



Strategic Planning Project

Work Session #1 Presentation

November 7, 2006



CentroMed



* Partial underwriter of project costs.

Table of Contents

	<u>Page</u>
I. Introduction.....	1
– Project Objectives	
– Key Findings	
– Approach & Data Sources	
II. Demographics.....	10
– Population Growth	
– Income & Poverty	
– Other Characteristics: Ethnicity, Education, & Car Access	
III. Utilization Rates.....	53
– Methodology	
– Use Rates	
IV. Demand Analysis.....	76
– Scenario Definitions	
– Projected Total Market Growth 2005 - 2016	
– Projections by Scenario	
V. Conclusions / Next Steps.....	97

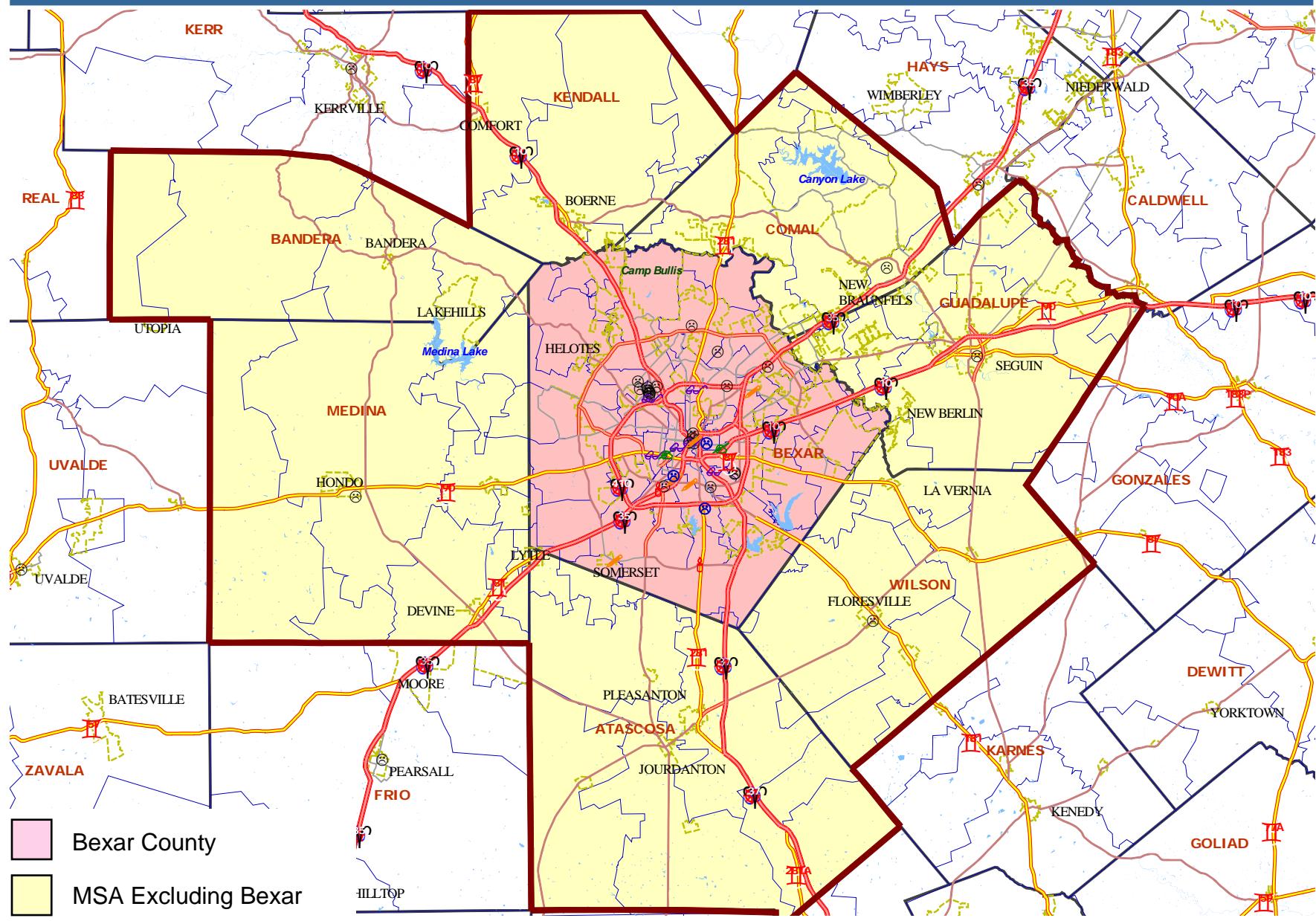
I. Introduction

Project Objectives

- I. To determine the optimal location and configuration of all MHM owned and funded clinics to best fulfill the mission of Methodist Healthcare Ministries within the context of:
 - Current and projected demographic and socioeconomic trends; and
 - Strategic direction of all MHM owned and funded Community Health Clinics.
- II. To develop a data-driven framework for rationalizing resource allocation of all Partner Organizations. This includes analysis of socioeconomic/demographic trends in the San Antonio MSA and development of a Demand Analysis model for projecting the healthcare needs of the targeted population.
- III. To work with MHM and the leadership of organizations funded by MHM to develop consensus on the coordination and prioritization of facility projects.

I. Introduction

San Antonio Metropolitan Statistical Area (MSA)



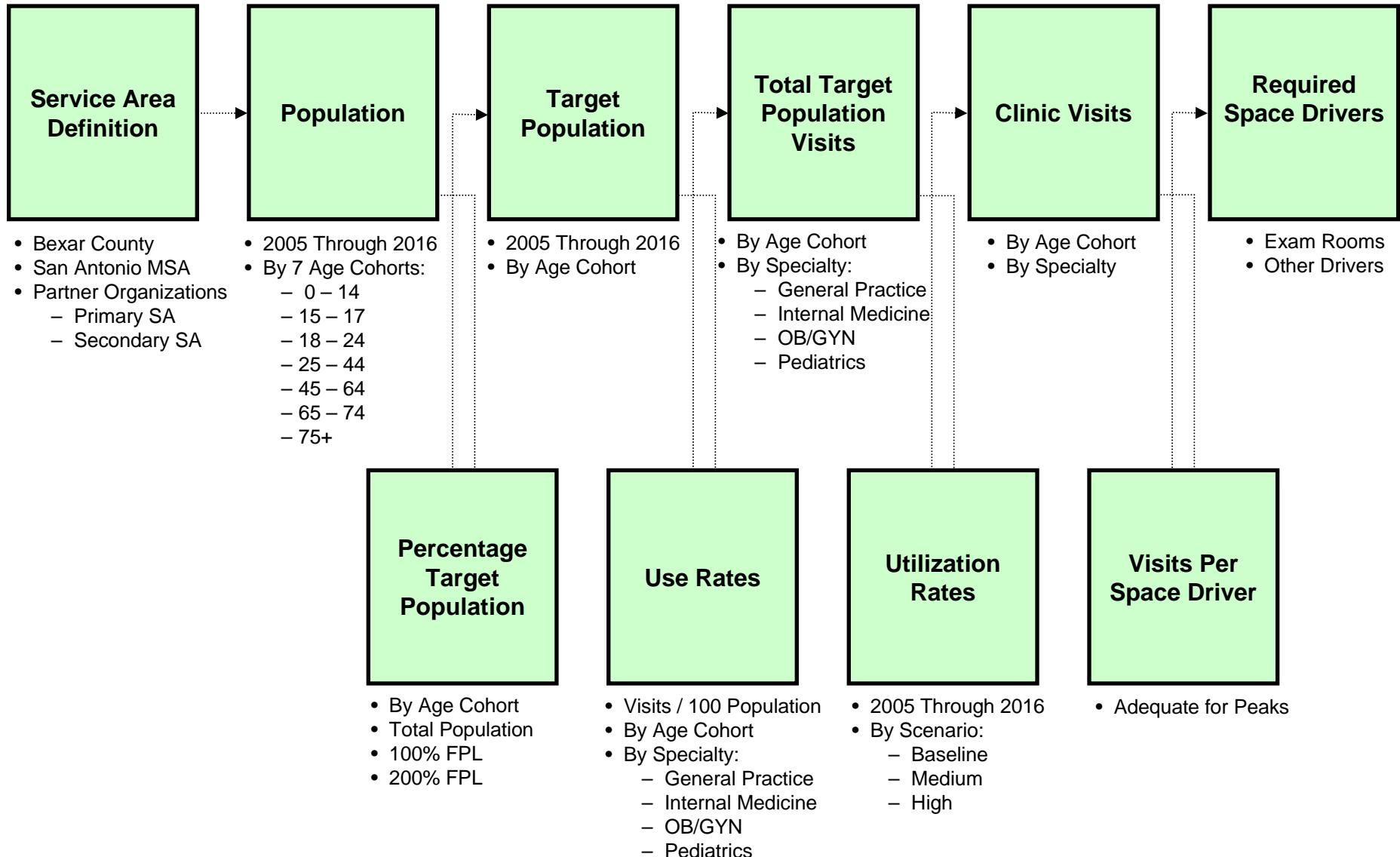
I. Introduction

Agenda

- Demographic Analysis
 - Total Population Projections 2006 Through 2016
 - Low Income Population Projections 2006 Through 2016
 - Other Factors
- Utilization Analysis
 - Use Rates
 - 2005 Low-Income / Uninsured Clinic Volumes
 - 2005 Partner Organizations' Clinic Volumes
 - 2005 Partner Organizations' Utilization Rate
- Demand Analysis
 - Projected Growth in Volumes 2005 Through 2016
 - By Age Cohort
 - By Location
 - By Specialty
 - Scenario Definitions
 - Baseline Scenario
 - Medium Scenario
 - High Scenario
 - Projected Volumes 2005 Through 2016
 - By Organization
 - By Scenario
- Conclusions / Next Steps
 - Key Findings
 - Work Session #2 Agenda

I. Introduction

Demand Analysis Approach



I. Introduction

Data Sources

Demographics

- Claritas 2000, 2006, & 2011
 - Population
 - Socioeconomics
- U.S. Census Bureau
 - Poverty Level Definitions
 - Poverty Level Estimates

Use Rates

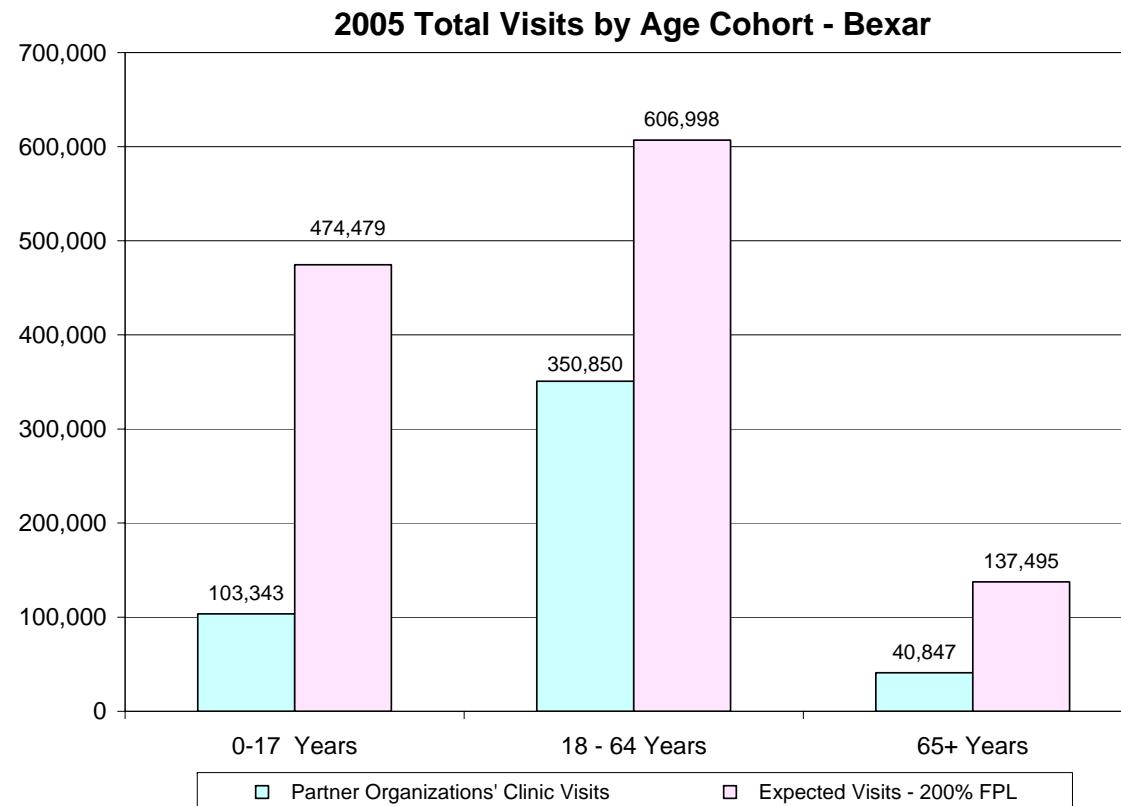
- Centers for Disease Control and Prevention / National Center for Health Statistics
 - National Ambulatory Medical Care Survey – 2004
 - National Hospital Ambulatory Medical Care Survey – 2004
 - South Geographic Region

Clinic Visits

- University Health System
- CentroMed
- CommuniCare
- Methodist Healthcare Ministries
- Daughters of Charity

I. Introduction

Key Findings



- Partner Organizations account for 40.6% of visits for the 200% FPL population of Bexar County
- Percentage of expected volumes varies significantly by age cohort:
 - 21.8% of expected volumes from 0 – 17 age cohort
 - 57.8% of expected volumes from 18 – 64 cohort
 - 29.7% of expected volumes from 65+ age cohort

I. Introduction

Key Findings

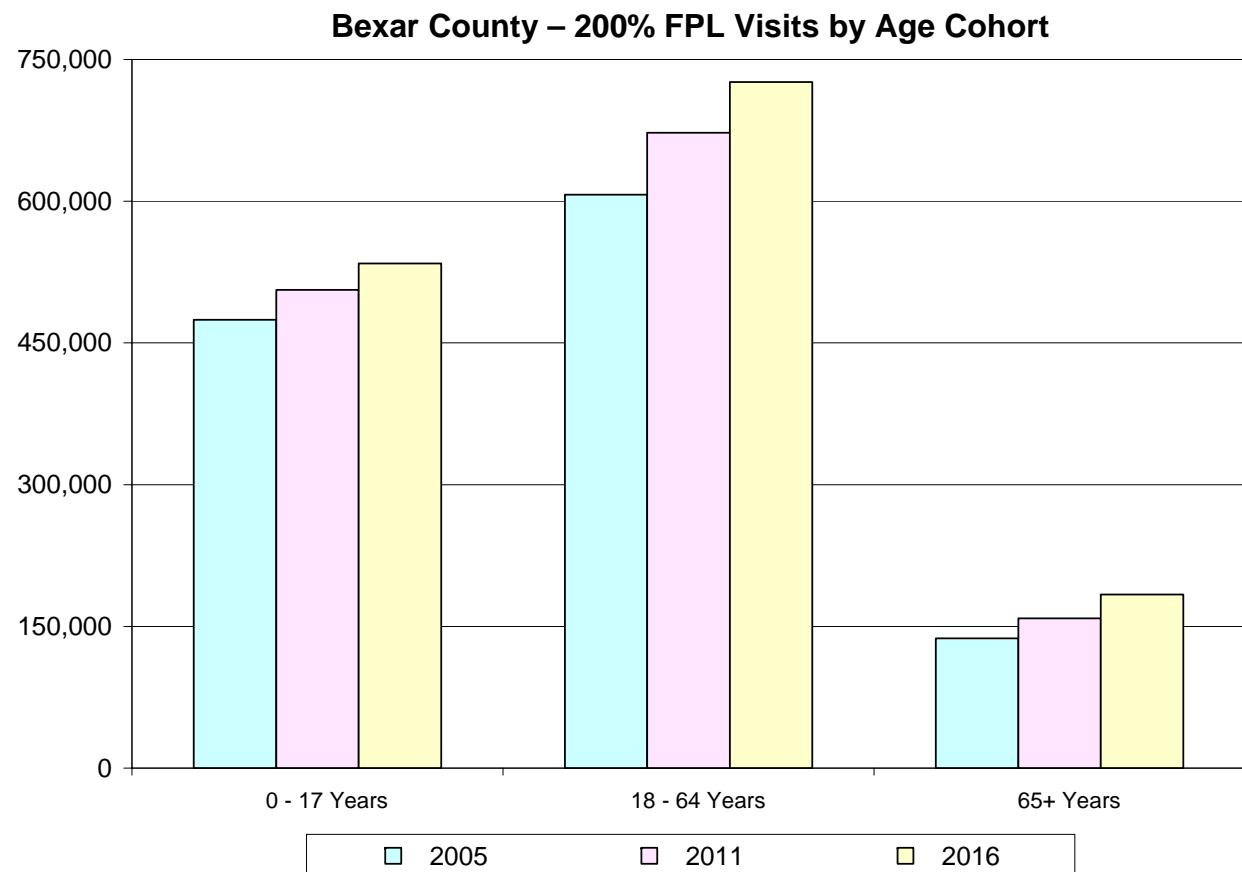
- 2005 Utilization – Bexar County

Partner Organization	0-17 Years	18 - 64 Years	65+ Years	Total
University Health System	7.4%	36.7%	20.8%	23.5%
CentroMed	9.8%	12.5%	4.4%	10.5%
CommuNiCare	3.3%	6.1%	3.2%	4.7%
Methodist Healthcare Ministries	0.6%	1.5%	0.8%	1.0%
Daughters of Charity	0.7%	1.1%	0.5%	0.9%
Total - Partner Organizations	21.8%	57.8%	29.7%	40.6%
Total - Other	78.2%	42.2%	70.3%	59.4%

- Service Areas of Partner Organizations
 - Widely dispersed patient origin for almost all organizations & clinics
 - Large overlap of service areas
- Bexar County Poverty Rates
 - Poverty rates have steadily increased since 2000
 - 17.6% of Total Population below 100% FPL
 - 25.1% of 0 - 17 Population below 100% FPL
 - Population below 200% FPL is over twice that of 100% FPL
- Underserved Areas
 - Significant areas of Bexar County are currently underserved
 - Population growth is expected to be concentrated in these areas

I. Introduction

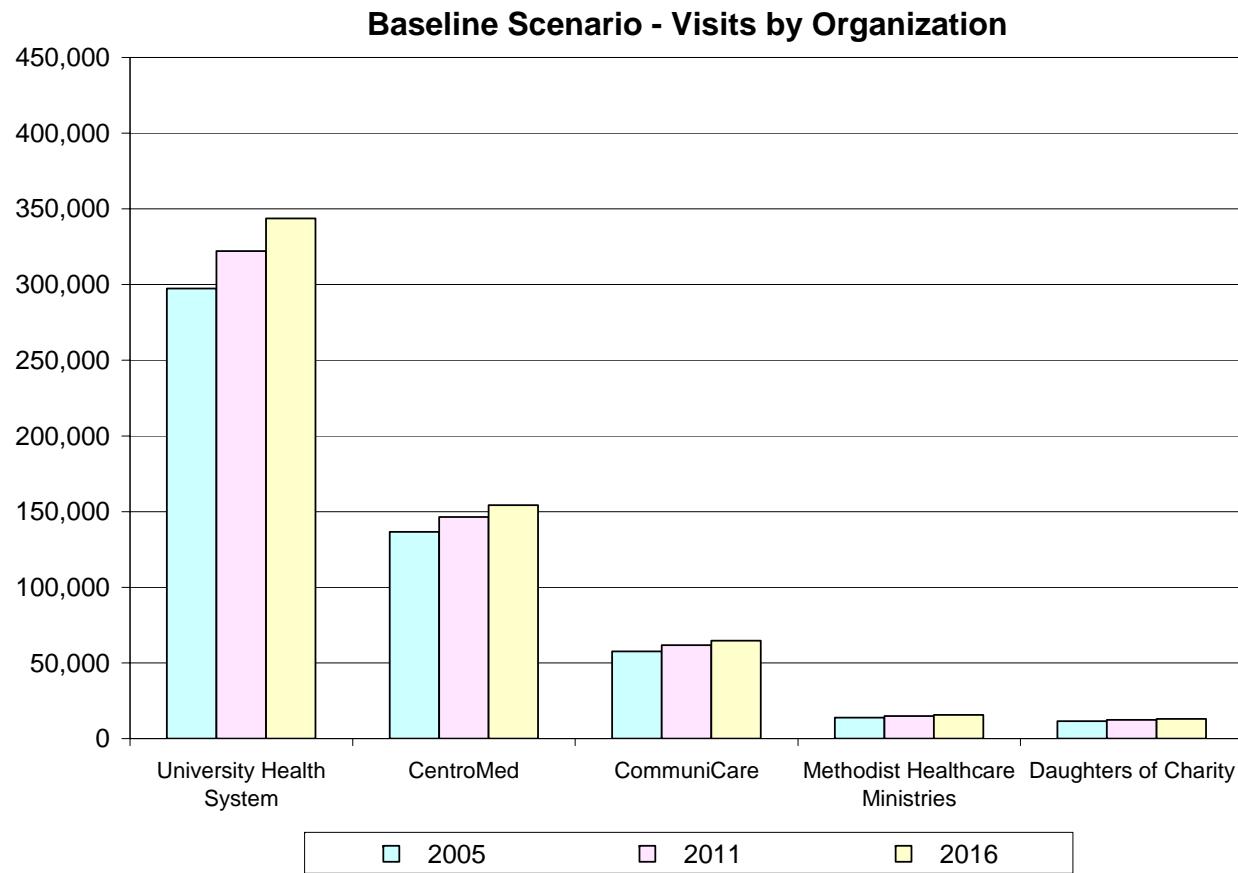
Key Findings



Age Cohort	2005	2011	2016	% Increase 2005 - 2011	Variance 2005 - 2011	% Increase 2005 - 2016	Variance 2005 - 2016
0 - 17 Years	474,479	506,229	534,160	6.7%	31,750	12.6%	59,681
18 - 64 Years	606,998	672,418	726,104	10.8%	65,420	19.6%	119,106
65+ Years	137,495	158,385	183,777	15.2%	20,890	33.7%	46,282
Total Bexar County	1,218,972	1,337,031	1,444,041	9.7%	118,059	18.5%	225,069

I. Introduction

Key Findings



Partner Organization	2005	2011	2016	% Increase 2005 - 2011	Variance 2005 - 2011	% Increase 2005 - 2016	Variance 2005 - 2016
University Health System	297,420	322,132	343,631	8.3%	24,712	15.5%	46,210
CentroMed	136,614	146,337	154,271	7.1%	9,723	12.9%	17,657
CommuniCare	57,732	61,762	64,718	7.0%	4,030	12.1%	6,987
Methodist Healthcare Ministries	13,930	14,899	15,674	7.0%	970	12.5%	1,744
Daughters of Charity	11,587	12,369	13,084	6.8%	783	12.9%	1,497
Total	517,283	557,500	591,378	7.8%	40,216	14.3%	74,095

II. Demographics

Key Issues

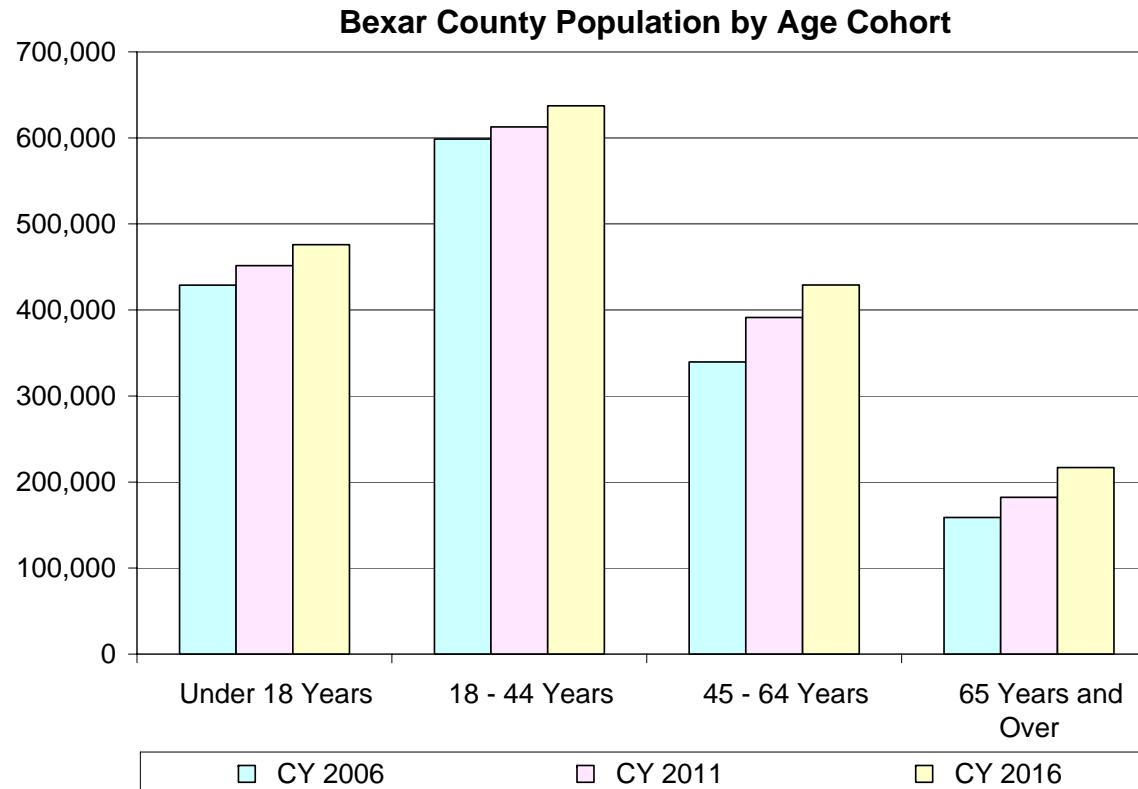
- What are the Bexar County population projections over the next 10 years?
 - By Age Cohort
 - By location
- How is poverty expected to grow over the same time frame?
 - By Age Cohort
 - By Location

Following Slides Address:

- Total Population Growth
 - By Age Cohort
 - By Location
 - 2006 Through 2016
- Population by Poverty Level
 - Historic Poverty Trends
 - 100% & 200% Federal Poverty Line (FPL)
 - By Age
 - By Location
 - 2006 Through 2016
- Other Metrics
 - Household Access to Vehicle
 - Education
 - Ethnicity

II. Demographics

Demographics – Bexar County⁽¹⁾



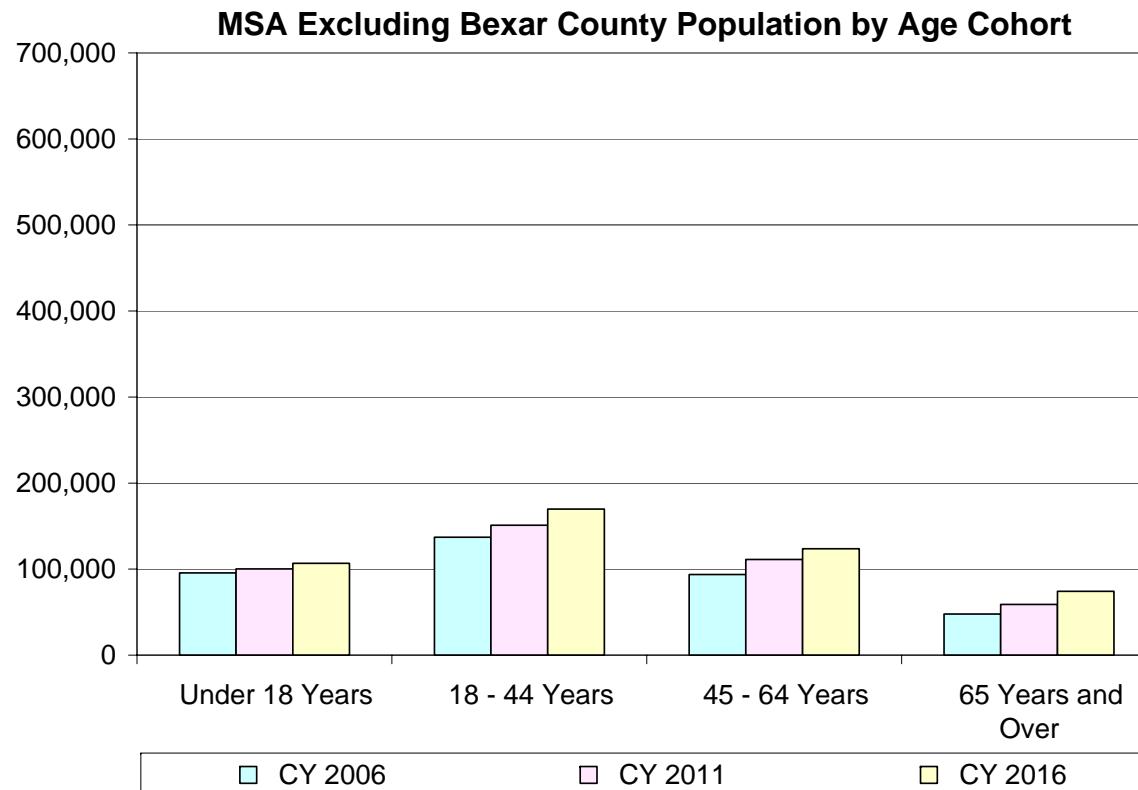
Bexar County Population	CY 2006	CY 2011	CY 2016	% Increase 2006 - 2016	Variance
Under 18 Years	428,768	451,625	475,939	11.0%	47,171
18 - 44 Years	598,736	612,682	637,458	6.5%	38,722
45 - 64 Years	339,502	391,263	428,920	26.3%	89,418
65 Years and Over	158,914	182,137	216,821	36.4%	57,907
Total Population	1,525,920	1,637,707	1,759,138	15.3%	233,218

(1) Source: Claritas 2000 – 2011 database; 2016 population extrapolated from 2006 - 2011 data.



II. Demographics

Demographics – San Antonio MSA Excluding Bexar County⁽¹⁾



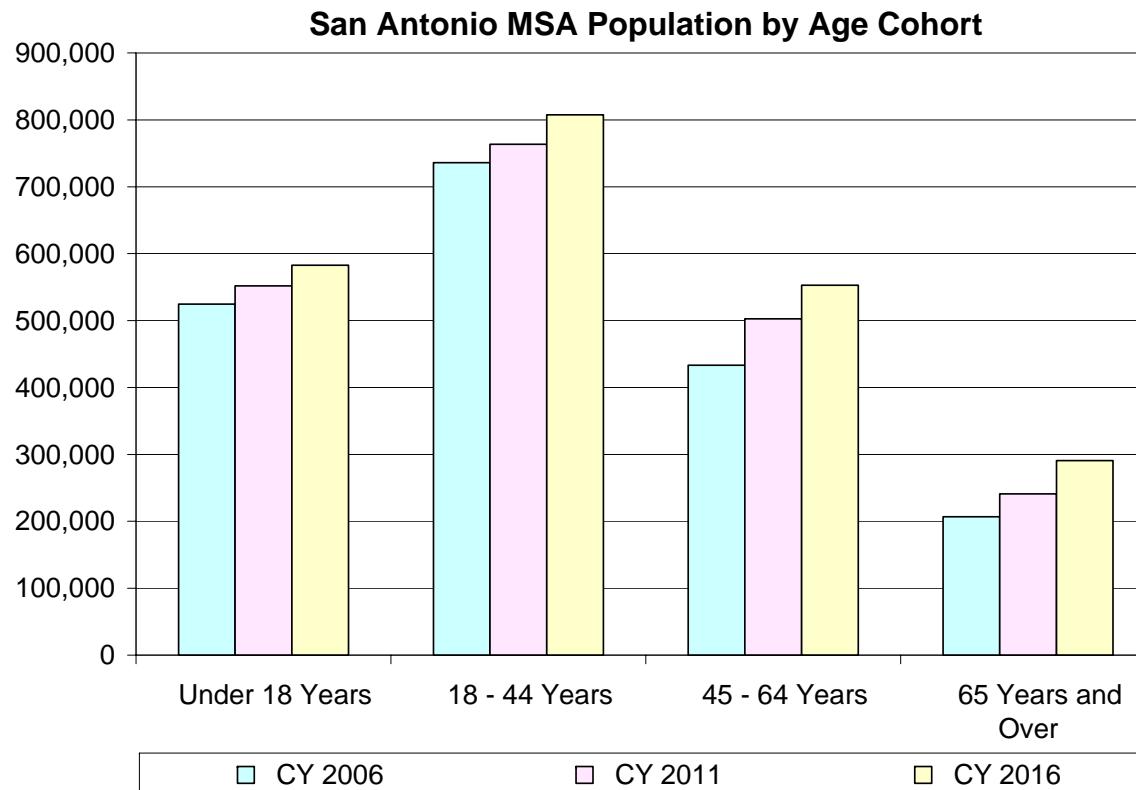
MSA Excluding Bexar Population	CY 2006	CY 2011	CY 2016	% Increase 2006 - 2016	Variance
Under 18 Years	95,727	100,370	106,738	11.5%	11,011
18 - 44 Years	137,084	151,038	170,015	24.0%	32,931
45 - 64 Years	93,725	111,258	123,857	32.1%	30,132
65 Years and Over	47,965	59,067	74,087	54.5%	26,122
Total Population	374,501	421,733	474,697	26.8%	100,196

(1) Source: Claritas 2000 – 2011 database; 2016 population extrapolated from 2006 - 2011 data.



II. Demographics

Demographics – San Antonio MSA⁽¹⁾



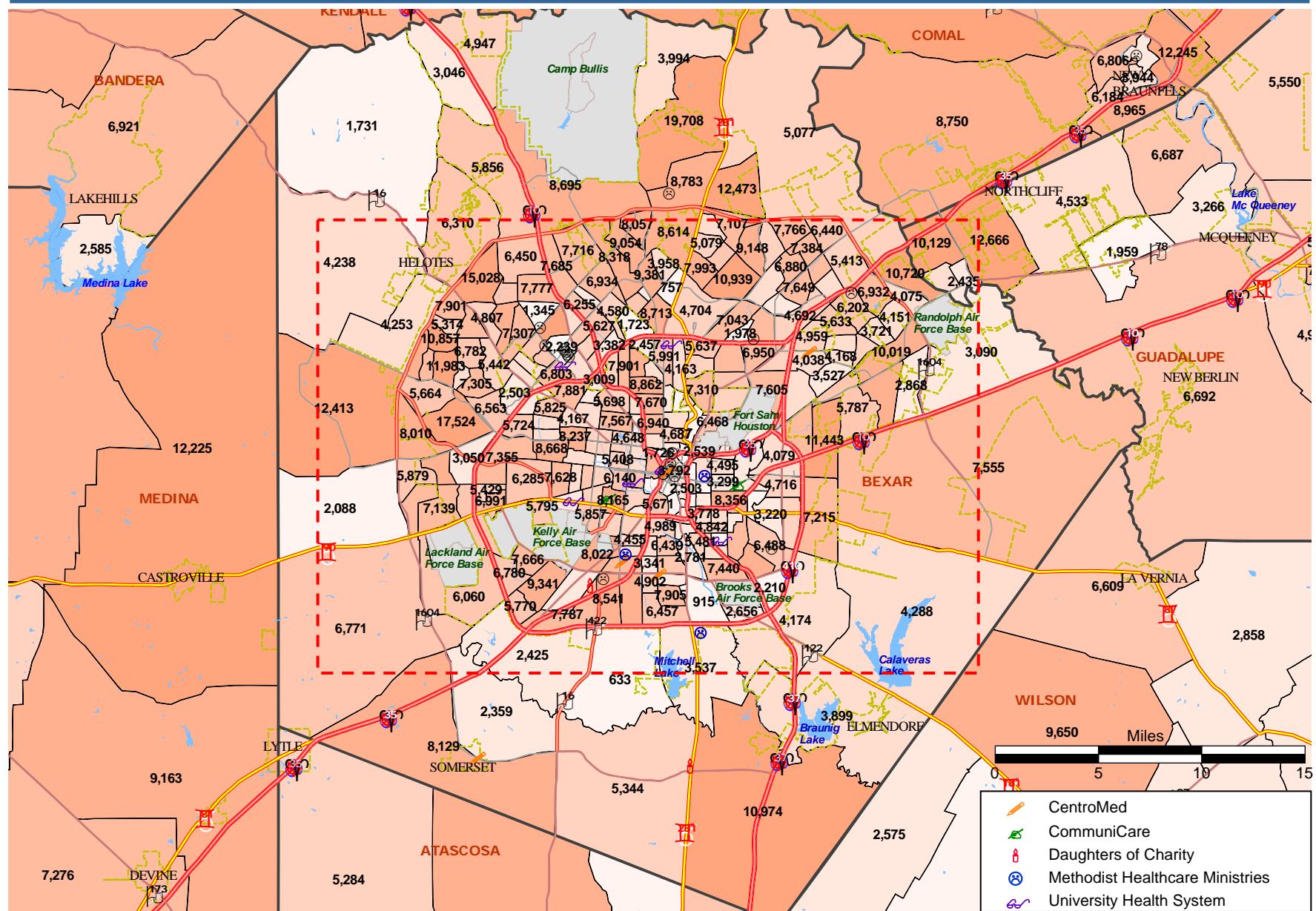
San Antonio MSA Population	CY 2006	CY 2011	CY 2016	% Increase 2006 - 2016	Variance
Under 18 Years	524,495	551,995	582,676	11.1%	58,181
18 - 44 Years	735,820	763,720	807,473	9.7%	71,653
45 - 64 Years	433,227	502,521	552,776	27.6%	119,549
65 Years and Over	206,879	241,204	290,908	40.6%	84,029
Total Population	1,900,421	2,059,440	2,233,834	17.5%	333,413

(1) Source: Claritas 2000 – 2011 database; 2016 population extrapolated from 2006 - 2011 data.



II. Demographics

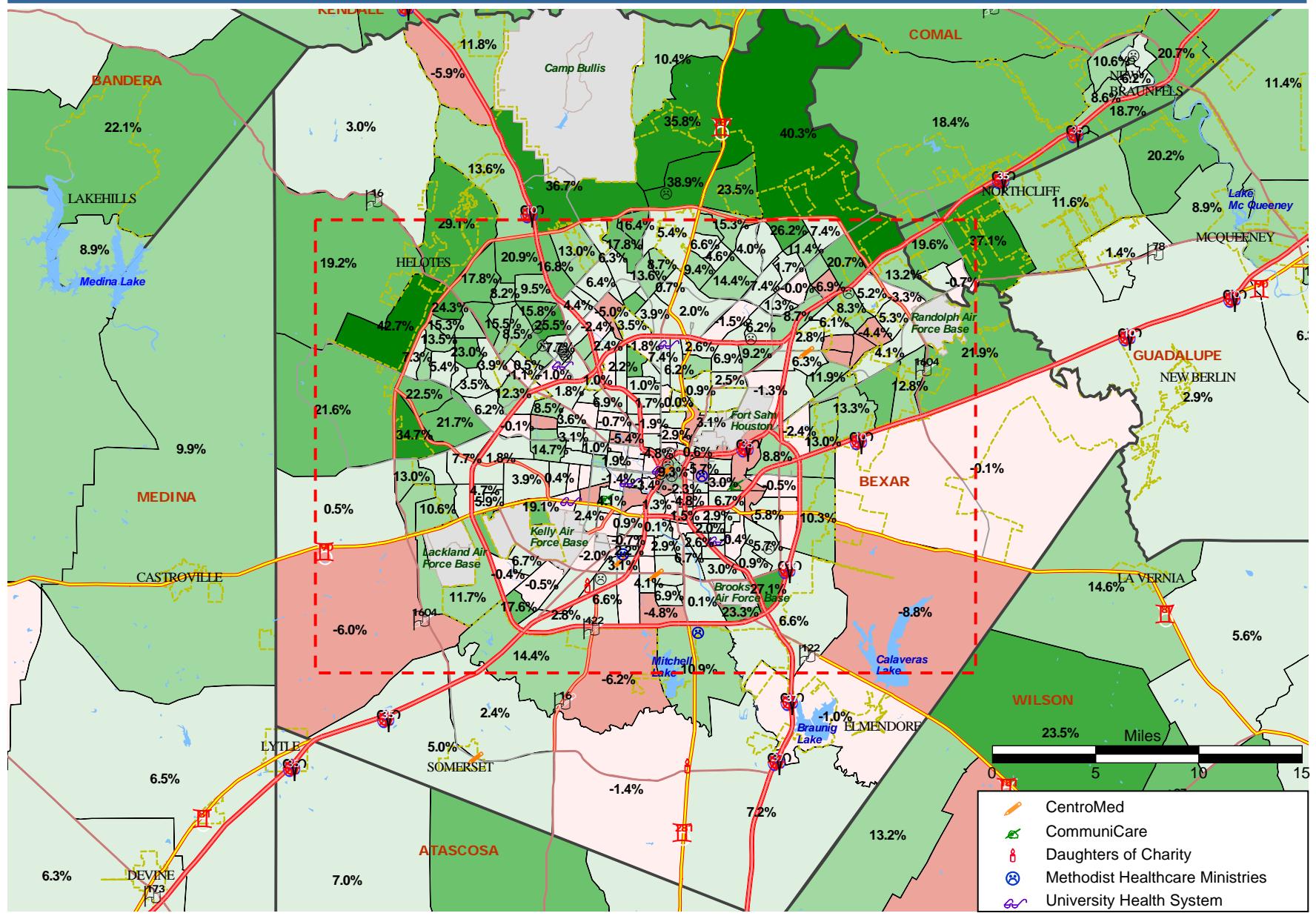
2006 Total Population⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

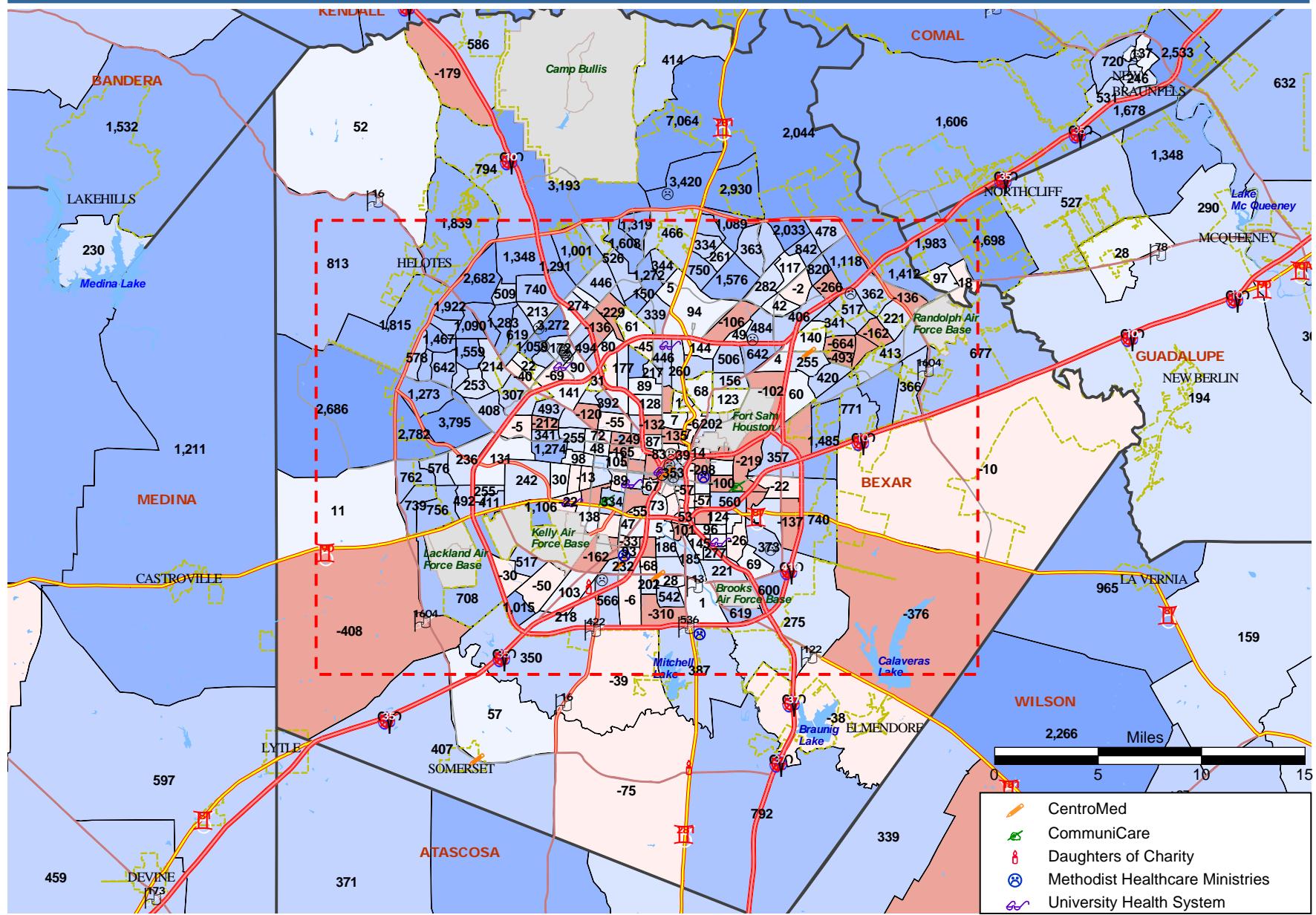
Percentage Total Population Growth 2006 - 2011⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

Absolute Population Growth 2006 - 2011⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.



