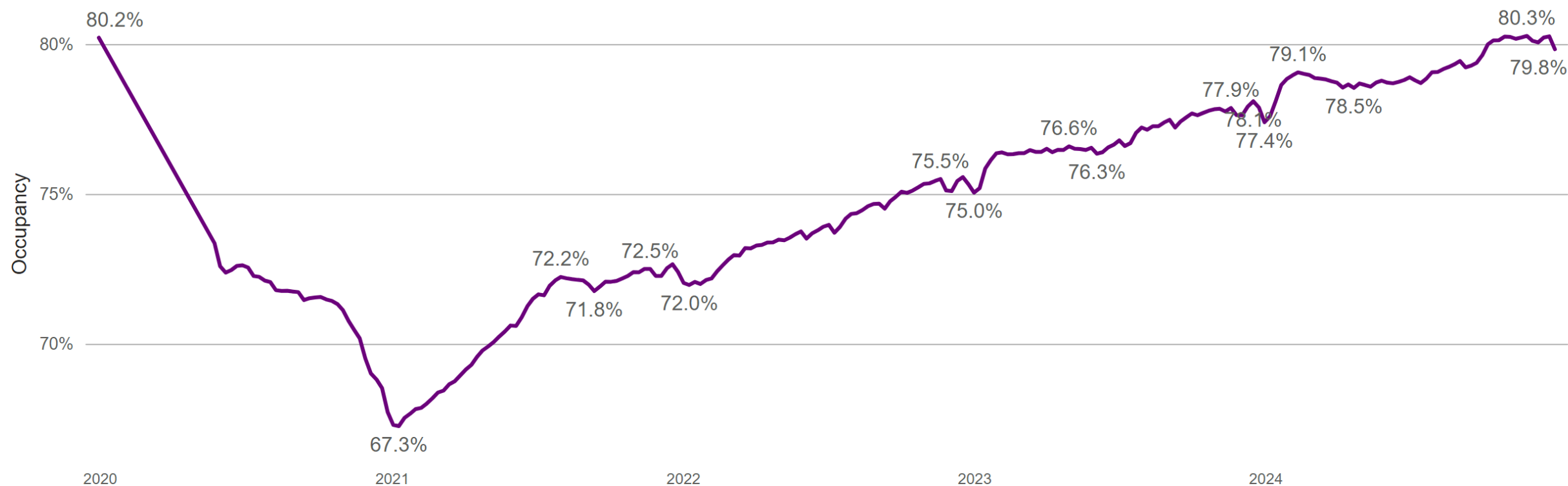
79.8%

State

All



Average Occupancy

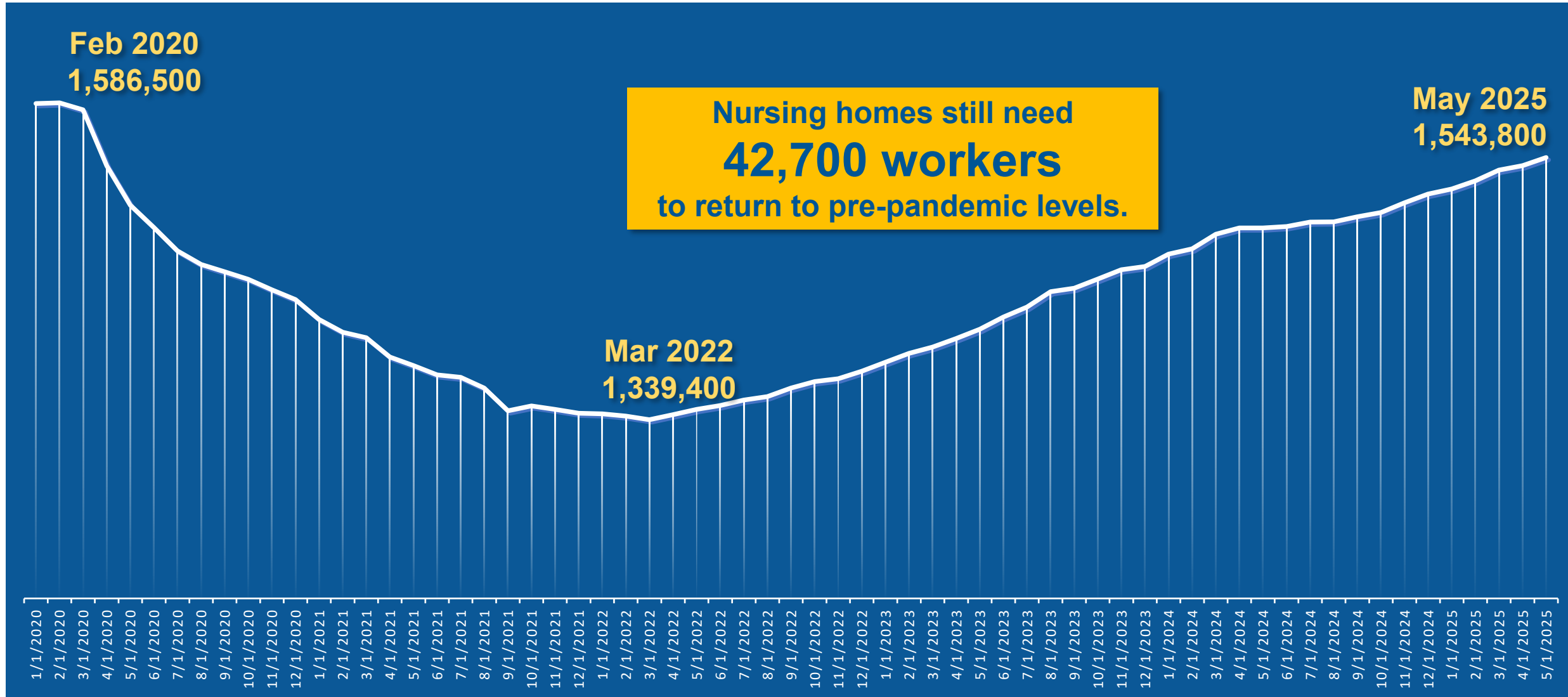


