

Long-Term and Behavioral Health Committee  
Agency Report for  
Special Need Determination Petition  
Meridian Senior Living, LLC

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*Petitioner:*

Meridian Senior Living, LLC  
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*Request:*

The petitioner, Meridian Senior Living, requests inclusion in the 2011 State Medical Facilities Plan (SMFP) of a special need determination for an adult care home demonstration project for Alexander County. The project would be designed to address an unmet need for services to people with Alzheimer's disease who display violent behavior and require supervision beyond that which many adult care homes can provide.

*Background Information:*

The Proposed 2011 SMFP describes the basic assumptions underlying the methodology for determining need for adult care home beds in a county. Adult care homes are those facilities with seven or more beds; adult care homes with zero to six beds are family care homes and are not part of the SMFP. The standard need methodology takes into consideration each county's bed inventory, population and utilization of adult care beds by age group. Need is projected three years beyond the plan year; the Proposed 2011 SMFP projects adult care bed need for 2014. Each of the 100 counties in the state is a separate adult care bed service area.

The petitioner describes a lack of services in Alexander County for residents of special care units who exhibit violent behaviors, particularly toward other residents. The petitioner notes that

“Meridian Senior Living is North Carolina's largest provider of Special Care Units in adult care facilities. In this capacity we have discovered a unique subgroup of Special Care Unit residents. They have chronic behavioral problems resulting from the progression of their Alzheimer's disease. Addressing their needs is beyond the capabilities of normal Special Care Units. Because operators must consider the needs of all residents, members of this subgroup are either discharged to the care of their families, or, more often, committed to a Psychiatric Hospital because no other type of facility has the capability to take care of them. The subgroup is large enough to justify focused attention. Addressing their needs will help both them and other residents of adult care facilities from whom resources are drained as staff try to handle the group's special needs.”

The purpose of the requested demonstration project would be to create a level of care between adult care home special care units and psychiatric hospitals to meet a need within the

Alzheimer's community. The petitioner proposes using the following criteria for the demonstration project:

- Primary diagnosis of dementia;
- Current placement in a long term care facility with evidence of recent medical assessment (FL2, history, physical, hospital summaries);
- Documentation of difficult behavior not responsive to facility interventions (redirection, activities, front line medication trail);
- Current medication administration record;
- Resident information summaries (care plans, care plan addendums, Resident Register, other assessments);
- Comprehensive assessment to include interview of facility staff, family, other care takers, medical providers, and significant persons involved in the resident's life.

The proposed demonstration project would consist of 50 beds; and would "be located in a dedicated Adult Care Home as a Special Care Unit to care for persons with Alzheimer's and Related Disorders, and located in Alexander County on a campus that has been occupied by a licensed hospital; to be awarded to an applicant or co-applicants, one or more of which is an existing provider of Adult Care Home services in Alexander County that has an existing, operational Special Care Unit for Alzheimer's and Related Disorders as of January 1, 2011."

Currently, the methodology for adult care beds results in planning for only one type (level) of adult care home bed. The Agency acknowledges a need for additional study and analysis of services available to people with Alzheimer's disease whose disorder involves violent and disruptive behaviors; however, conduct of such a demonstration project requires significant preparation as well as investigation into the implications for the ~~acute~~ adult care bed methodology. In fact, the 2009 North Carolina General Assembly directed the North Carolina Institute of Medicine to create a Task Force to study short-term and long-term strategies to address issues within adult care homes that provide residence to persons who are frail and elderly and to persons experiencing mental illness (Section 10.78ff(s) of Session Law 2009-451). The Task Force will examine co-location of people with behavioral health disorders with frail elderly or other people with disabilities. A final report will be presented to the General Assembly in 2011.

As explained in Chapter Two of the 2011 Proposed SMFP,

"Anyone who finds that the North Carolina State Medical Facilities Plan policies or methodologies, or the results of their application, are inappropriate may petition for changes or revisions. Such petitions are of two general types: those requesting changes in basic policies and methodologies; and those requesting adjustments to the need projections... People who wish to recommend changes that may have a statewide effect are asked to contact the Medical Facilities Planning Section staff as early in the year as possible, and to submit petitions no later than **March 3, 2010**. Changes with the potential for a statewide effect are the addition, deletion, and revision of policies and revision of the projection methodologies."

Demonstration projects such as the one proposed by the petitioner follow substantial study and review of related need determination methodologies. Therefore, in accordance with procedures set forth in Chapter Two of the SMFP, the petition has not been timely filed for inclusion in the 2011 SMFP.

*Agency Recommendation:*

Given that the petition seeks to establish a demonstration project that would affect need projection methodologies, and the deadline for submission of such petitions for the 2011 SMFP has passed, the Agency recommends the petition be denied.