II. Demographics

Income & Poverty

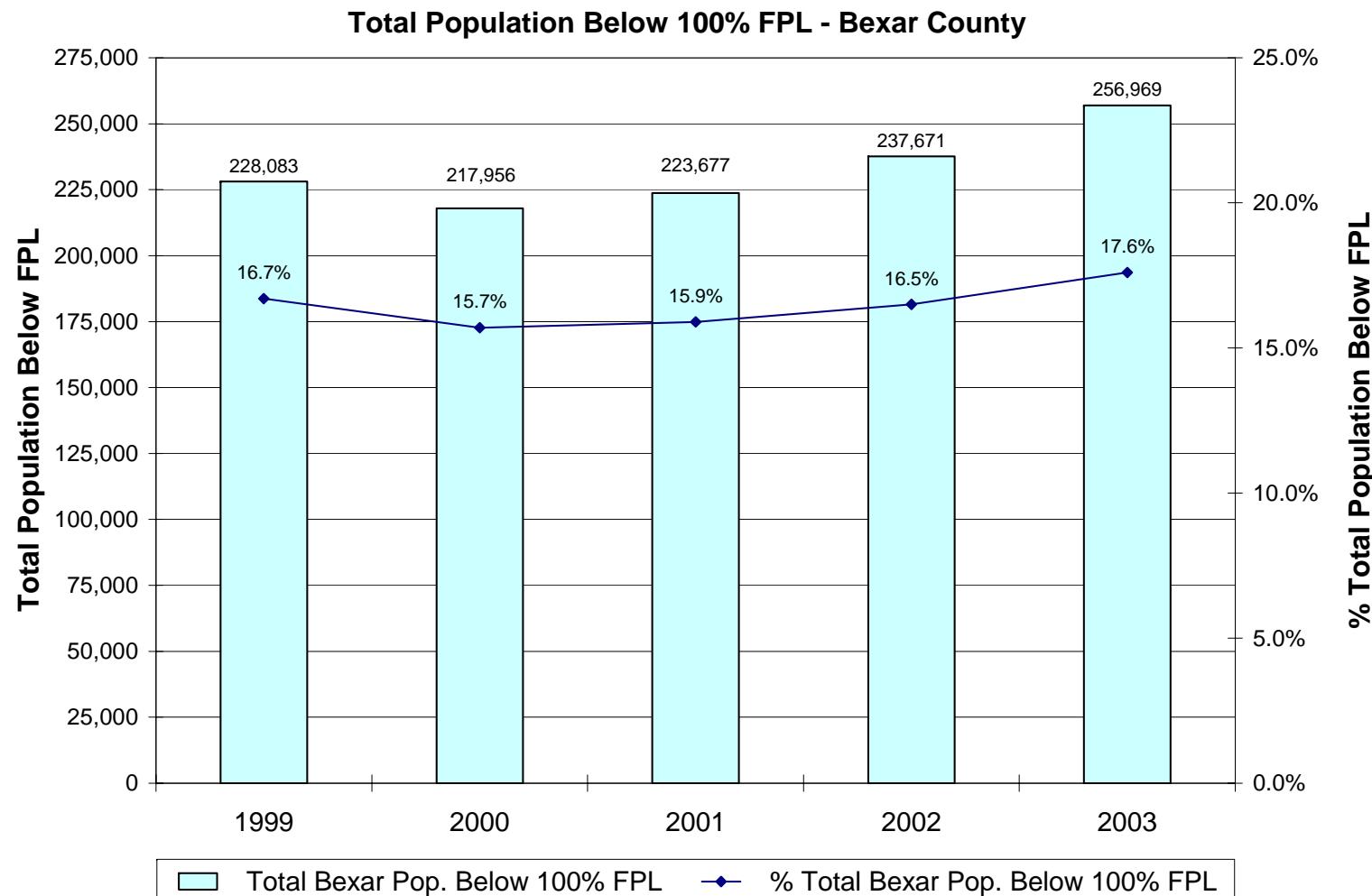
- 2006 HHS Poverty Guidelines

Persons in Family or Household	48 Contiguous States and D.C.
1	\$9,800
2	13,200
3	16,600
4	20,000
5	23,400
6	26,800
7	30,200
8	33,600
For Each Add'l Person	3,400

- For projecting future demand, 200% Federal Poverty Line (FPL) Used as Proxy for Target Population
 - Benchmark used by most Partner Organizations
 - Most Partner Organizations seeking patients from all payors
 - Does not necessarily reflect the uninsured population
 - Medicare
 - Medicaid
 - SCHIP
 - Other Programs

II. Demographics

Total Population Below 100% FPL - Bexar County⁽¹⁾



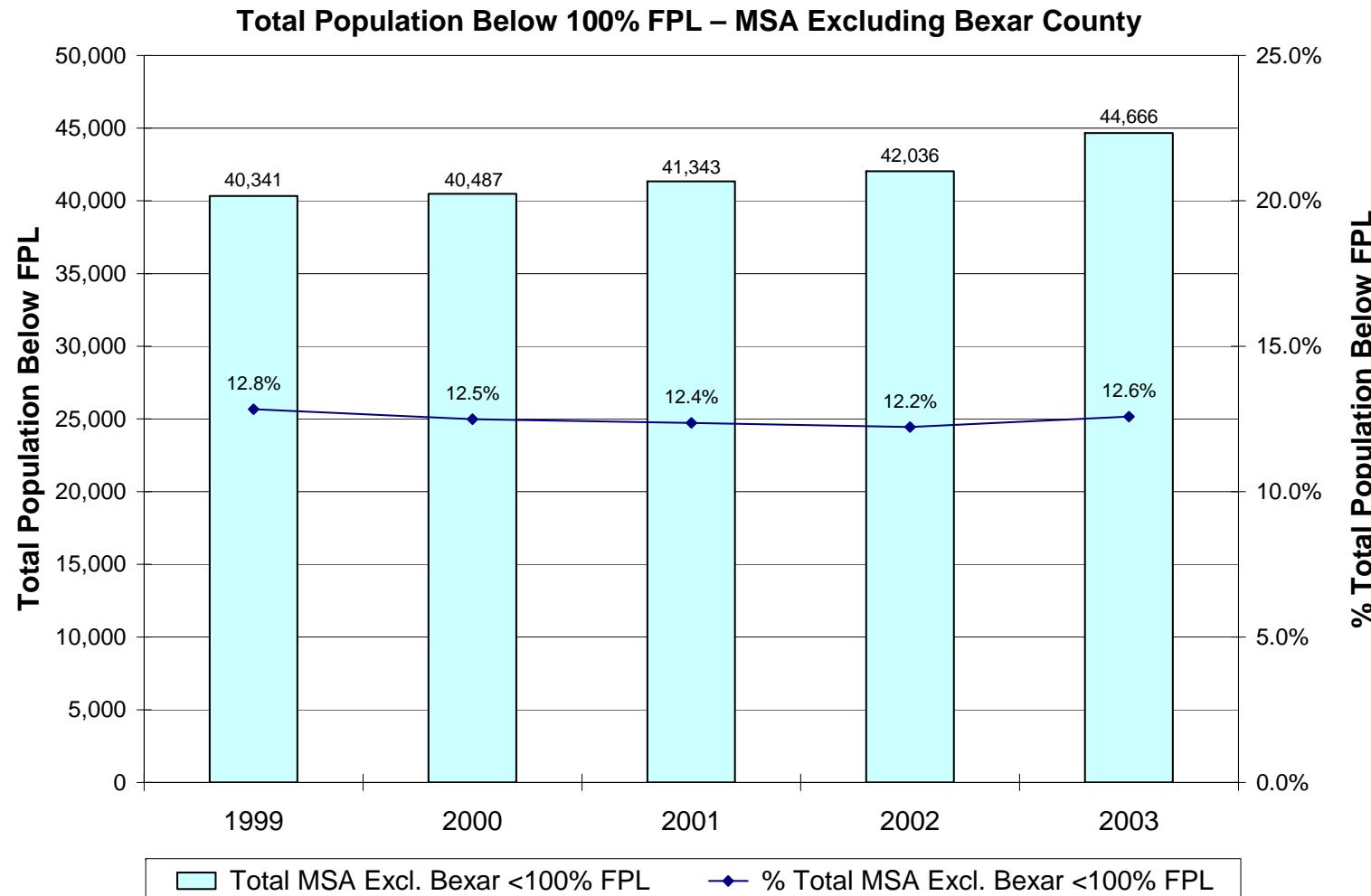
- Bexar County population below 100% FPL increased by 39,013 from 2000 to 2003
- Percentage of population below 100% FPL increased 1.9% over same time

(1) Source: U.S. Census Bureau; Small Area Income & Poverty Estimates

(2) Website: <http://quickfacts.census.gov/qfd/states/48000lk.html>.

II. Demographics

Total Population Below 100% FPL – MSA Excluding Bexar County⁽¹⁾



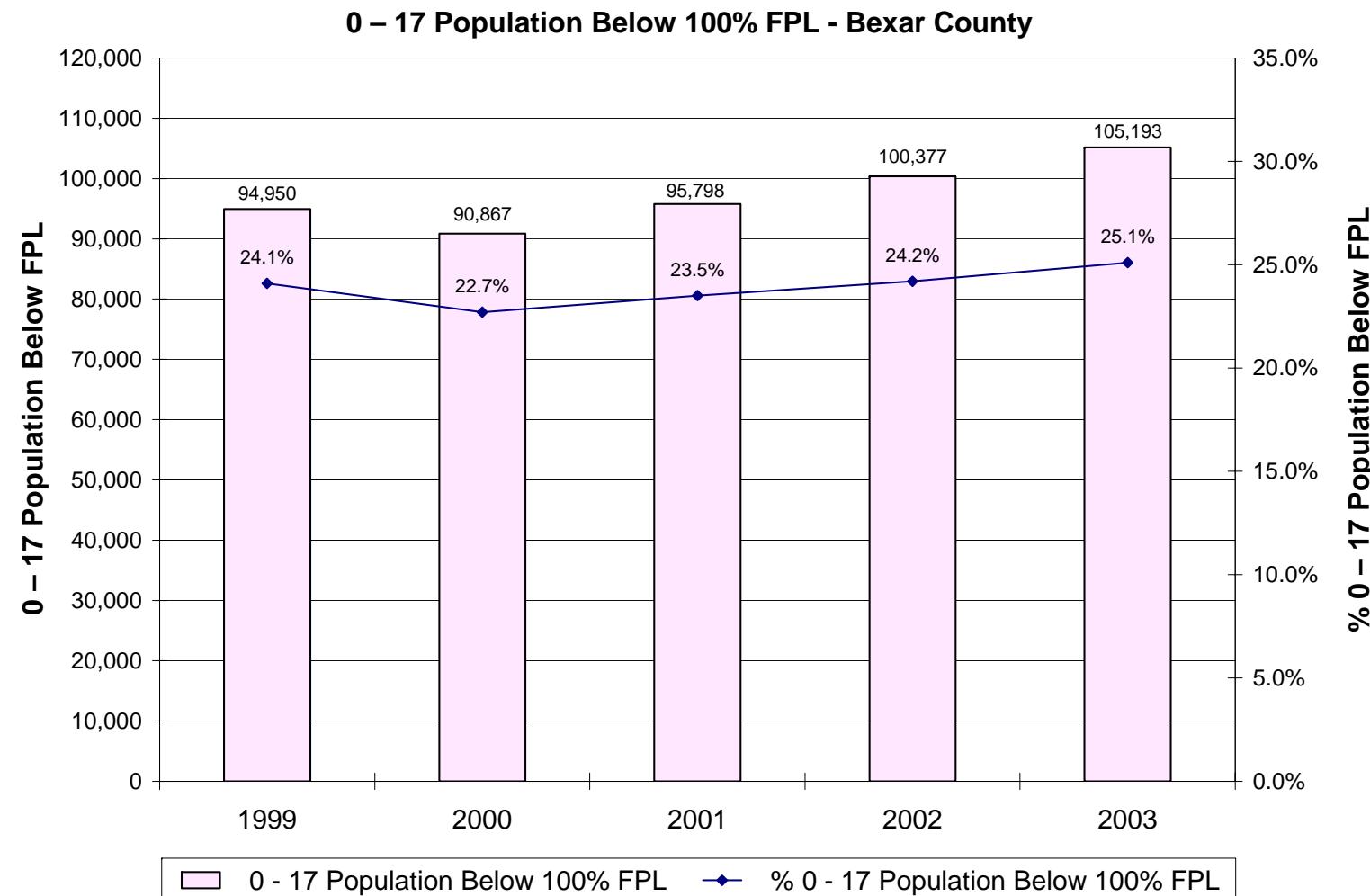
- In the MSA excluding Bexar County, the population below 100% FPL increased by 4,179 from 2000 to 2003
- Percentage of population below 100% FPL significantly below that of Bexar County
- Percentage of population below 100% FPL remained almost constant... increased 0.1% over same time

(1) Source: U.S. Census Bureau; Small Area Income & Poverty Estimates

(2) Website: <http://quickfacts.census.gov/qfd/states/48000lk.html>.

II. Demographics

0 – 17 Population Below 100% FPL - Bexar County⁽¹⁾



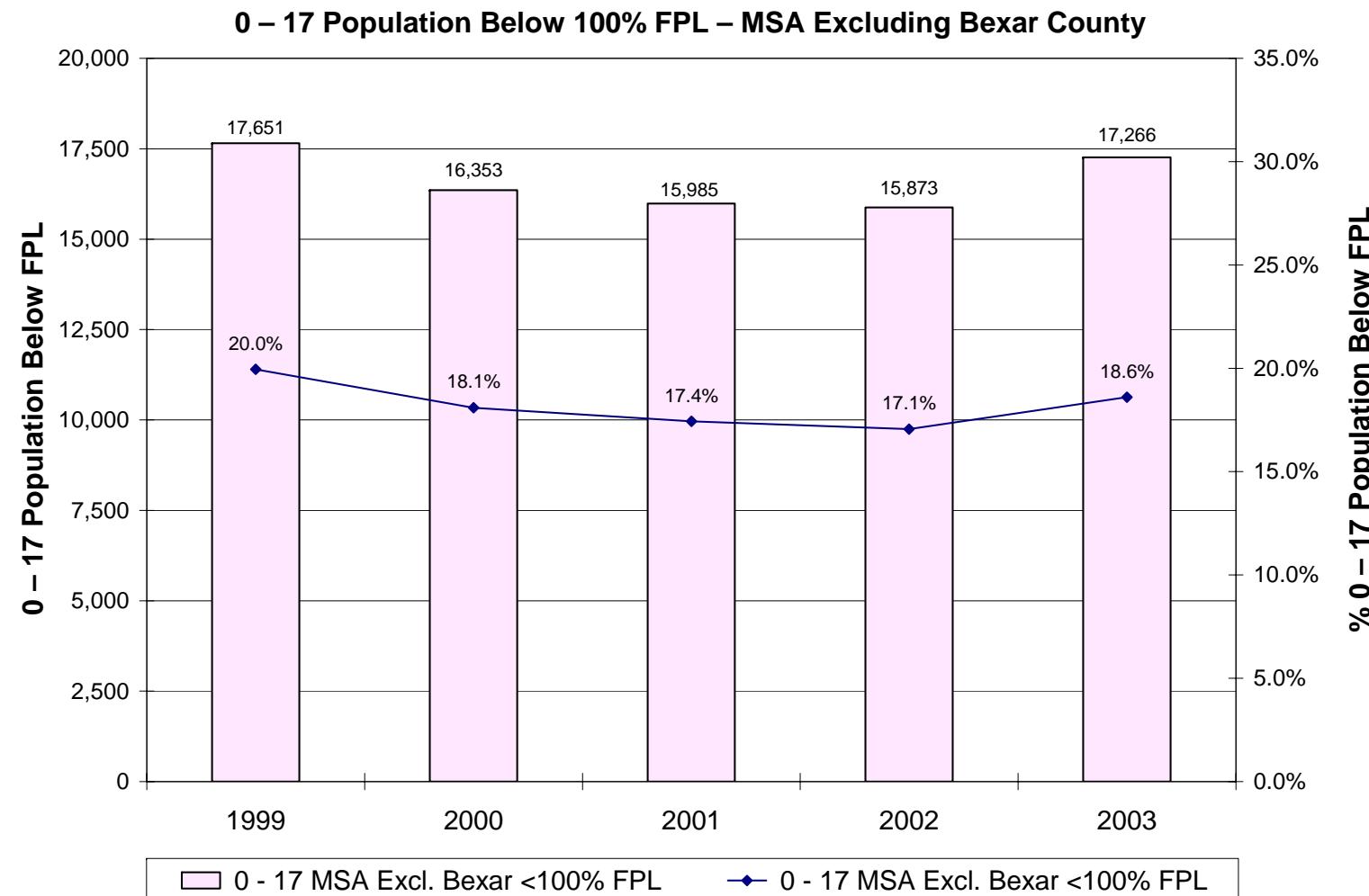
- Bexar County 0 – 17 population below 100% FPL increased by 14,326 from 2000 to 2003
- Percentage of 0 – 17 population below 100% FPL increased 2.4% over same time

(1) Source: U.S. Census Bureau; Small Area Income & Poverty Estimates

(2) Website: <http://quickfacts.census.gov/qfd/states/48000lk.html>.

II. Demographics

0 – 17 Population Below 100% FPL – MSA Excluding Bexar County⁽¹⁾



- In the MSA excluding Bexar County, the 0 – 17 population below 100% FPL increased by 913 from 2000 to 2003
- Percentage of 0 – 17 population below 100% FPL significantly below that of Bexar County
- Percentage of population below 100% FPL remained almost constant... increased 0.5% over same time

(1) Source: U.S. Census Bureau; Small Area Income & Poverty Estimates

(2) Website: <http://quickfacts.census.gov/qfd/states/48000lk.html>.

II. Demographics

Income & Poverty

Summary of FPL Rates

- 100% FPL Rates for Bexar County, MSA, Texas, & United States – 2003⁽¹⁾

Location	Total Population	0 - 17 Population
United States	12.5%	17.6%
Texas	16.2%	22.8%
Atascosa County	18.9%	28.1%
Bandera County	12.5%	20.2%
Bexar County	17.6%	25.1%
Comal County	9.9%	14.7%
Guadalupe County	12.0%	17.4%
Kendall County	9.2%	12.3%
Medina County	16.2%	22.9%
Wilson County	12.0%	17.1%
Total MSA	16.6%	23.9%

- 100% & 200% FPL Rates for Bexar County & MSA⁽¹⁾⁽²⁾

Location	% Total Population Below 100% FPL	% 0 - 17 Population Below 100% FPL	% Total Population Below 200% FPL	% 0 - 17 Population Below 200% FPL
2003 Bexar County	17.6%	25.1%	43.0%	55.1%
2003 San Antonio MSA	16.6%	23.9%	40.6%	52.6%

Assumptions for Demand Analysis

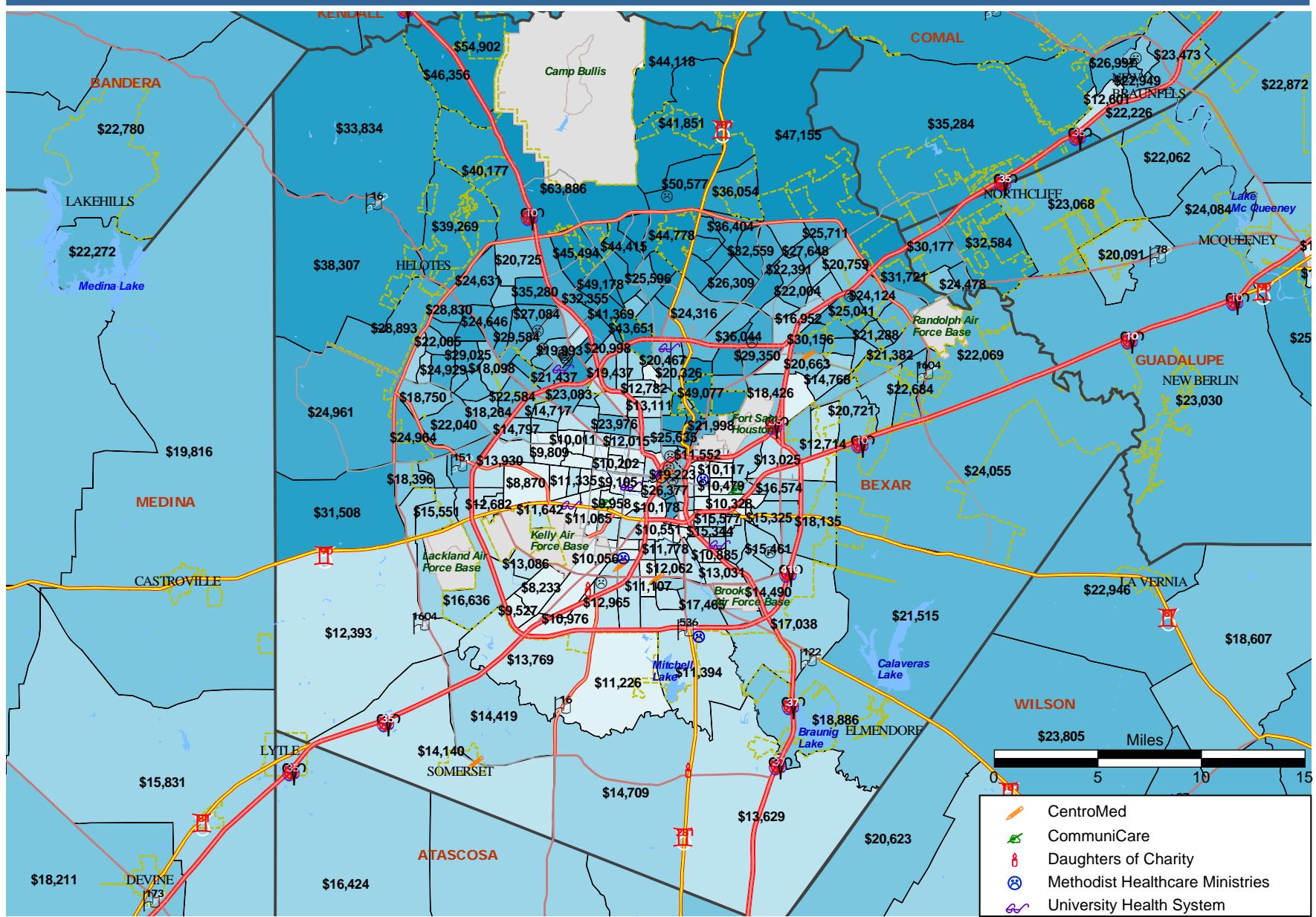
- For purposes of projecting future demand 2003 poverty rates are held constant
 - No updated sources available at this level of detail
 - Claritas 2006 to 2011 poverty data project insignificant changes
 - 2005 U.S. poverty rate released by Census Bureau in September 2006 indicates very little difference from 2003
 - 12.6% <100% FPL in 2005
 - 12.5% <100% FPL in 2003

(1) Source: U.S. Census Bureau; Small Area Income & Poverty Estimates

(2) Website: <http://www.hhsc.state.tx.us/research/dssi/PS/CntyPoverty.html>

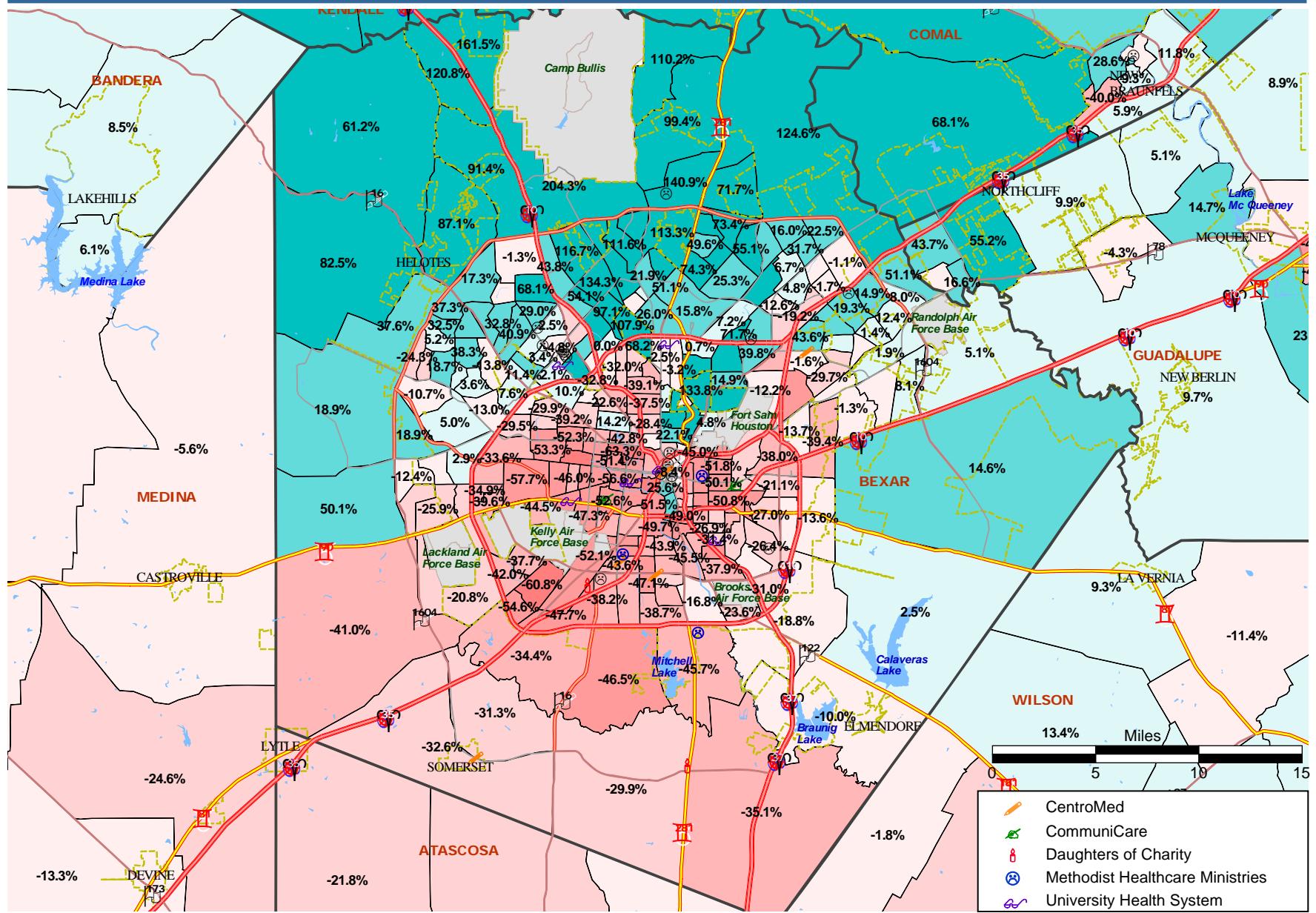
II. Demographics

2006 Per Capita Income⁽¹⁾



II. Demographics

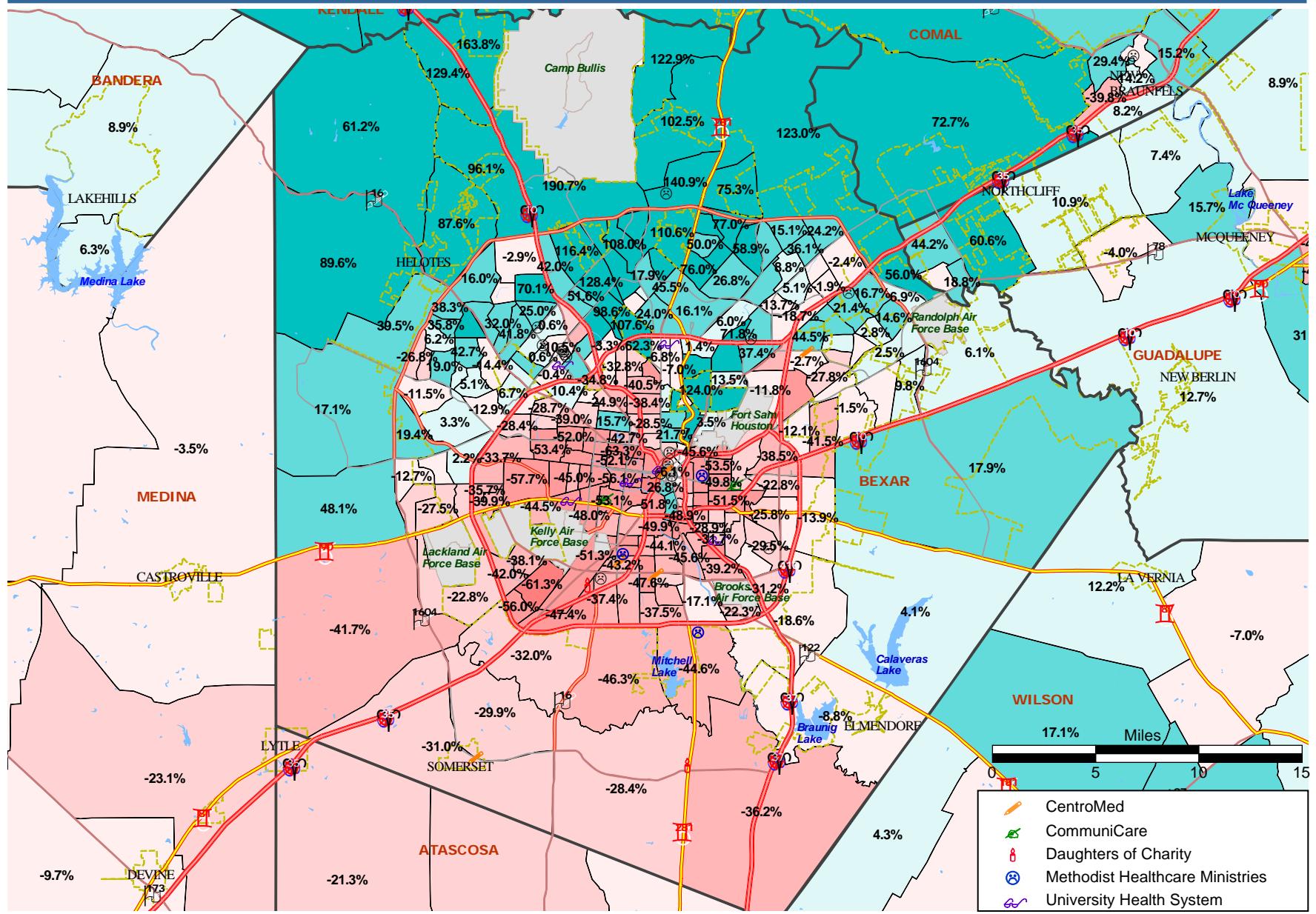
2006 Per Capita Income % Above or Below Bexar County Average⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

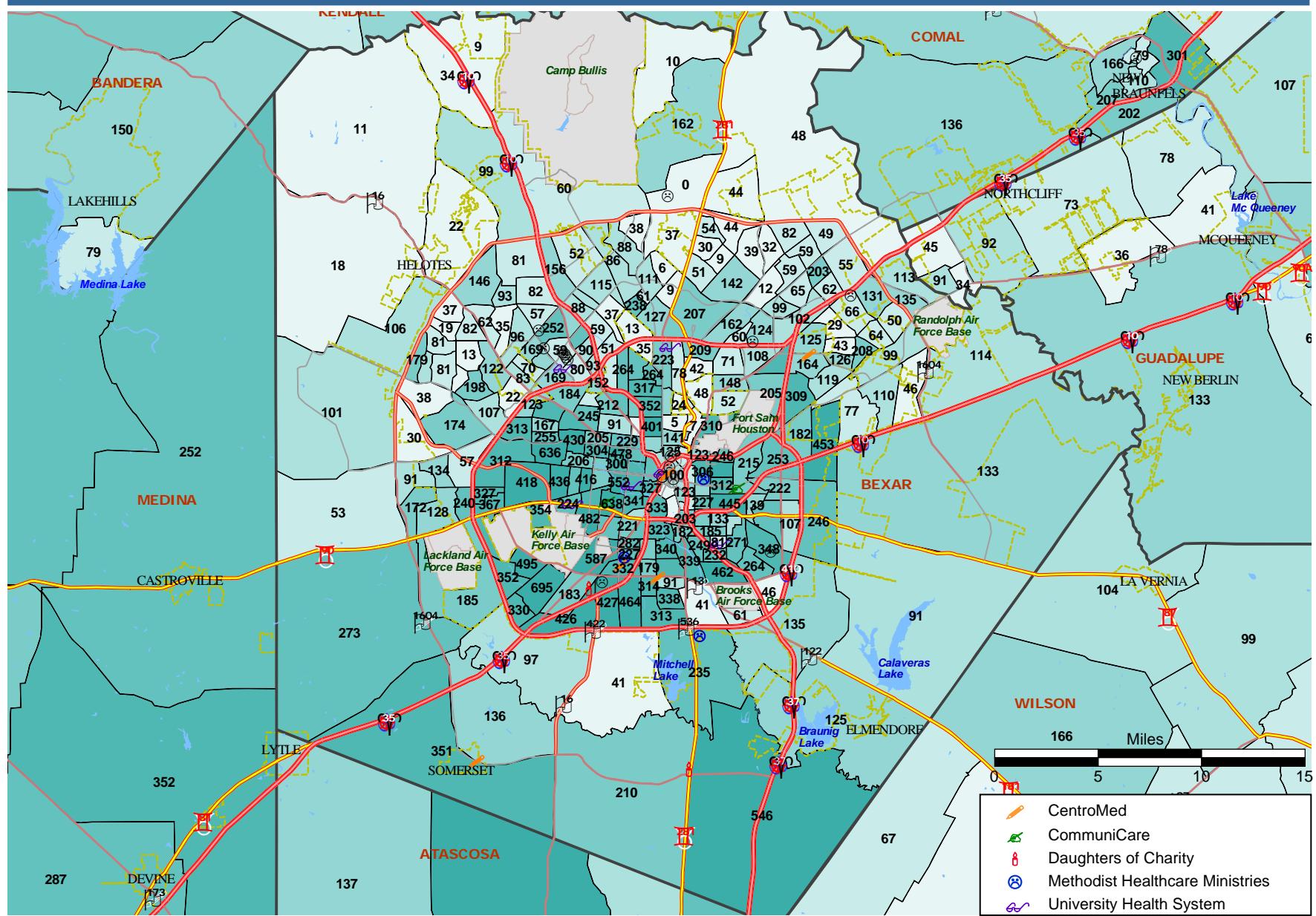
2011 Per Capita Income % Above or Below Bexar County Average⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

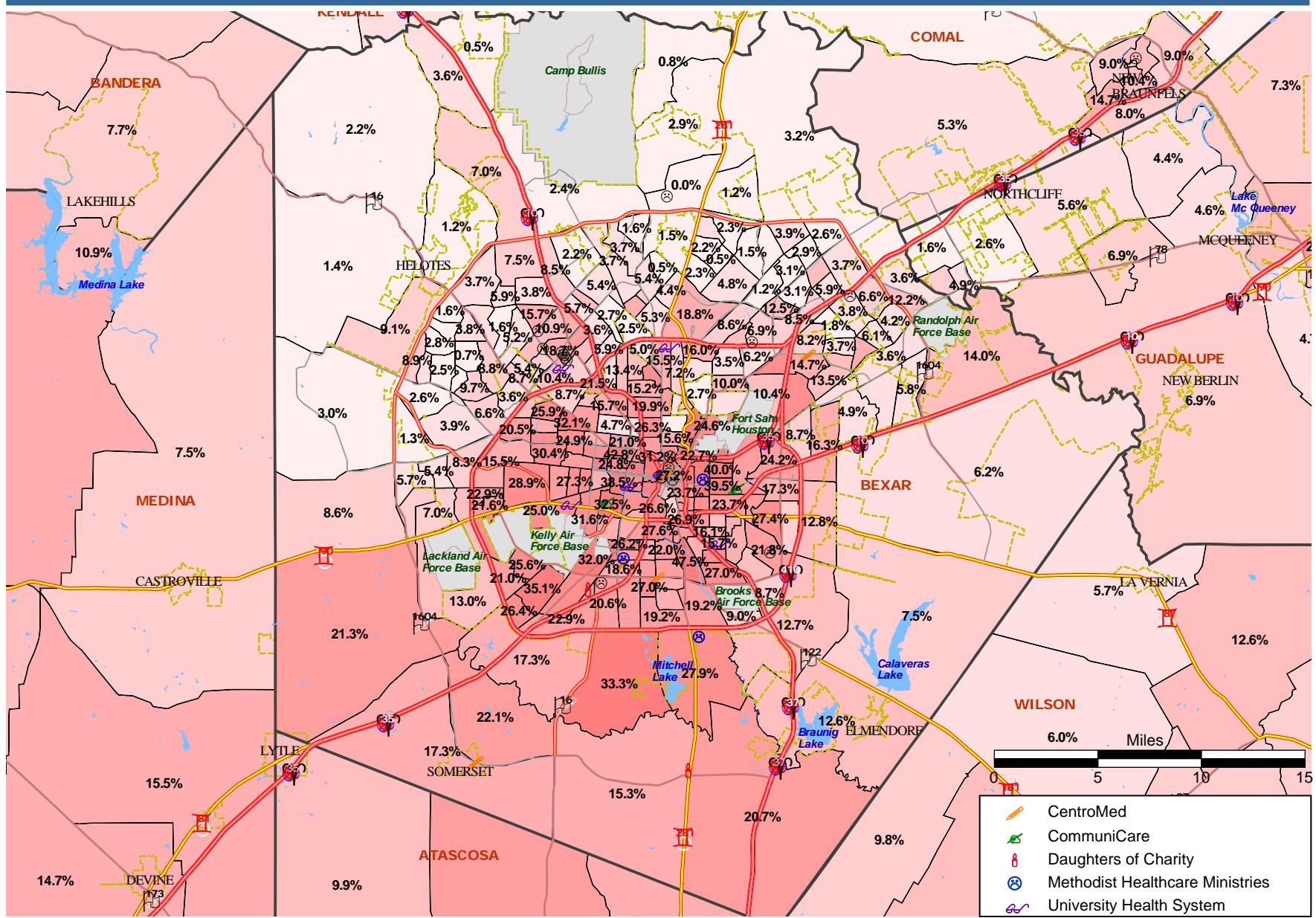
2006 Families Below 100% FPL⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

2006 Percentage of Total - Families Below 100% FPL⁽¹⁾

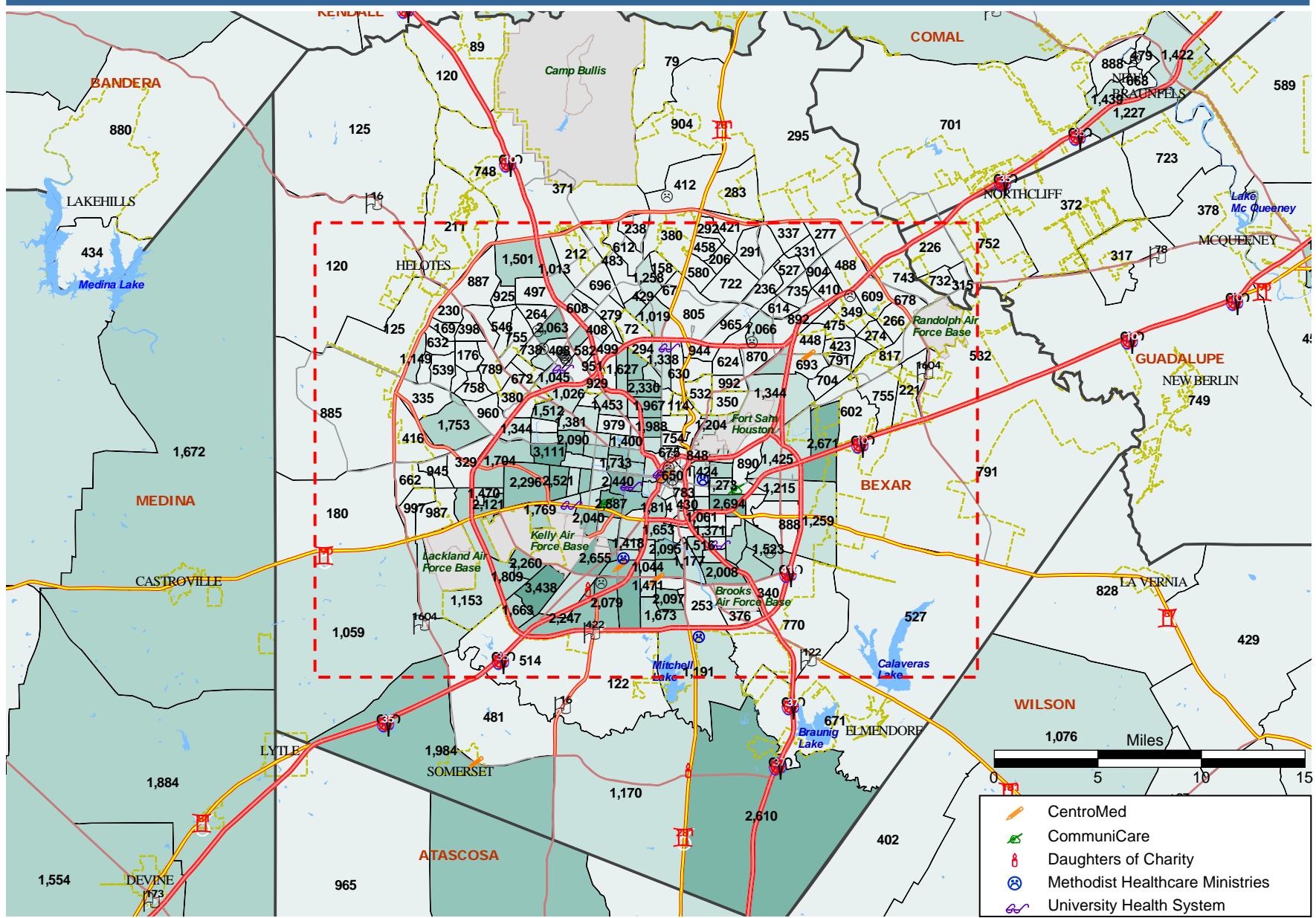


(1) Source: Claritas 2000 – 2011 database.



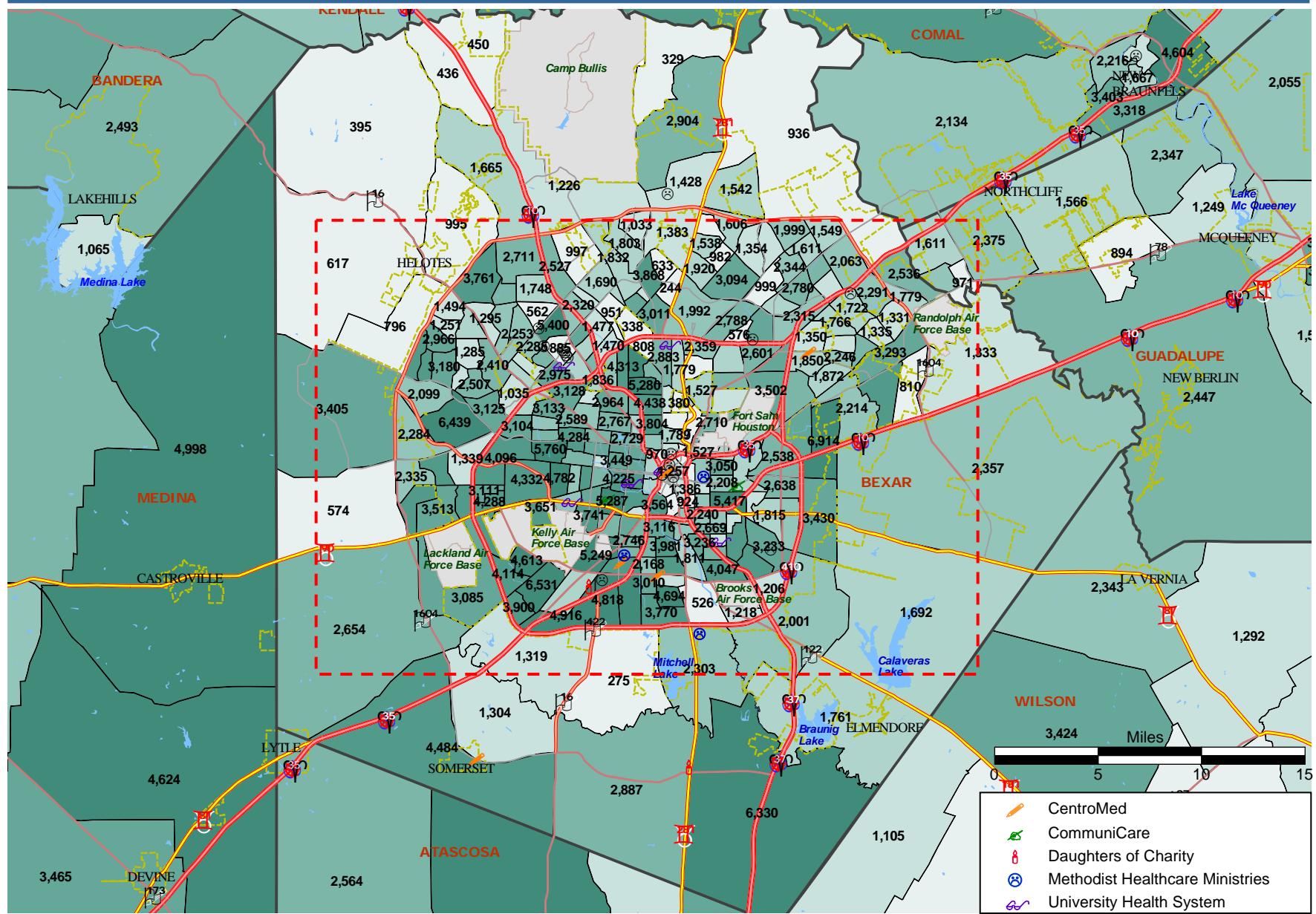
II. Demographics

2006 Population Below 100% FPL⁽¹⁾



II. Demographics

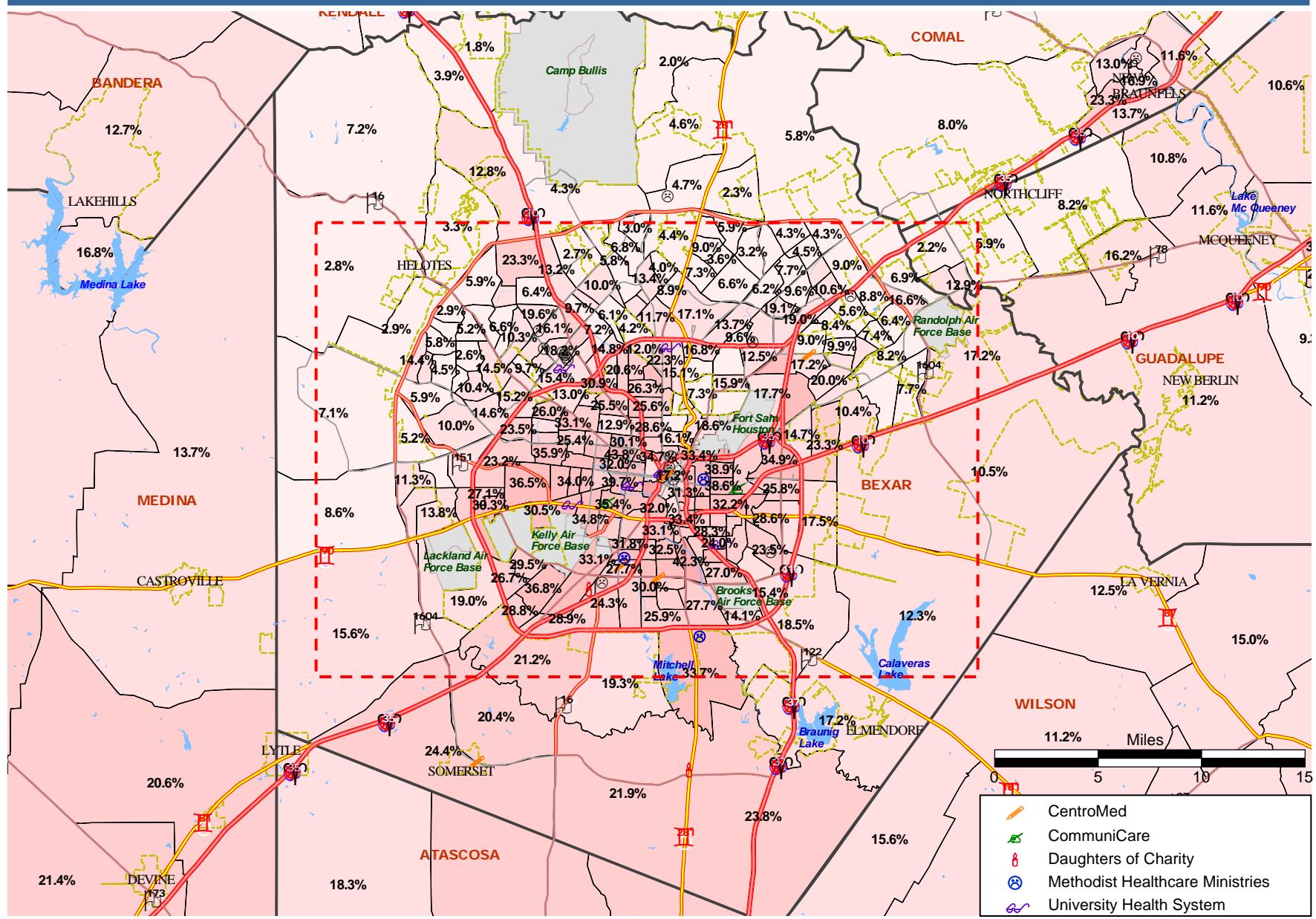
2006 Population Below 200% FPL⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

2006 Percentage of Total - Population Below 100% FPL⁽¹⁾

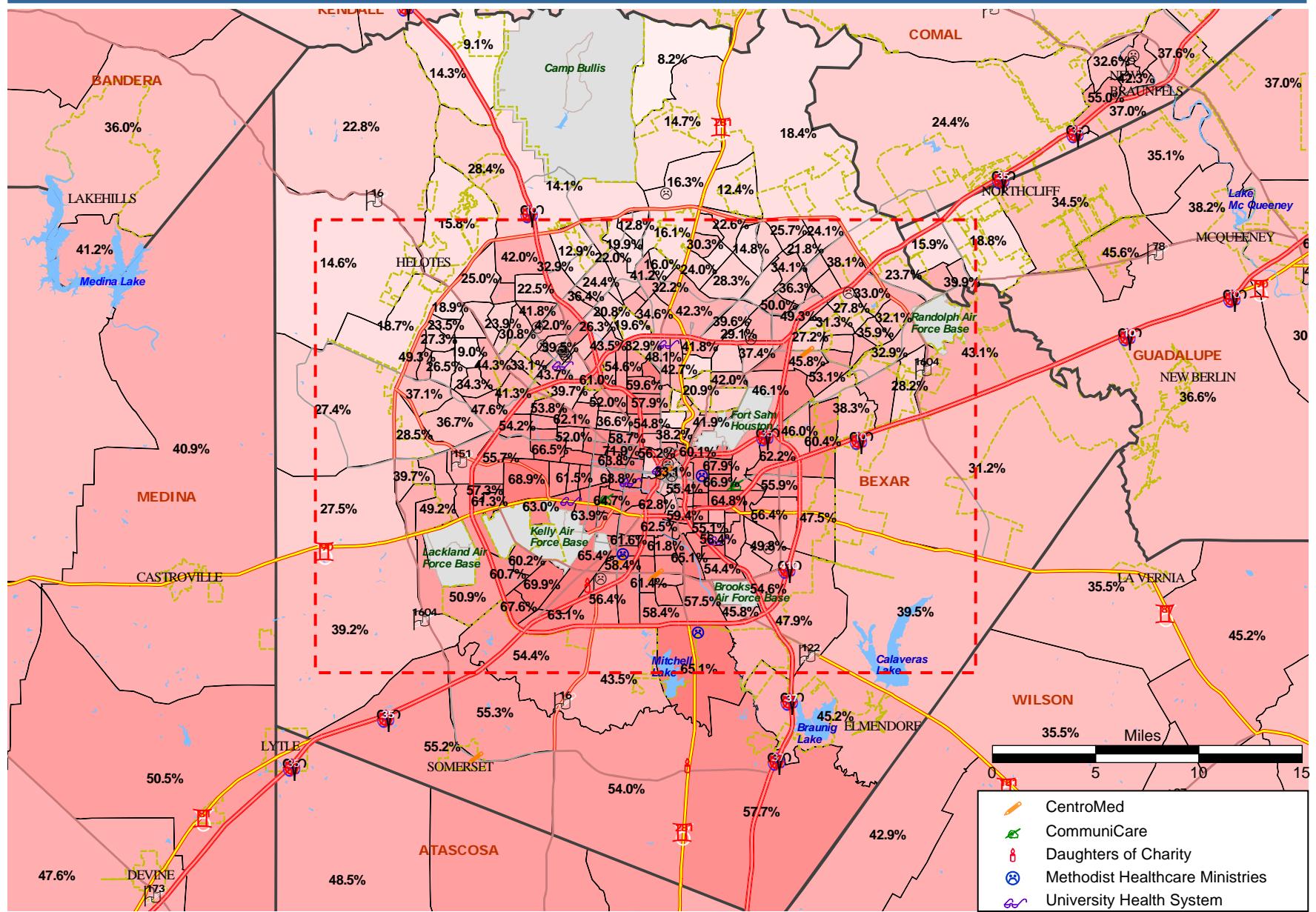


(1) Source: Claritas 2000 – 2011 database.