Data Through Week
Ending:

December 29, 2024

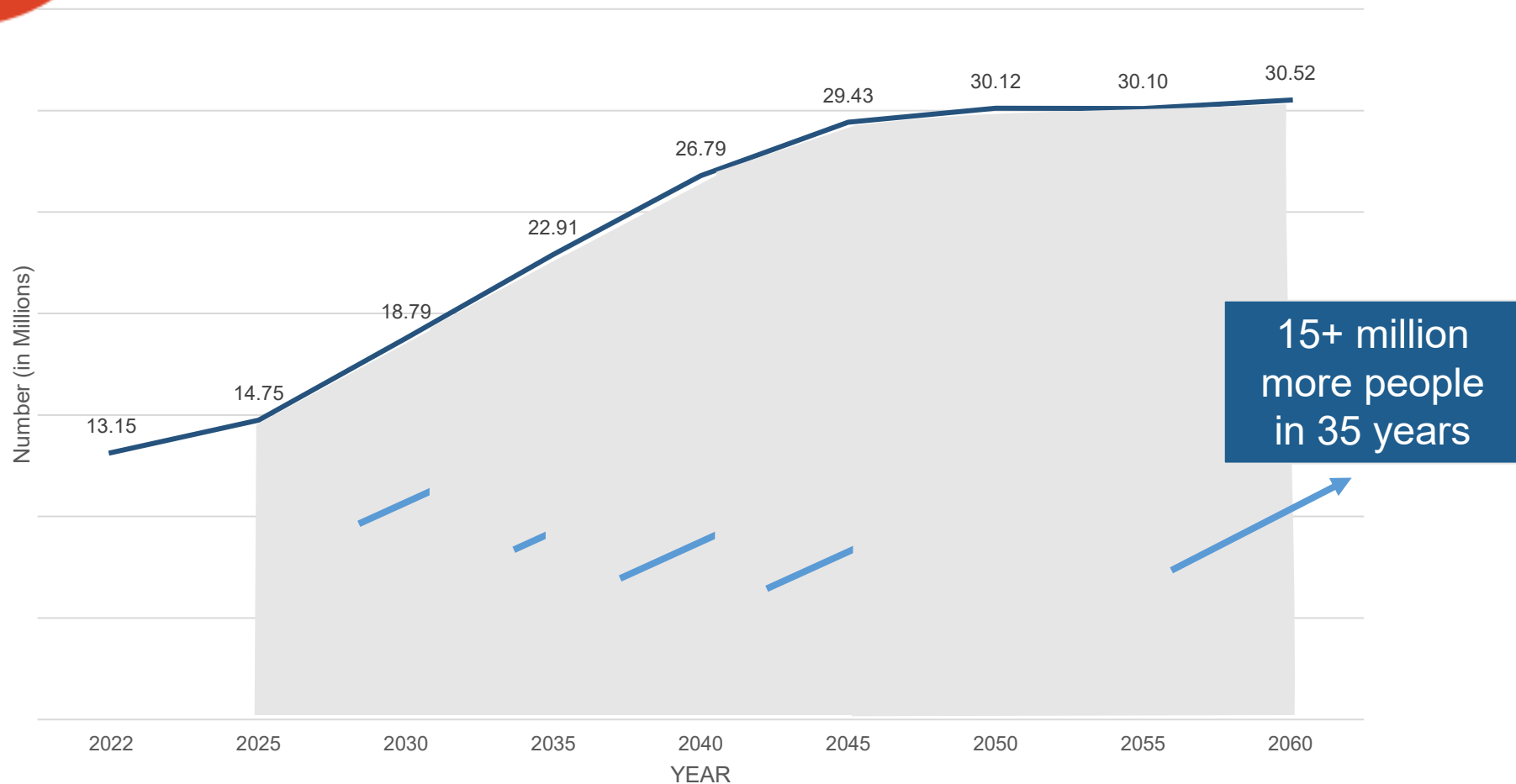
Source: Payroll-Based Journal (PBJ) and NHSN