II. Demographics

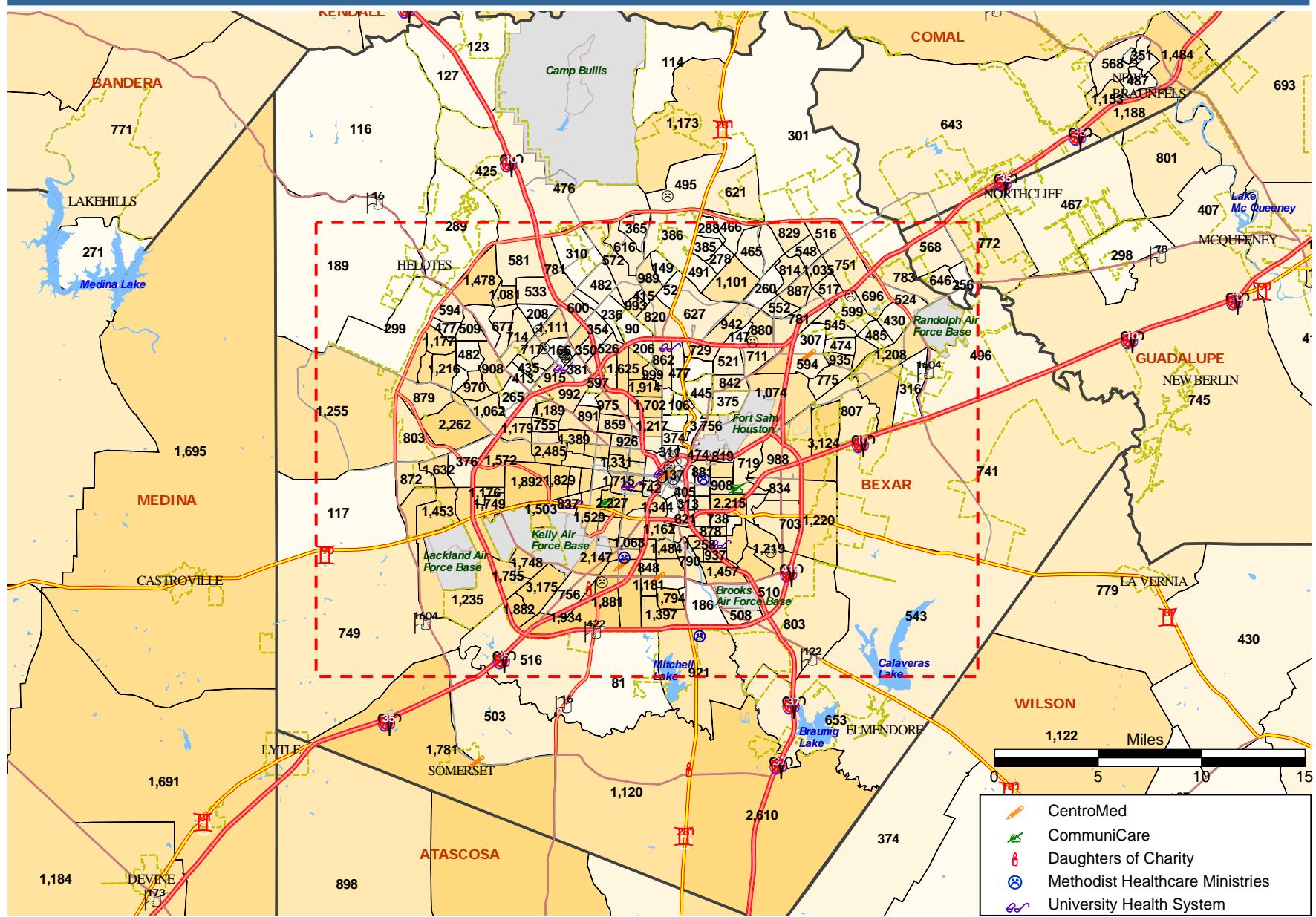
2006 Percentage of Total - Population Below 200% FPL⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

2006 Population Age 0-17 Below 200% FPL⁽¹⁾

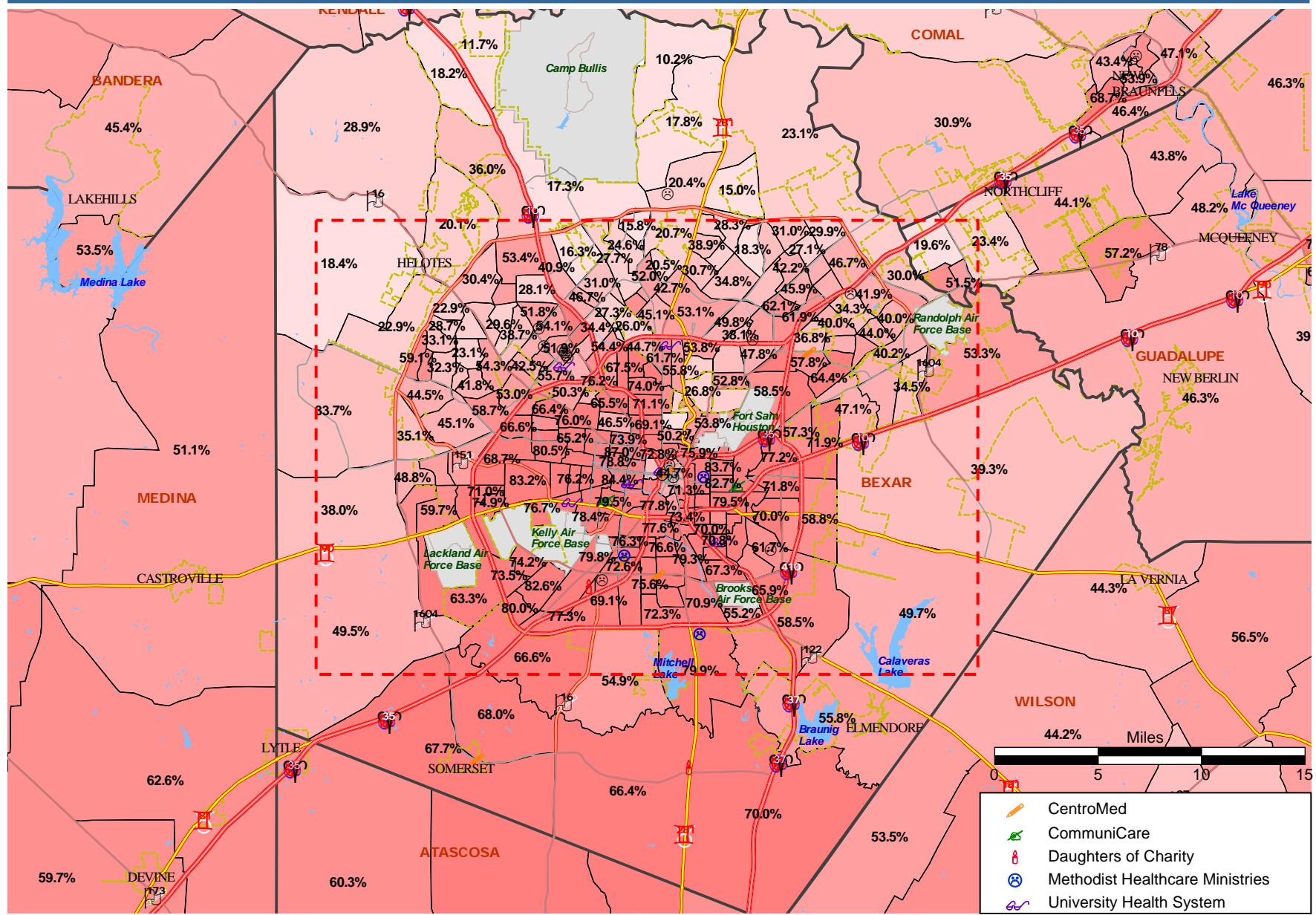


(1) Source: Claritas 2000 – 2011 database.



II. Demographics

2006 Percentage of Total – Population Age 0-17 Below 200% FPL⁽¹⁾

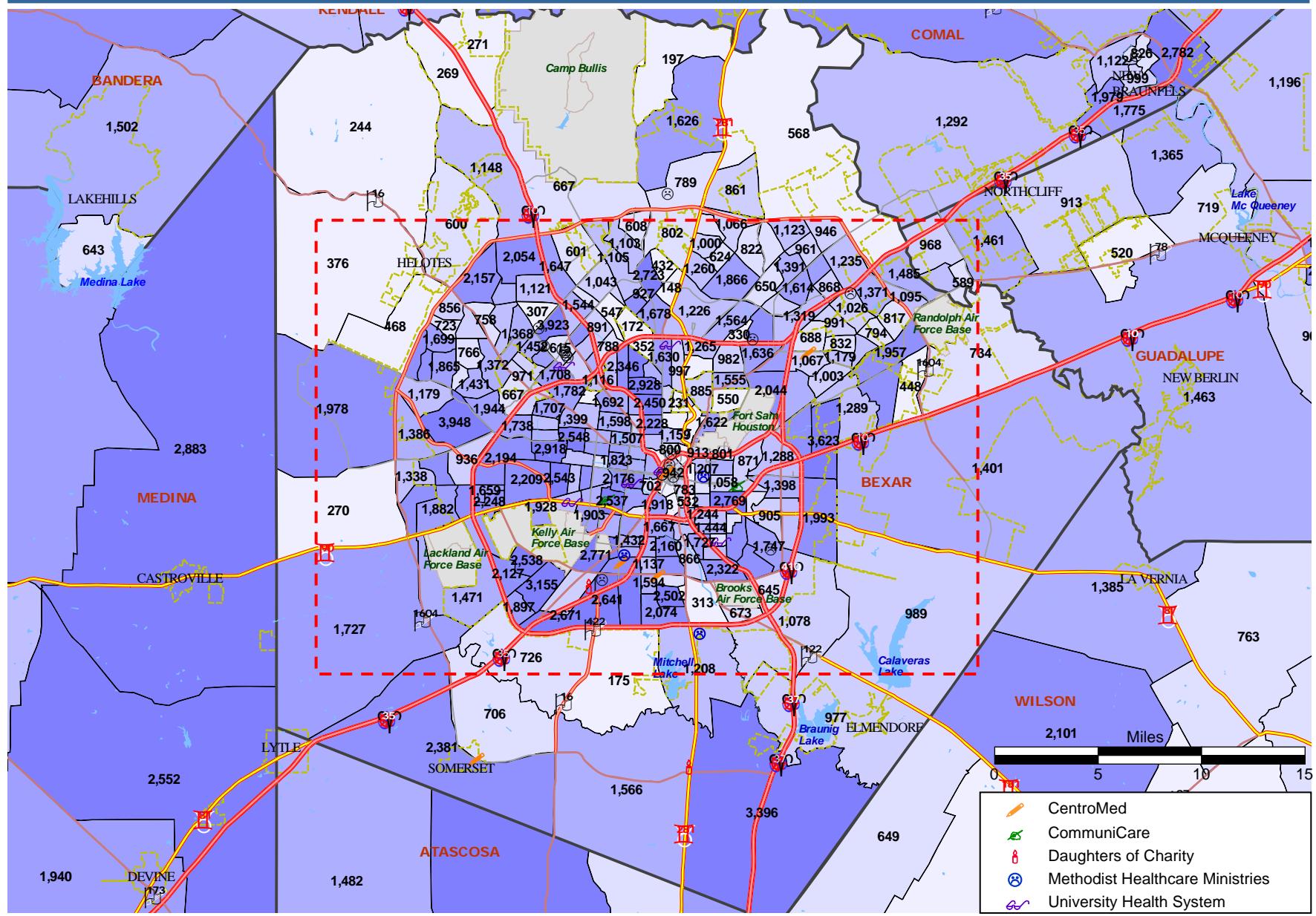


(1) Source: Claritas 2000 – 2011 database.



II. Demographics

2006 Population Age 18-64 Below 200% FPL⁽¹⁾

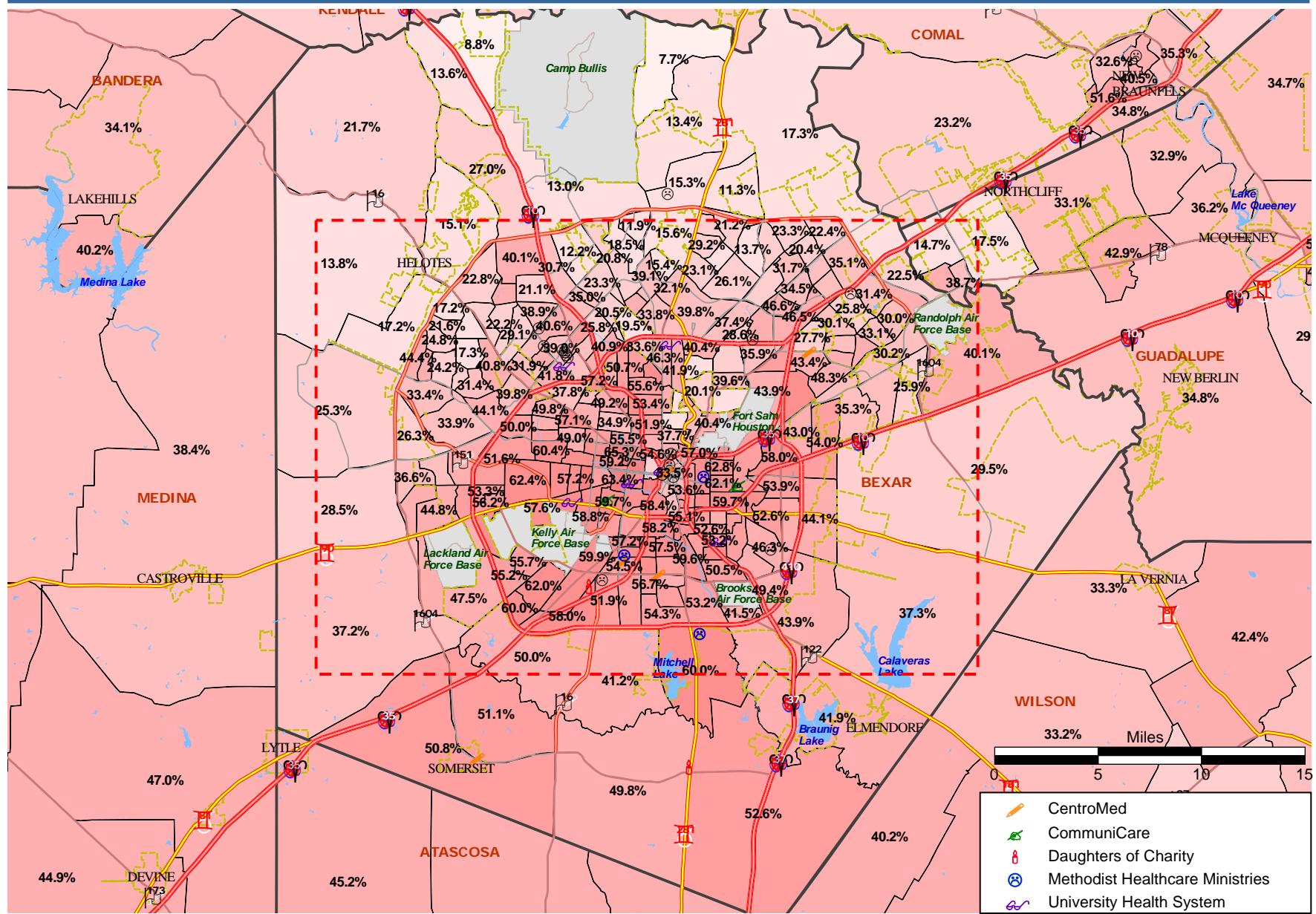


(1) Source: Claritas 2000 – 2011 database.



II. Demographics

2006 Percentage of Total – Population Age 18-64 Below 200% FPL⁽¹⁾

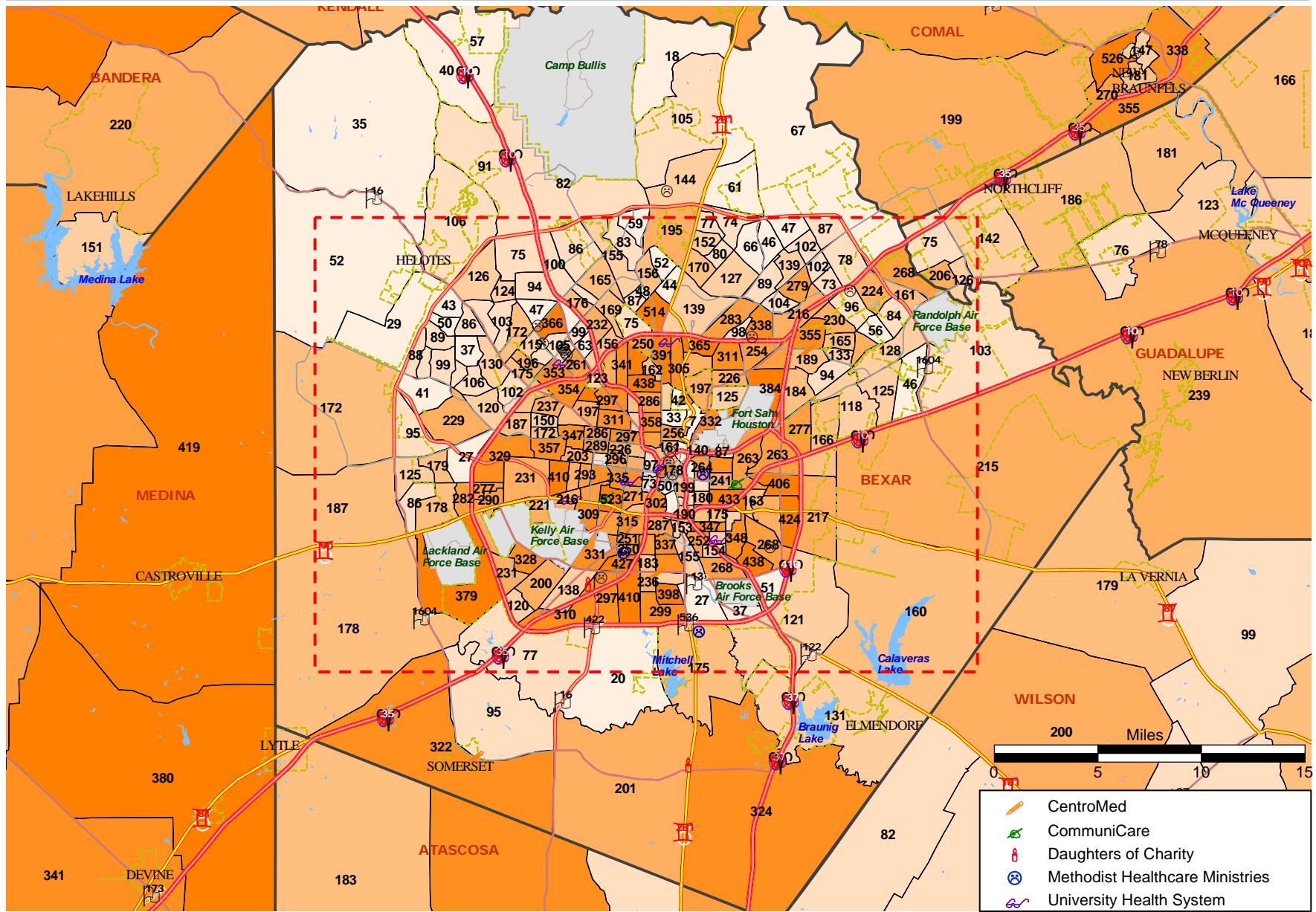


(1) Source: Claritas 2000 – 2011 database.



II. Demographics

2006 Population Age 65+ Below 200% FPL⁽¹⁾

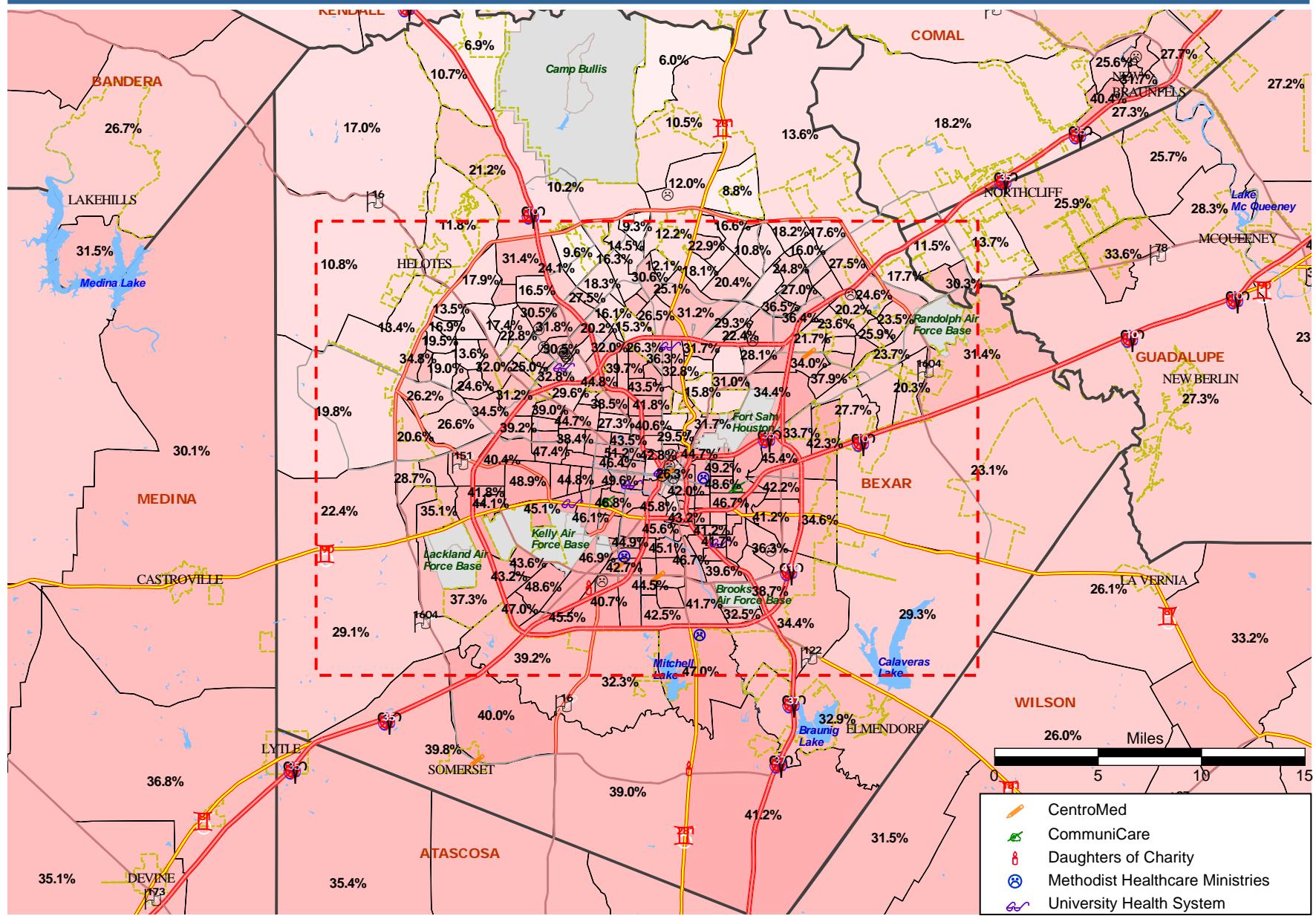


(1) Source: Claritas 2000 – 2011 database.



II. Demographics

2006 Percentage of Total – Population Age 65+ Below 200% FPL⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.



II. Demographics

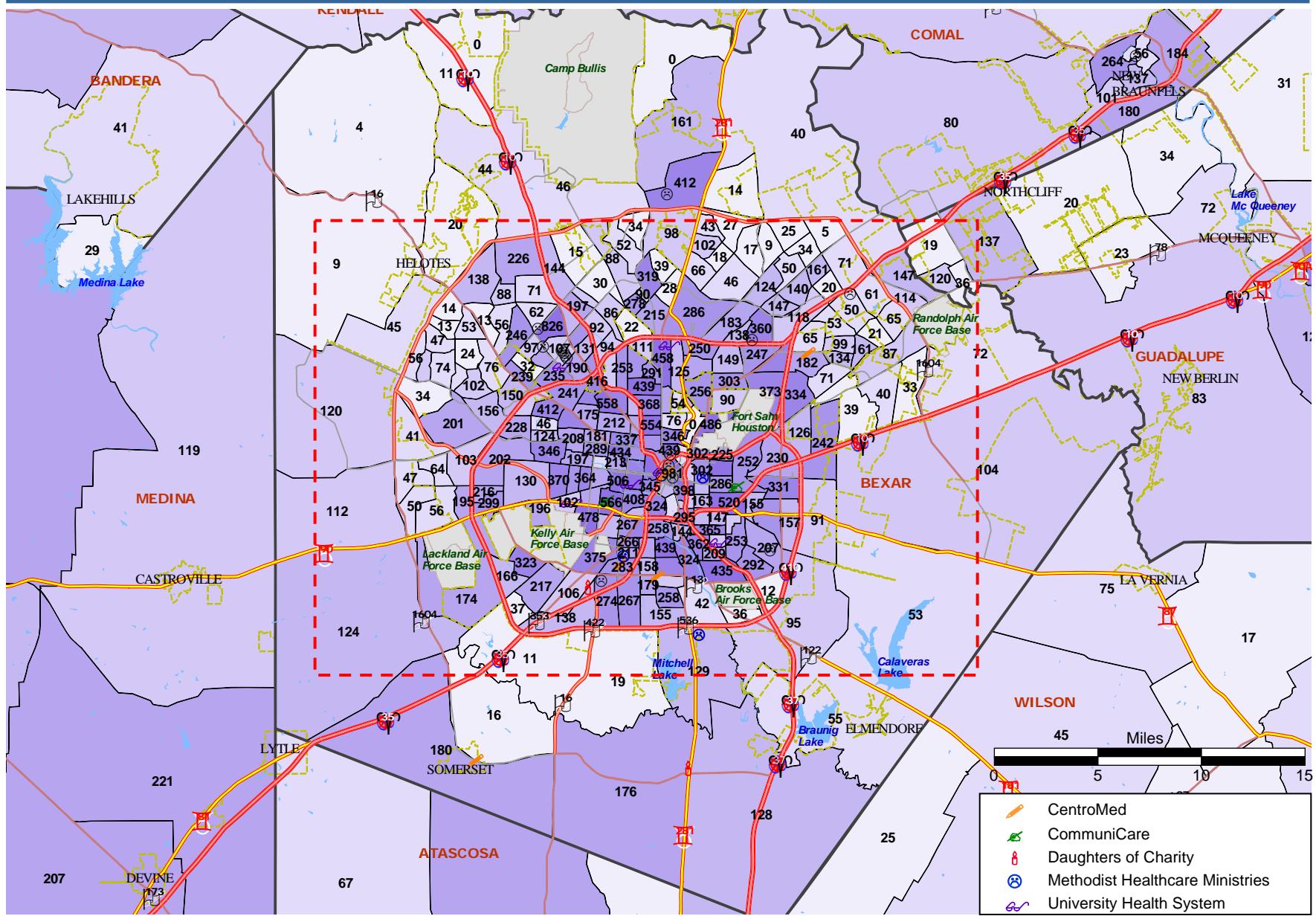
Other Metrics

Following Slides Address:

- Housing Units With No Vehicles Available
- Education Levels
 - Population Age 25+ Without High School Diploma
 - Population Age 25+ High School Graduate With Some College
 - Population Age 25+ With College Degree
- Ethnicity by 4 Major Groups
 - Hispanic
 - Anglo
 - African American
 - Other

II. Demographics

2006 Housing Units with No Vehicles Available⁽¹⁾

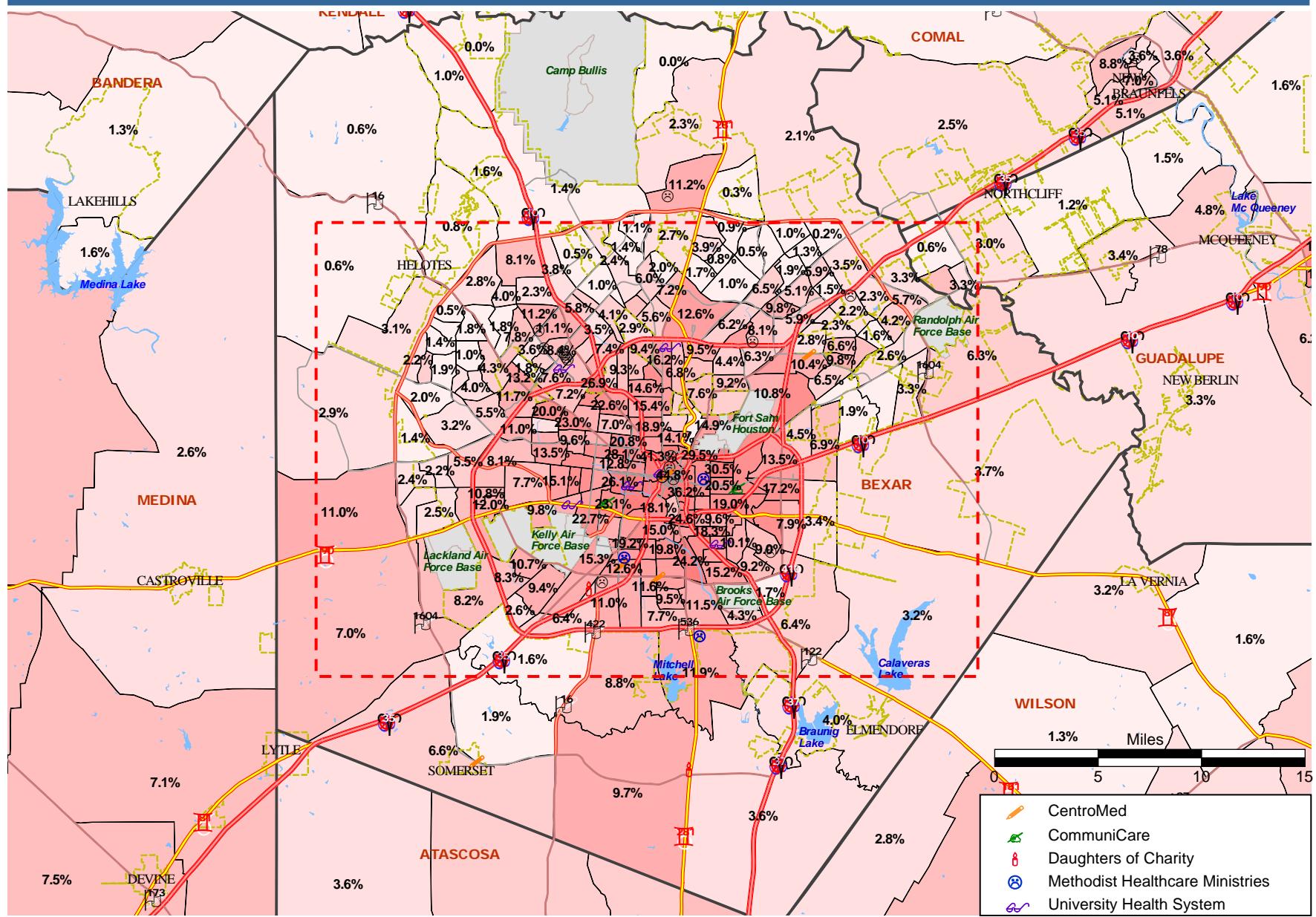


(1) Source: Claritas 2000 – 2011 database.



II. Demographics

2006 Percentage of Total - Housing Units with No Vehicles Available⁽¹⁾

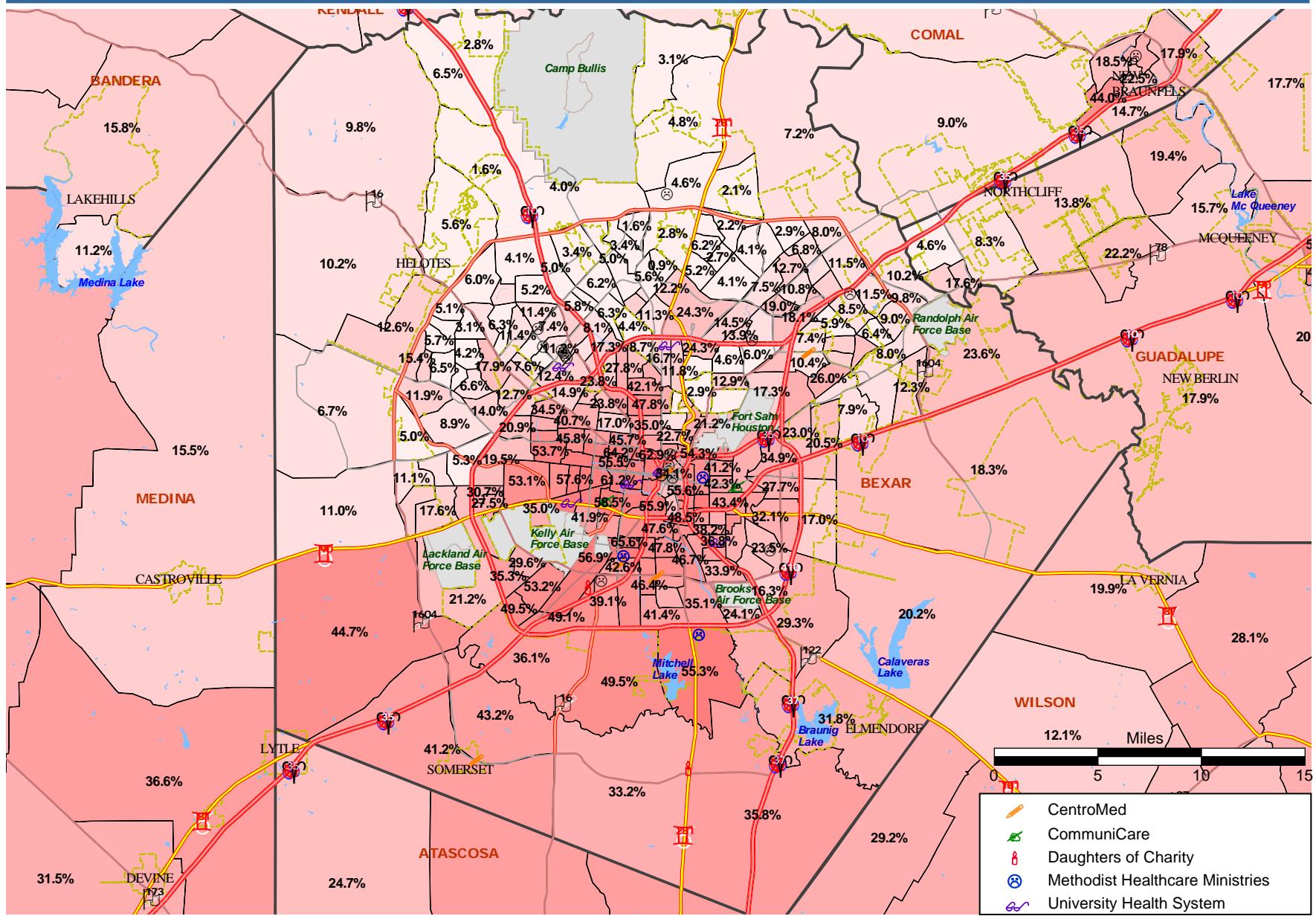


(1) Source: Claritas 2000 – 2011 database.



II. Demographics

Percentage of Population Age 25+ Without High School Diploma⁽¹⁾

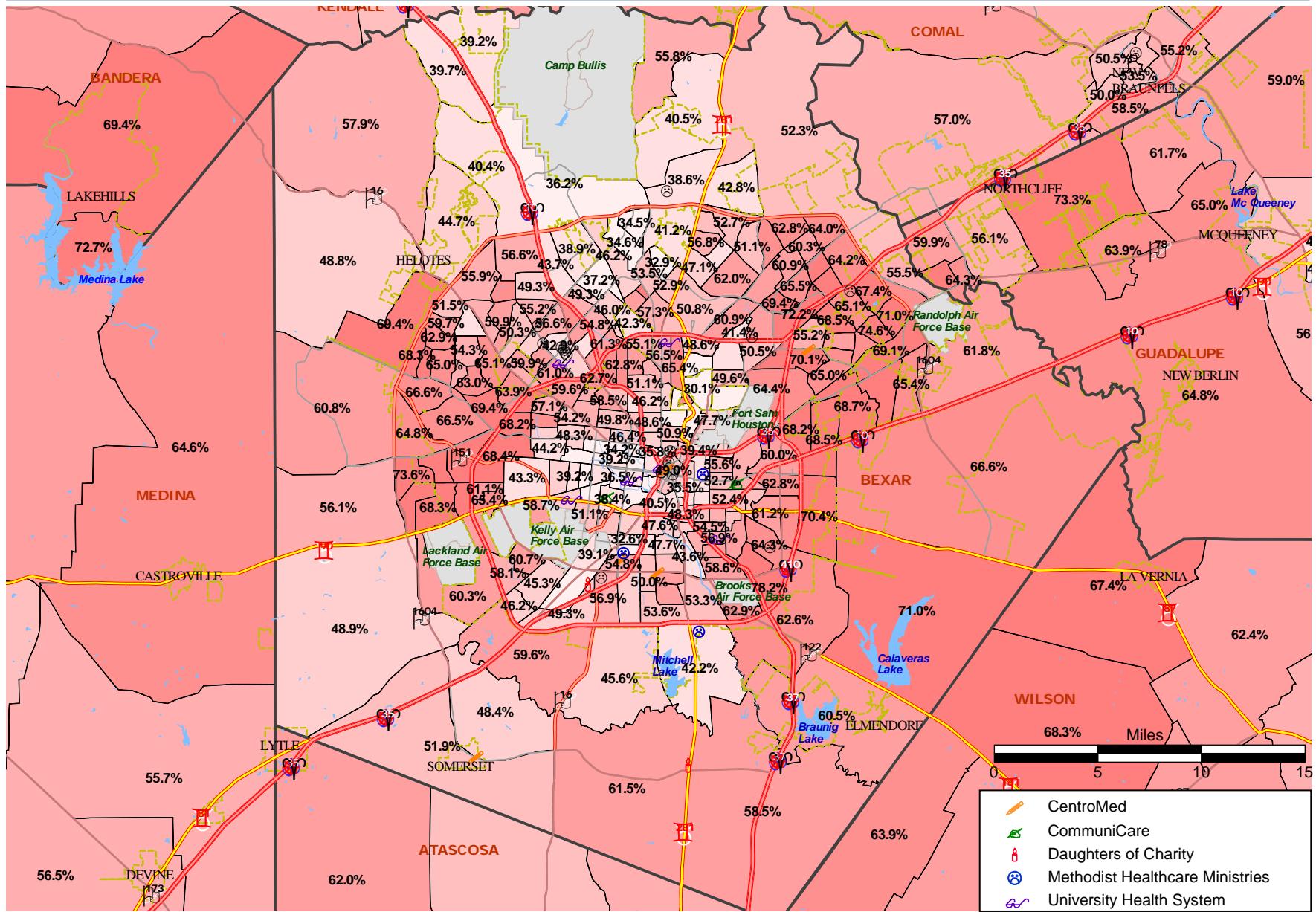


(1) Source: Claritas 2000 – 2011 database.



II. Demographics

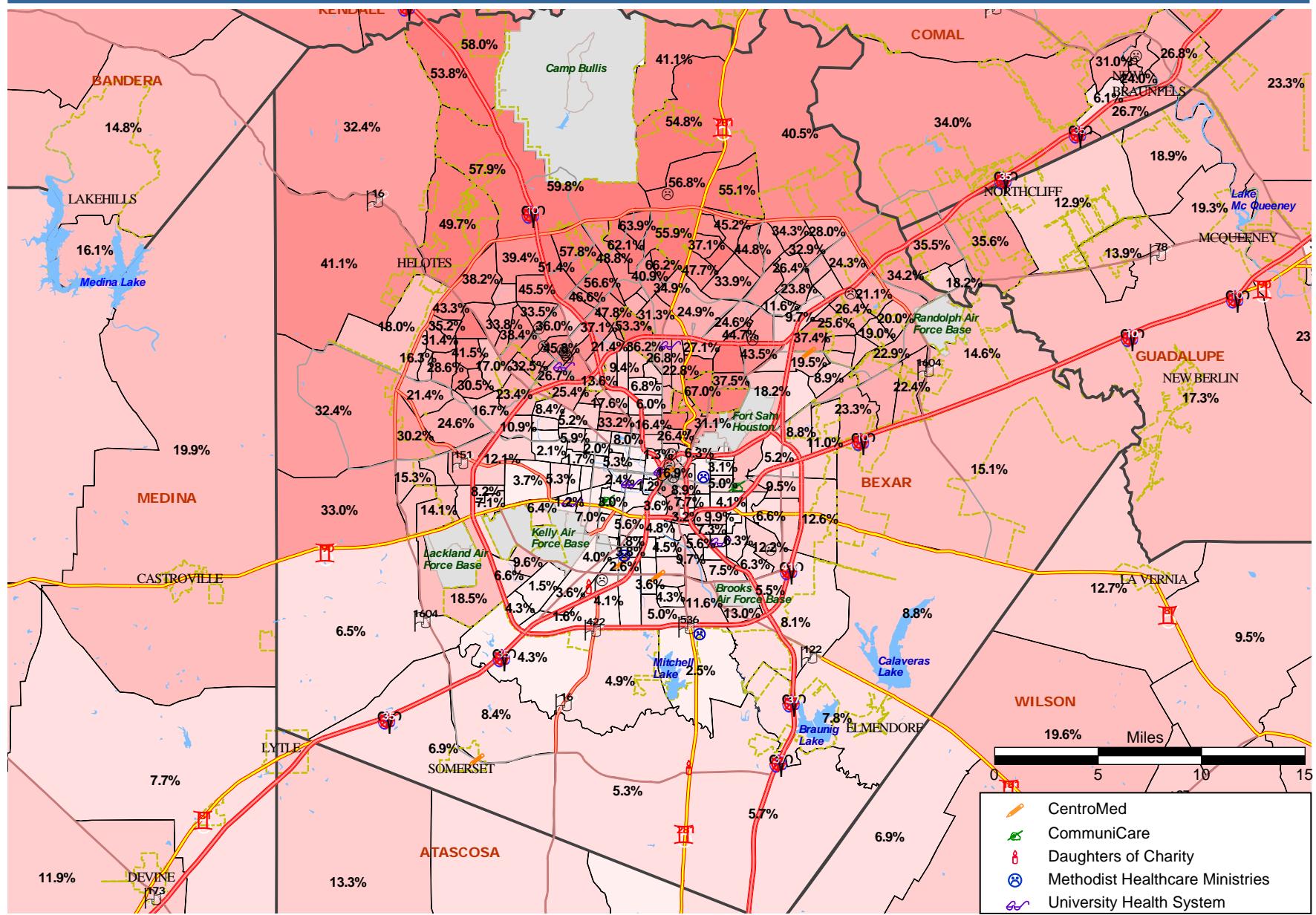
Percentage of Population Age 25+ High School Grad With Some College⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

Percentage of Population Age 25+ College Graduate⁽¹⁾

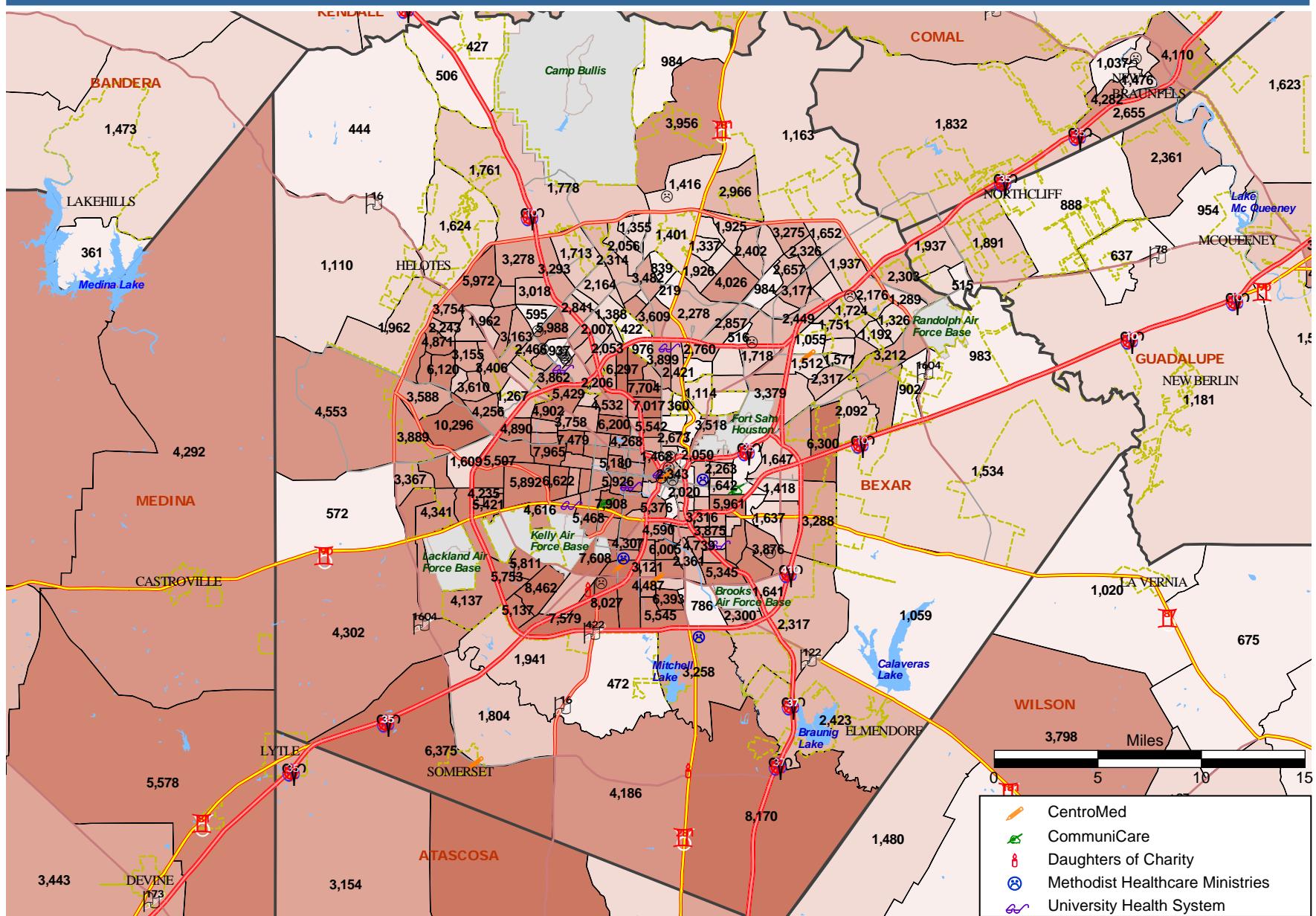


(1) Source: Claritas 2000 – 2011 database.



II. Demographics

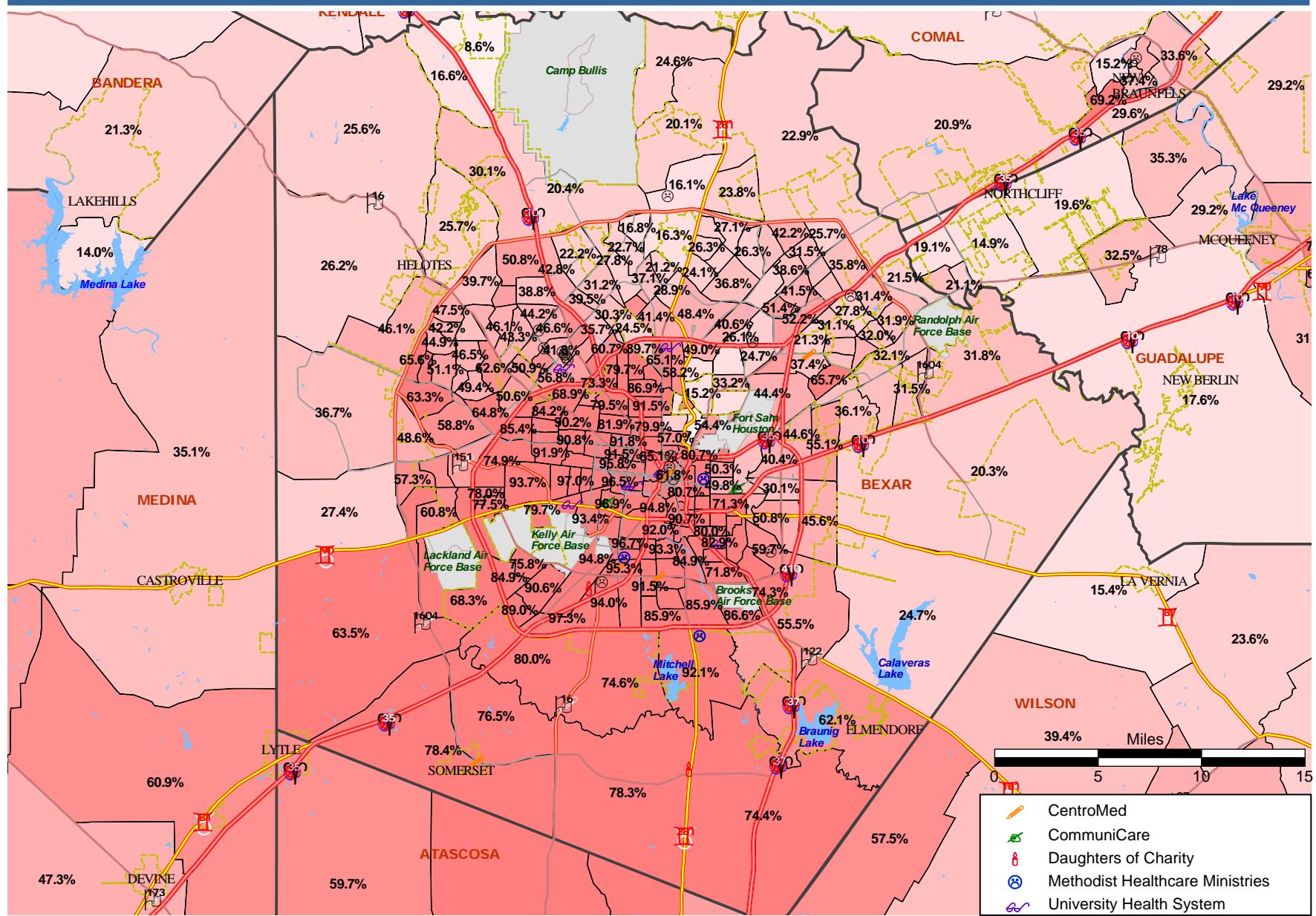
2006 Hispanic Population⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

2006 Percentage of Total – Hispanic Population⁽¹⁾

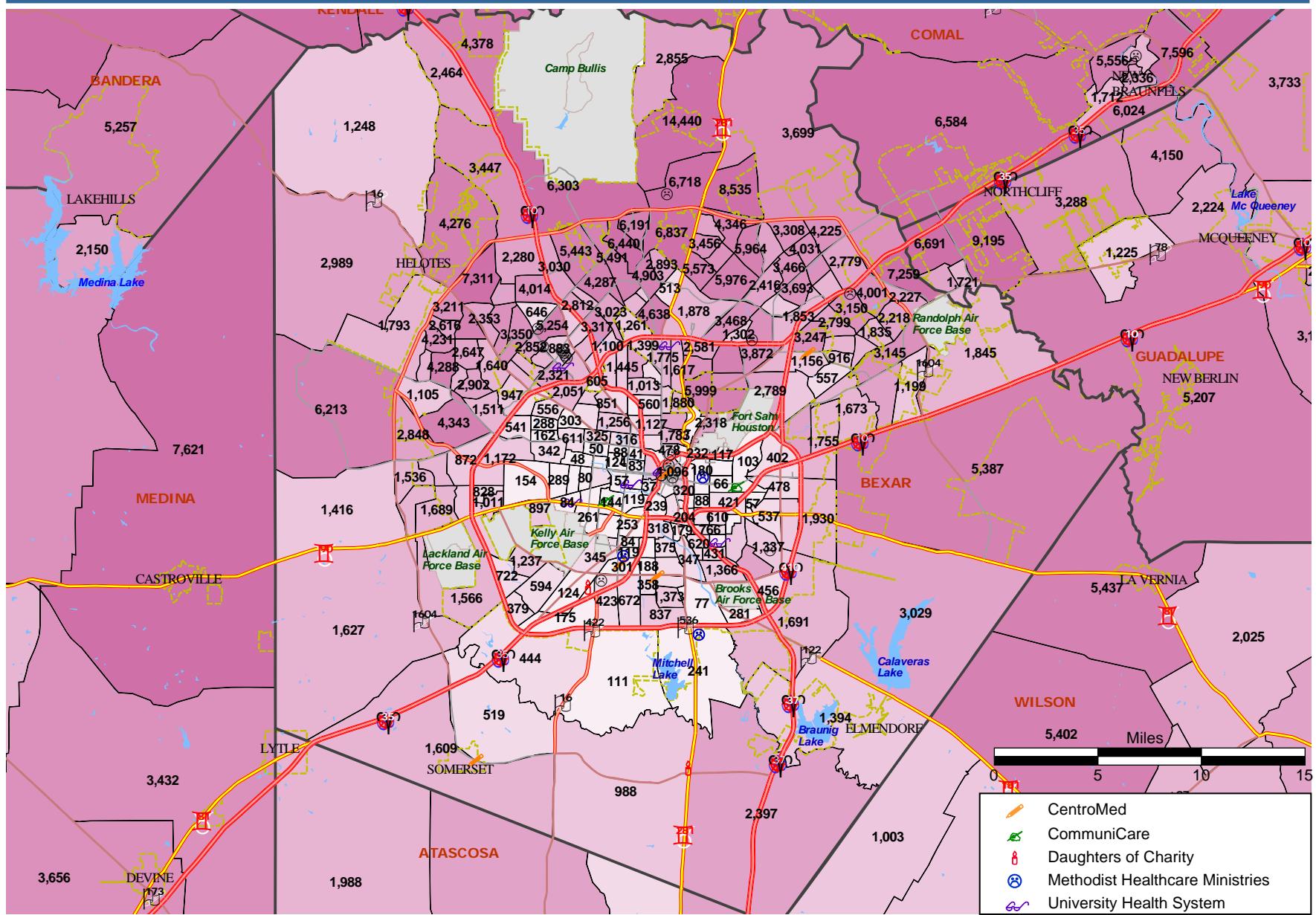


(1) Source: Claritas 2000 – 2011 database.



II. Demographics

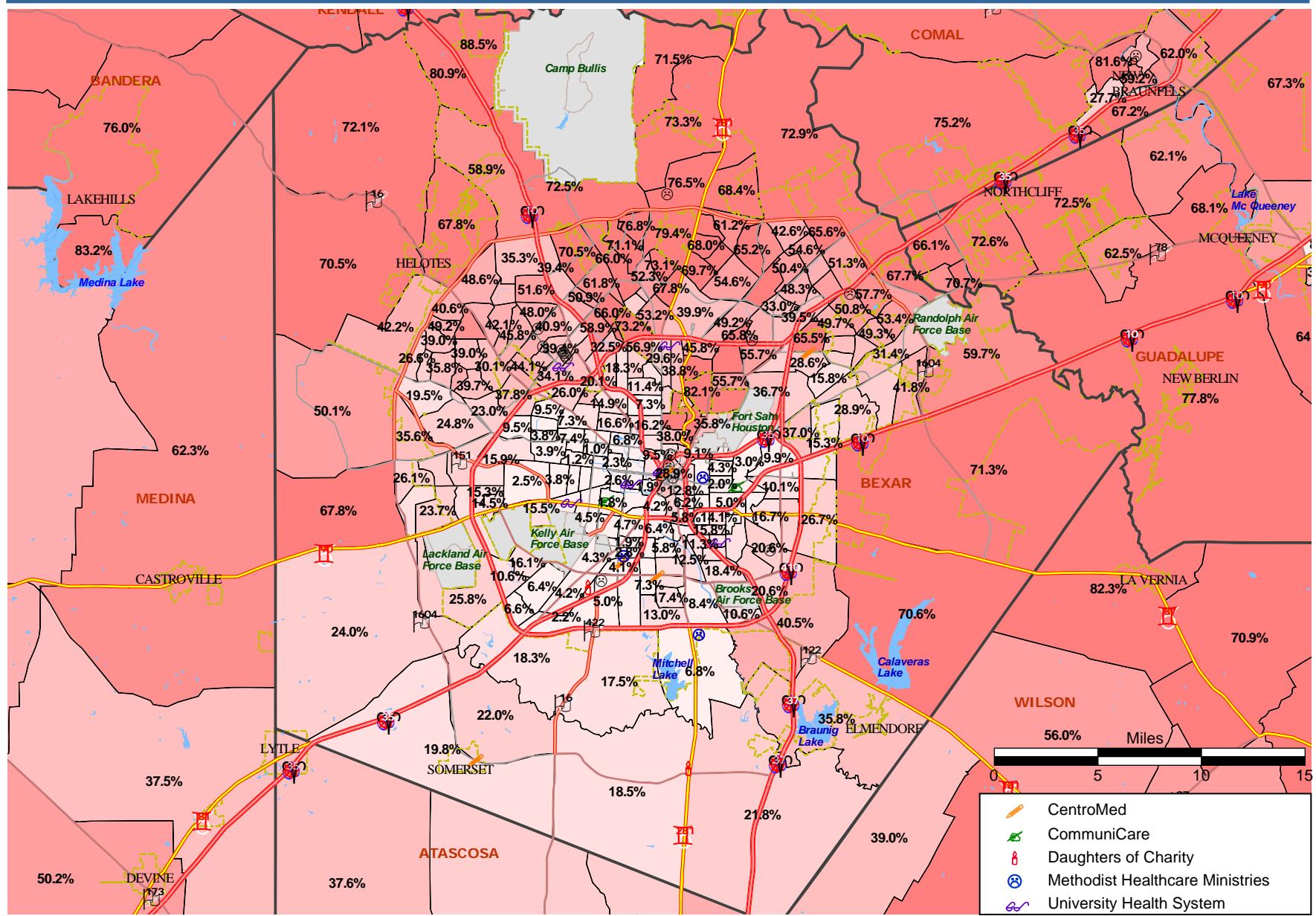
2006 Anglo Population⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

2006 Percentage of Total – Anglo Population⁽¹⁾

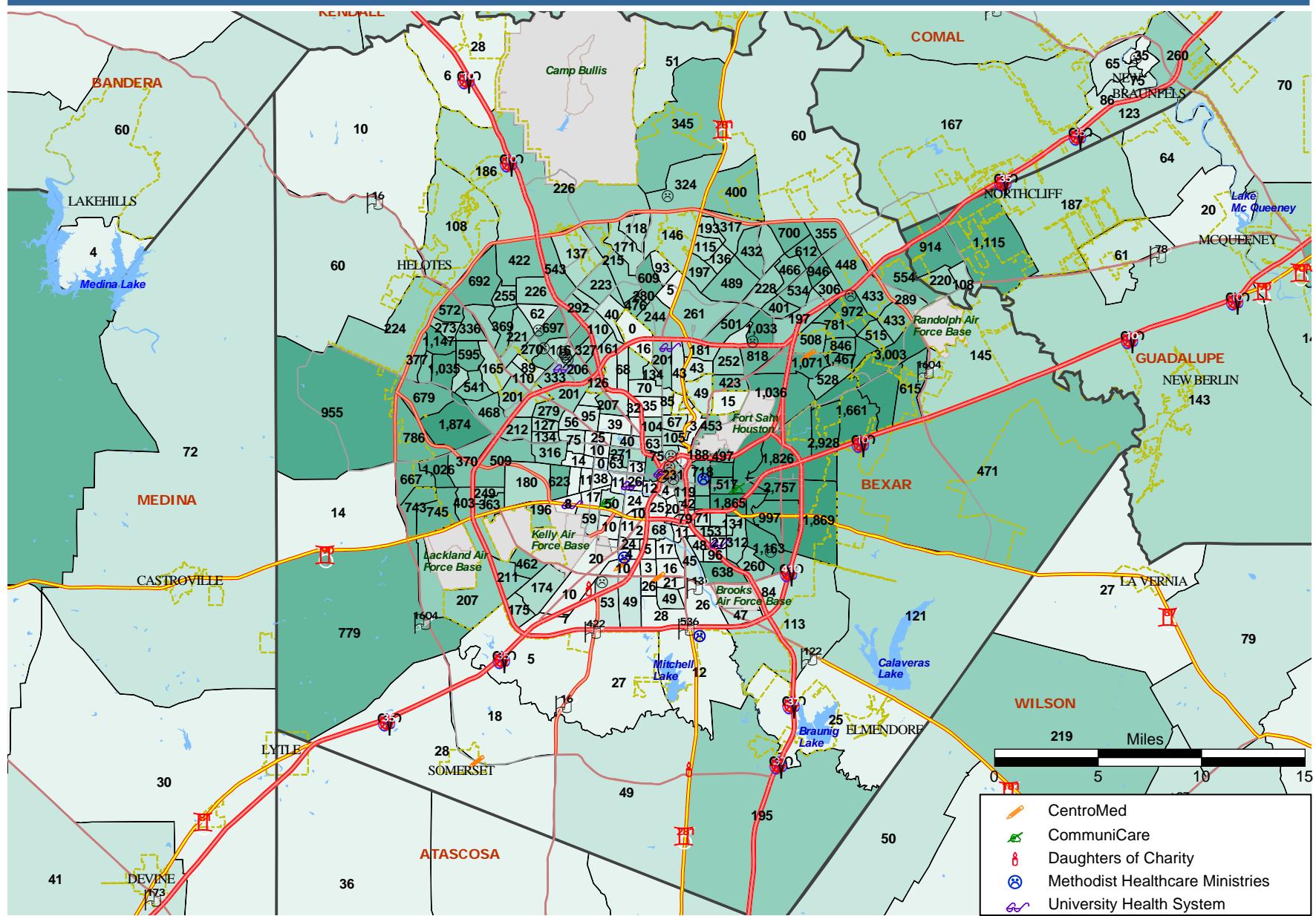


(1) Source: Claritas 2000 – 2011 database.



II. Demographics

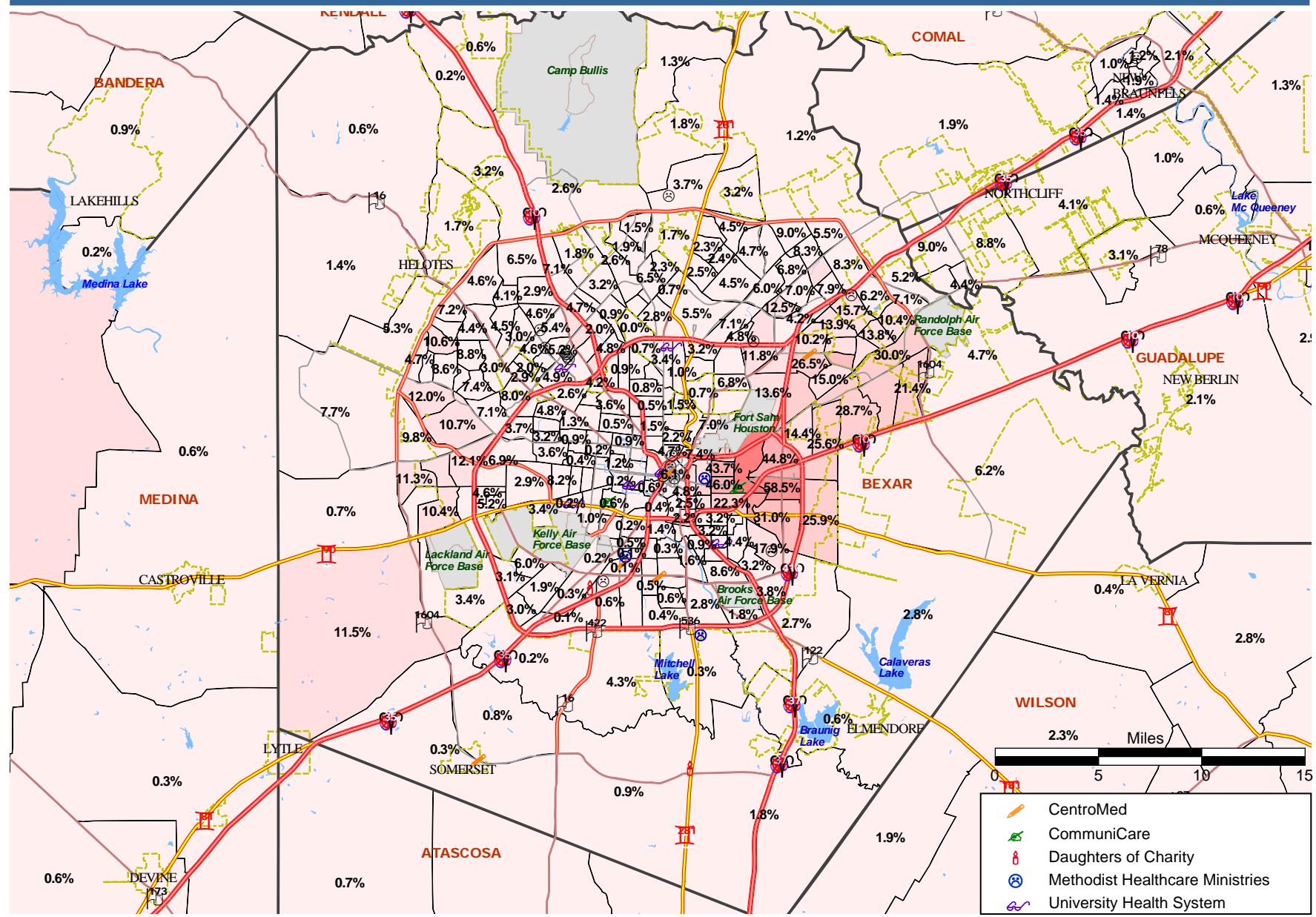
2006 African American Population⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

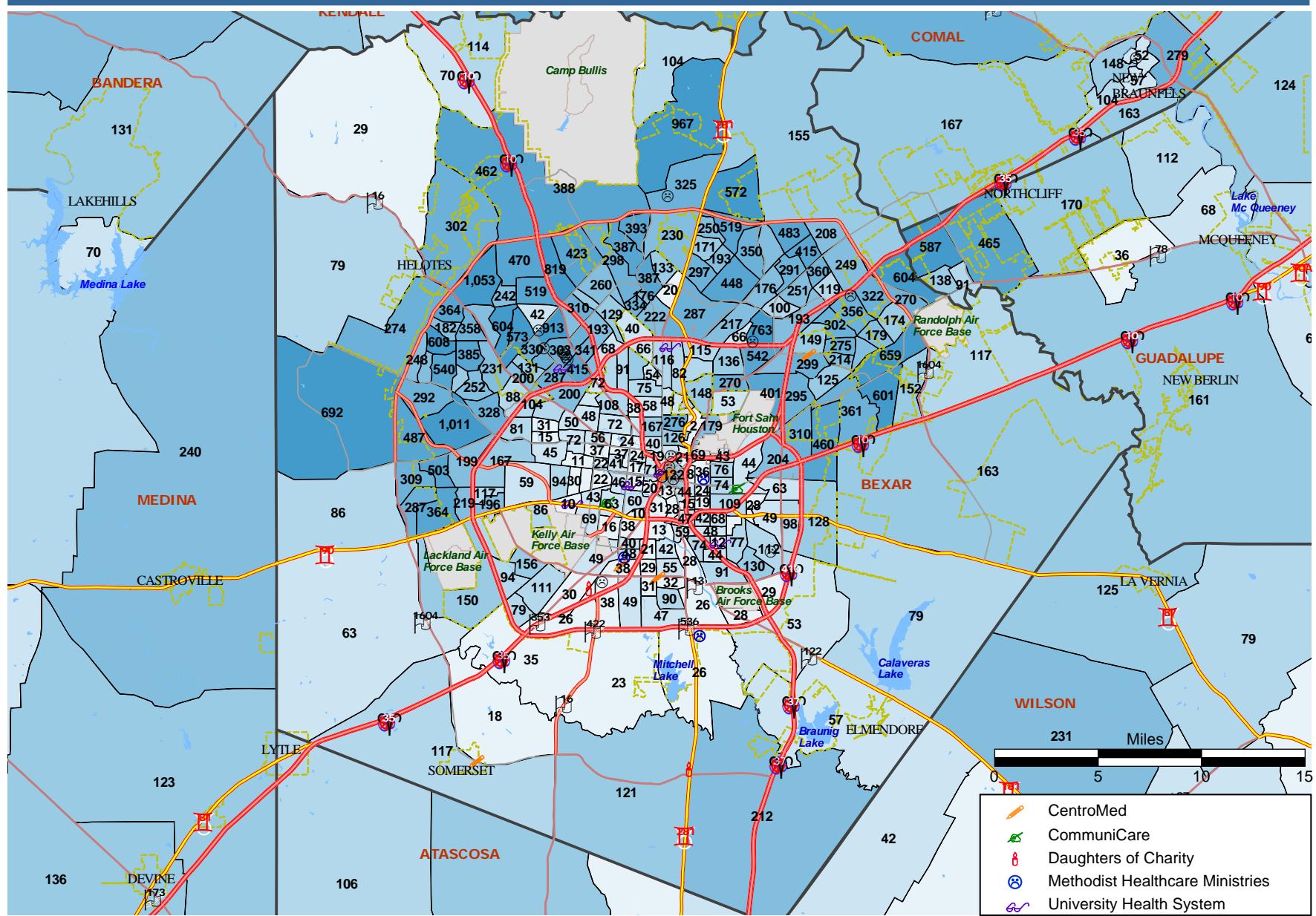
II. Demographics

2006 Percentage of Total – African American Population⁽¹⁾



II. Demographics

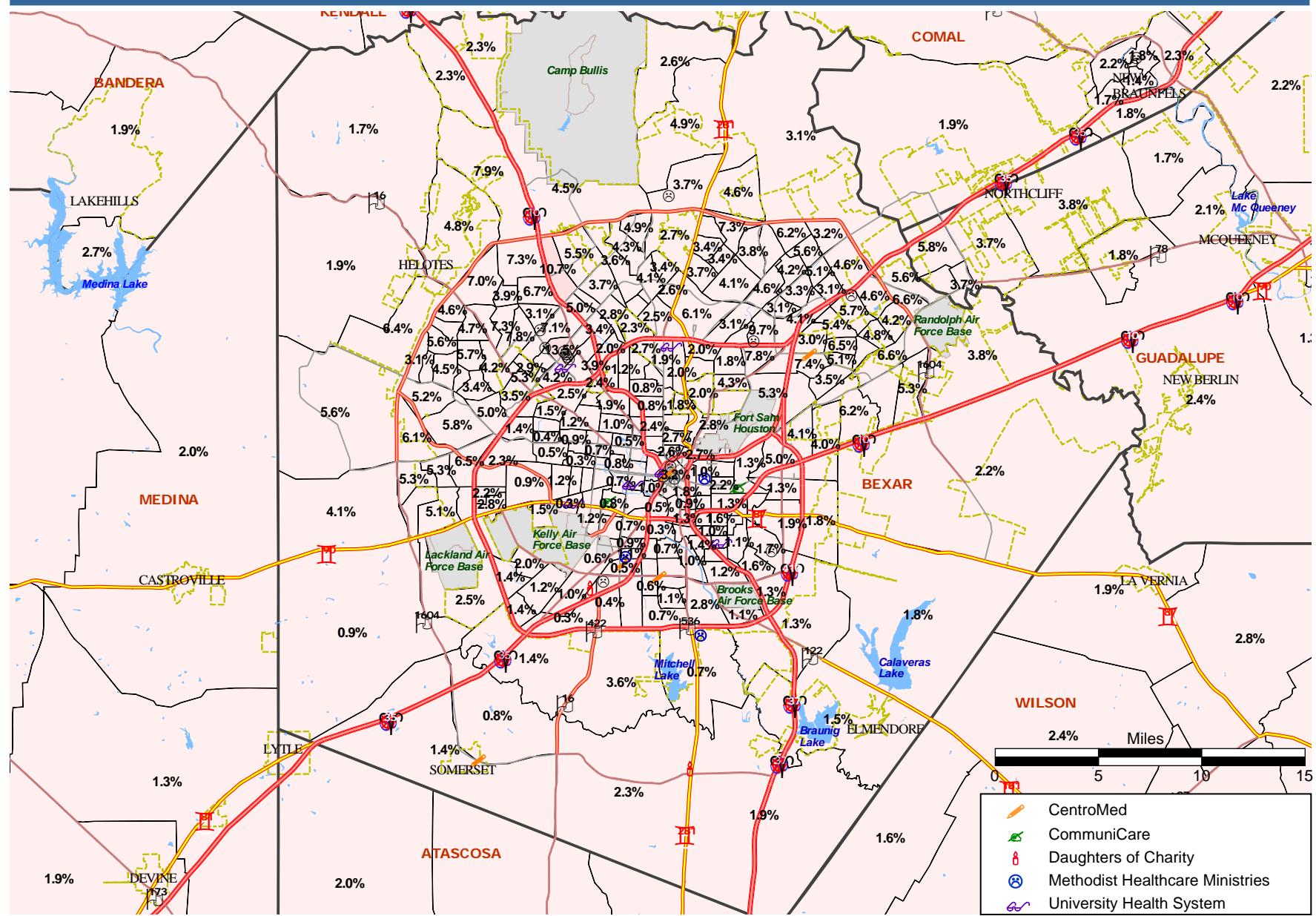
2006 Other Ethnicities Population⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

2006 Percentage of Total – Other Ethnicities Population⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.



II. Demographics

Summary

Population

- Bexar County population expected to experience very strong growth over the next 10 years
 - 1,525,920 Population in 2006 projected to be 1,759,138 in 2016
 - +15.3% Growth
 - 233,218 Additional Lives
- 54.9% of growth is projected to occur in the 18 – 64 age cohort... group most likely to be uninsured
- Most population growth concentrated in the northern half of Bexar County outside Loop 410

Poverty

- 100% FPL poverty rates in Bexar County are significantly higher than Texas and U.S.

	<u>Total Population</u>	<u>0 – 17 Population</u>
– Bexar County 100% FPL	17.6%	25.1%
– Texas 100% FPL	16.2%	22.8%
– United States 100% FPL	12.5%	17.6%

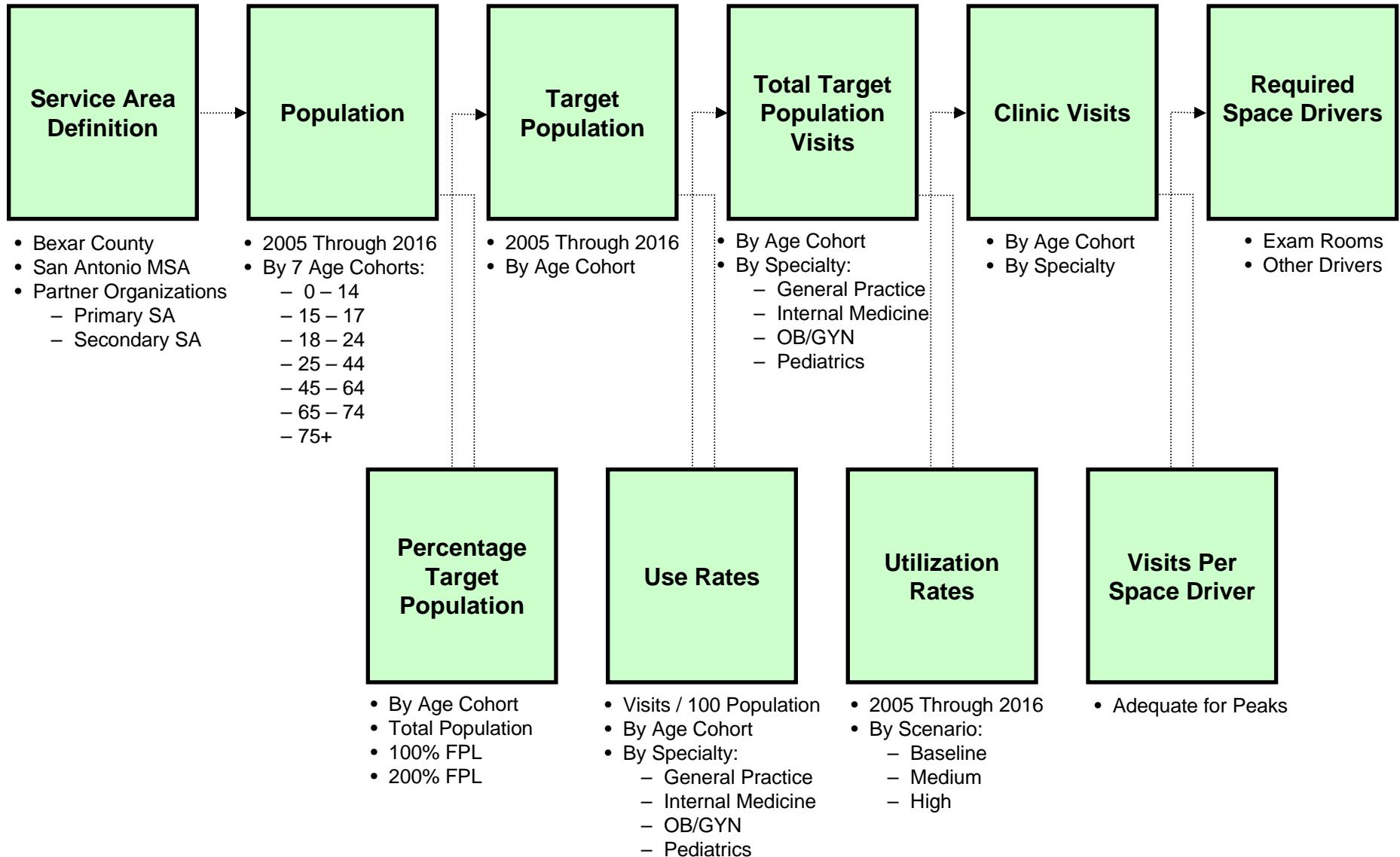
- 200% FPL rates are over twice the 100% FPL rates

	<u>Total Population</u>	<u>0 – 17 Population</u>
– Bexar County 200% FPL	43.0%	55.1%

- Poverty in Bexar County has been trending up in recent years... from 2000 – 2003 for 100% FPL:
 - 0 – 17 Population +2.4% +14,326 lives
 - Total Population +1.9% +39,013 lives
- Poverty is heavily concentrated inside Loop 410 and southern Bexar County
- Percentage of population below 200% FPL inside Loop 410 expected to increase from 2006 - 2011

III. Utilization Rate

Demand Analysis Approach



III. Utilization Rates

Use Rates

- Centers for Disease Control and Prevention / National Center for Health Statistics
 - National Ambulatory Medical Care Survey – 2004
 - National Hospital Ambulatory Medical Care Survey – 2004
 - South Geographic Region Use Rates
 - <http://www.cdc.gov/nchs/>
- Visits Per 100 Population by Specialty

Age Cohort	General Practice	Internal Medicine	OB/GYN	Pediatrics
0 - 14 Years	36.69	2.36	0.71	177.83
15 - 17 Years	41.70	12.64	18.45	61.84
18 - 24 Years	51.17	19.99	59.33	3.11
25 - 44 Years	55.04	42.62	52.80	3.55
45 - 64 Years	93.13	86.12	19.34	7.36
65 - 74 Years	111.13	138.76	8.80	5.10
75+ Years	126.51	158.23	5.64	3.21

III. Utilization Rates

Utilization Rates Methodology

Partner Organization Clinic Visits

- Bexar County
- MSA Excluding Bexar County

Estimated Total Visits – 200% FPL

- Bexar County
- MSA Excluding Bexar County

=

Utilization Rates
(Percentage of Expected Visits
by Organization)

Objectives

- To quantify the Partner Organizations' volumes as a percentage of the expected 200% FPL visits
 - By Partner Organization / Clinic
 - By Age Cohort
- To identify areas of Bexar County with lower utilization of Partner Organizations' Primary Care services

III. Utilization Rates

Clinic Visits by Patient Origin⁽¹⁾

- 2005 Clinic Visits by Patient Origin

Partner Organization	Bexar County	MSA Excluding Bexar County	Outside of MSA	Total
University Health System	286,738	5,355	5,327	297,420
CentroMed	128,361	7,083	1,170	136,614
CommuNiCare	56,807	716	209	57,732
Methodist Healthcare Ministries	12,769	836	324	13,930
Daughters of Charity	10,364	1,147	76	11,587
Total - Partner Organizations	495,040	15,137	7,106	517,283

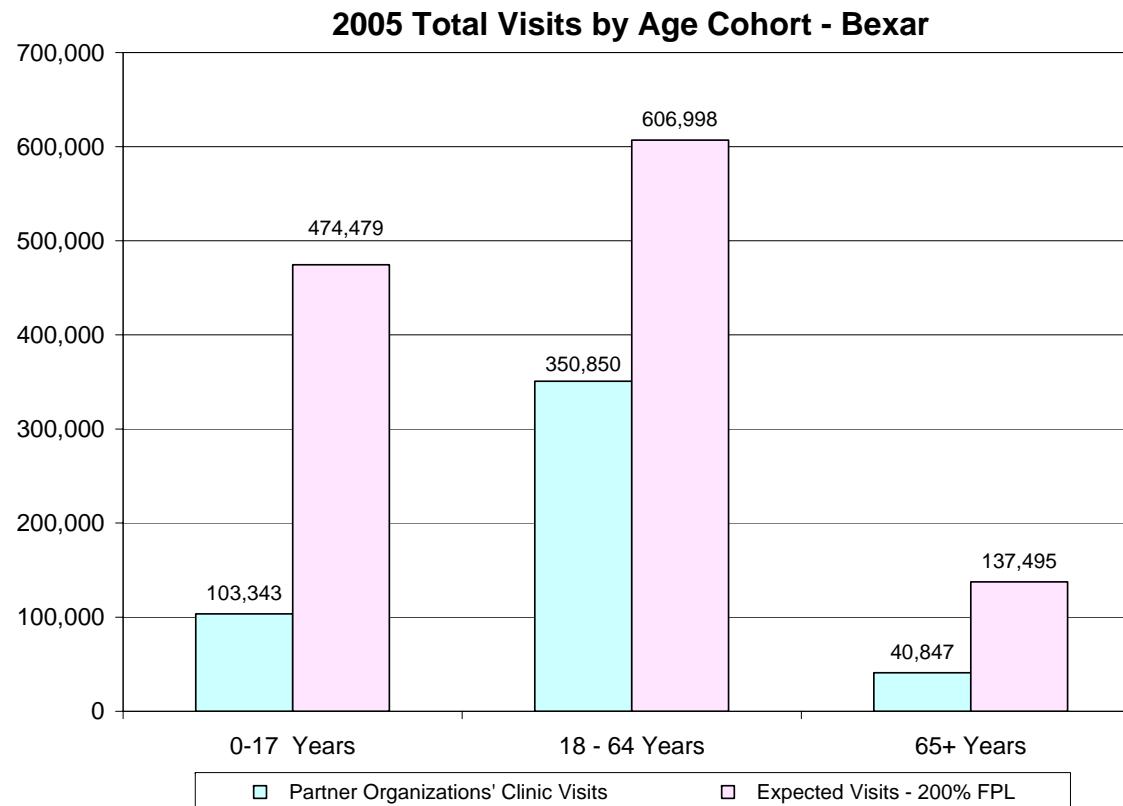
- 2005 Percentage of Clinic Visits by Patient Origin

Partner Organization	Bexar County	MSA Excluding Bexar County	Outside of MSA	Total
University Health System	96.4%	1.8%	1.8%	100.0%
CentroMed	94.0%	5.2%	0.9%	100.0%
CommuNiCare	98.4%	1.2%	0.4%	100.0%
Methodist Healthcare Ministries	91.7%	6.0%	2.3%	100.0%
Daughters of Charity	89.4%	9.9%	0.7%	100.0%
Total - Partner Organizations	95.7%	2.9%	1.4%	100.0%

(1) Source: Partner Organizations' databases.

III. Utilization Rates

Total Visits & Utilization by Age Cohort – Bexar County⁽¹⁾



- Partner Organizations account for 40.6% of the expected visits for the 200% FPL population of Bexar County
- Utilization varies significantly by age cohort:
 - 21.8% of expected values from 0 – 17 age cohort
 - 57.8% of expected values from 18 – 64 cohort
 - 29.7% of expected values from 65+ age cohort

(1) Source: Partner Organizations' databases.

III. Utilization Rates

Visits & Utilization by Age Cohort – Bexar County⁽¹⁾

- 2005 Market Visits - Bexar County

Partner Organization	0-17 Years	18 - 64 Years	65+ Years	Total
University Health System	35,348	222,791	28,600	286,738
CentroMed	46,610	75,666	6,086	128,361
CommuniCare	15,438	36,956	4,413	56,807
Methodist Healthcare Ministries	2,665	9,051	1,054	12,769
Daughters of Charity	3,282	6,387	694	10,364
Total - Partner Organizations	103,343	350,850	40,847	495,040
Total Expected Market - 200% FPL	474,479	606,998	137,495	1,218,972

- 2005 Utilization – Bexar County

Partner Organization	0-17 Years	18 - 64 Years	65+ Years	Total
University Health System	7.4%	36.7%	20.8%	23.5%
CentroMed	9.8%	12.5%	4.4%	10.5%
CommuniCare	3.3%	6.1%	3.2%	4.7%
Methodist Healthcare Ministries	0.6%	1.5%	0.8%	1.0%
Daughters of Charity	0.7%	1.1%	0.5%	0.9%
Total - Partner Organizations	21.8%	57.8%	29.7%	40.6%
Total - Other	78.2%	42.2%	70.3%	59.4%

(1) Source: Partner Organizations' databases.

III. Utilization Rates

Key Findings

- Aggregate volumes of Partner Organizations are well below expected 200% FPL volumes
- Large variation in utilization by age cohort

Conclusions

- 1) Target Population Underutilizing Primary Care Services
 - Use Rates of target population are less than benchmarks
 - Essentially represents unmet needs
- 2) Target Population Overutilizing Emergency Services
 - Emergency Departments used in lieu of Primary Care Clinics
- 3) Patients in the lower and higher age cohorts often qualify for other sources of insurance
 - Medicaid, SCHIP, Medicare, etc.
 - Not seeking care at Partner Organizations' Clinics
- 4) Not all Primary Care providers serving the uninsured are included in data
 - Private Practice Physicians
 - METROHEALTH
 - Veteran's Administration
 - Department of Defense
 - Emergency Departments
 - Other Organizations

III. Utilization Rates

Key Issues

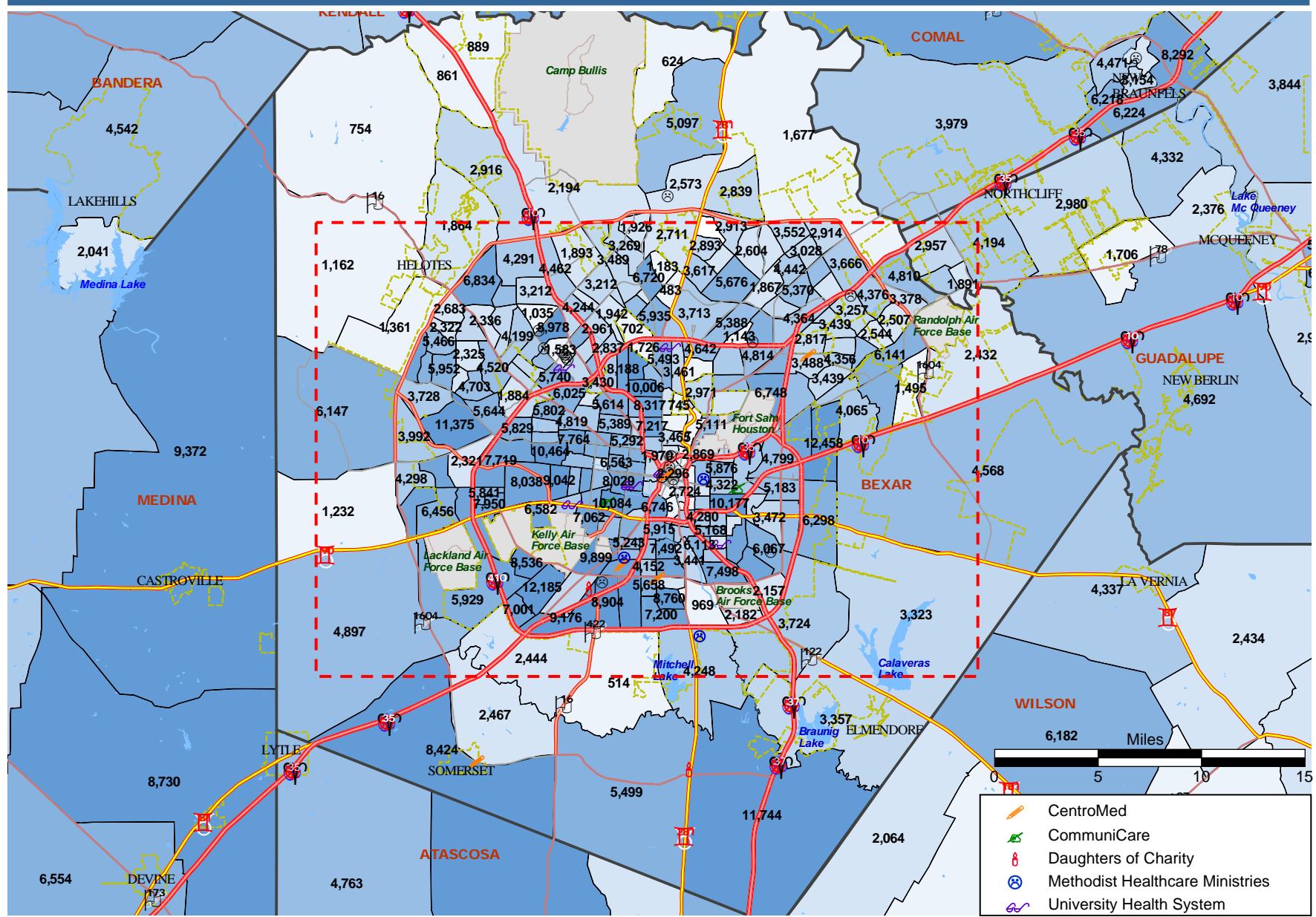
- Which areas of Bexar County have lower utilization of Partner Organizations' Primary Care services?
- How do these vary by age cohort?