Notes: PBJ data used to calculate 2019 average occupancy. All other occupancy data based on NHSN. Starting in October 2024, resident census is based on the denominator of the resident COVID vaccination measure.

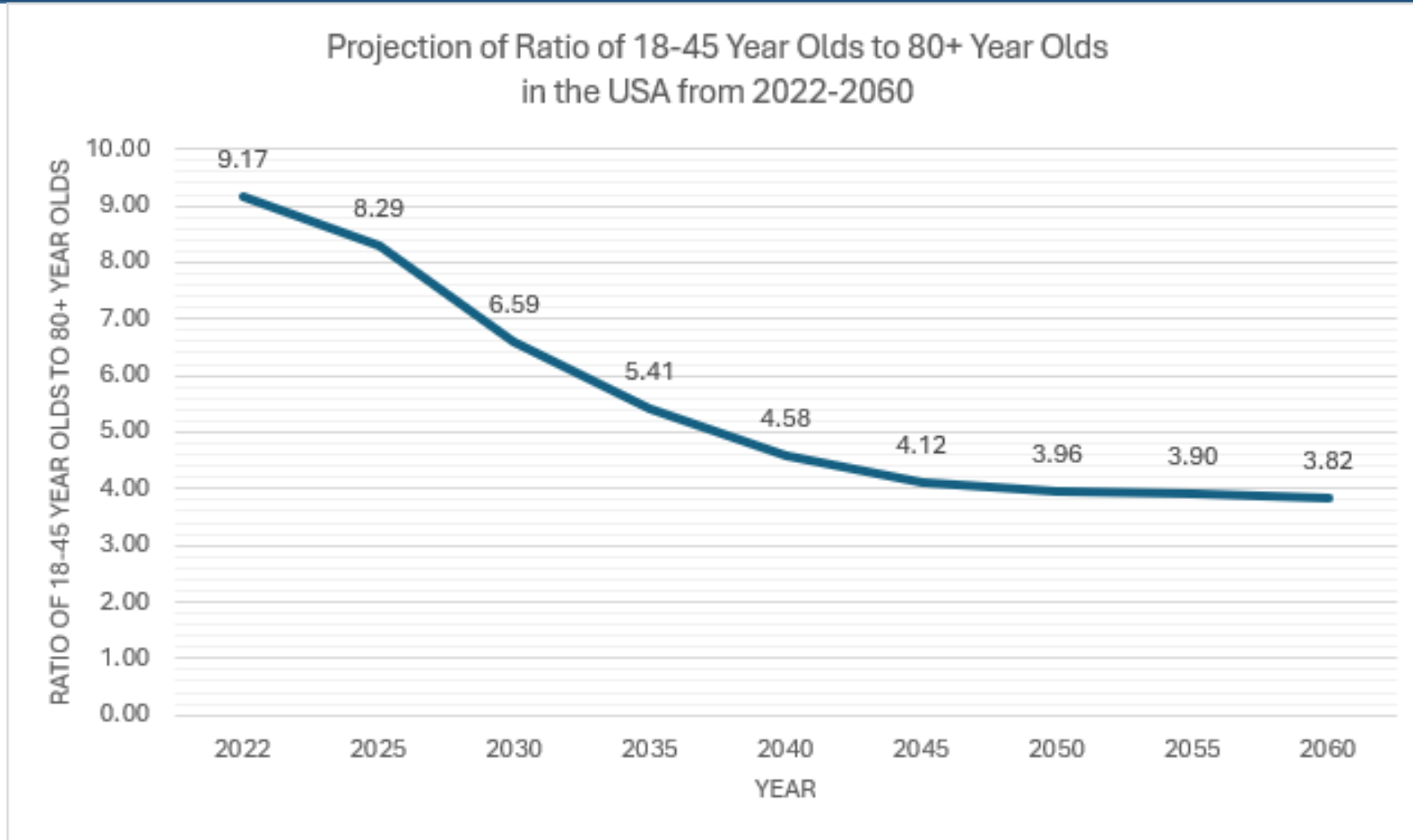




Population Projections of 80+ Year Olds from 2022-2060



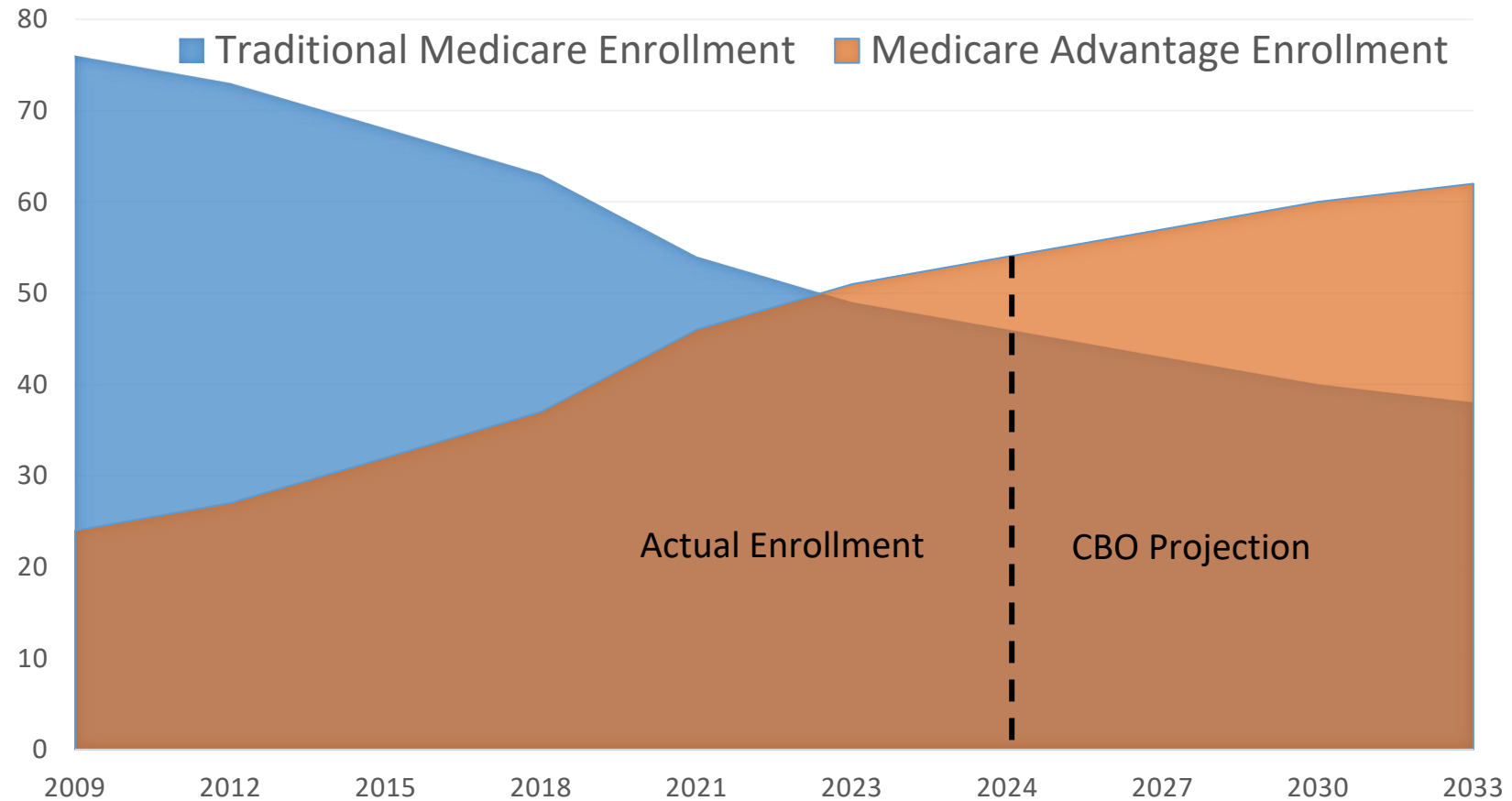
The Future Workforce



Data Source: [US Census Bureau](#) 2023 National Population Projections. This incorporates the results of the 2020 Census and uses official estimates of the resident population on July 1, 2022 as the base for projecting the U.S. population from 2023 to 2060.



Medicare Advantage is Now the Majority – Projections (2024-2033)





Association Update



Who We Are and What We Do

- Federation model
 - 49 NCAL state affiliates
 - 50 AHCA state affiliates
- Members
- Voice in Washington
- Leader on Quality

Increase Available Workforce for LTC Providers

1. Defeat minimum staffing rule
2. Advance health care visa legislation/reinvigorate efforts for visa programs
3. Provide resources to members to increase worker recruitment and retention
4. Ensure increased state and/or federal funding for health care worker training programs
5. Advocate for state or federal policies and legislation to support workforce development, promote long term care careers and attract workers