Following Slides Map:

- Aggregate Primary Care Clinic Visits of Partner Organizations
 - Total Visits
 - Visits by Age Cohort
- Aggregate Utilization of Partner Organizations
 - Total Utilization
 - Utilization by Age Cohort

III. Utilization Rates

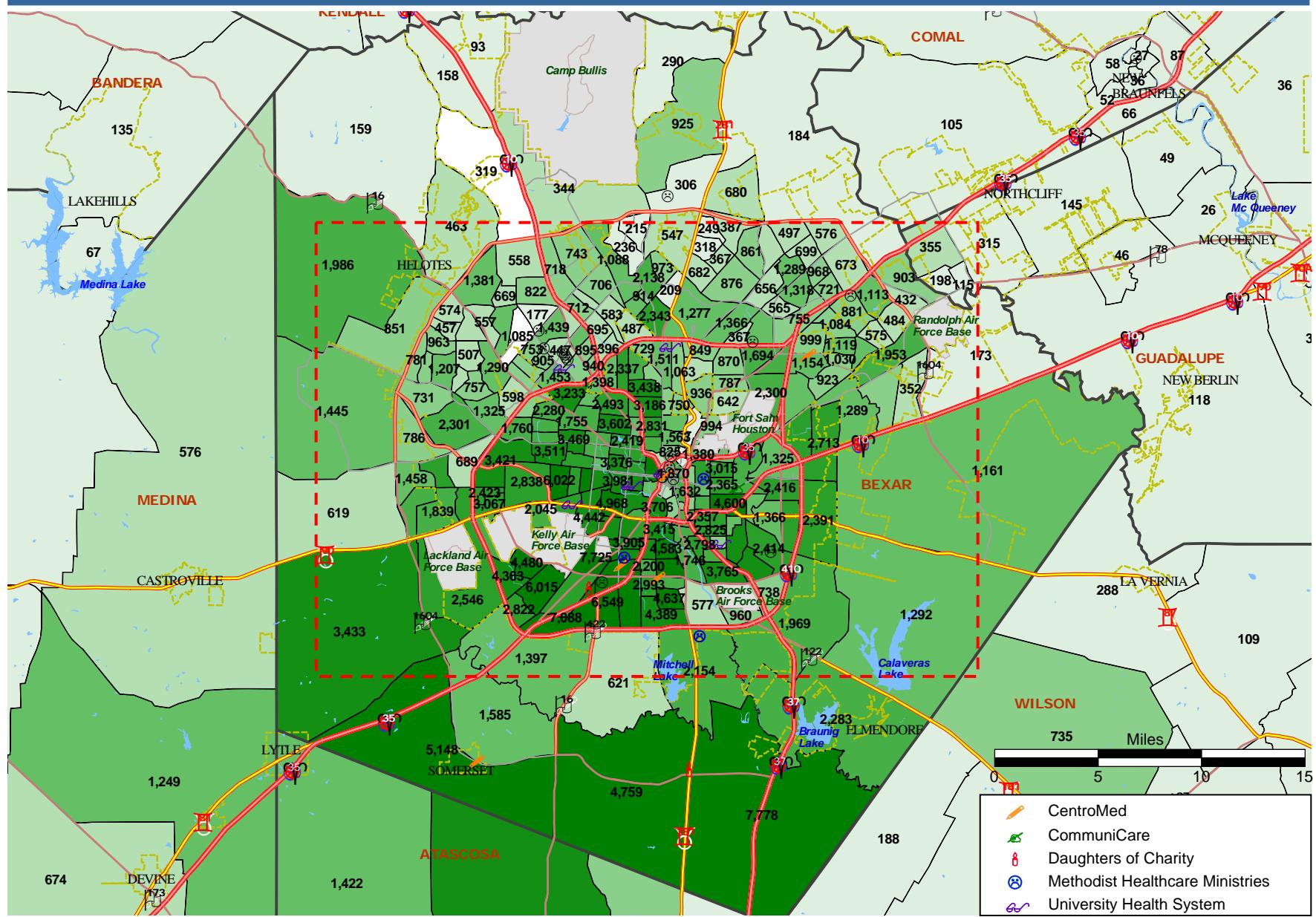
2005 Estimated Visits at 200% FPL⁽¹⁾



(1) Source: Capital Healthcare Planning estimated volumes.

III. Utilization Rates

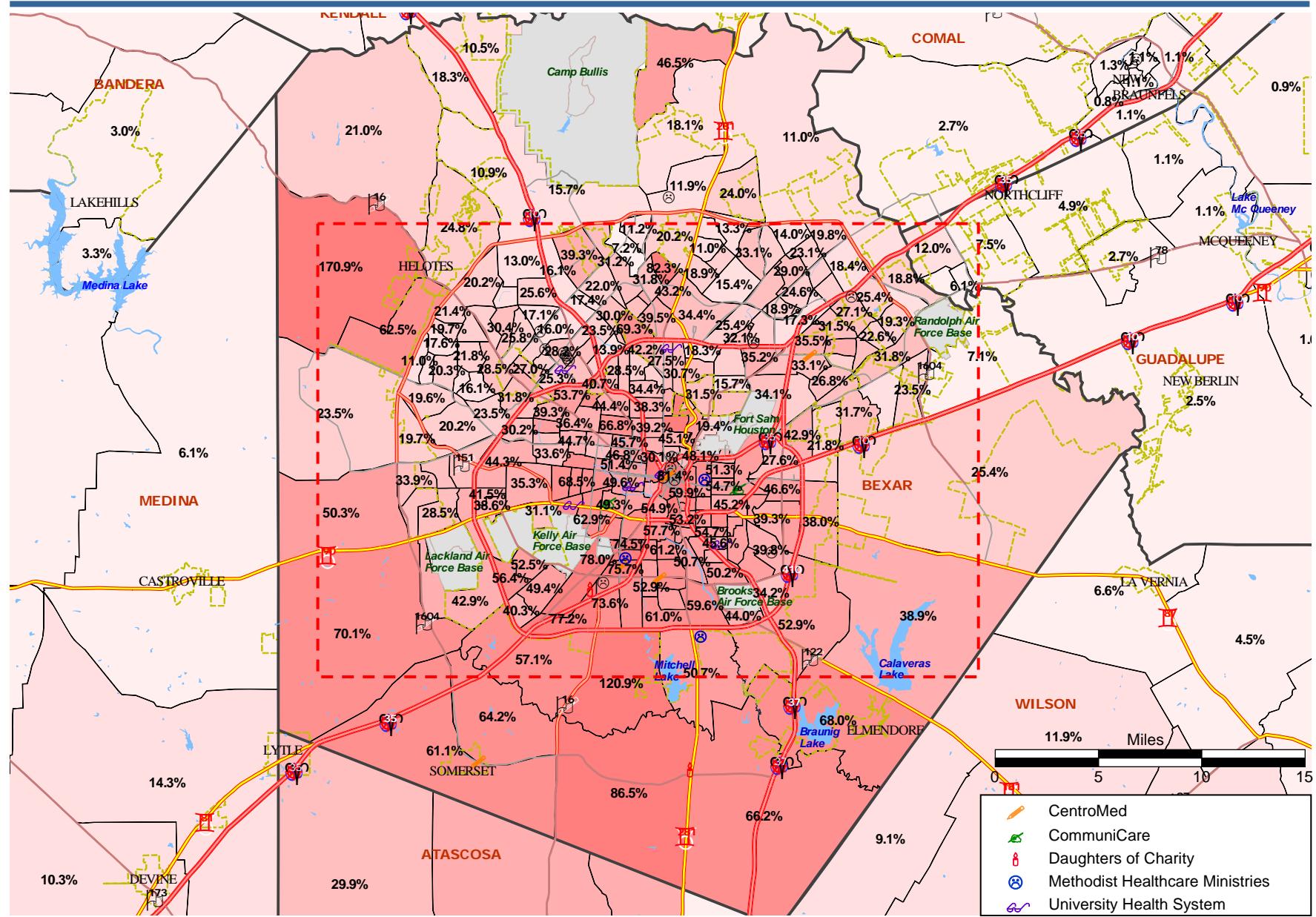
2005 Total Clinic Visits⁽¹⁾



(1) Source: Partner Organizations' databases.

III. Utilization Rates

2005 Total Clinic Utilization Rates⁽¹⁾



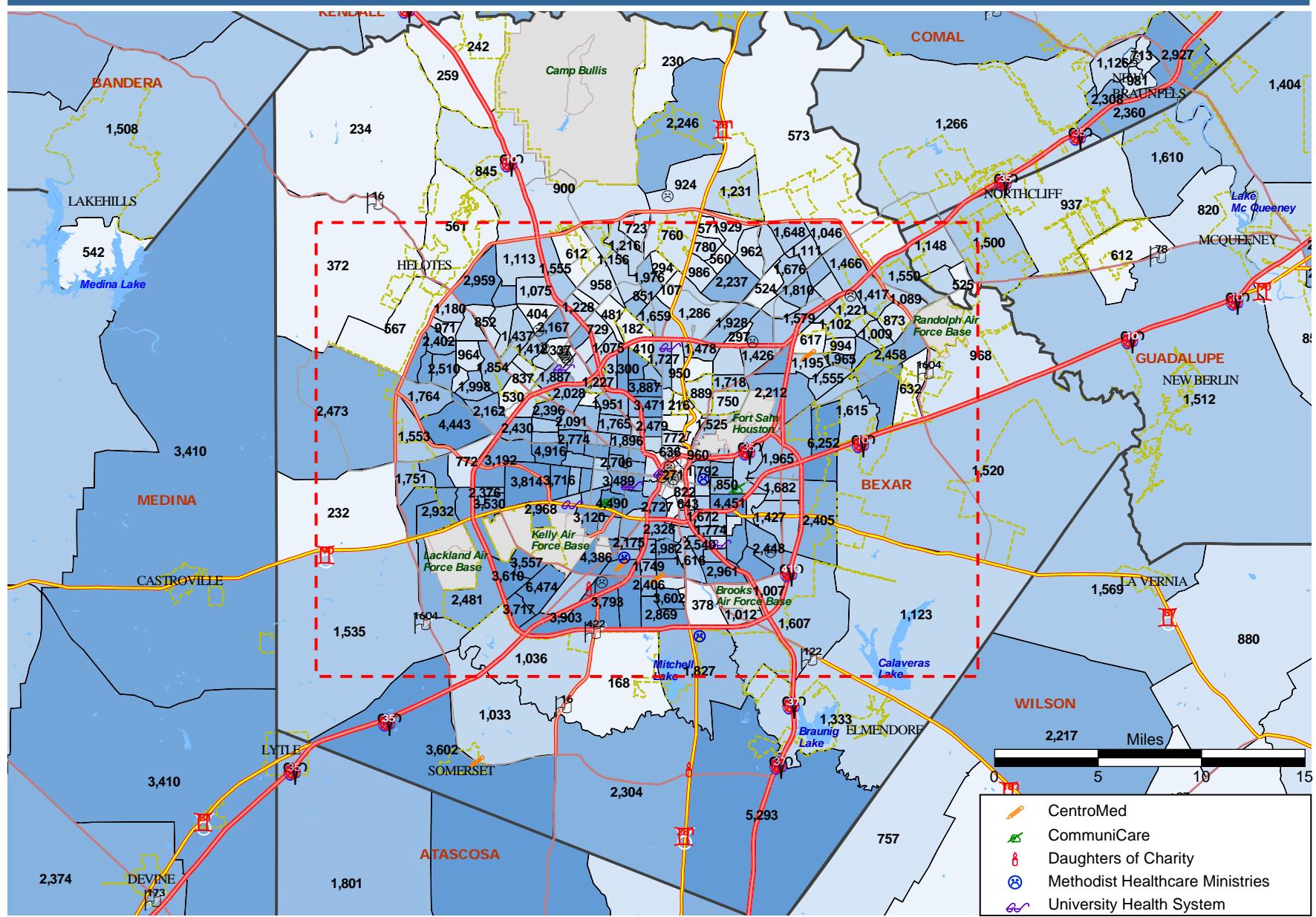
(1) Source: Partner Organizations' databases.

(2) Source: Capital Healthcare Planning estimated volumes.



III. Utilization Rates

2005 Estimated Visits Age 0-17 at 200% FPL⁽¹⁾

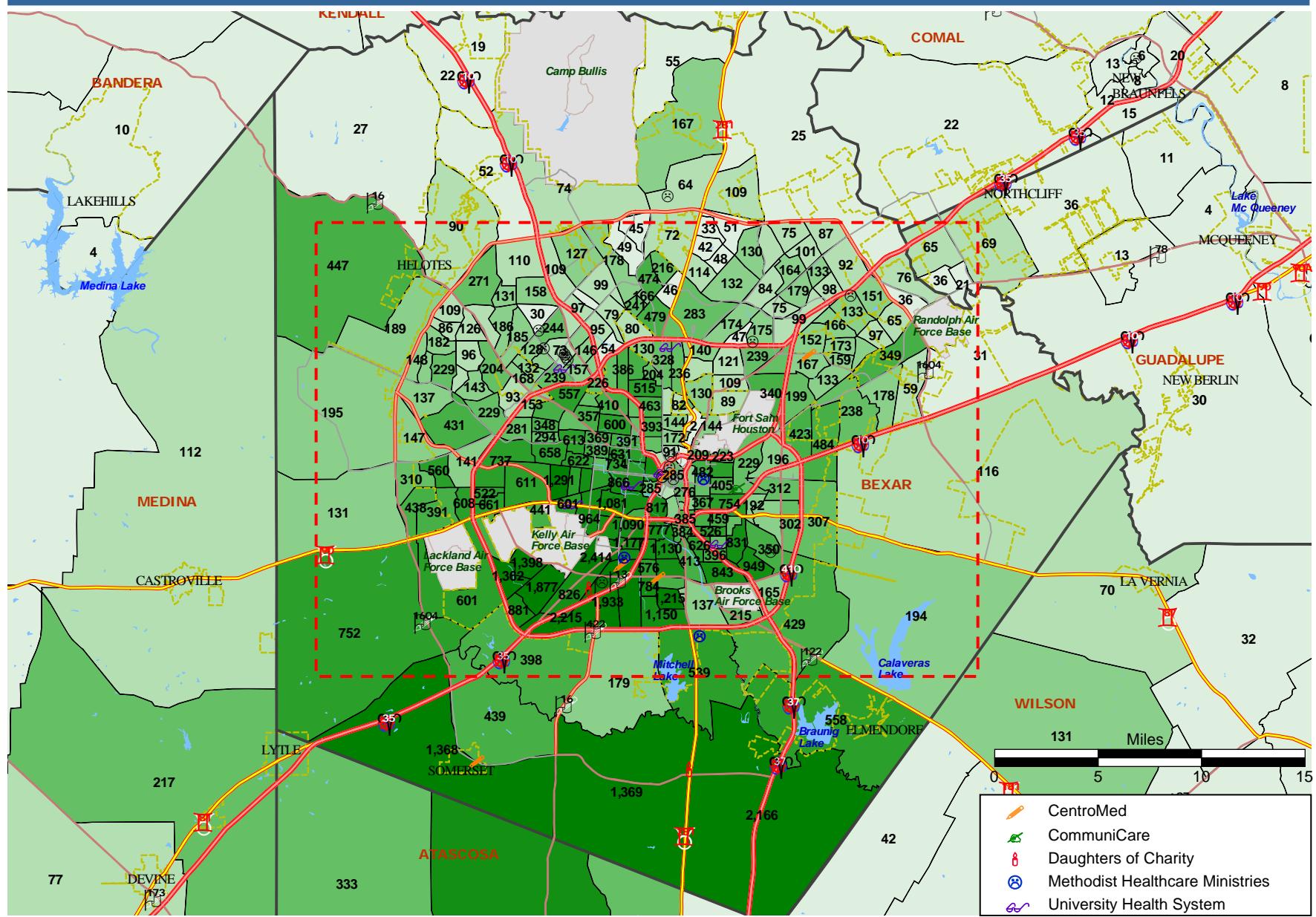


(1) Source: Capital Healthcare Planning estimated volumes.



III. Utilization Rates

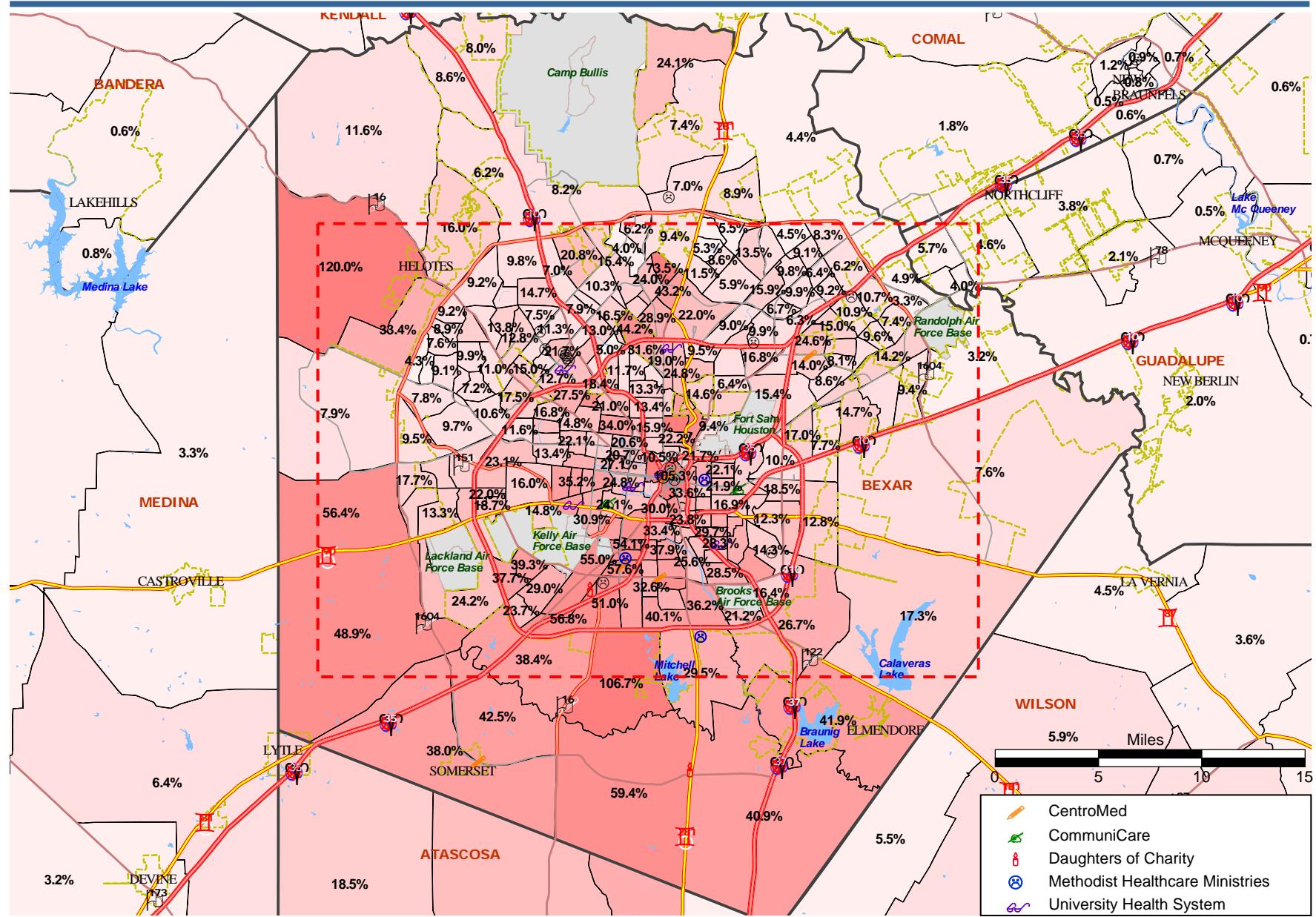
2005 Total Clinic Visits Age 0-17⁽¹⁾



(1) Source: Partner Organizations' databases.

III. Utilization Rates

2005 Total Clinic Utilization Rates Age 0-17⁽¹⁾



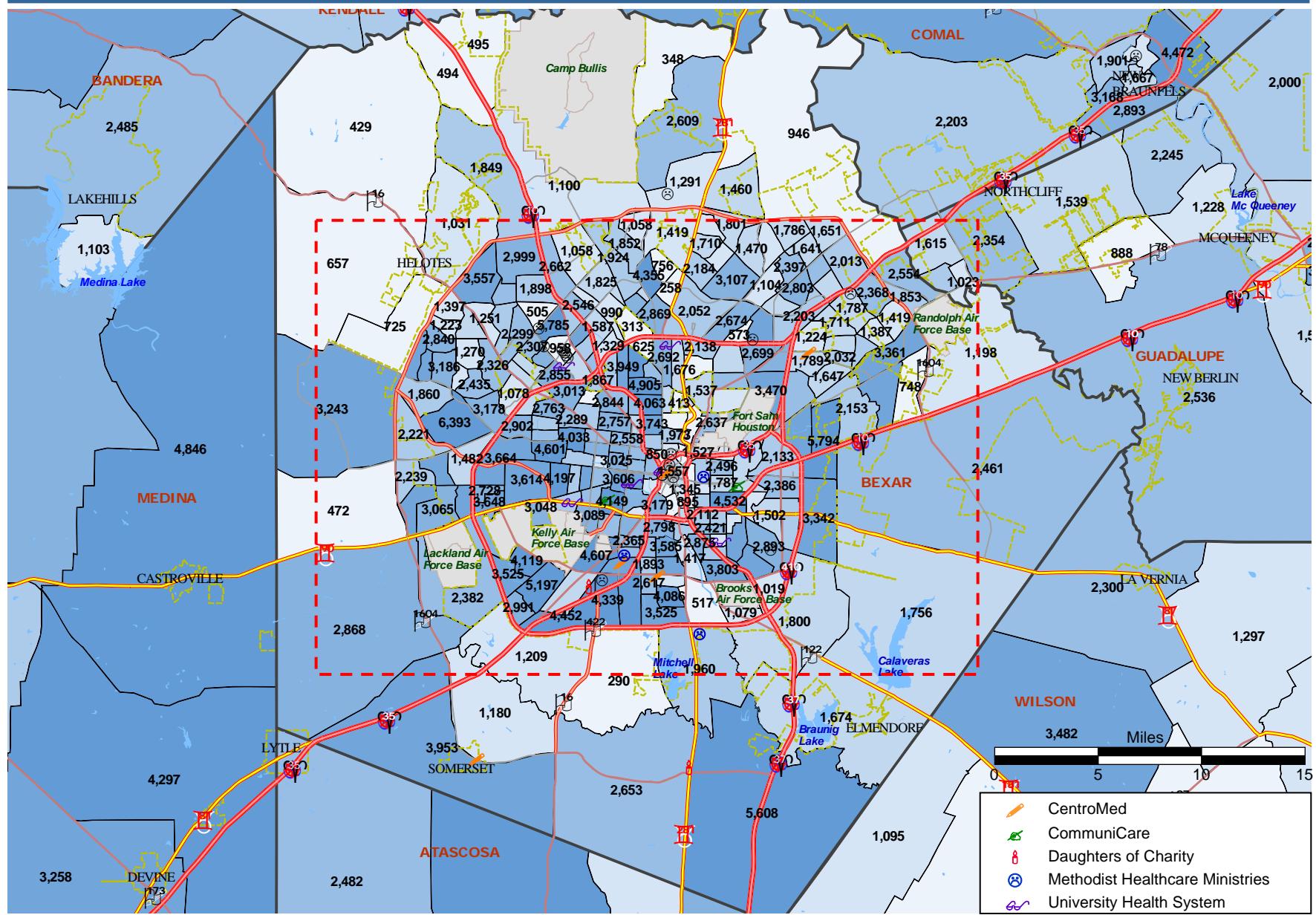
(1) Source: Partner Organizations' databases

(2) Source: Capital Healthcare Planning estimated volumes.



III. Utilization Rates

2005 Estimated Visits Age 18-64 at 200% FPL⁽¹⁾

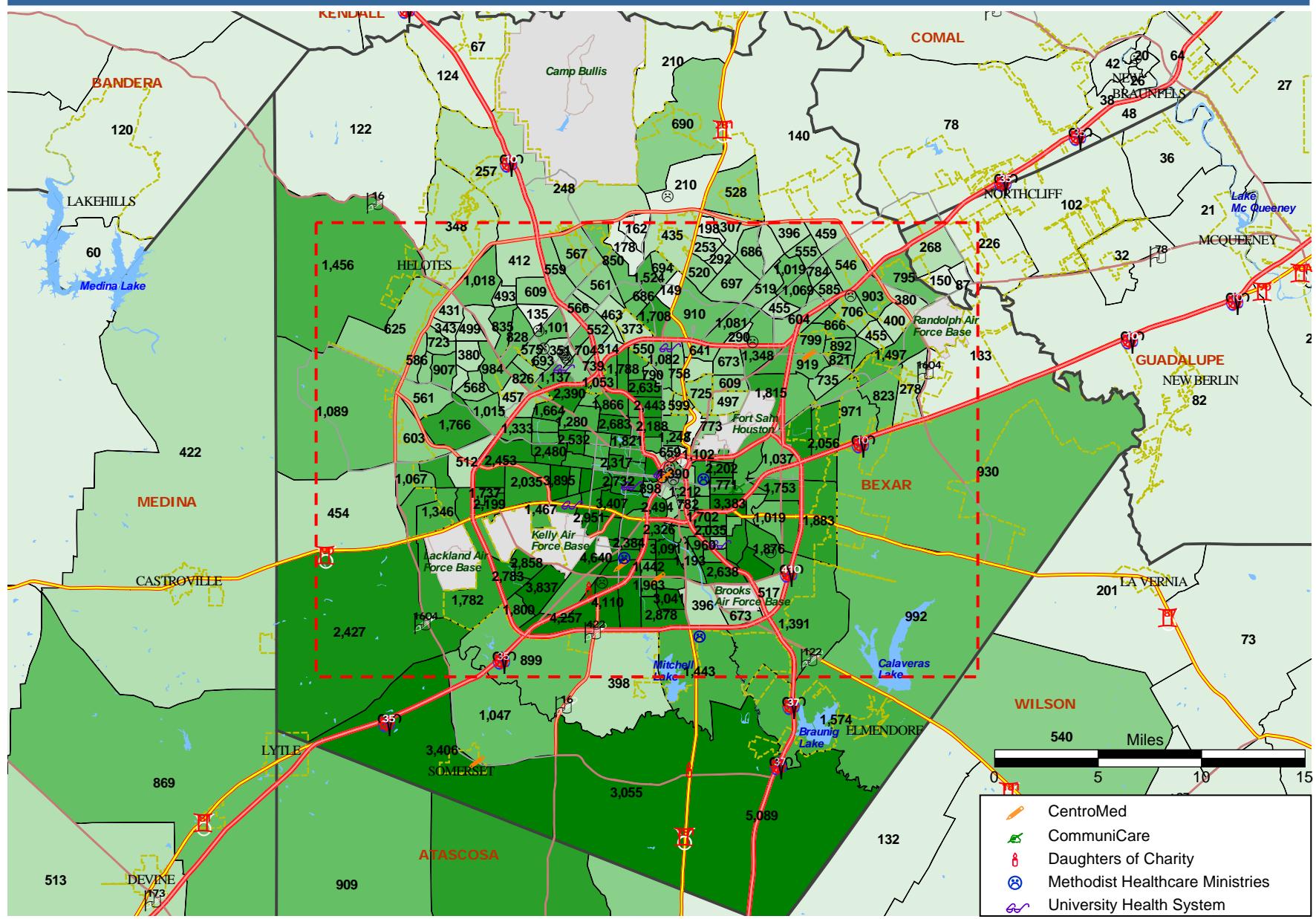


(1) Source: Capital Healthcare Planning estimated volumes.



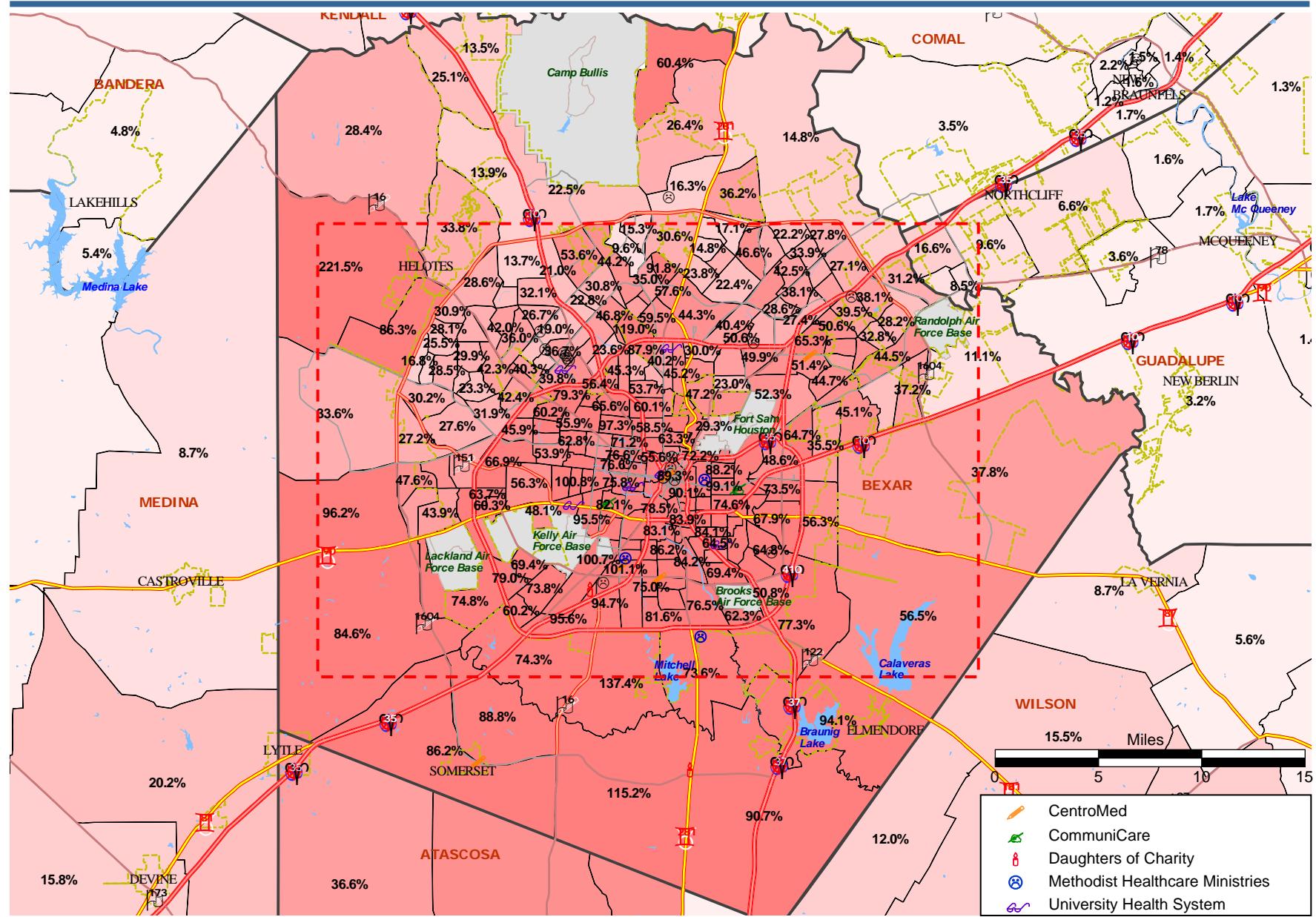
III. Utilization Rates

2005 Total Clinic Visits Age 18-64⁽¹⁾



III. Utilization Rates

2005 Total Clinic Utilization Rates Age 18-64⁽¹⁾



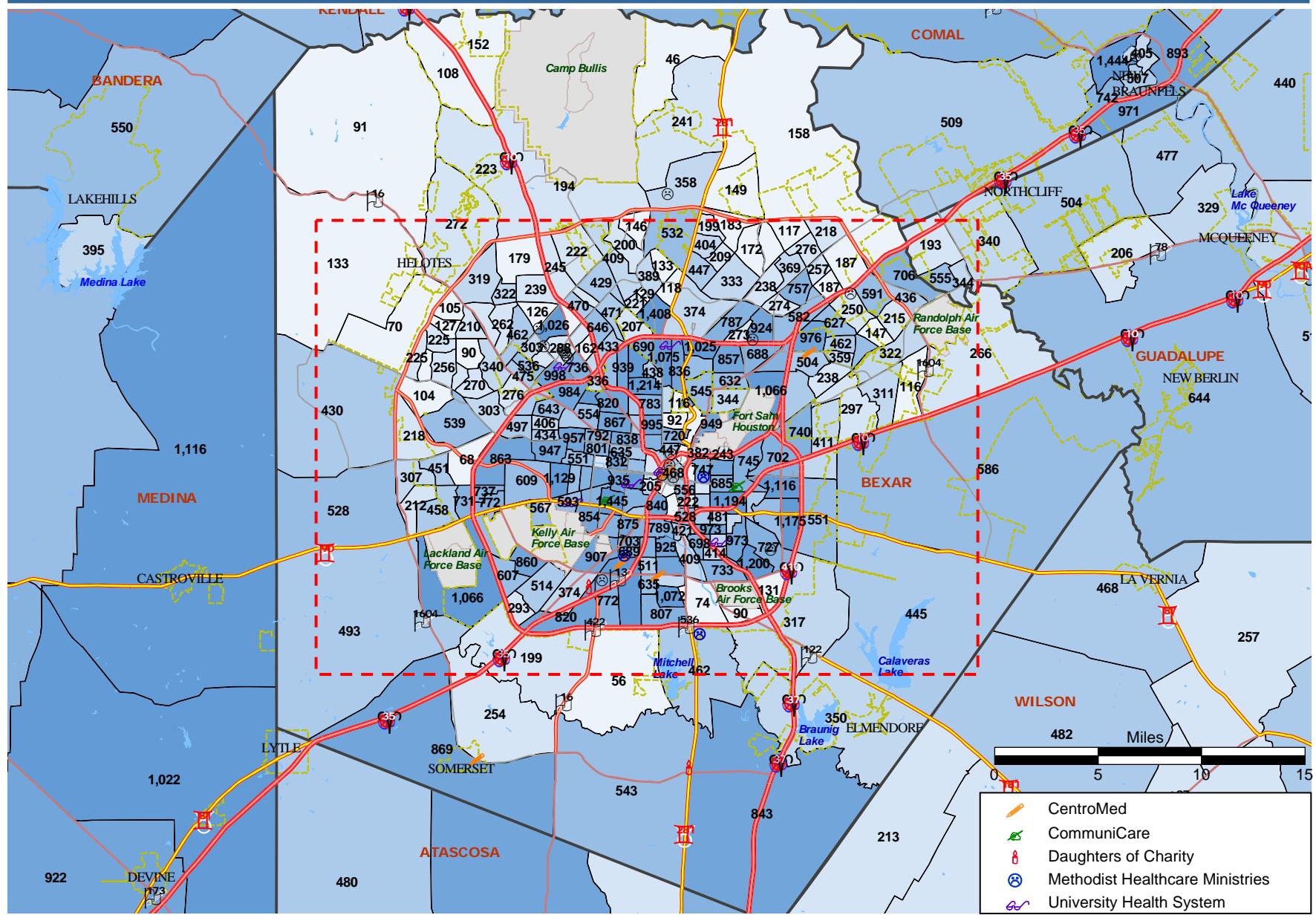
(1) Source: Partner Organizations' databases.

(2) Source: Capital Healthcare Planning estimated volumes.



III. Utilization Rates

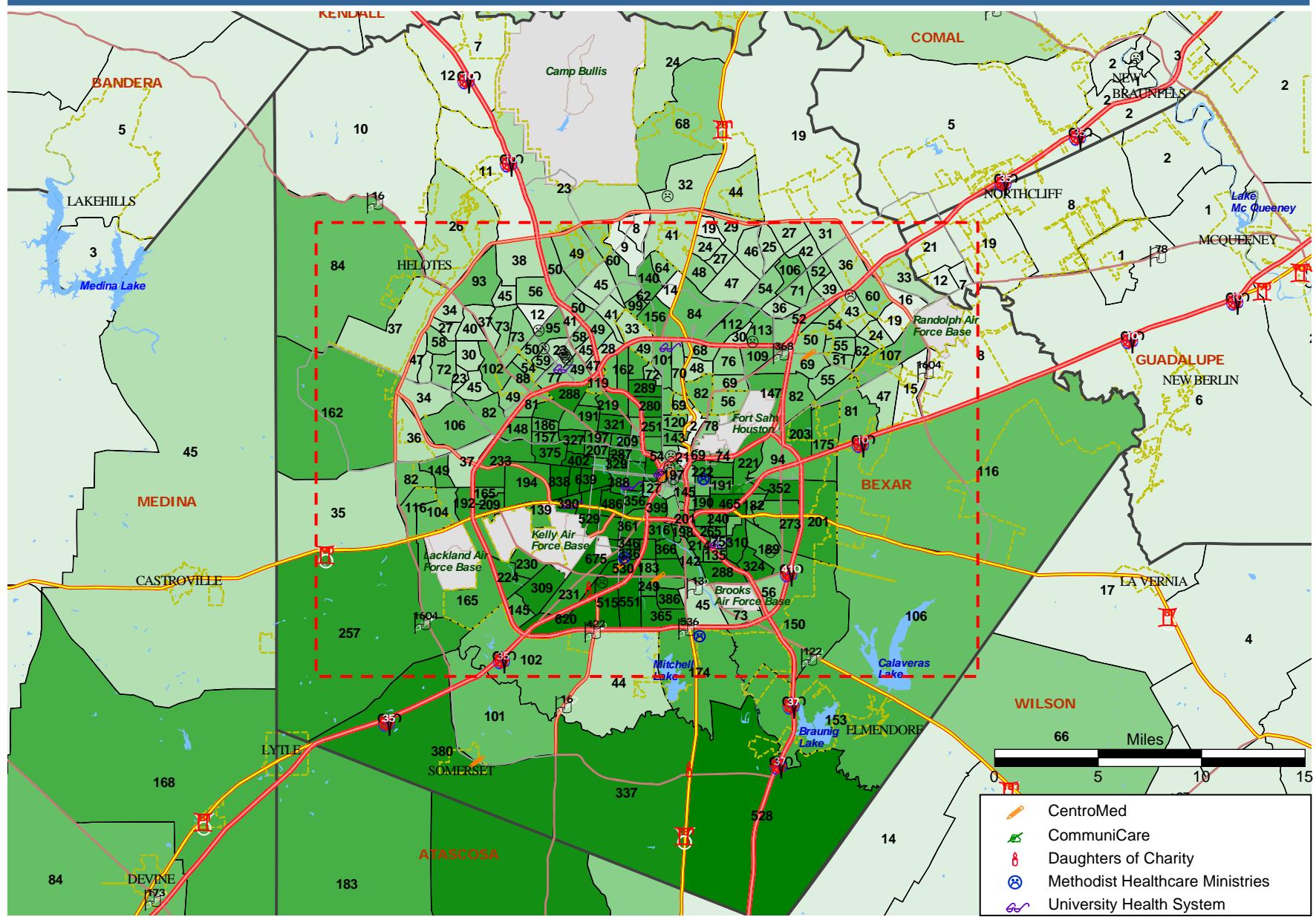
2005 Estimated Visits Age 65+ at 200% FPL⁽¹⁾



(1) Source: Capital Healthcare Planning estimated volumes.

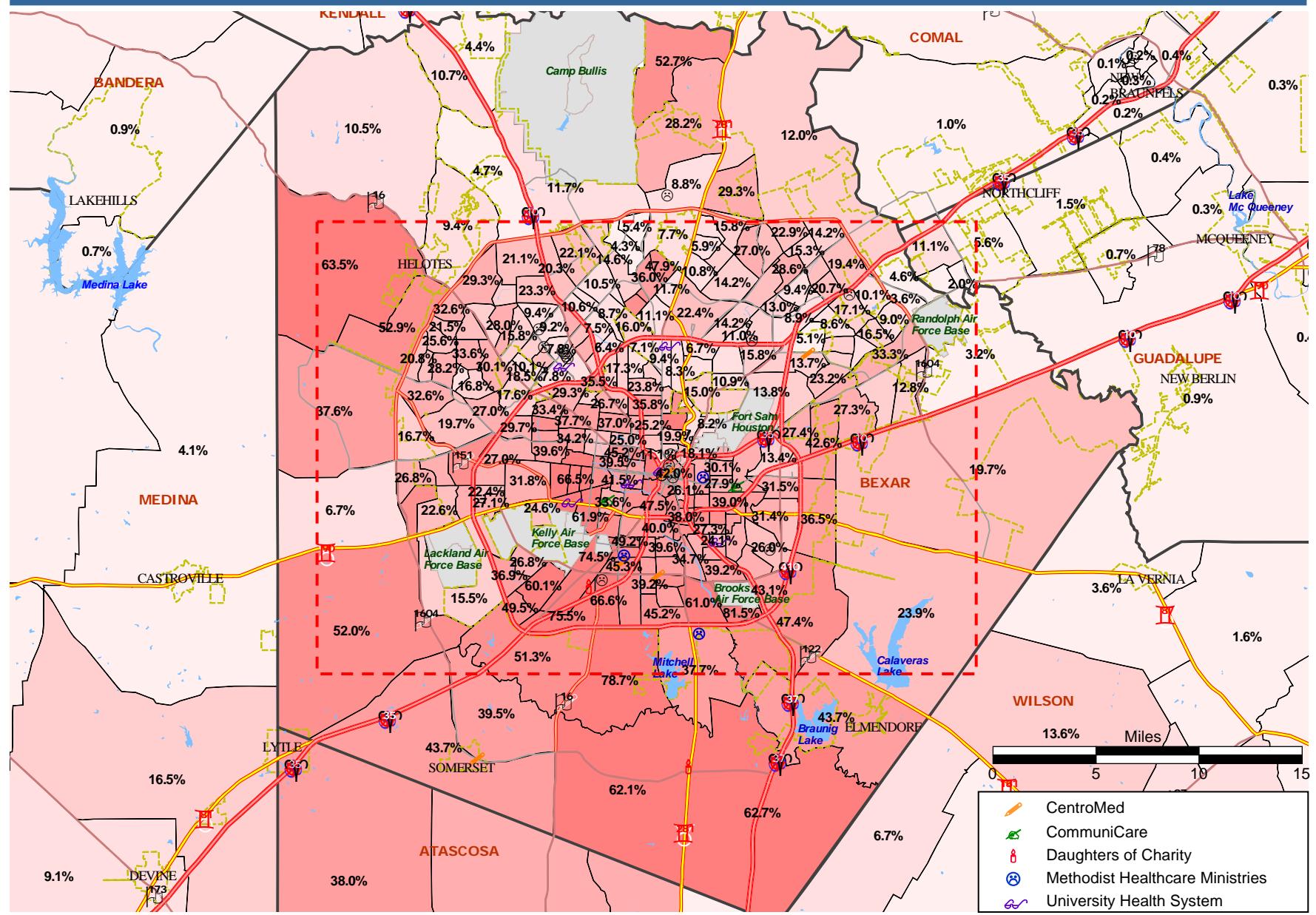
III. Utilization Rates

2005 Total Clinic Visits Age 65+⁽¹⁾



III. Utilization Rates

2005 Total Clinic Utilization Rates Age 65+⁽¹⁾

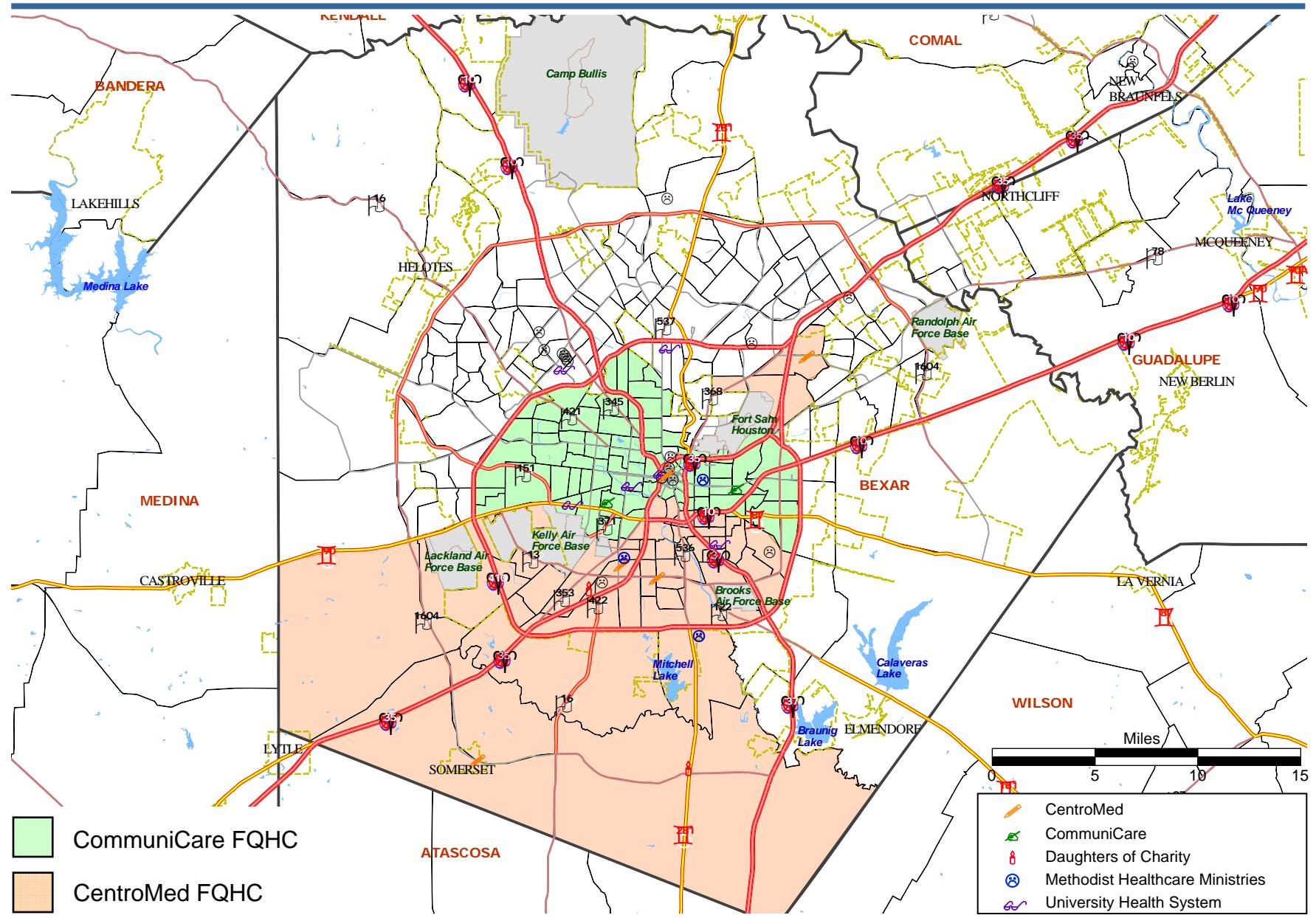


(1) Source: Partner Organizations' databases

(2) Source: Capital Healthcare Planning estimated volumes.