Improve Quality of Care

1. Provide resources for members to improve quality of care and navigate survey process
2. Increase 2026 Quality Award participants
3. Advocate for changes in survey and regulatory process to support quality improvement
4. Increase Assisted Living provider enrollment in the Long Term Care Data Collaborative

2025 3-Year Strategic Plan

Ensure the Economic Health of Sector

1. Defend sector from Medicaid or Medicare cuts by Congress or Administration
2. Stop any unfunded mandate
3. Preserve SNF/AL ability to own & control financial risk and increase number of lives under a population health management arrangement to 150,000 by 2026
4. Seek development of a SNF-specific wage index within the labor market basket rate
5. Advocate for legislation to hold MA plans accountable to beneficiaries and pay providers fair, timely and adequate reimbursement
6. Ensure there is a net increase in the SNF PPS annual payment rule
7. Support State Affiliates in Medicaid Reimbursement Advocacy

Be a Strong Organization

1. Raise \$4.8 million of \$12 million in first of two-year cycle in hard and soft money
2. Maintain membership level and engage new owners
3. Maintain Association reserves of at least 50% of operating budget
4. Increase non-dues revenue from 2024 budget



AHCA Priorities

- Repeal staffing mandate
- Protect entitlements (Medicaid)
- Rationalize regulatory environment
- Medicare Advantage strategic development
- Workforce development



Reconciliation Update

- Congress passed the Big, Beautiful Bill on July 3
- President Trump signed the bill into law on July 4
 - Excludes nursing homes and intermediate care facilities from provider tax reductions
 - Retroactive coverage
 - 10-year delay of staffing mandate



The Better Way

AHCA's forward-looking policy agenda to deliver bold solutions for quality long term and post-acute care.



How We All Win

We believe there is A Better Way forward, and we stand ready to offer **bold solutions** that benefit all stakeholders:

Seniors & Families

Quality
Choice
Access
Clear information

Caregivers

Grow jobs
Competitive pay & benefits
Develop skills & careers

Policymakers

Create efficiencies
Ensure accountability & transparency
Better return on investment

Providers

Sustainability & growth
Support improvement
Modernize
Foster innovation

AHCA 2025 Policy Agenda

Our work will remain centered on finding efficient and effective solutions that support the continued delivery of high-quality care to our nation's seniors and individuals with disabilities.

Key priorities include:





01

Strengthening
The Long Term
Care Workforce

A Lack of Caregivers Is Fueling An Access To Care Crisis

- Workforce shortages in long term care have forced many nursing homes and assisted living communities to limit or deny new admissions, downsize their facilities, or close altogether.
- Since 2020, **774 nursing homes have closed**, displacing 28,000 residents.
- The overall decline in the number of nursing homes accelerated by nearly **four times** compared to pre-pandemic.



Source: AHCA's [2024 Access to Care Report](#)

A Better Way:

Our Solutions

Build the Pipeline

Address faculty shortages at nursing schools

Streamline legal pathways for international caregivers to work in the U.S.

Recruit & Retain

Student loan forgiveness, tax credits, affordable housing & childcare incentives

Subsidies & grants to schools whose graduates work in LTC

Develop Skills

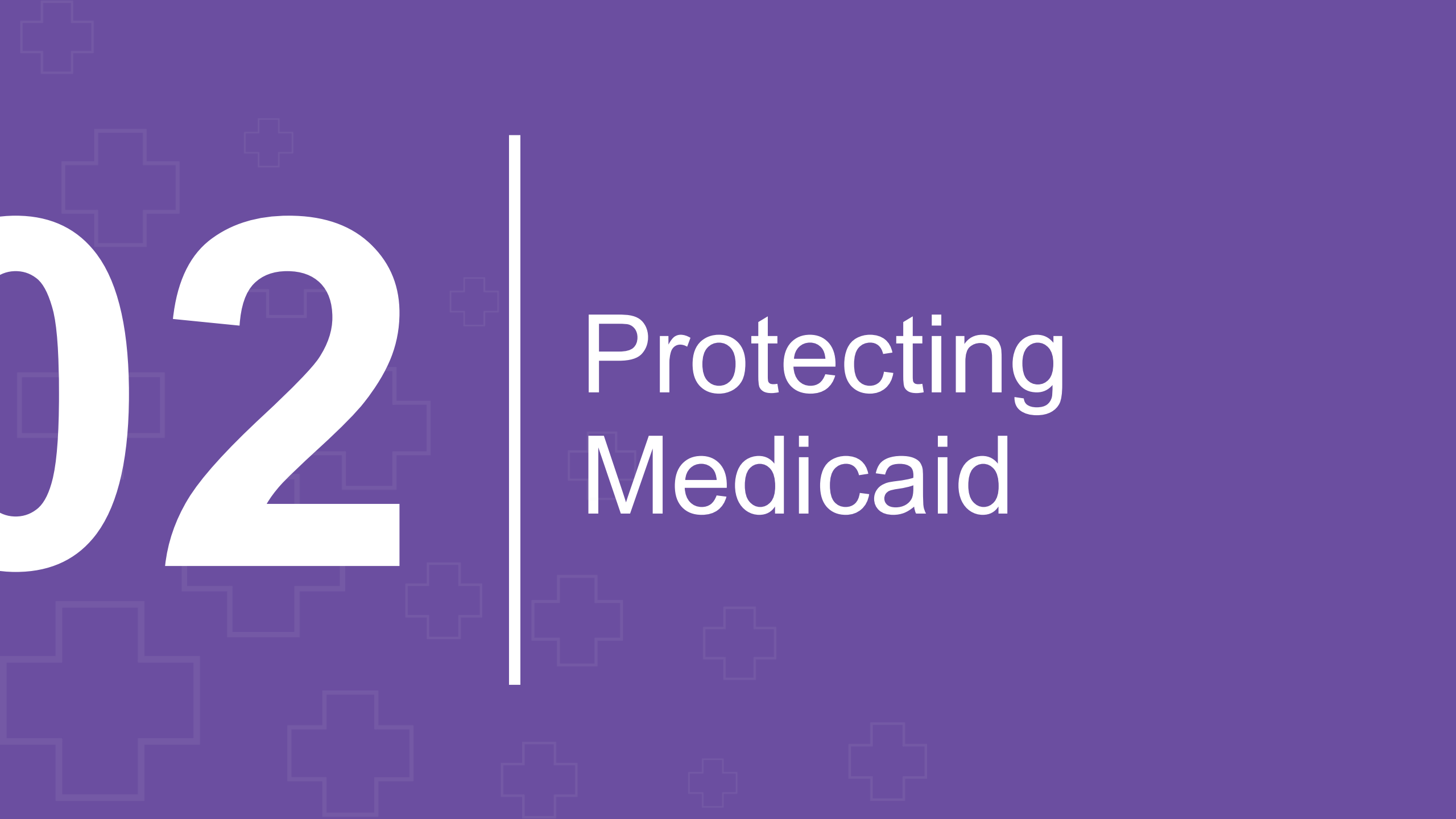
Grants and scholarships for ongoing training