III. Utilization Rates FQHC Service Areas



III. Utilization Rates

FQHC Service Areas⁽¹⁾

Visits & Utilization Rates by FQHC Service Area

Partner Organization	CommuNiCare FQHC Service Area	
	2005 Visits	2005 Utilization Rates
University Health System	116,039	29.4%
CentroMed	29,443	7.5%
CommuNiCare	36,927	9.3%
Methodist Healthcare Ministries	4,448	1.1%
Daughters of Charity	481	0.1%
Total - Partner Organizations	187,338	47.4%
Total - Other	207,845	52.6%
Total - Expected Visits 200% FPL	395,183	100.0%

Partner Organization	CentroMed FQHC Service Area	
	2005 Visits	2005 Utilization Rates
University Health System	77,192	24.1%
CentroMed	77,960	24.4%
CommuNiCare	9,175	2.9%
Methodist Healthcare Ministries	5,816	1.8%
Daughters of Charity	8,810	2.8%
Total - Partner Organizations	178,953	55.9%
Total - Other	140,903	44.1%
Total - Expected Visits 200% FPL	319,855	100.0%

Patient Origin Analysis by FQHC

CommuNiCare	2005 Visits	% of 2005 Visits
From FQHC Service Area	36,927	64.0%
Outside FQHC Service Area	20,805	36.0%
Total	57,732	100.0%

CentroMed	2005 Visits	% of 2005 Visits
From FQHC Service Area	77,960	57.1%
Outside FQHC Service Area	58,654	42.9%
Total	136,614	100.0%

(1) Source: Partner Organizations' Databases.

III. Utilization Rates

Summary

Utilization Rates

- Partner Organizations' 2005 volumes were 40.6% of expected 200% FPL visits in Bexar County... utilization rates varied significantly by age cohort

	<u>Expected 200% FPL</u>	<u>Partner Organizations</u>	<u>Utilization Rate</u>
– Age 0 – 17	474,479	103,343	21.8%
– Age 18 - 64	606,998	350,850	57.8%
– <u>Age 65+</u>	<u>137,495</u>	<u>40,847</u>	<u>29.7%</u>
– Total	1,218,972	495,040	40.6%

- University Health System had 23.5% of expected visits in Bexar County... by far the largest
- 95.7% of total Partner Organizations' medical visits originated in Bexar County in 2005

Low Utilization Areas

- Areas in northern half of Bexar County outside of Loop 410 appear to have the lowest utilization of Partner Organizations' Primary Care services
- These are also the locations with the highest projected population growth

Service Areas

- Widely dispersed patient origin for almost all organizations and clinics
- Large overlap of service areas
- Both CommuniCare and CentroMed:
 - Draw significant volumes from each other's FQHC service area
 - Draw large volumes from outside their own FQHC service area... 36.0% and 42.9% of their totals respectively

IV. Demand Analysis

Key Issues

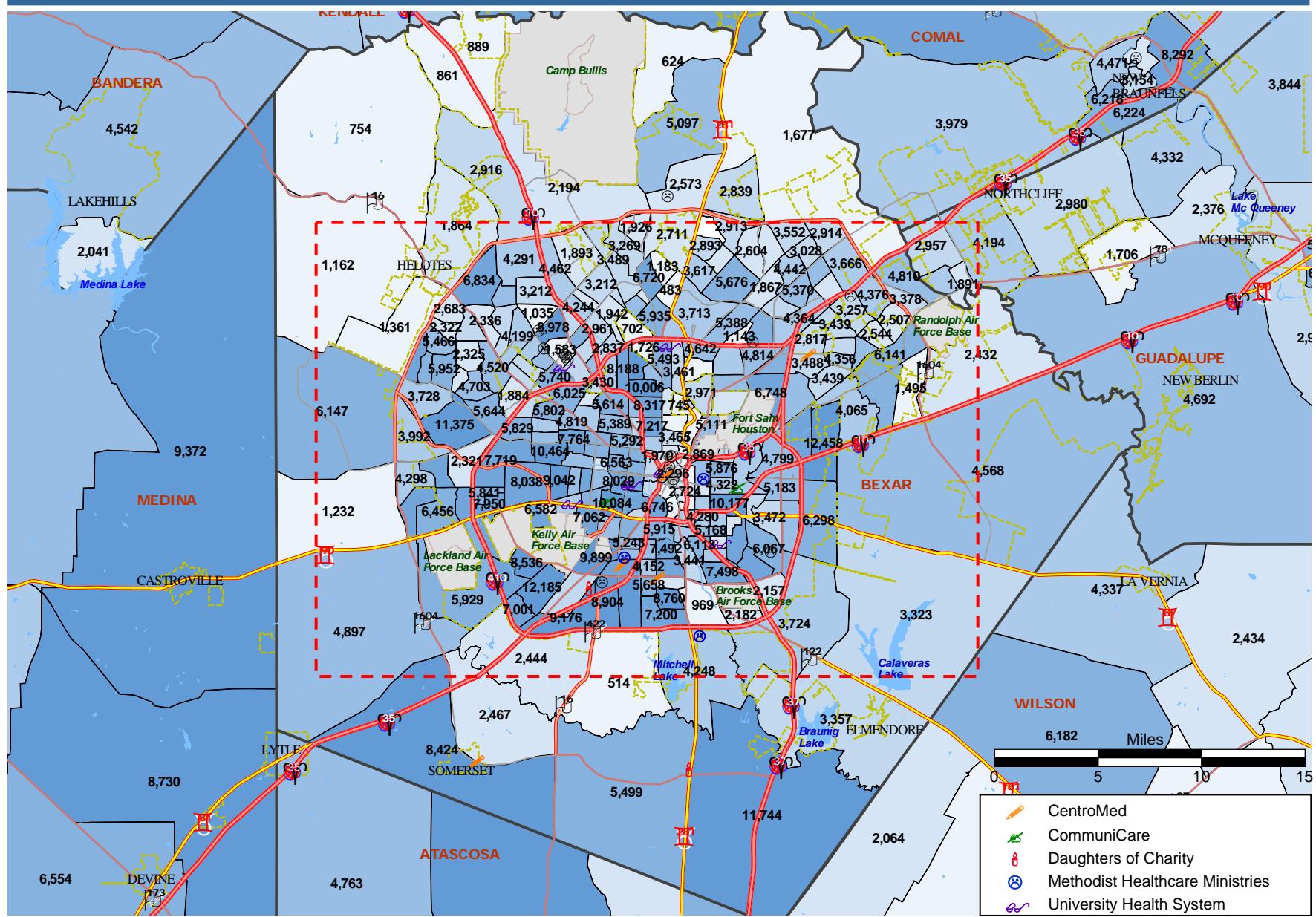
- What is the expected future growth in demand in Bexar County and the MSA?
 - From 2005 through 2016
 - By Specialty
 - By Age Cohort
- Where is the growth expected to occur?

Following Slides:

- Map projected demand growth from 2005 through 2016
 - Total Visits Increase
 - Percentage Increase
- Quantify Bexar County and MSA total demand from 2005 through 2016
 - By Specialty
 - By Age

IV. Demand Analysis

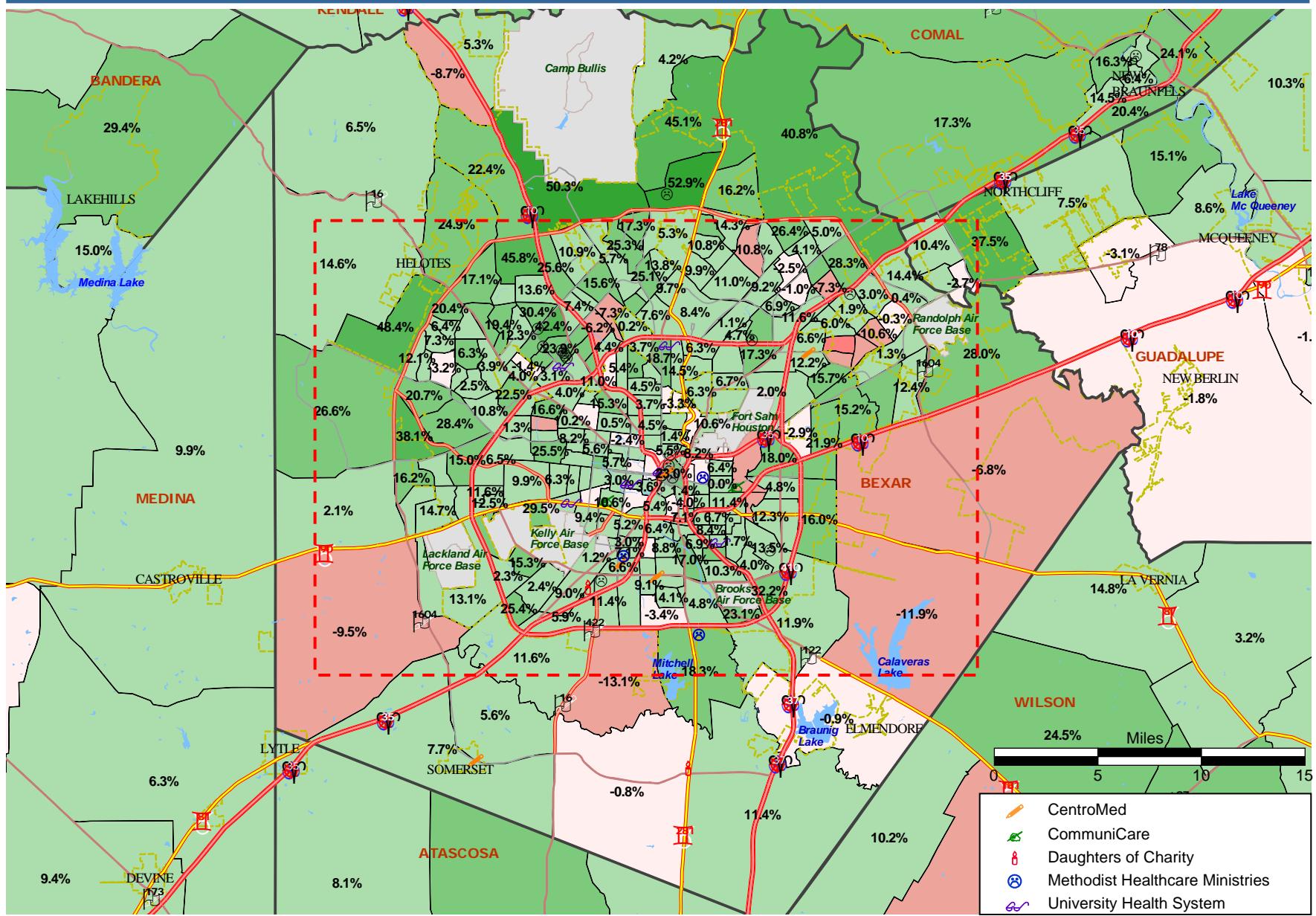
2005 Estimated Visits at 200% FPL⁽¹⁾



(1) Source: Capital Healthcare Planning estimated volumes.

IV. Demand Analysis

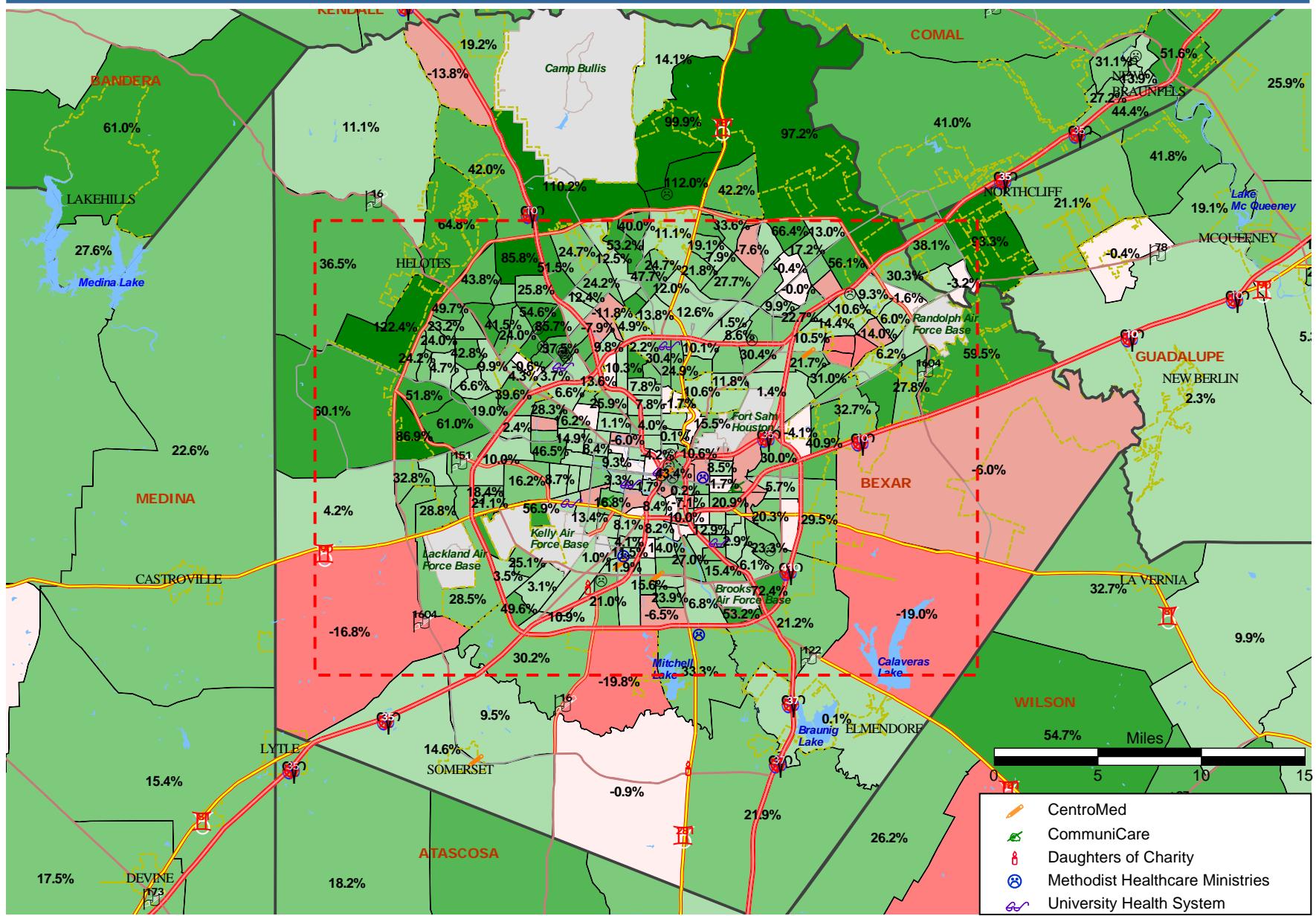
Percentage Growth in Estimated Visits at 200% FPL 2005 - 2011⁽¹⁾



(1) Source: Capital Healthcare Planning estimated volumes.

IV. Demand Analysis

Percentage Growth in Estimated Visits at 200% FPL 2005 - 2016⁽¹⁾

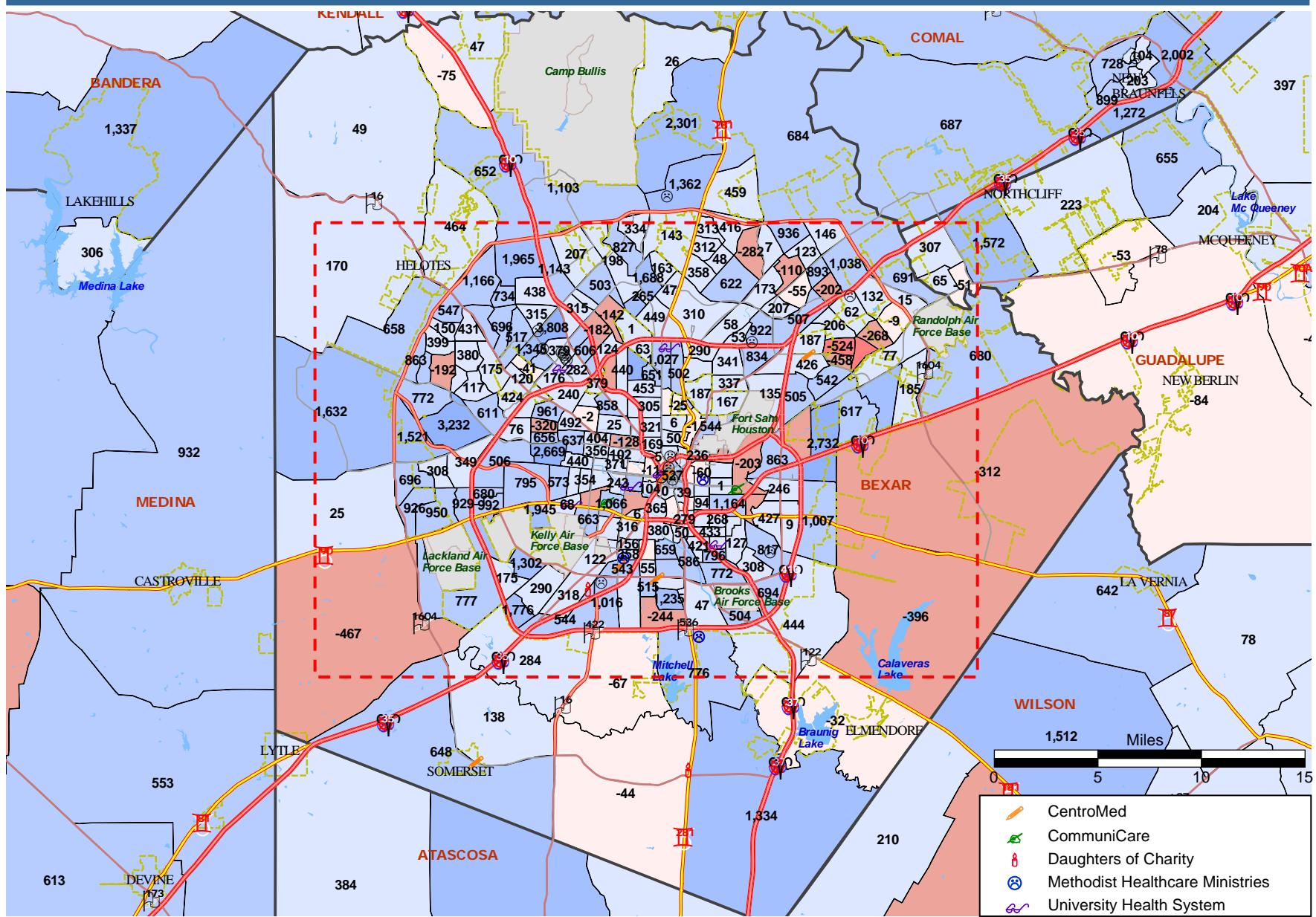


(1) Source: Capital Healthcare Planning estimated volumes.



IV. Demand Analysis

Absolute Growth in Estimated Visits at 200% FPL 2005 - 2011⁽¹⁾

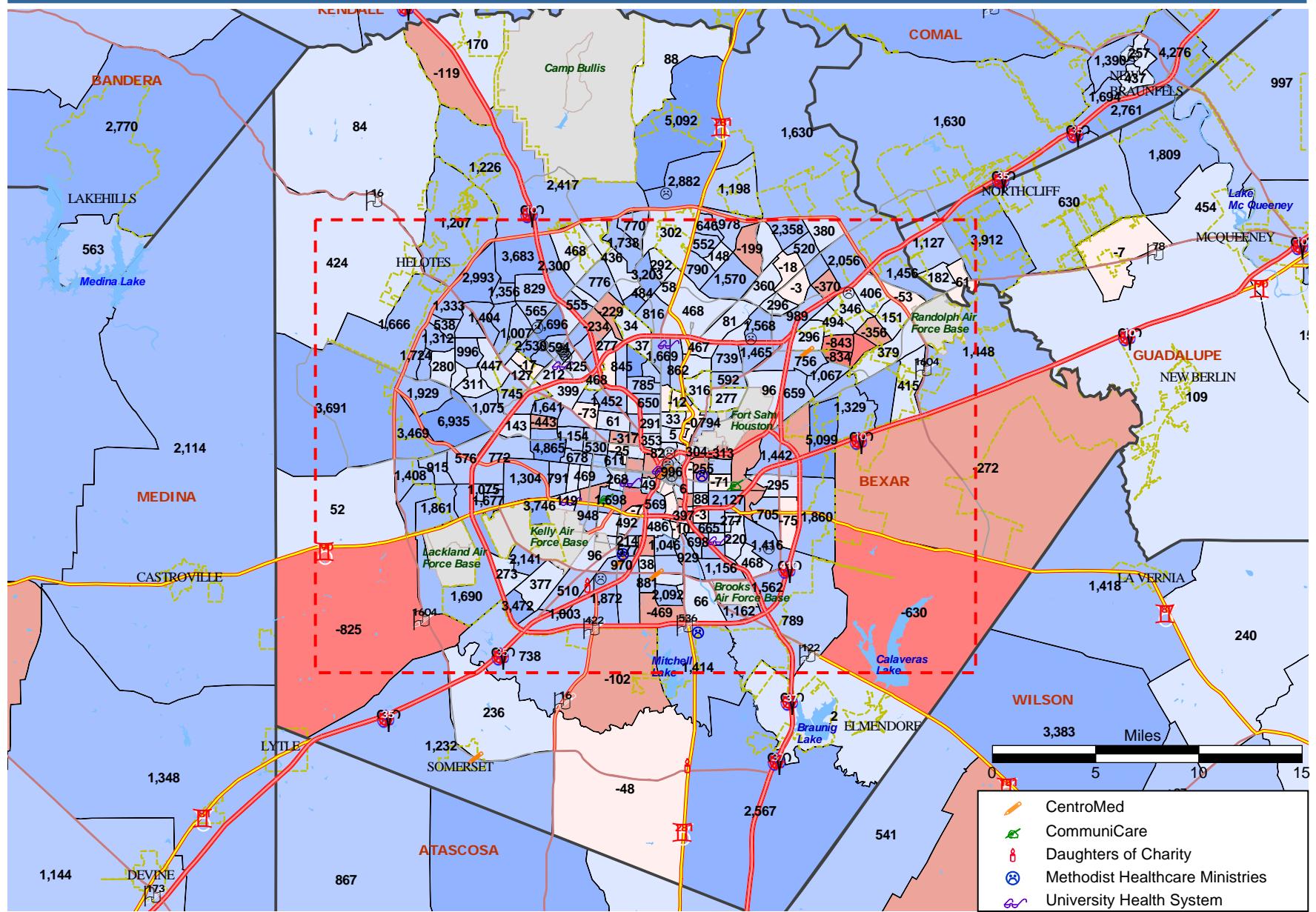


(1) Source: Capital Healthcare Planning estimated volumes.



IV. Demand Analysis

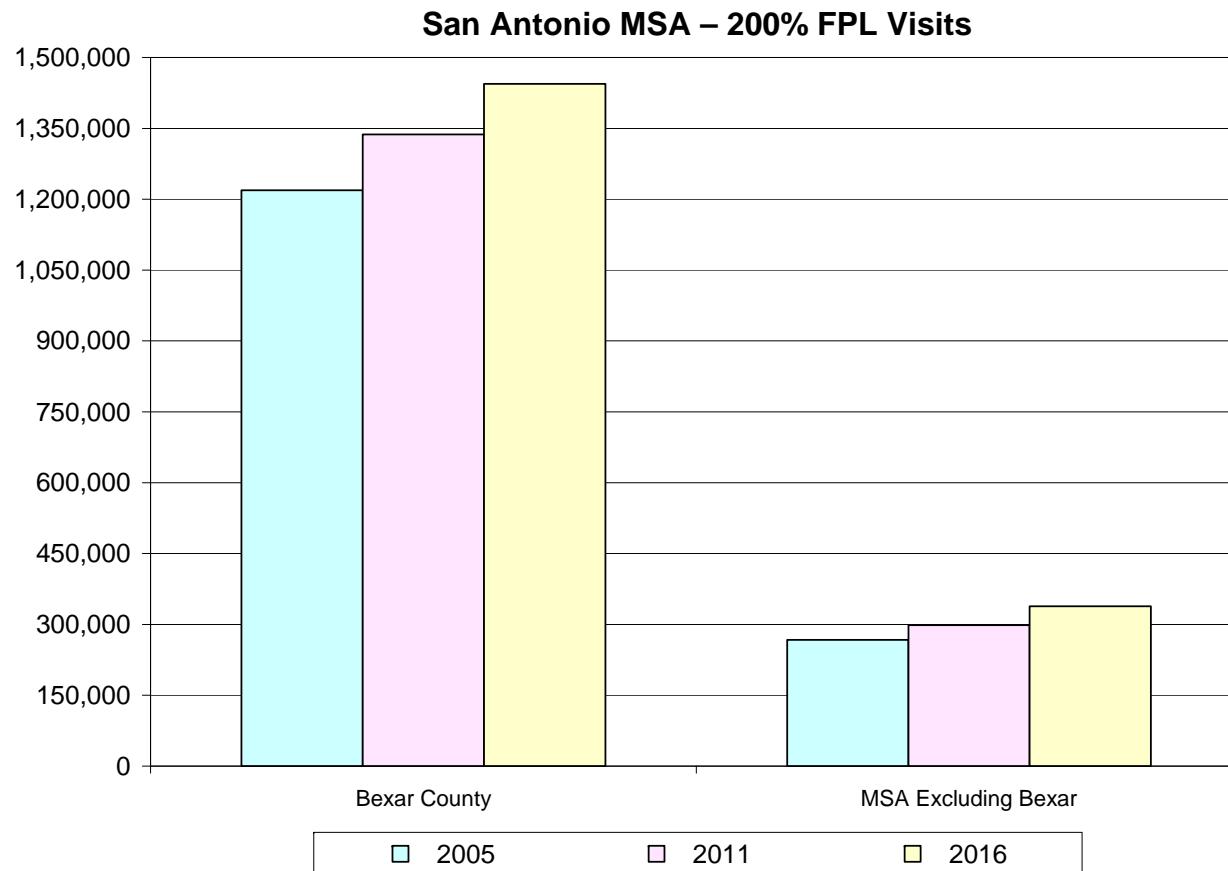
Absolute Growth in Estimated Visits at 200% FPL 2005 - 2016⁽¹⁾



(1) Source: Capital Healthcare Planning estimated volumes.

IV. Demand Analysis

San Antonio MSA – 200% FPL Visits

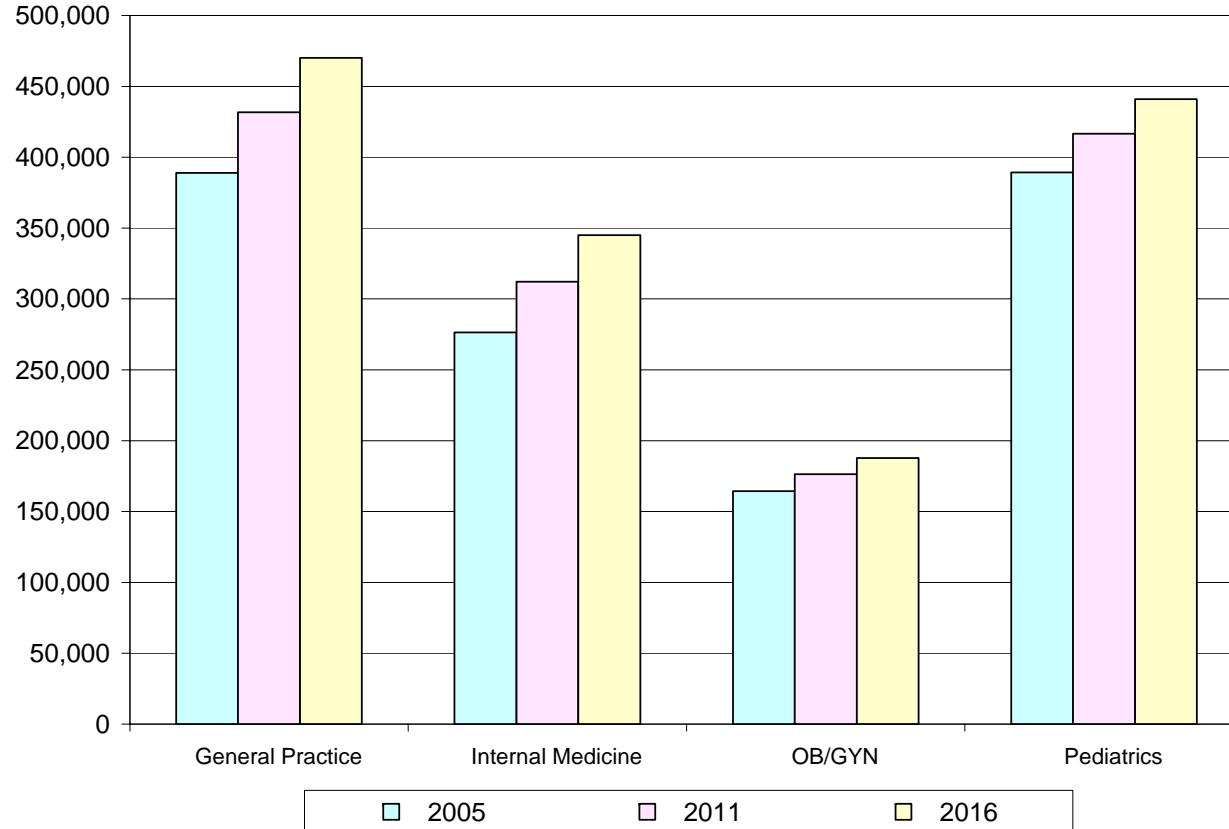


Service Area	2005	2011	2016	% Increase 2005 - 2011	Variance 2005 - 2011	% Increase 2005 - 2016	Variance 2005 - 2016
Bexar County	1,218,972	1,337,031	1,444,041	9.7%	118,059	18.5%	225,069
MSA Excluding Bexar	267,238	298,331	338,338	11.6%	31,093	26.6%	71,099
Total San Antonio MSA	1,486,211	1,635,363	1,782,379	10.0%	149,152	19.9%	296,169

IV. Demand Analysis

Bexar County – 200% FPL Visits by Specialty

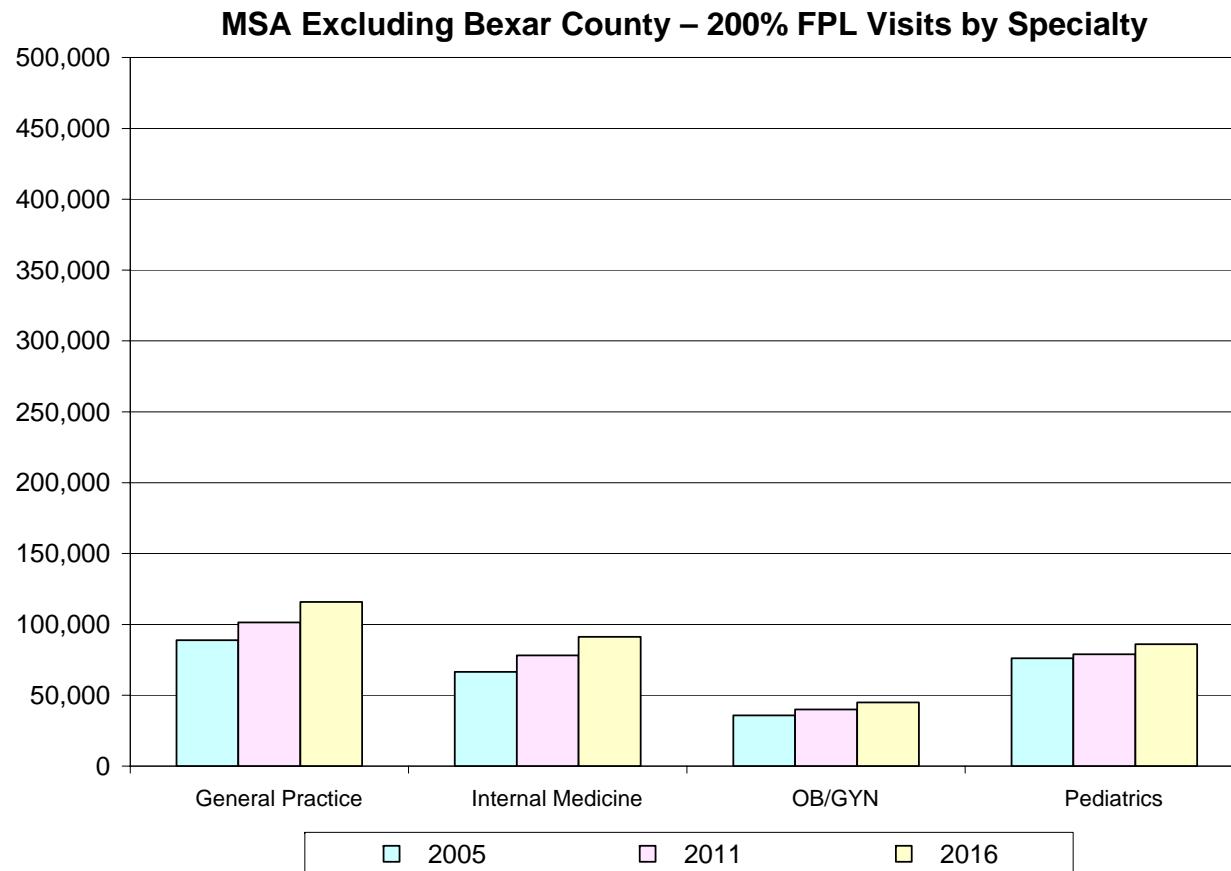
Bexar County – 200% FPL Visits by Specialty



Specialty	2005	2011	2016	% Increase 2005 - 2011	Variance 2005 - 2011	% Increase 2005 - 2016	Variance 2005 - 2016
General Practice	388,947	431,715	470,204	11.0%	42,767	20.9%	81,256
Internal Medicine	276,303	312,220	345,137	13.0%	35,917	24.9%	68,835
OB/GYN	164,441	176,465	187,817	7.3%	12,024	14.2%	23,376
Pediatrics	389,282	416,632	440,884	7.0%	27,351	13.3%	51,602
Total Bexar County	1,218,972	1,337,031	1,444,041	9.7%	118,059	18.5%	225,069

IV. Demand Analysis

MSA Excluding Bexar County – 200% FPL Visits by Specialty



Specialty	2005	2011	2016	% Increase 2005 - 2011	Variance 2005 - 2011	% Increase 2005 - 2016	Variance 2005 - 2016
General Practice	88,842	101,342	115,961	14.1%	12,499	30.5%	27,119
Internal Medicine	66,425	78,099	91,299	17.6%	11,673	37.4%	24,873
OB/GYN	35,777	39,914	45,033	11.6%	4,137	25.9%	9,256
Pediatrics	76,193	78,977	86,045	3.7%	2,784	12.9%	9,852
Total MSA Excluding Bexar	267,238	298,331	338,338	11.6%	31,093	26.6%	71,099

IV. Demand Analysis

Physician Requirements

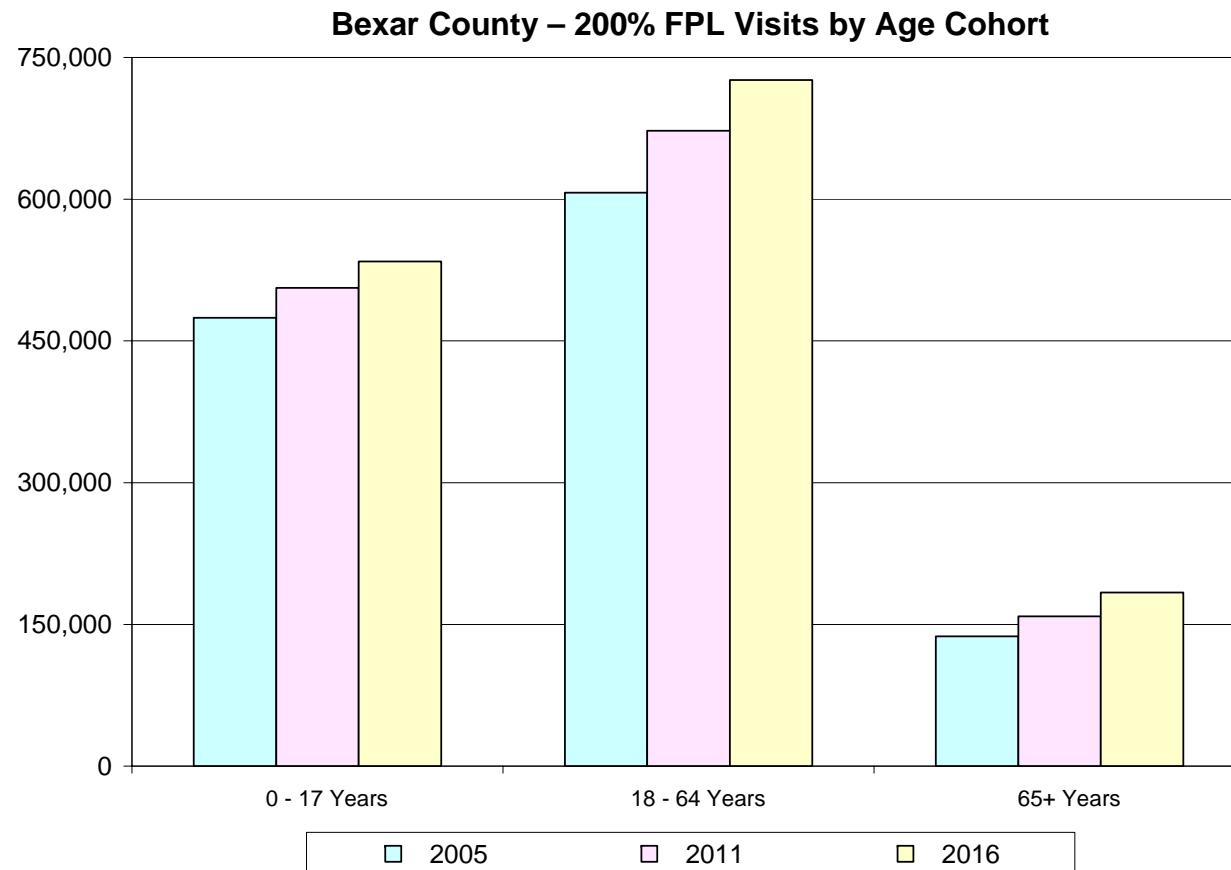
- Physician requirements dependent upon the staffing models of individual Partner Organizations
 - Physicians
 - Physician Assistants
 - Licensed Nurses
 - Licensed Practical Nurses
- 2003 MGMA Primary Care Productivity Benchmarks

Specialty	Annual Visits Per Physician			
	25th Percentile	50th Percentile	75th Percentile	90th Percentile
General Practice	3,389	4,268	5,228	6,343
Internal Medicine	2,752	3,574	4,416	5,371
OB/GYN	2,096	2,898	3,871	4,880
Pediatrics	3,878	4,771	5,927	7,354

- Using the MGMA benchmarks as a general guideline, significant Physician recruiting will be required to meet incremental 2005 to 2016 demand in Bexar County, applying 50th percentile productivity:
 - General Practice +19.0
 - Internal Medicine +19.3
 - OB/GYN + 8.1
 - Pediatrics +10.8
 - Total +57.2

IV. Demand Analysis

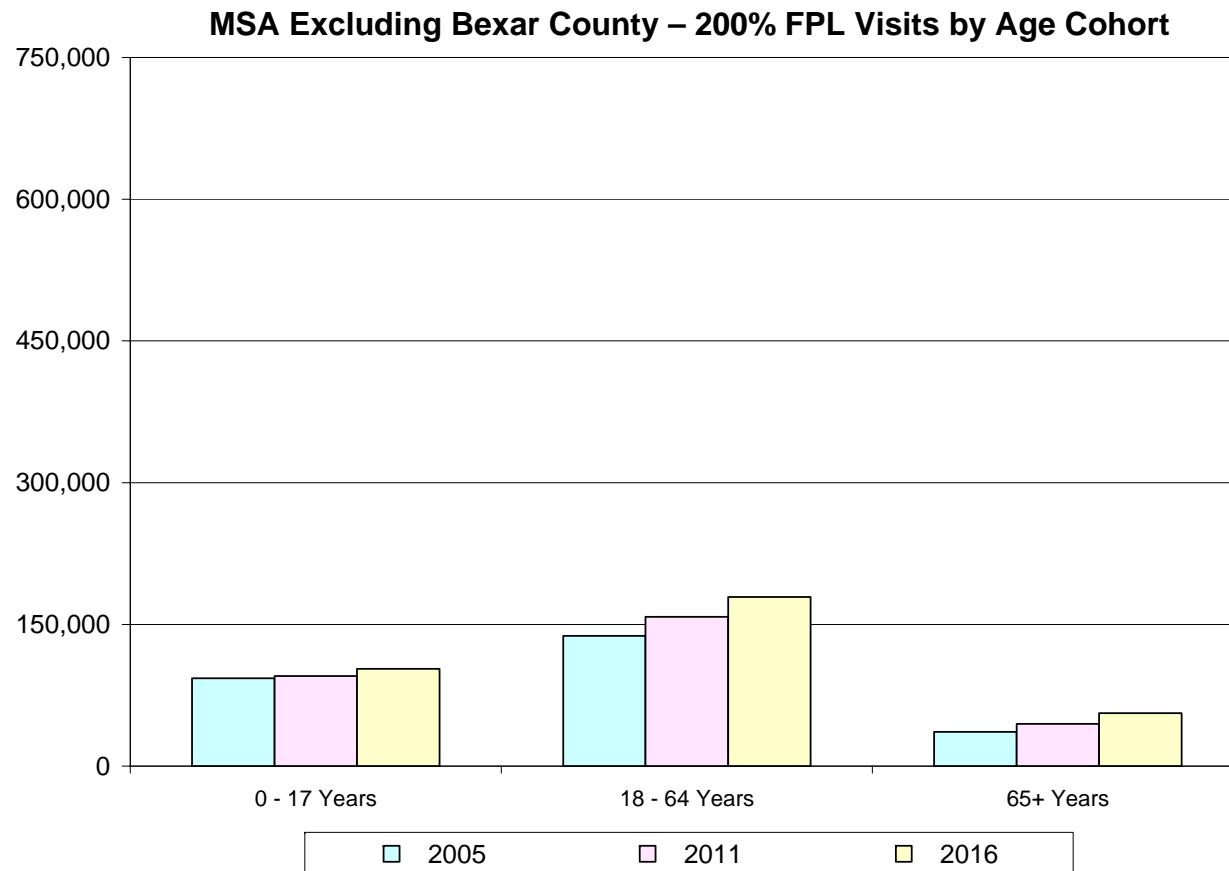
Bexar County – 200% FPL Visits by Age



Age Cohort	2005	2011	2016	% Increase 2005 - 2011	Variance 2005 - 2011	% Increase 2005 - 2016	Variance 2005 - 2016
0 - 17 Years	474,479	506,229	534,160	6.7%	31,750	12.6%	59,681
18 - 64 Years	606,998	672,418	726,104	10.8%	65,420	19.6%	119,106
65+ Years	137,495	158,385	183,777	15.2%	20,890	33.7%	46,282
Total Bexar County	1,218,972	1,337,031	1,444,041	9.7%	118,059	18.5%	225,069

IV. Demand Analysis

MSA Excluding Bexar County – 200% FPL Visits by Age



Specialty	2005	2011	2016	% Increase 2005 - 2011	Variance 2005 - 2011	% Increase 2005 - 2016	Variance 2005 - 2016
0 - 17 Years	92,982	95,507	103,084	2.7%	2,525	10.9%	10,102
18 - 64 Years	137,894	157,961	179,008	14.6%	20,067	29.8%	41,114
65+ Years	36,362	44,863	56,246	23.4%	8,500	54.7%	19,884
Total MSA Excluding Bexar	267,238	298,331	338,338	11.6%	31,093	26.6%	71,099

IV. Demand Analysis

Key Issues

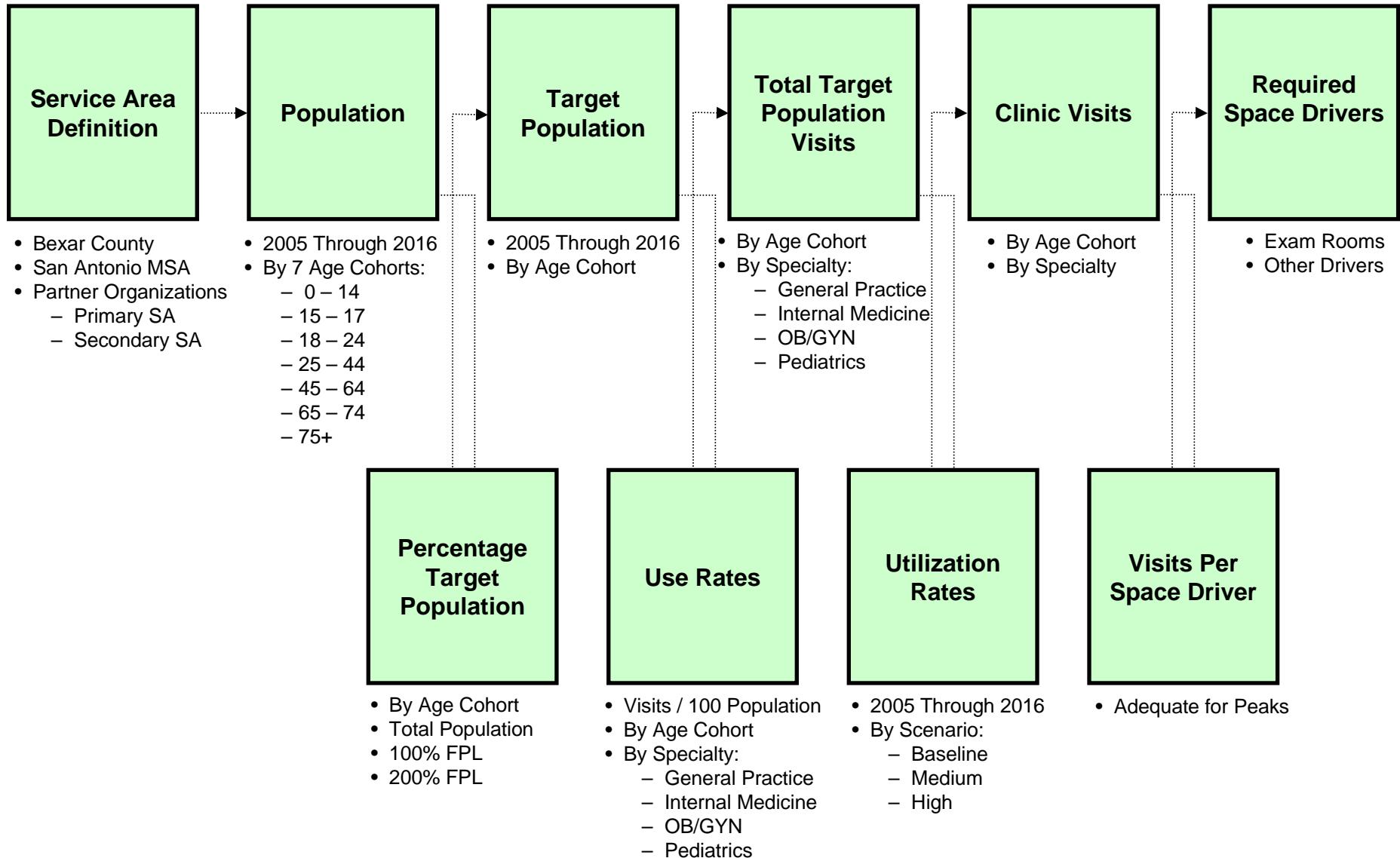
- Given the projected growth in demand, how might the Partner Organizations' volumes increase over time under various scenarios?