Expand career ladder programs

Remove Barriers

Repeal the federal staffing mandate

End bans on in-house CNA training programs



02

Protecting Medicaid

Medicaid:

The Lifeblood of Long Term Care

- Nearly **two-thirds** of nursing home residents rely on Medicaid to cover their care.
- Medicaid in many states fails to cover the actual cost of nursing home care (**on average, 82 cents on the dollar**), leaving providers with a significant financial shortfall.
- Chronic underfunding makes it **difficult to invest** in the nursing home workforce, care services, and modernization. For some, it means **closing their doors** all together.



Source: ASPE, ["Assessing Medicaid Payment Rates and Costs of Caring for the Medicaid Population Residing in Nursing Homes: Final Report"](#), October 2024

A Better Way: Our Solutions

- Protect and defend Medicaid from cuts.
- Federal policymakers should require that Medicaid rates are brought up to equal the cost of care and regularly updated to keep pace with increasing costs.

03

Reaffirming the
Promise of
Medicare
Advantage

Challenges with Access

- As patients get sicker, MA plans are too often **denying or delaying** seniors' access to necessary post-acute care, including in skilled nursing facilities.
- From 2019 to 2022, the top three MA insurers denied prior authorization requests for post-acute care at **higher rates** than for other types of care.
- As a result, the rate of seniors in the final year of their lives leaving MA plans for traditional Medicare doubled from 2016 to 2022, **leaving taxpayers will the bill.**



Sources: U.S. Senate Permanent Subcommittee on Investigations, "[Refusal of Recovery: How Medicare Advantage Insurers Have Denied Patients Access to Post-Acute Care](#)" October 2024

Wall Street Journal, "[The Sickest Patients Are Fleeing Private Medicare Plans—Costing Taxpayers Billions](#)" November 11, 2024

STAT, "[Denied by AI: How Medicare Advantage plans use algorithms to cut off care for seniors in need](#)" March 13, 2023

A Better Way: Our Solutions

- **Seniors have earned the right to make choices, changes, and have timely access to necessary care.**
 - Put the power to determine the course of care in the hands of medical professionals and patients, rather than AI or insurers.
 - Enhance MA transparency and the rating system, so seniors can make informed decisions.
 - Foster market competition, so seniors have options to select the best plan.
- **Make sure patients, policymakers, and taxpayers are getting the best deal.**
 - Encourage insurers to work with providers to improve outcomes and reduce costs through shared savings programs.

04

Rationalizing the Regulatory Environment

A Broken Oversight System

- For decades, federal bureaucrats have doubled down on an excessive punitive system that has failed to produce real change.
- Federal regulators pile on regulations, guidance, and penalties, while administering enforcement disproportionately.
- The current system is **inconsistent and ineffective**. It does not drive quality improvement among nursing homes or enhance the quality of life for residents.
- Stakeholders across the gamut are unsatisfied with the results, and policymakers aren't getting a return on their investment.

A Better Way: Our Solutions

- Create more effective and balanced oversight that prioritizes quality care while maintaining safety, accountability, and transparency.
 - [OMB RFI on Deregulation Comments Submitted 5/12/25](#)
 - [CMS RFI on Deregulation Comments Submitted 6/10/25](#)
- **Examples:**
 - **Update the Five-Star Rating System:** to provide more complete and useful information to consumers.
 - **Expand Risk-Based Surveys Nationwide:** to reduce survey backlog, recognize higher-quality facilities, and incentivize more facilities to qualify.
 - **Improve Access to the Civil Monetary Penalty Reinvestment Program:** to increase use of funds on quality improvement initiatives; allow them to be used for workforce programs and technology investments to enhance care.
 - **Strengthen the Special Focus Facility Program:** to help poor-performing facilities get better and out of the program.



Meet us in

LAS VEGAS

DELIVERING
SOLUTIONS **25**

AHCA/NCAL CONVENTION & EXPO

OCTOBER 19-22, 2025

LAS VEGAS, NV

ID/DD & Workforce Updates & Initiatives

Dana Ritchie

AVP Workforce & Constituency Services





ID/DD Advocacy



ID/DD Comm and Advocacy

- ID/DD Committee
- ID/DD Hill Fly-In Event
 - [ID/DD Providers Take on Capitol Hill During Annual Fly-in Event](#)
 - Politico: “Without reliable Medicaid funding, our residents could see their coverage cancelled, their care options reduced, or their facilities close,” said Jamie Anthony, chair of the AHCA/NCAL’s ID/DD Comm.
 - [Medicaid Cuts Would Devastate Providers Serving ID/DD Populations](#)
- Deregulation - RFIs
- ID/DD Networking Event – Oct 20th





Solutions

Workforce Package Ideas

- Agency, Hill & Partnerships
 - RN Next Gen
 - Train More Nurses Act
 - Immigration
 - Tech Solutions
 - CNA Lockout Bill

Read more: www.ahcancal.org

Workforce Partnerships

- Vision Centre – Building our LTC workforce future (www.visioncentre.org)
- Equus Workforce Solutions – Apprenticeships (equusworks.com)
- State Initiatives
- AHCA/NCAL LTC Workforce Webinar Series

CAREERS IN CARING UPDATE

- How to start an apprenticeship program Q&A with Equus Workforce Solutions
- In development:
 - Career pathways templates
 - How to host a facility tour
 - Social media best practices



Ready to Build Your Apprenticeship Program?

Starting an apprenticeship program can transform your workforce, offering sustainable solutions for recruitment and development. Hear from Equus Workforce Solutions (Equus), a leading provider of support in registered apprenticeship (RA) programs, on guidance to help organizations establish and expand apprenticeship programs. Whether you're looking to develop a new program or strengthen an existing one, this resource provides insights on how your facility can get started, and the benefits of offering apprenticeships.

Q&A with Michelle Day

National Workforce Solutions Director at Equus Workforce Solutions



Michelle oversees work as an Industry Intermediary and National Program Sponsor to support the development and expansion of registered apprenticeship programs in the health care and public service industries.

1 How does Equus partner with long term care facilities to support RA programs?

Equus partners with long term care facilities by providing information and technical assistance to support the development of a new RA program and/or support the expansion of an existing program.

Our team of experts will connect long term care facilities to career seekers and workforce system resources to support recruitment and staff development.

2 What types of positions or roles within long term care can apprenticeships help fill?

Long term care facilities are developing RA programs to fill various roles from entry-level positions, such as a Certified Nursing Assistant, to senior-level positions, such as a Licensed Nursing Home Administrator. There are more than 60 occupations approved by the DOL for apprenticeships in the health care industry, including non-clinical roles such as Environmental Technicians, Cooks, and more.

Equus offers program standards for the following occupations: Certified Nursing Assistant, Cook, Direct Support Professional Lead, Licensed Practical Nurse, Medical Assistant, Registered Nurse, Registered Nurse Resident, and Registered Nurse Preceptor. These standards can be customized to meet the specific needs of each facility.



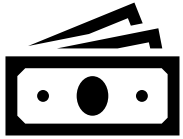
Quality Award Program

“It's a continuous journey of gradual improvements which requires the engagement of the entire organization. The more time and energy we invest into the process of evaluation and improvement, the more we learn and grow. A sense of accomplishment is obvious when we compare us today to when we first wrote our Bronze application.”

-2025 Quality Award Applicant on the benefits of completing an application



2026 National Quality Award Program Deadlines



Intent to Apply Deadline

November 13, 2025



Bronze, Silver, and Gold Application Deadline

January 22, 2026

All deadline are 8PM EST

2026 Quality Award Kick-Off Webinar

When: Thursday, July 31, 2025 at 3pm EST

Where: Online on ahcanceled

Learn how to start a 2026 application with expert guidance from National Quality Award Program staff.

Register Now

Scan the QR code to secure your spot!



INTERESTED IN SERVING AS AN EXAMINER IN 2026?



Examiner Application Opens

October 9, 2025



Examiner Application Closes

November 6, 2025



Examiner Selection Notification

December 2025

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IMPROVING LIVES *by*
DELIVERING SOLUTIONS *for*
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