Following Slides:

- Define potential scenarios for future growth
 - Baseline Scenario
 - Medium Scenario
 - High Scenario
- Project future volumes by scenario from 2005 through 2016
 - By Partner Organization
 - By Year

IV. Demand Analysis

Approach



IV. Demand Analysis

Scenario Definitions

Utilization Rate

- **Baseline Scenario**
 - No changes to the 2005 utilization rates of Partner Organizations
 - Applies to Bexar County and MSA excluding Bexar County
 - Outside of MSA visits remain constant at 2005 volumes
- **Medium Scenario**
 - Bexar County utilization increases from 40.6% to 45.0%
 - Utilization increases among Partner Organizations proportionate to 2005
 - Utilization increases occur between 2005 and 2011
 - MSA utilization outside of Bexar remains unchanged from 2005
 - Outside of MSA visits remain constant at 2005 volumes
- **High Scenario**
 - Bexar County utilization increases from 40.6% to 50.0%
 - Utilization increases among Partner Organizations proportionate to 2005
 - Utilization increases occur between 2005 and 2011
 - MSA utilization outside of Bexar remains unchanged from 2005
 - Outside of MSA visits remain constant at 2005 volumes

Variable Factors

Use Rates

- NAMCH / NHAMCS use rates by Age Cohort applied to all Scenarios

Constant Factors

Population:

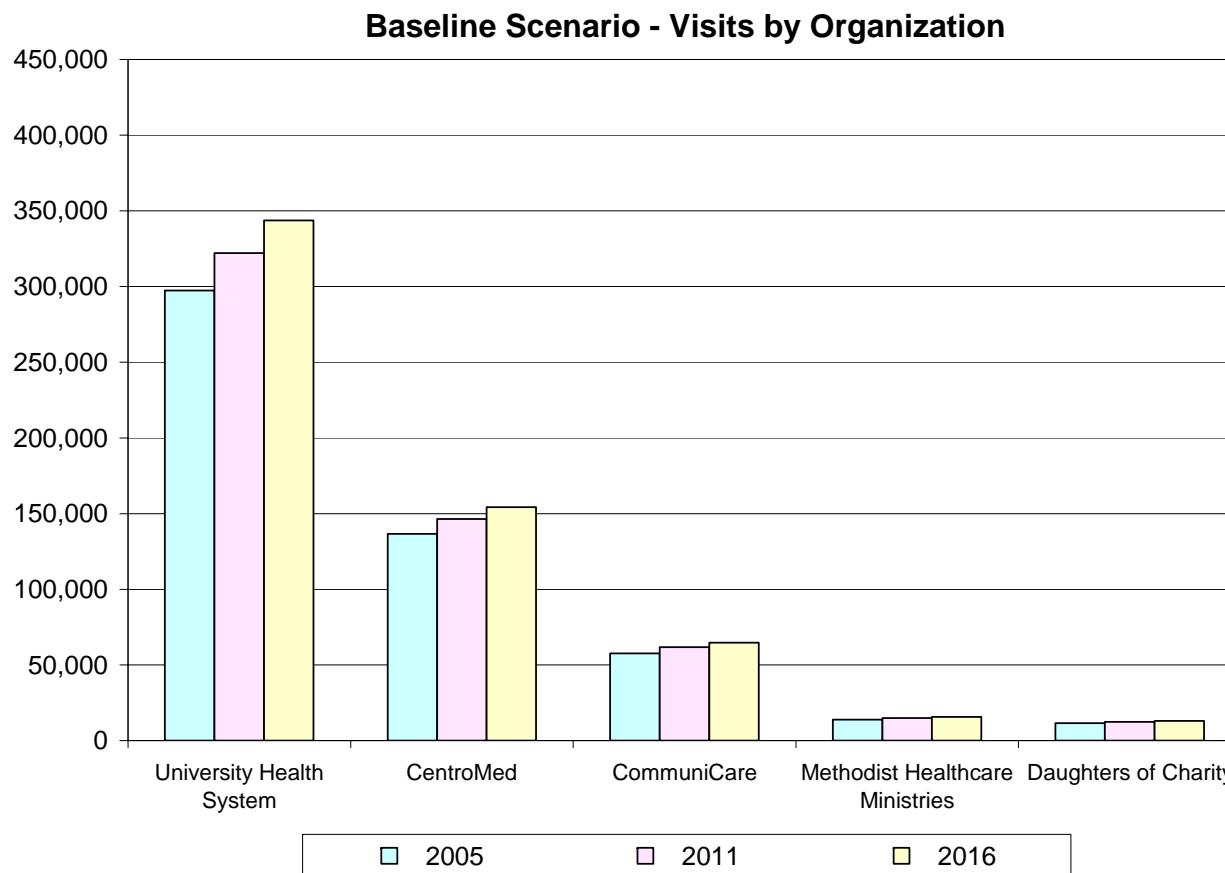
- 2005 through 2016 population by age cohort applied to all Scenarios

Poverty Rates

- 200% FPL is proxy for uninsured population
- No changes to 2003 Poverty Rates in Bexar / MSA Counties

IV. Demand Analysis

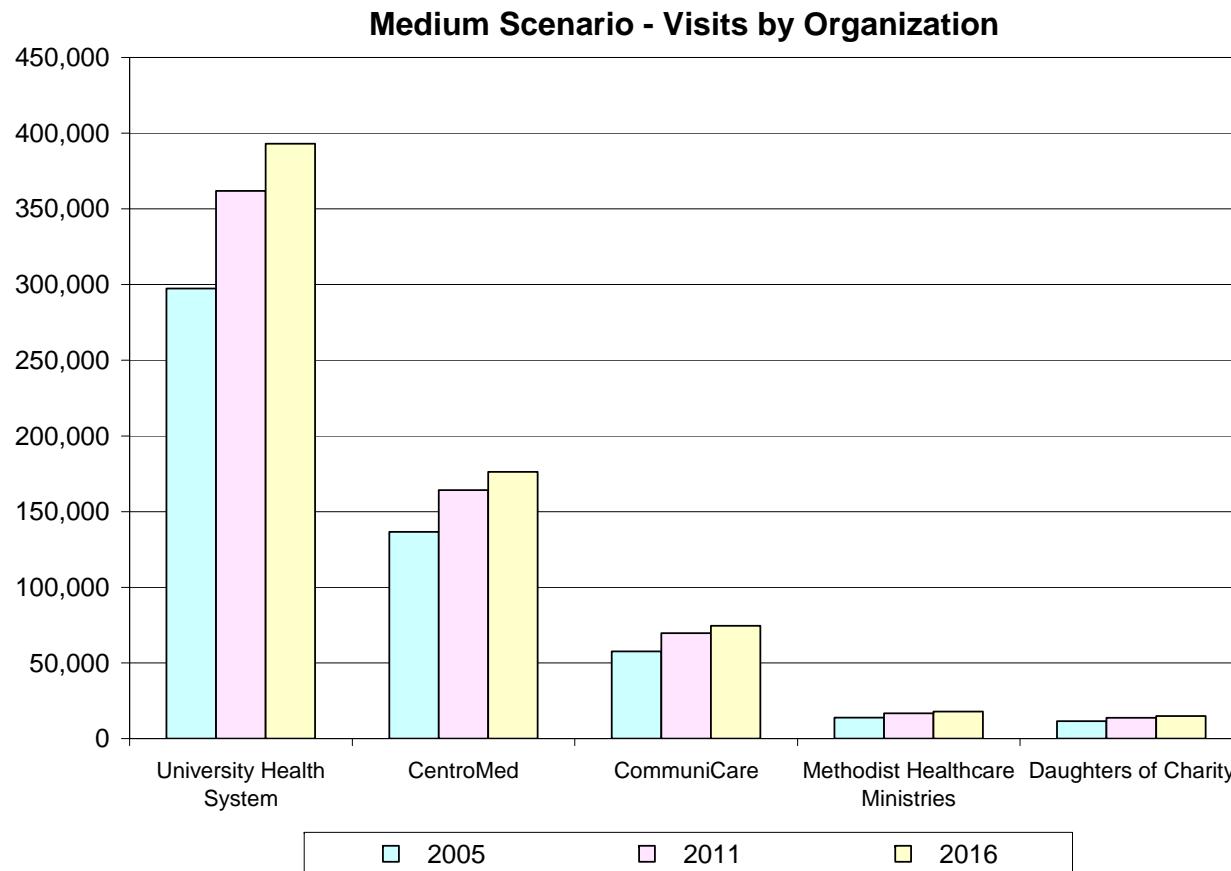
Baseline Scenario



Partner Organization	2005	2011	2016	% Increase 2005 - 2011	Variance 2005 - 2011	% Increase 2005 - 2016	Variance 2005 - 2016
University Health System	297,420	322,132	343,631	8.3%	24,712	15.5%	46,210
CentroMed	136,614	146,337	154,271	7.1%	9,723	12.9%	17,657
CommuniCare	57,732	61,762	64,718	7.0%	4,030	12.1%	6,987
Methodist Healthcare Ministries	13,930	14,899	15,674	7.0%	970	12.5%	1,744
Daughters of Charity	11,587	12,369	13,084	6.8%	783	12.9%	1,497
Total	517,283	557,500	591,378	7.8%	40,216	14.3%	74,095

IV. Demand Analysis

Medium Scenario

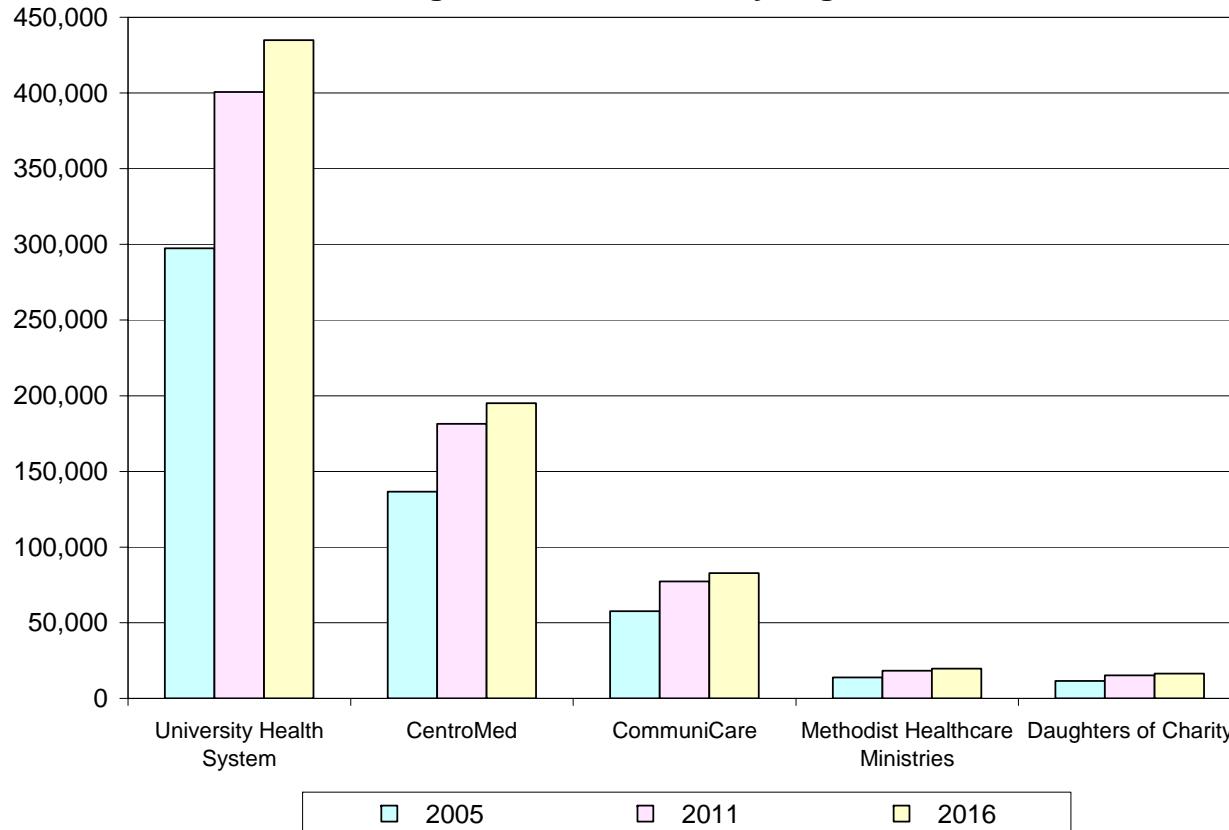


Partner Organization	2005	2011	2016	% Increase 2005 - 2011	Variance 2005 - 2011	% Increase 2005 - 2016	Variance 2005 - 2016
University Health System	297,420	361,888	393,057	21.7%	64,468	32.2%	95,637
CentroMed	136,614	164,090	176,342	20.1%	27,475	29.1%	39,728
CommuniCare	57,732	69,638	74,511	20.6%	11,906	29.1%	16,779
Methodist Healthcare Ministries	13,930	16,670	17,875	19.7%	2,741	28.3%	3,946
Daughters of Charity	11,587	13,806	14,871	19.2%	2,219	28.3%	3,284
Total	517,283	626,093	676,656	21.0%	108,809	30.8%	159,373

IV. Demand Analysis

High Scenario

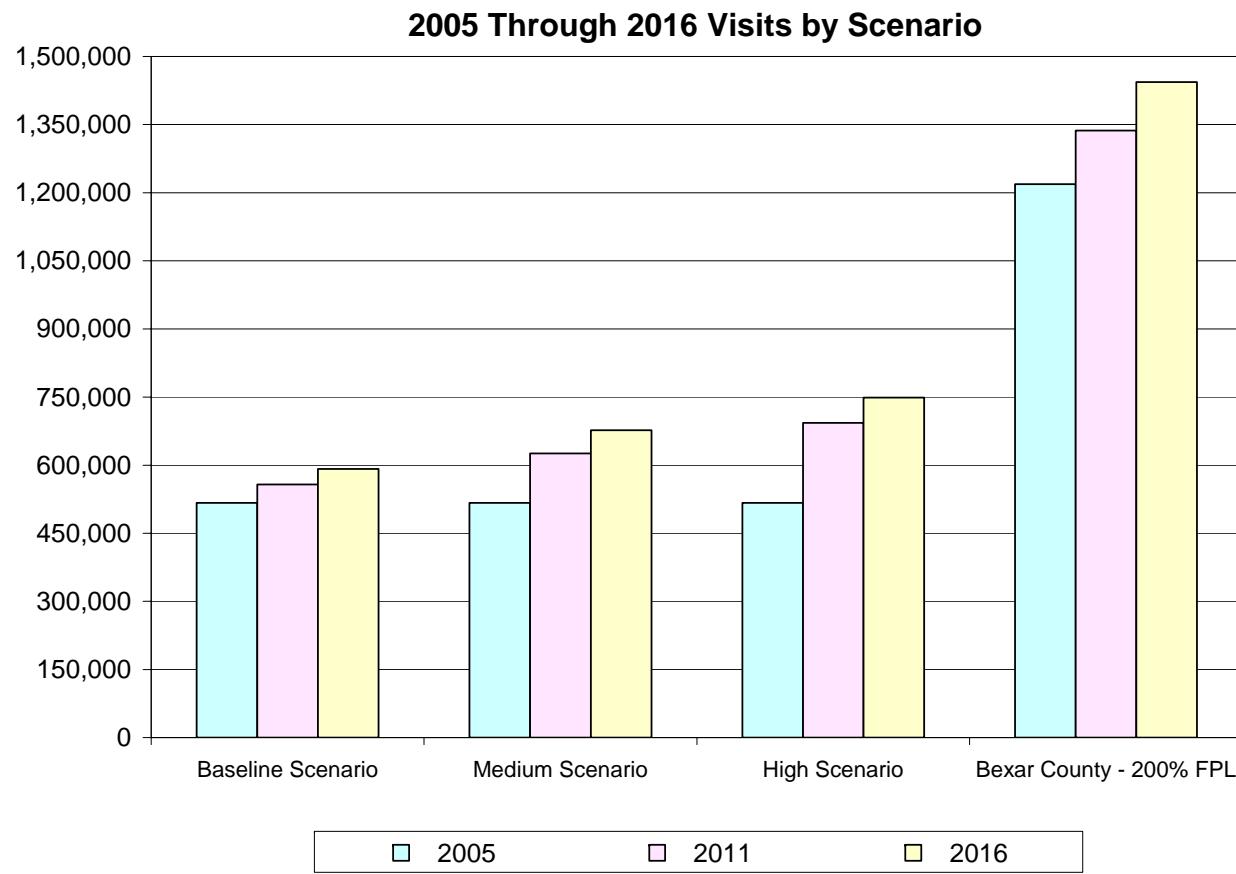
High Scenario - Visits by Organization



Partner Organization	2005	2011	2016	% Increase 2005 - 2011	Variance 2005 - 2011	% Increase 2005 - 2016	Variance 2005 - 2016
University Health System	297,420	400,635	434,905	34.7%	103,215	46.2%	137,485
CentroMed	136,614	181,392	195,029	32.8%	44,778	42.8%	58,415
CommuniCare	57,732	77,314	82,801	33.9%	19,582	43.4%	25,069
Methodist Healthcare Ministries	13,930	18,396	19,740	32.1%	4,467	41.7%	5,810
Daughters of Charity	11,587	15,207	16,383	31.2%	3,620	41.4%	4,796
Total	517,283	692,944	748,859	34.0%	175,661	44.8%	231,575

IV. Demand Analysis

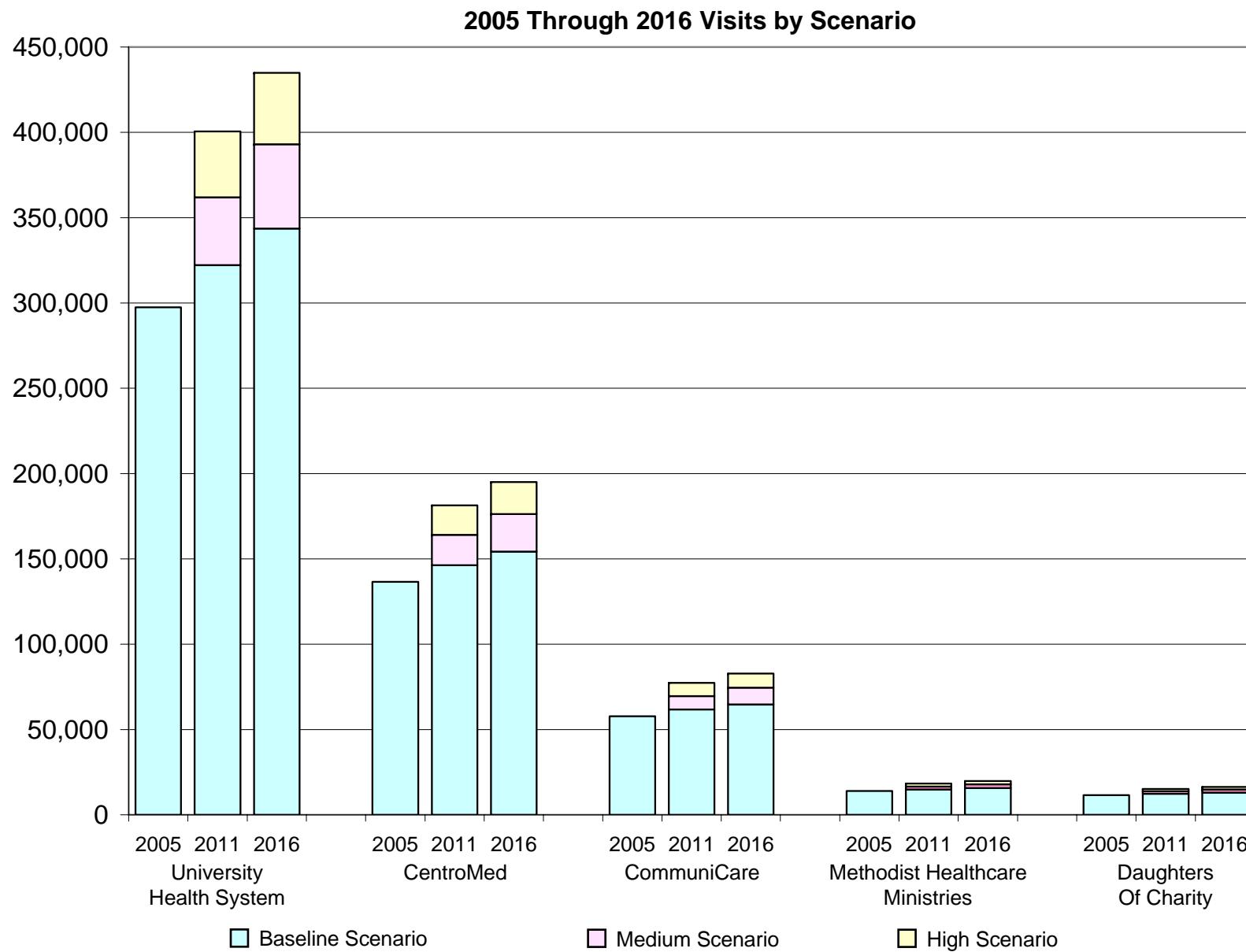
Scenario Summary



Scenario	2005	2011	2016	% Increase 2005 - 2011	Variance 2005 - 2011	% Increase 2005 - 2016	Variance 2005 - 2016
Baseline Scenario	517,283	557,500	591,378	7.8%	40,216	14.3%	74,095
Medium Scenario	517,283	626,093	676,656	21.0%	108,809	30.8%	159,373
High Scenario	517,283	692,944	748,859	34.0%	175,661	44.8%	231,575
Bexar County - 200% FPL	1,218,972	1,337,031	1,444,041	9.7%	118,059	18.5%	225,069

IV. Demand Analysis

Scenario Summary



IV. Demand Analysis

Summary

Projected Volumes

- Bexar County projected to experience large increases in Primary Care demand for the 200% FPL population over next 10 years... from 2005 to 2016:

	<u>Incremental Visits</u>	<u>% Increase</u>
– General Practice	81,256	20.9%
– Internal Medicine	68,835	24.9%
– OB/GYN	23,376	14.2%
– Pediatrics	51,602	13.3%
– Total	225,069	18.5%

- Most incremental demand will occur in the 18 – 64 age cohort... those most likely to be uninsured

	<u>Incremental Visits</u>	<u>% Increase</u>
– 0 – 17 Years	59,681	12.6%
– 18 – 64 Years	119,106	19.6%
– 65+ Years	46,282	33.7%
– Total	225,069	18.5%

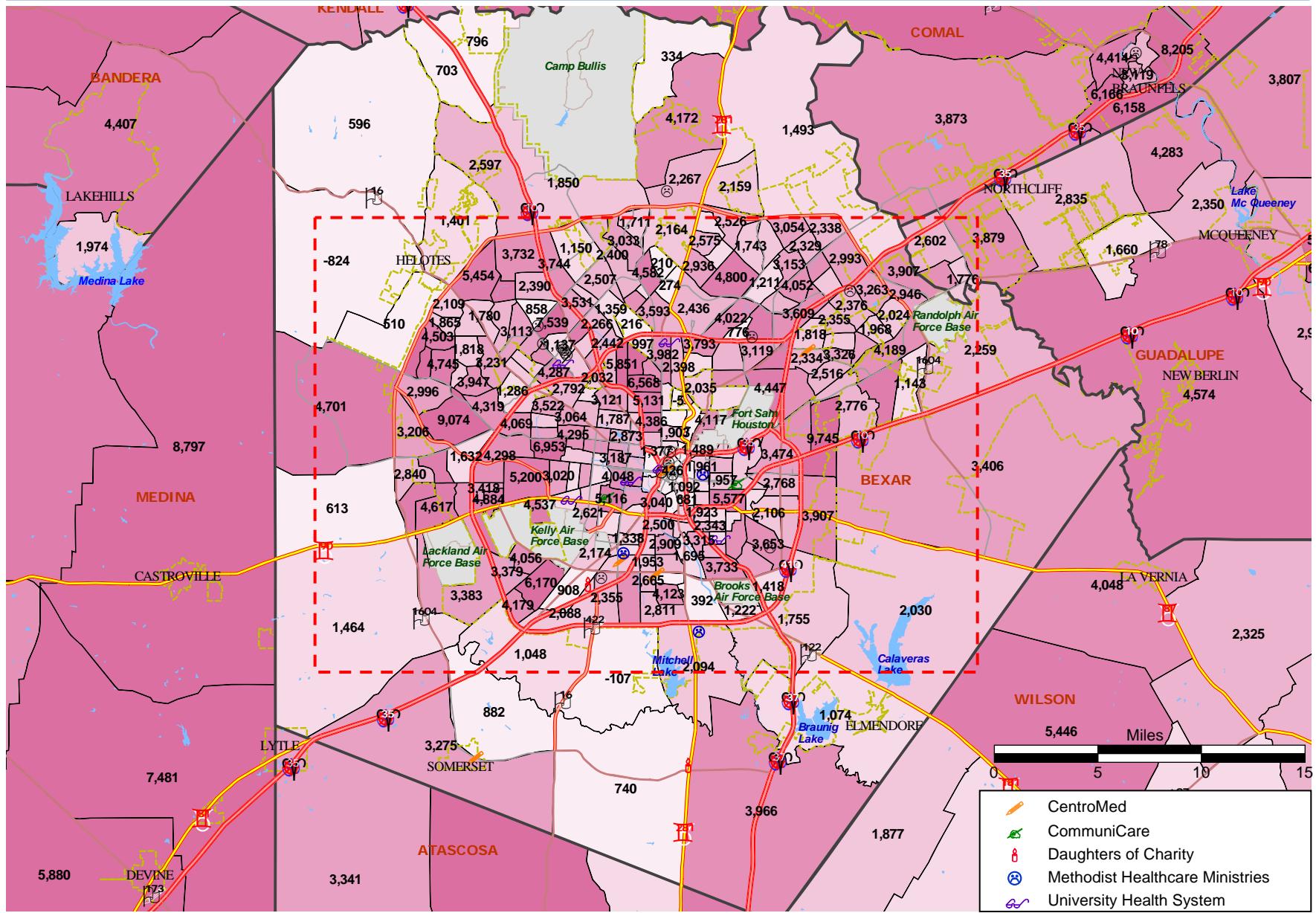
- Incremental demand will occur throughout Bexar County, but will be concentrated in the northern half of Bexar County outside of Loop 410... those areas least utilizing Partner Organizations' services

Demand Analysis

- Under the Baseline Scenario, to maintain current 40.6% utilization, the Partner Organizations would need to significantly expand capacity by 2016... +74,095 visits... +14.3% increase
- To meet the Medium and High Scenarios, capacity expansion would be far greater:
 - Medium Scenario: +159,373 visits... +30.8%
 - High Scenario: +231,575 visits... +44.8%

V. Conclusions

Difference Between Expected Visits and Partner Organizations' Clinic Visits



(1) Source: Partner Organizations' Databases.

V. Conclusions

Summary

- There is currently a large unmet need for Primary Care for the 200% FPL population
 - Most areas of Bexar County have some degree of unmet needs
 - Varies significantly by location
- Underutilization of Primary Care by target population results in:
 - Higher healthcare costs to community, both short-term and long-term
 - Over-utilization of Emergency Services
 - Less Preventive Care
 - Less Early Detection and Treatment of Disease
 - Lower quality of life
- Very strong incremental demand for Bexar County projected over the next 10 years across all age cohorts, especially in the 18 – 64 age group
 - To maintain current utilization of 40.6%, Partner Organizations will need to expand capacity significantly
 - To improve utilization in Bexar County to 45% or 50%, even larger commitments of resources will be required
- Existing clinic locations:
 - Positioned to serve current target population within Loop 410
 - Considerable overlap of Service Areas and close proximity of Clinic sites
 - Not as well positioned to accommodate much of future growth

V. Conclusions

Questions for Discussion – Work Session #2

- What is the need for additional clinic locations:
 - Within the Partner Organizations' current service areas?
 - Outside of the Partner Organizations' current service areas?
- Where do you see your organization's growth occurring in the future?
- Recognizing the lower cost per visit at the community health centers, what is the best strategy for ensuring greatest coverage in the most cost effective manner of the low-income uninsured?
- What roles do you see each of the Partner Organizations playing in the future?
- Are there opportunities for partnership with one another?
- How can we work together to better meet the future needs of the low-income uninsured in the most cost effective, efficient manner?

V. Next Steps

Additional Strategic & Demand Analysis

- Based upon feedback from today's meeting, conduct additional analysis as required:
 - Strategic Analysis
 - Demand Analysis
 - Other Metrics
 - Dental
 - Emergency

Work Session #2:

- Additional Strategic & Demand Analysis
- Prioritization of Potential Facility Projects
- Coordination of Planning Efforts

Final Report

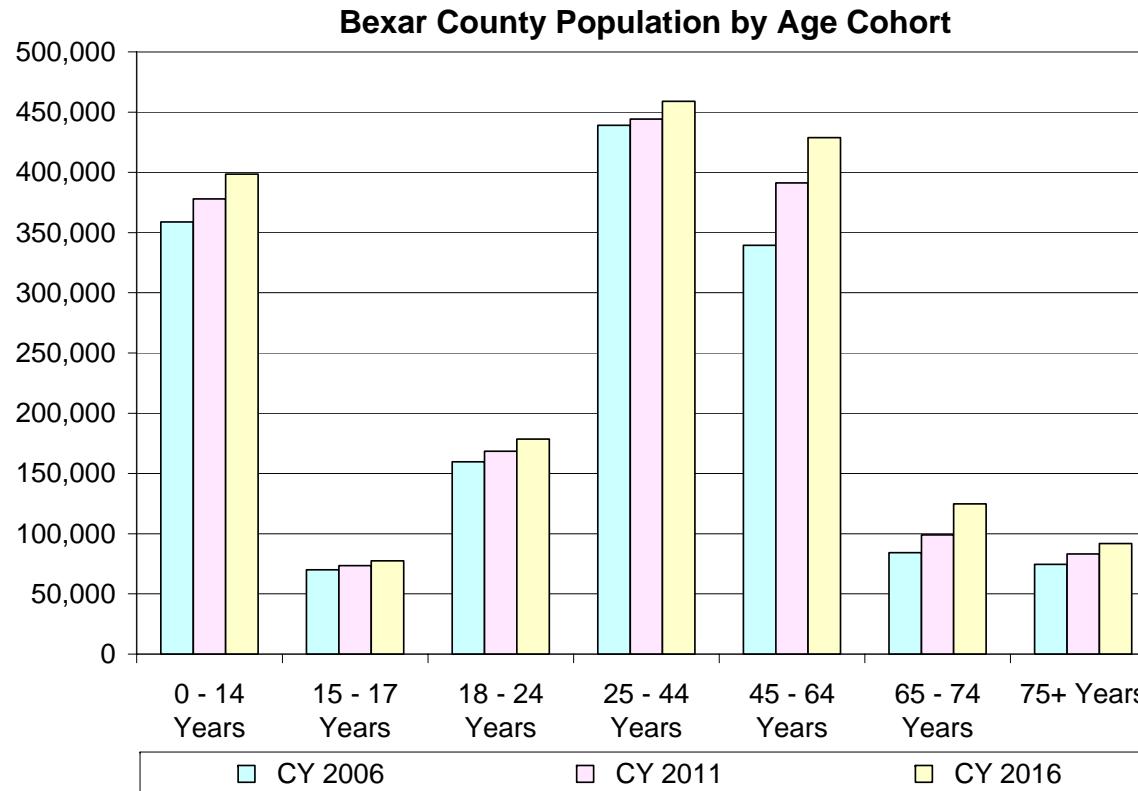
- Executive Summary
- Consolidated Strategic & Demand Analysis
- Prioritization of Facility Projects
- Coordination of Future Planning Efforts

-
- Beginning of Hyperlinked Slides

- Demographic Hyperlinked Slides

II. Demographics

Demographics – Bexar County⁽¹⁾

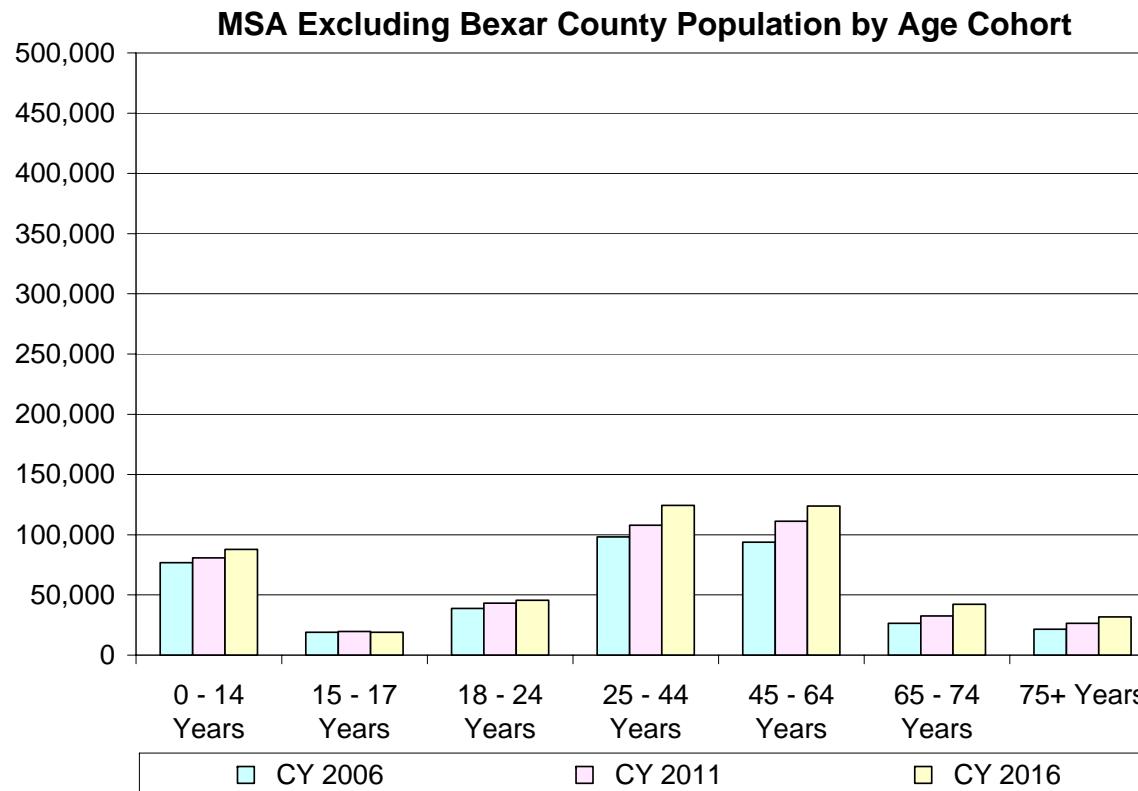


Bexar County Population	CY 2006	CY 2011	CY 2016	% Increase 2006 - 2016	Variance
0 - 14 Years	358,703	378,005	398,417	11.1%	39,714
15 - 17 Years	70,065	73,620	77,522	10.6%	7,457
18 - 24 Years	159,735	168,427	178,469	11.7%	18,734
25 - 44 Years	439,001	444,255	458,989	4.6%	19,988
45 - 64 Years	339,502	391,263	428,920	26.3%	89,418
65 - 74 Years	84,249	98,984	124,912	48.3%	40,663
75+ Years	74,665	83,153	91,909	23.1%	17,244
Total Population	1,525,920	1,637,707	1,759,138	15.3%	233,218

(1) Source: Claritas 2000 – 2011 database; 2016 population extrapolated from 2006 - 2011 data.

II. Demographics

Demographics – San Antonio MSA Excluding Bexar County⁽¹⁾

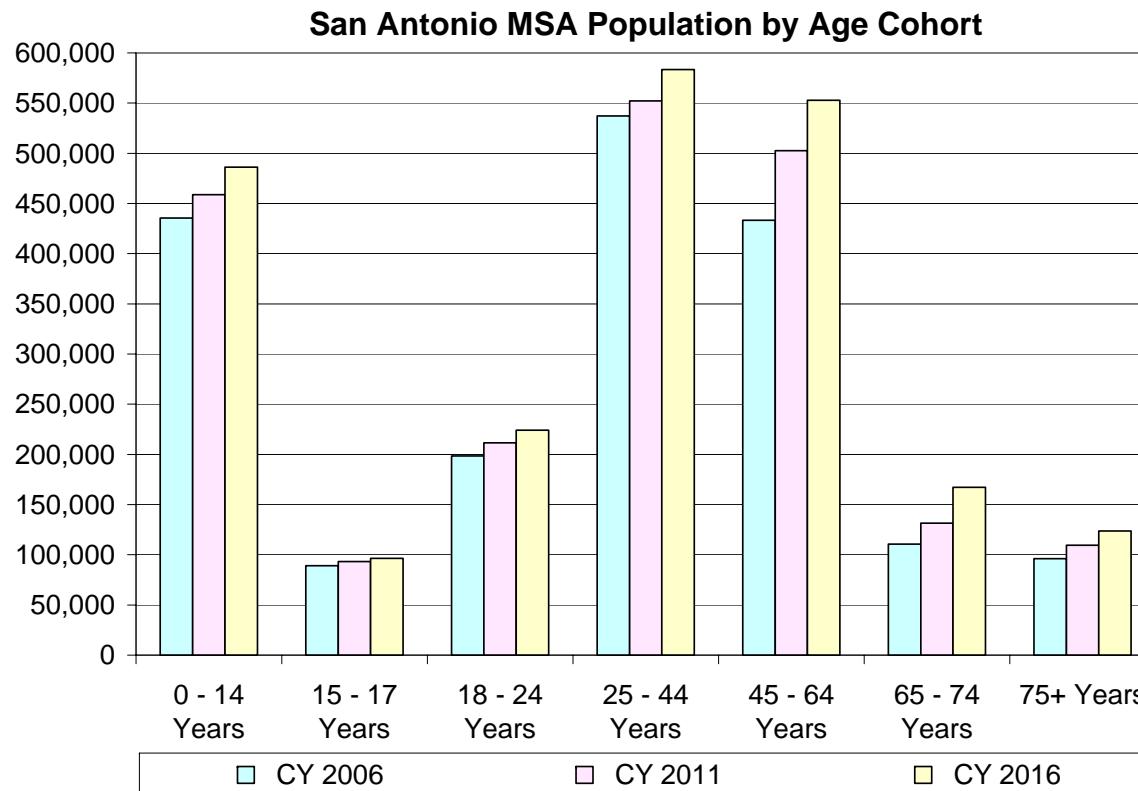


MSA Excluding Bexar Population	CY 2006	CY 2011	CY 2016	% Increase 2006 - 2016	Variance
0 - 14 Years	76,757	80,749	87,794	14.4%	11,037
15 - 17 Years	18,970	19,621	18,944	-0.1%	-26
18 - 24 Years	38,845	43,100	45,651	17.5%	6,806
25 - 44 Years	98,239	107,938	124,364	26.6%	26,125
45 - 64 Years	93,725	111,258	123,857	32.1%	30,132
65 - 74 Years	26,452	32,666	42,311	60.0%	15,859
75+ Years	21,513	26,401	31,777	47.7%	10,264
Total Population	374,501	421,733	474,697	26.8%	100,196

(1) Source: Claritas 2000 – 2011 database; 2016 population extrapolated from 2006 - 2011 data.

II. Demographics

Demographics – San Antonio MSA⁽¹⁾

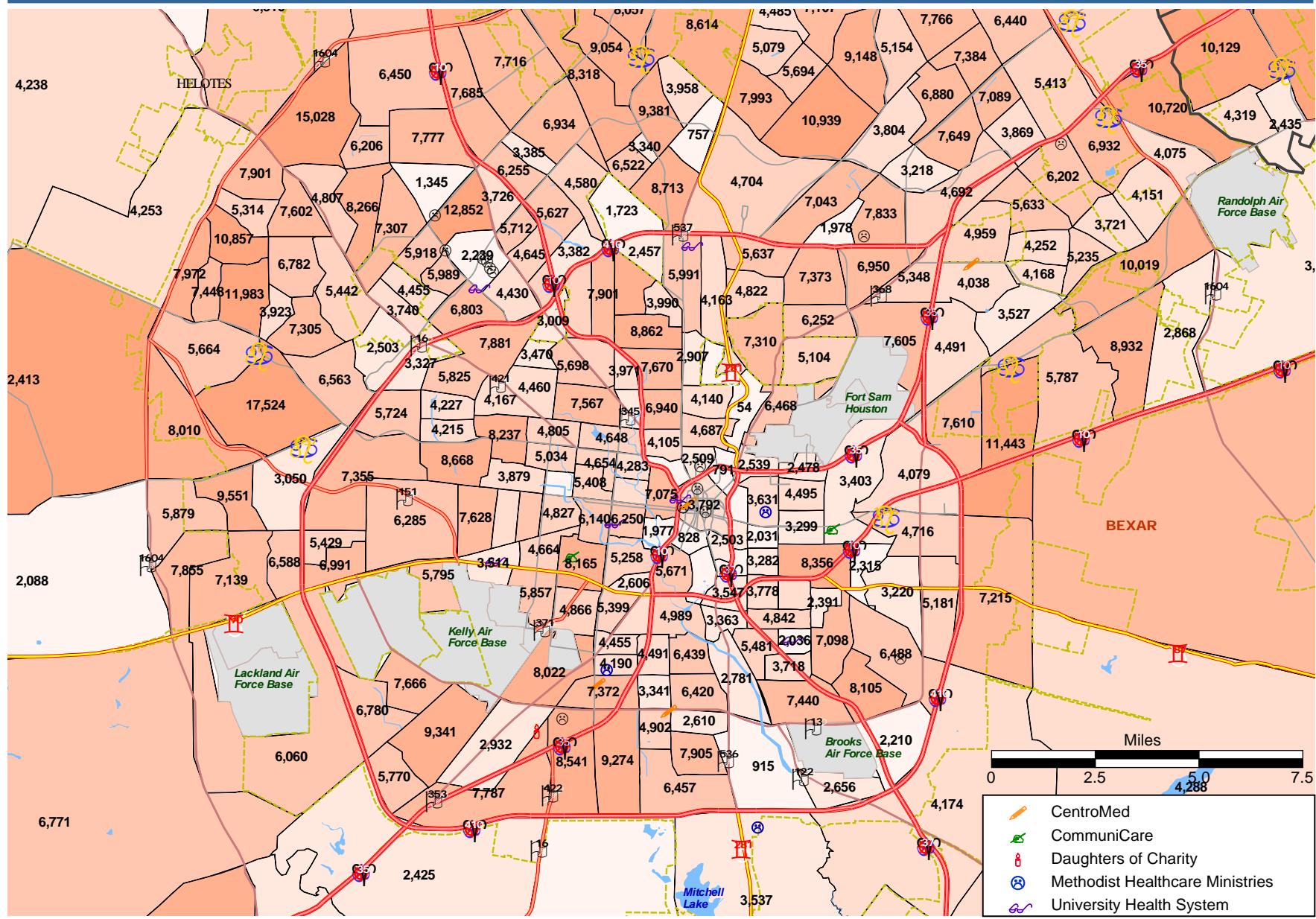


San Antonio MSA Population	CY 2006	CY 2011	CY 2016	% Increase 2006 - 2016	Variance
0 - 14 Years	435,460	458,754	486,211	11.7%	50,751
15 - 17 Years	89,035	93,241	96,465	8.3%	7,430
18 - 24 Years	198,580	211,527	224,120	12.9%	25,540
25 - 44 Years	537,240	552,193	583,353	8.6%	46,113
45 - 64 Years	433,227	502,521	552,776	27.6%	119,549
65 - 74 Years	110,701	131,650	167,223	51.1%	56,522
75+ Years	96,178	109,554	123,685	28.6%	27,507
Total Population	1,900,421	2,059,440	2,233,834	17.5%	333,413

(1) Source: Claritas 2000 – 2011 database; 2016 population extrapolated from 2006 - 2011 data.

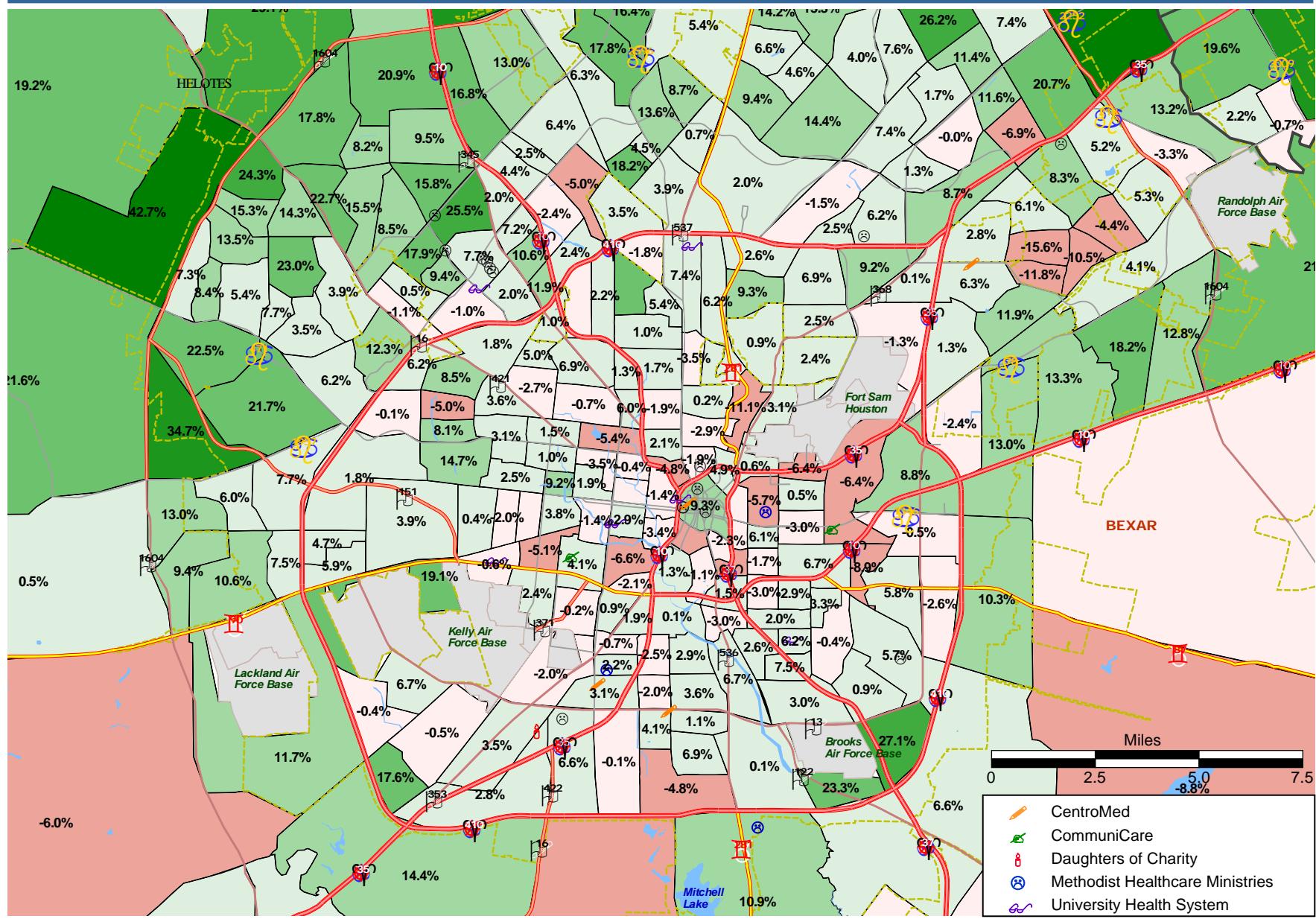
II. Demographics

2006 Total Population⁽¹⁾



II. Demographics

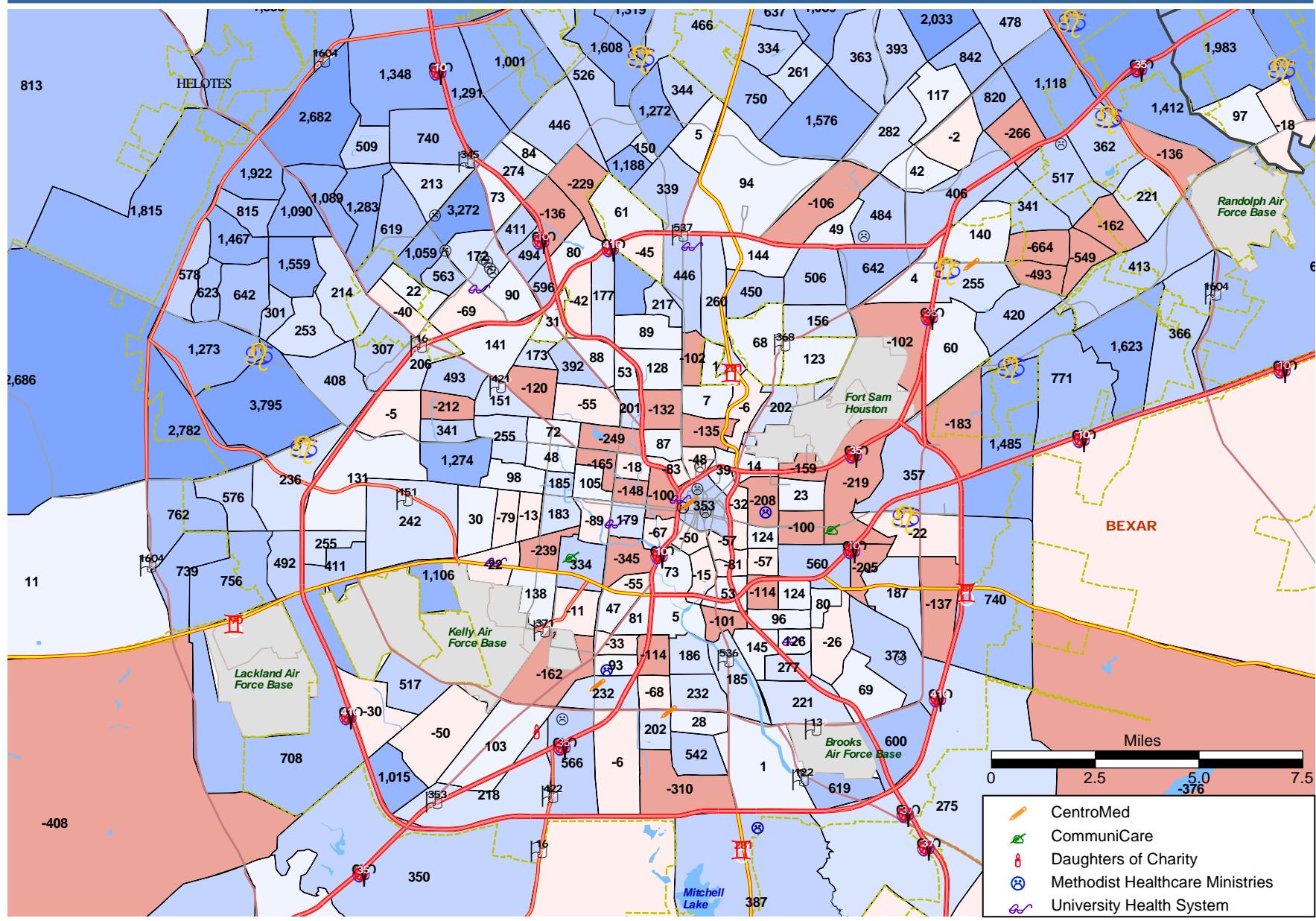
Percentage Total Population Growth 2006 - 2011⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

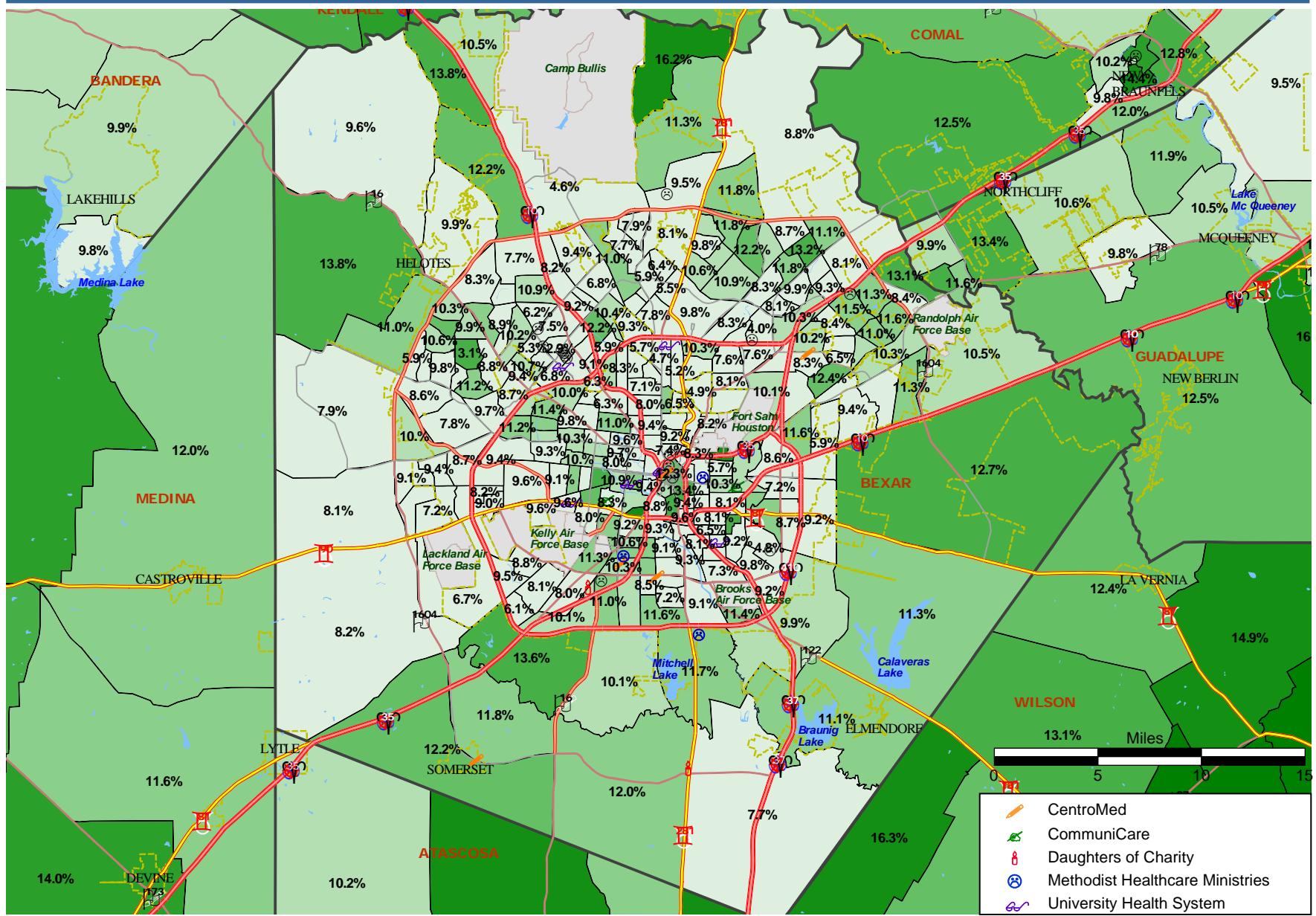
Absolute Population Growth 2006 - 2011⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

2006 – 2011 Percentage Change in Per Capita Income⁽¹⁾



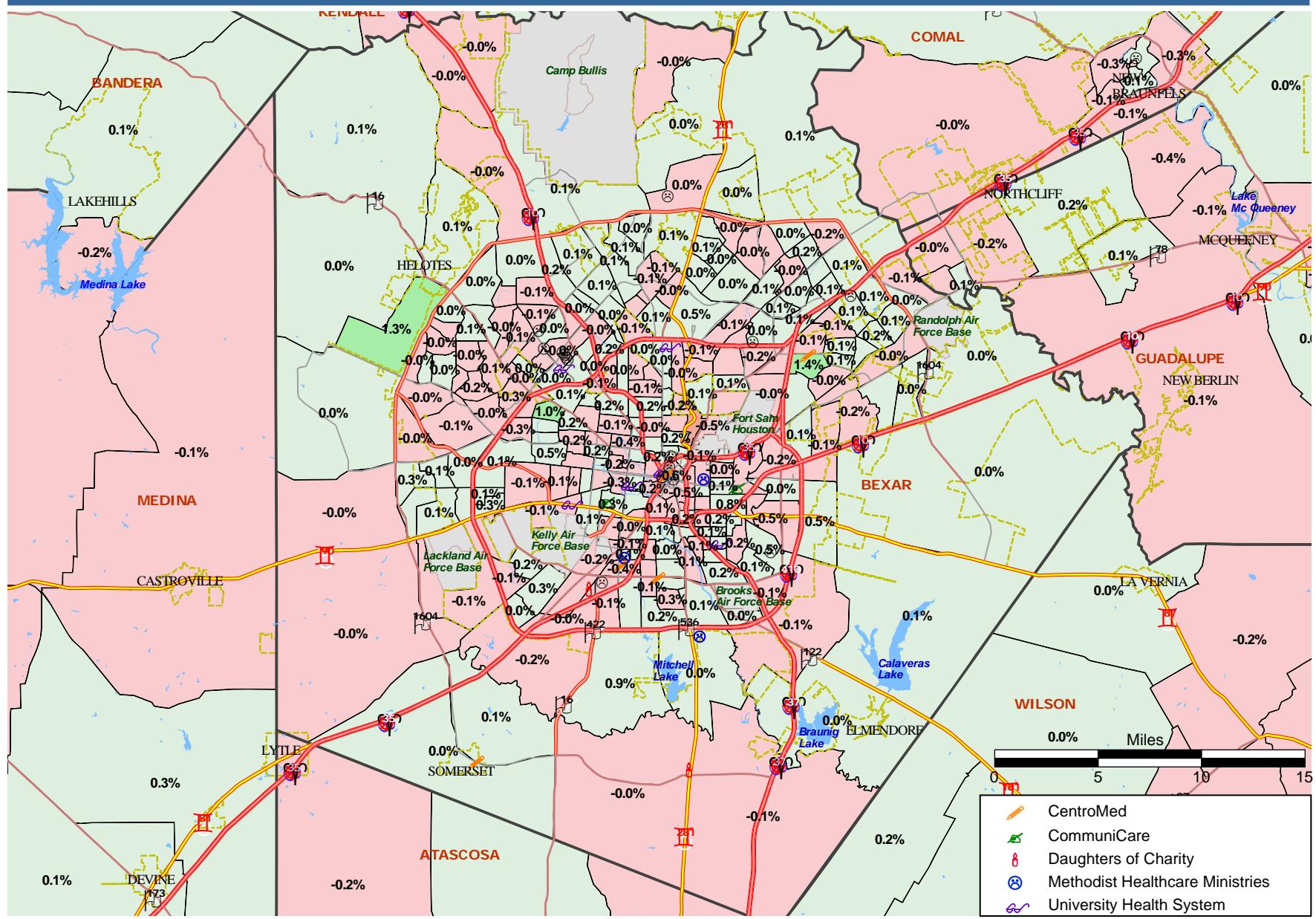
(1) Source: Claritas 2000 – 2011 database.



CAPITAL
HEALTHCARE PLANNING

II. Demographics

2006 – 2011 Change in Percentage of Families Below 100% FPL⁽¹⁾



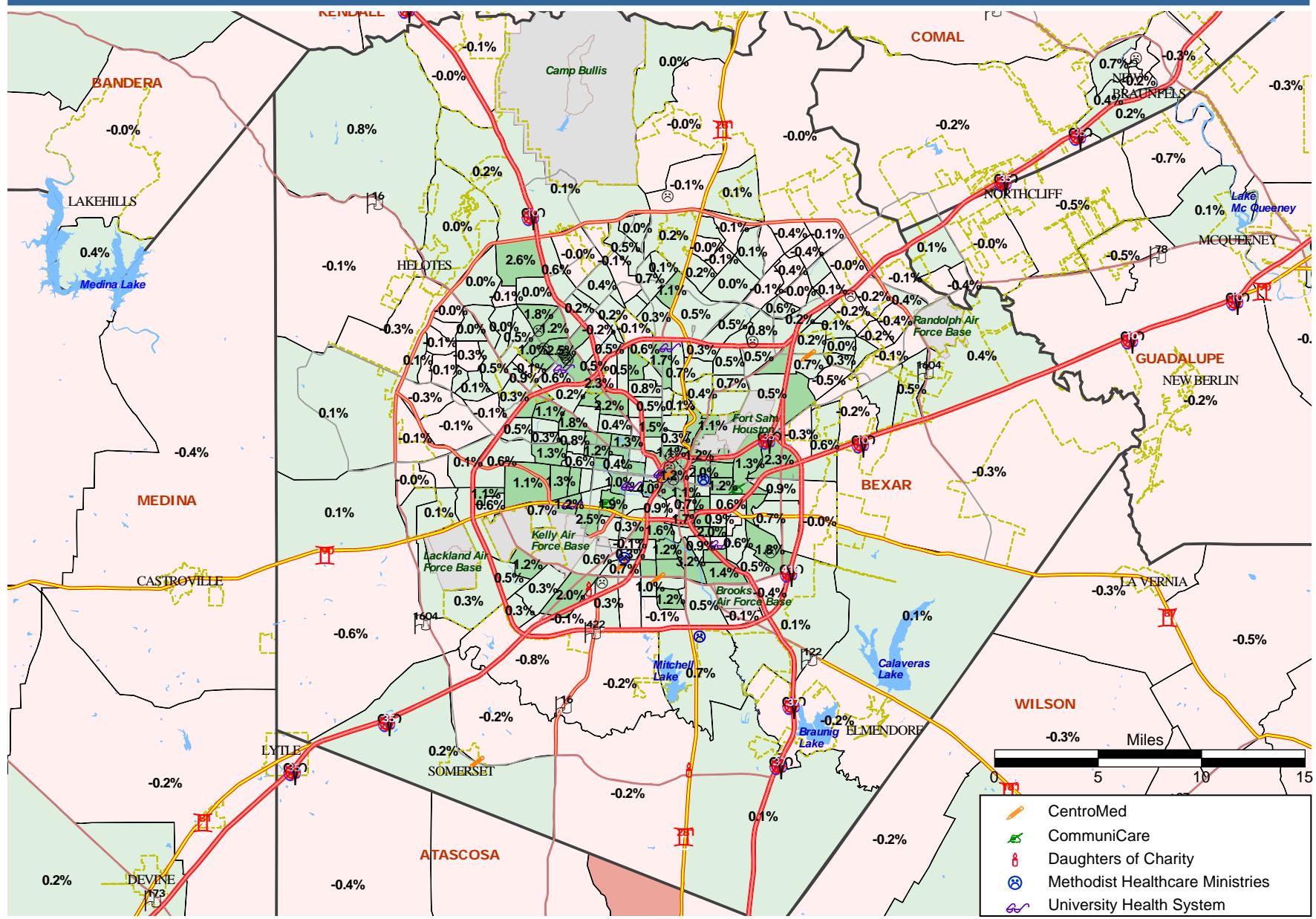
(1) Source: Claritas 2000 – 2011 database.



CAPITAL
HEALTHCARE PLANNING

II. Demographics

2006 – 2011 Change in % of Population Below 100% FPL⁽¹⁾



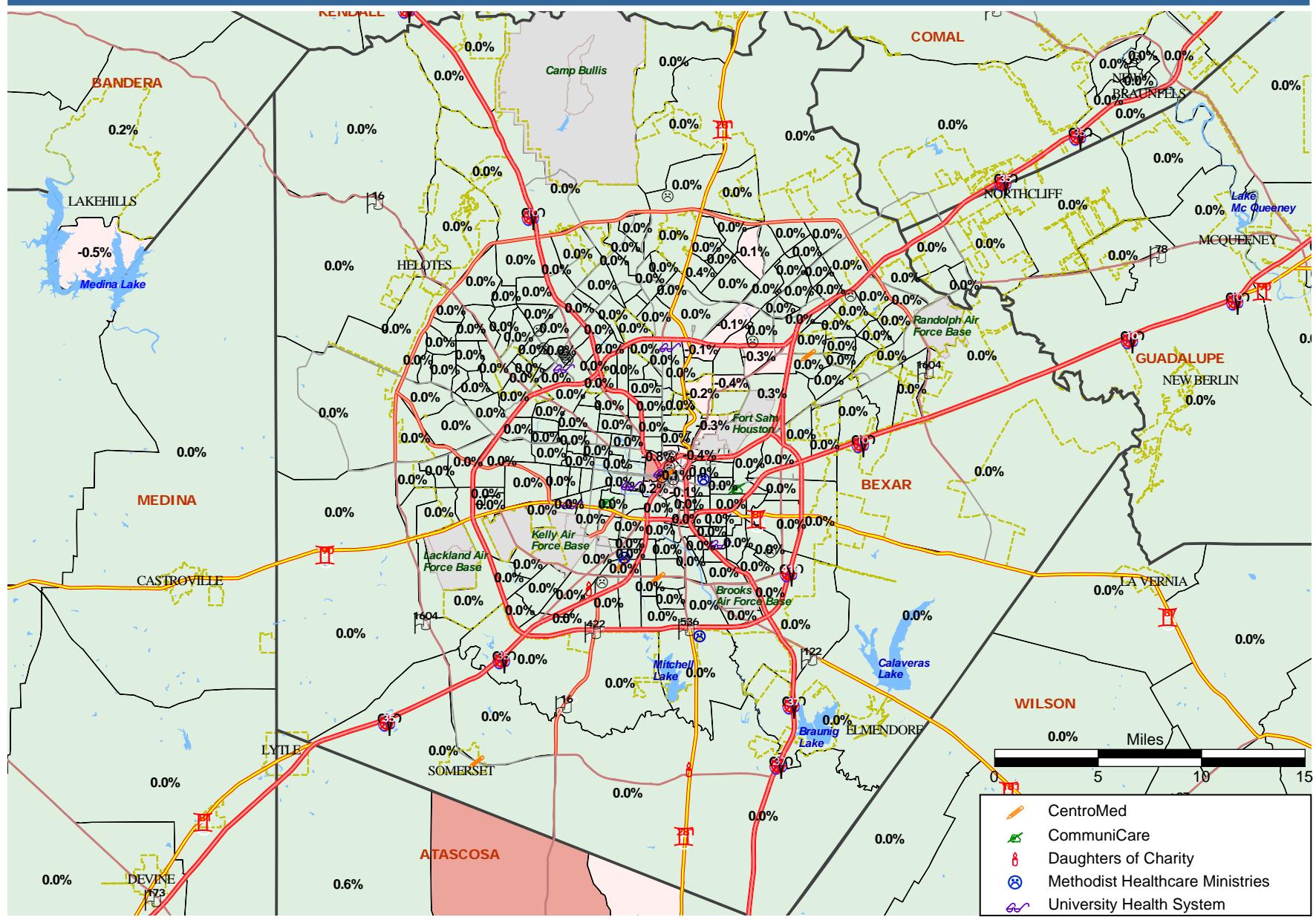
(1) Source: Claritas 2000 – 2011 database.



 TII CAPITAL
HEALTHCARE PLANNING

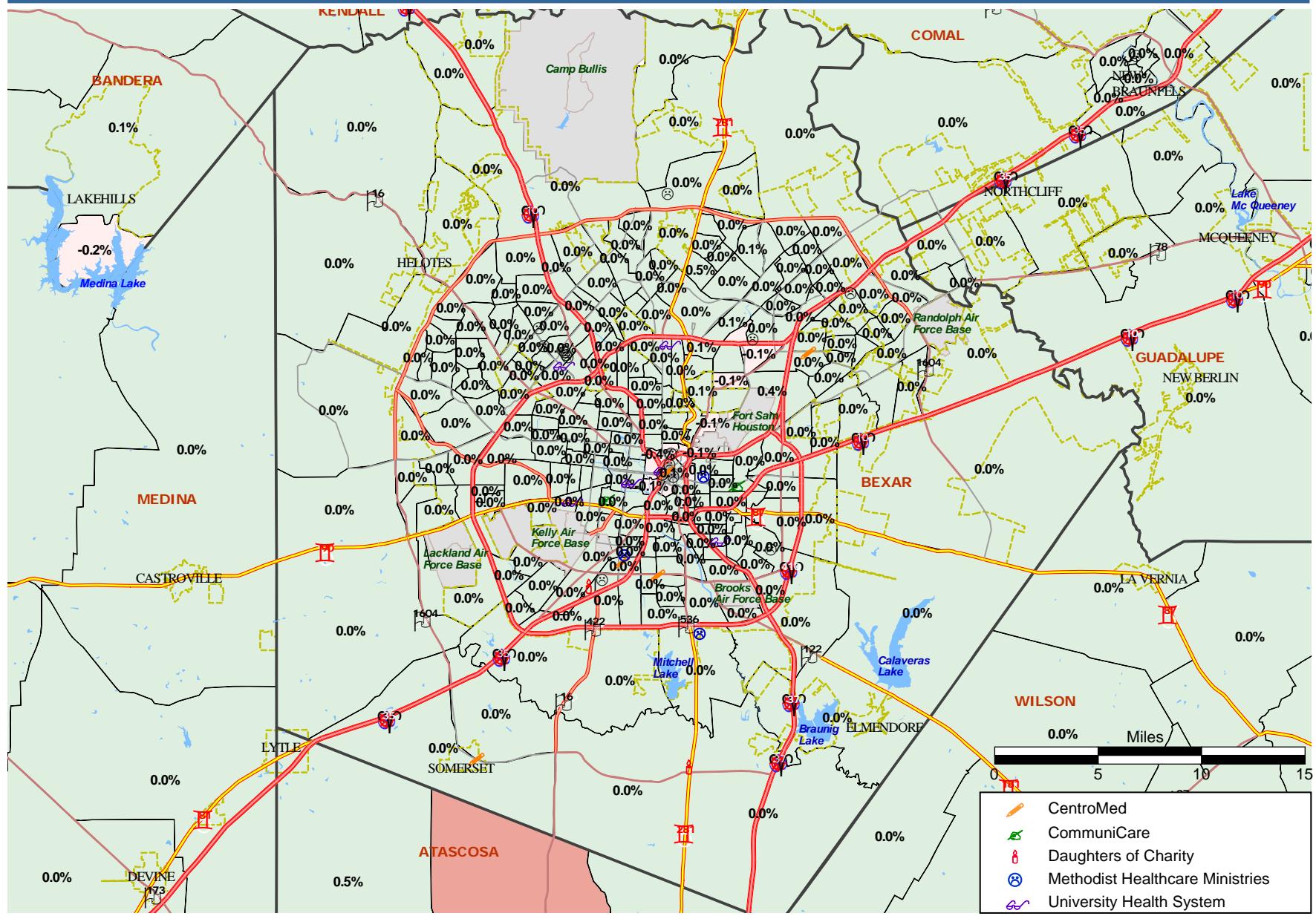
II. Demographics

2006 – 2011 Change in % of Population Age 0-17 Below 100% FPL⁽¹⁾



II. Demographics

2006 – 2011 Change in % of Population Age 18-64 Below 100% FPL⁽¹⁾



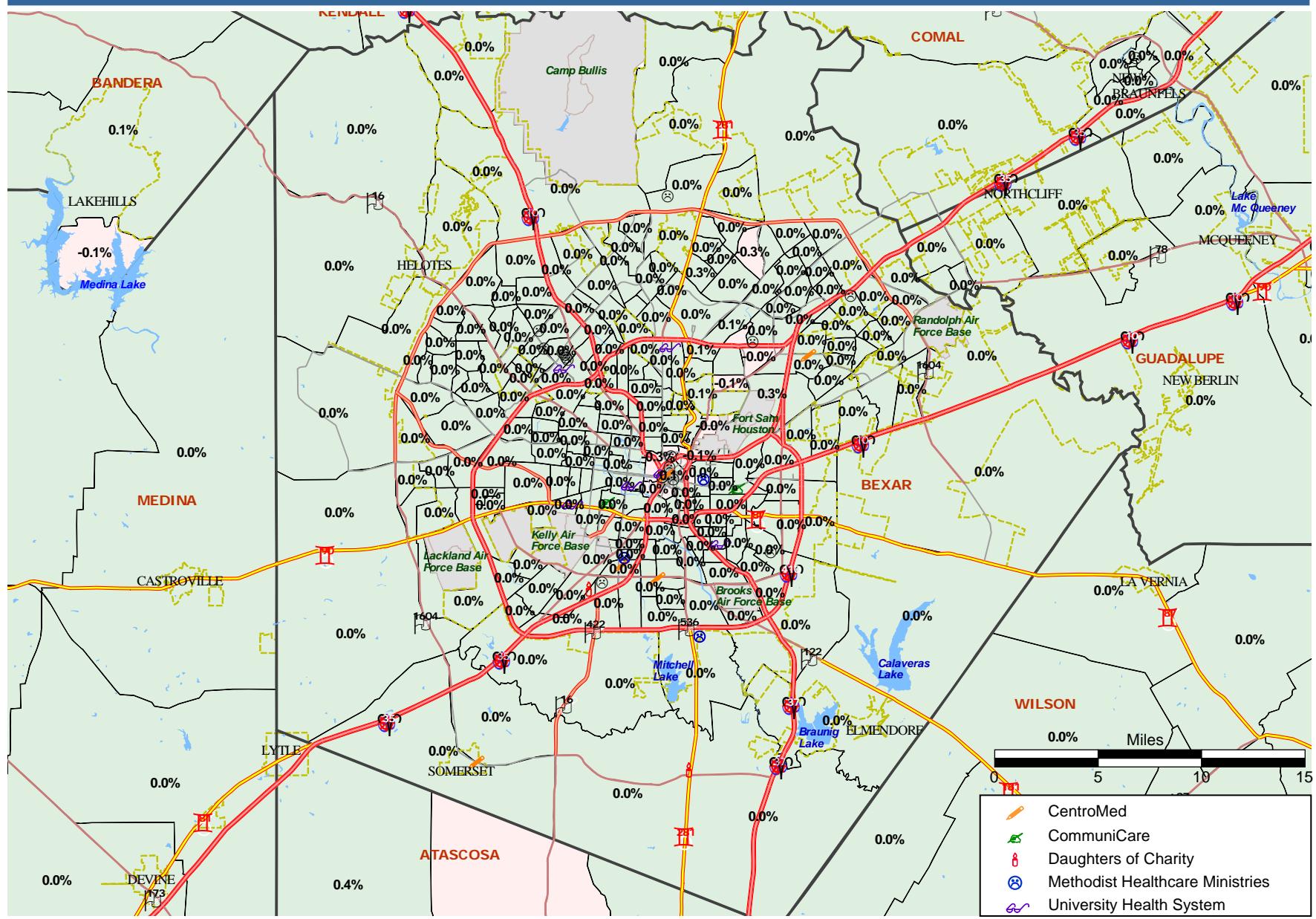
(1) Source: Claritas 2000 – 2011 database.



CAPITAL
HEALTHCARE PLANNING

II. Demographics

2006 – 2011 Change in % of Population Age 65+ Below 100% FPL⁽¹⁾

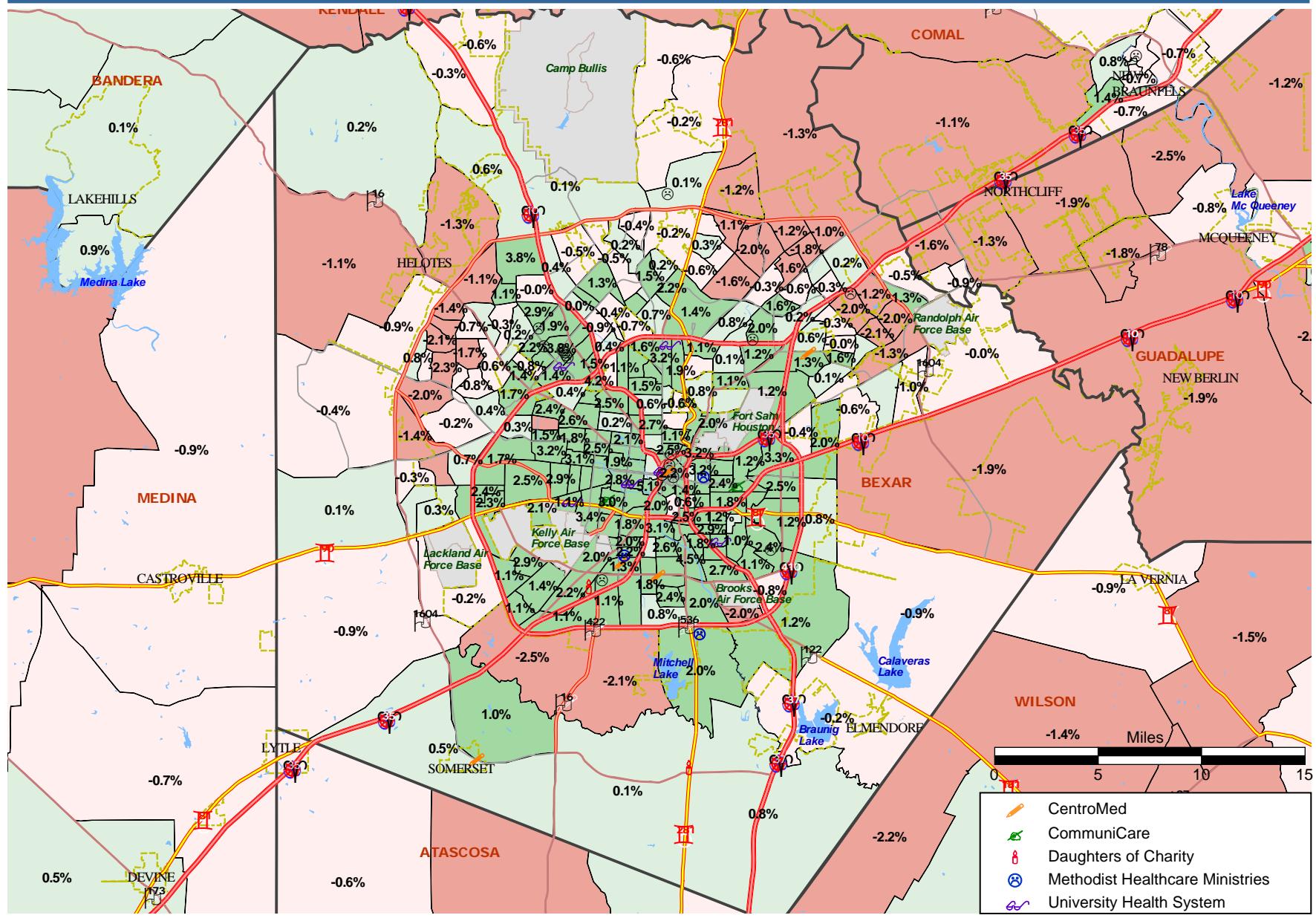


(1) Source: Claritas 2000 – 2011 database.



II. Demographics

2006 – 2011 Change in % of Population Below 200% FPL⁽¹⁾



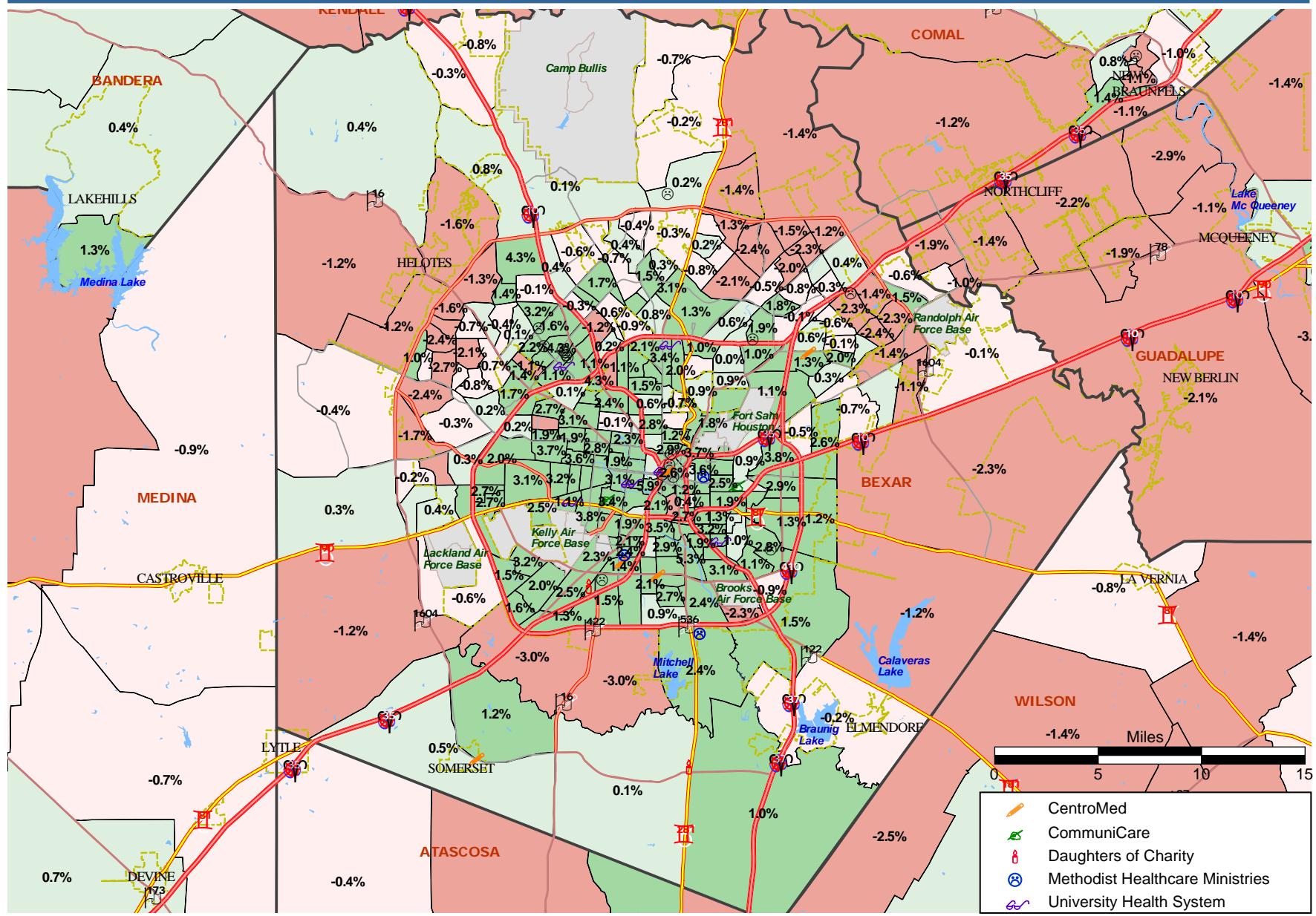
(1) Source: Claritas 2000 – 2011 database.



CAPITAL
HEALTHCARE PLANNING

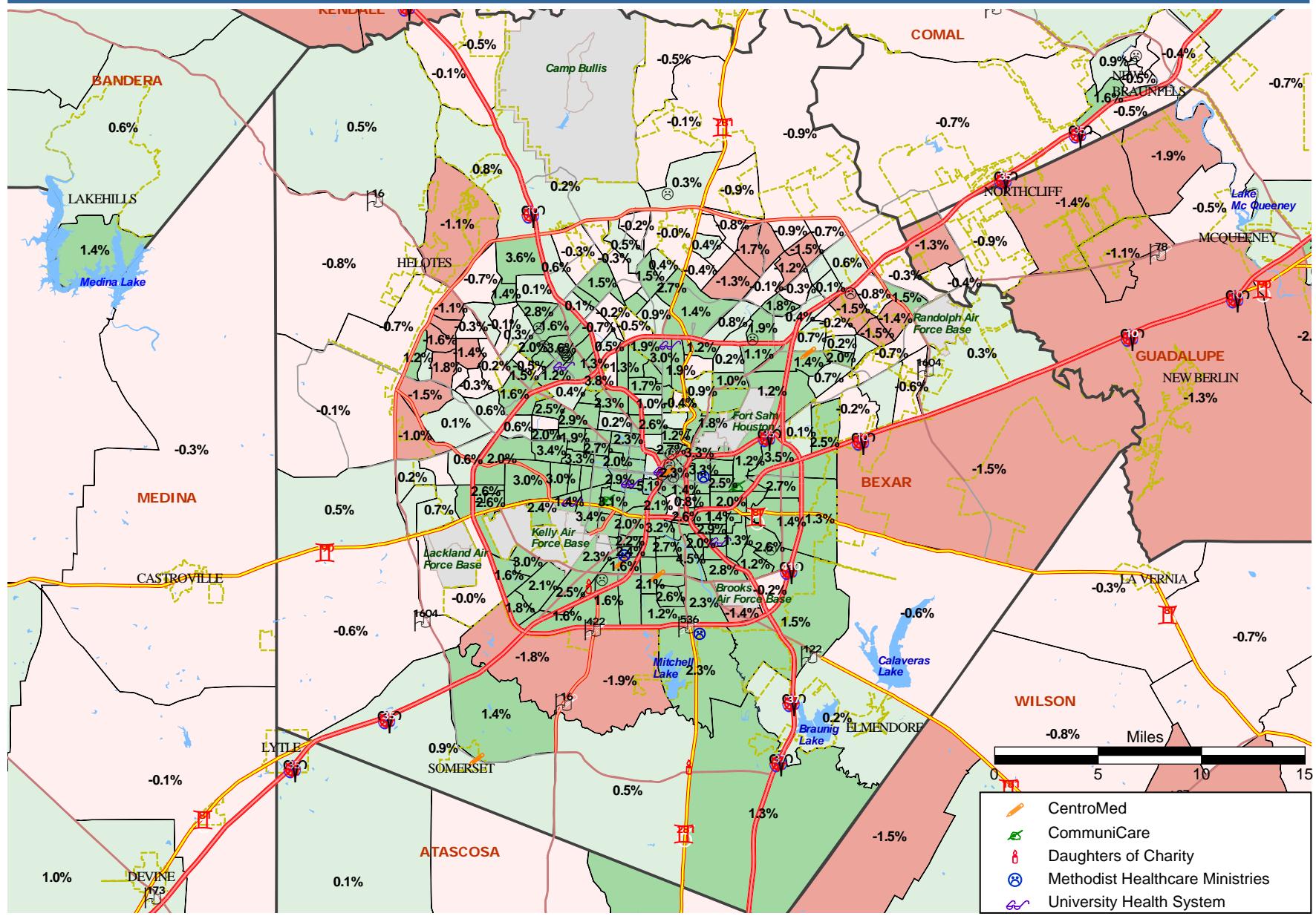
II. Demographics

2006 – 2011 Change in % of Population Age 0-17 Below 200% FPL⁽¹⁾



II. Demographics

2006 – 2011 Change in % of Population Age 18-64 Below 200% FPL⁽¹⁾

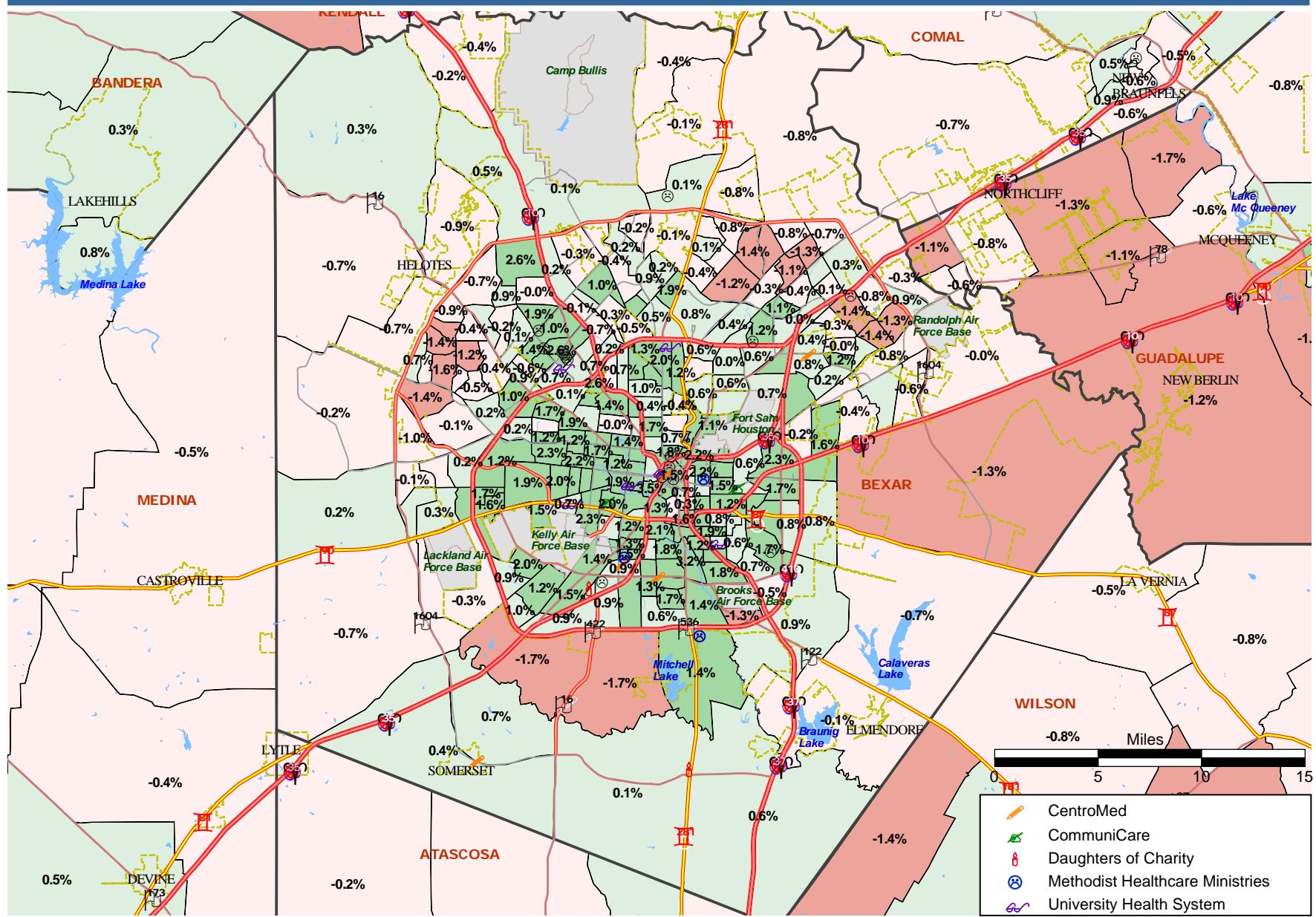


(1) Source: Claritas 2000 – 2011 database.



II. Demographics

2006 – 2011 Change in % of Population Age 65+ Below 200% FPL⁽¹⁾

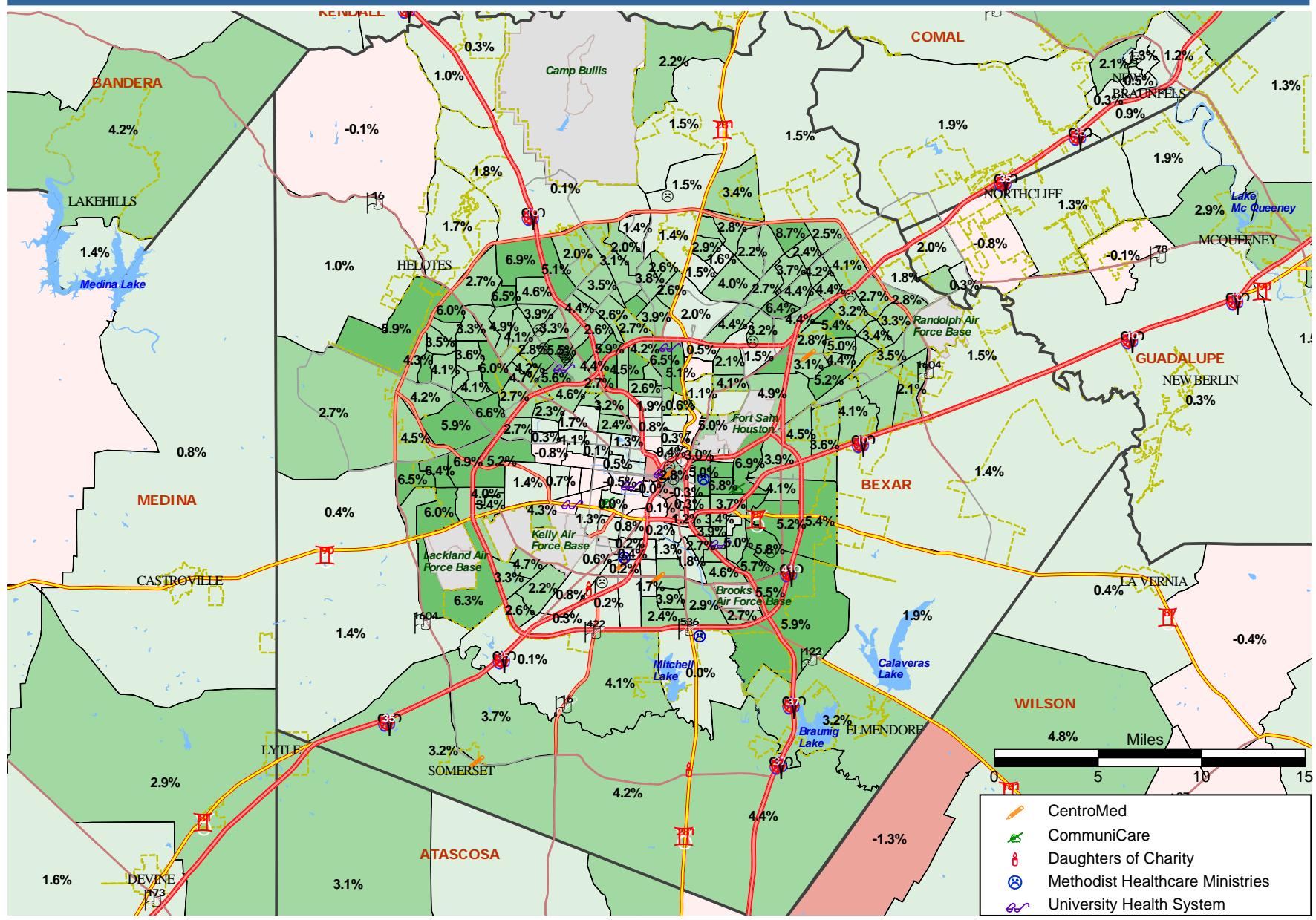


(1) Source: Claritas 2000 – 2011 database.



II. Demographics

2006 – 2011 Change in Percentage of Hispanics⁽¹⁾



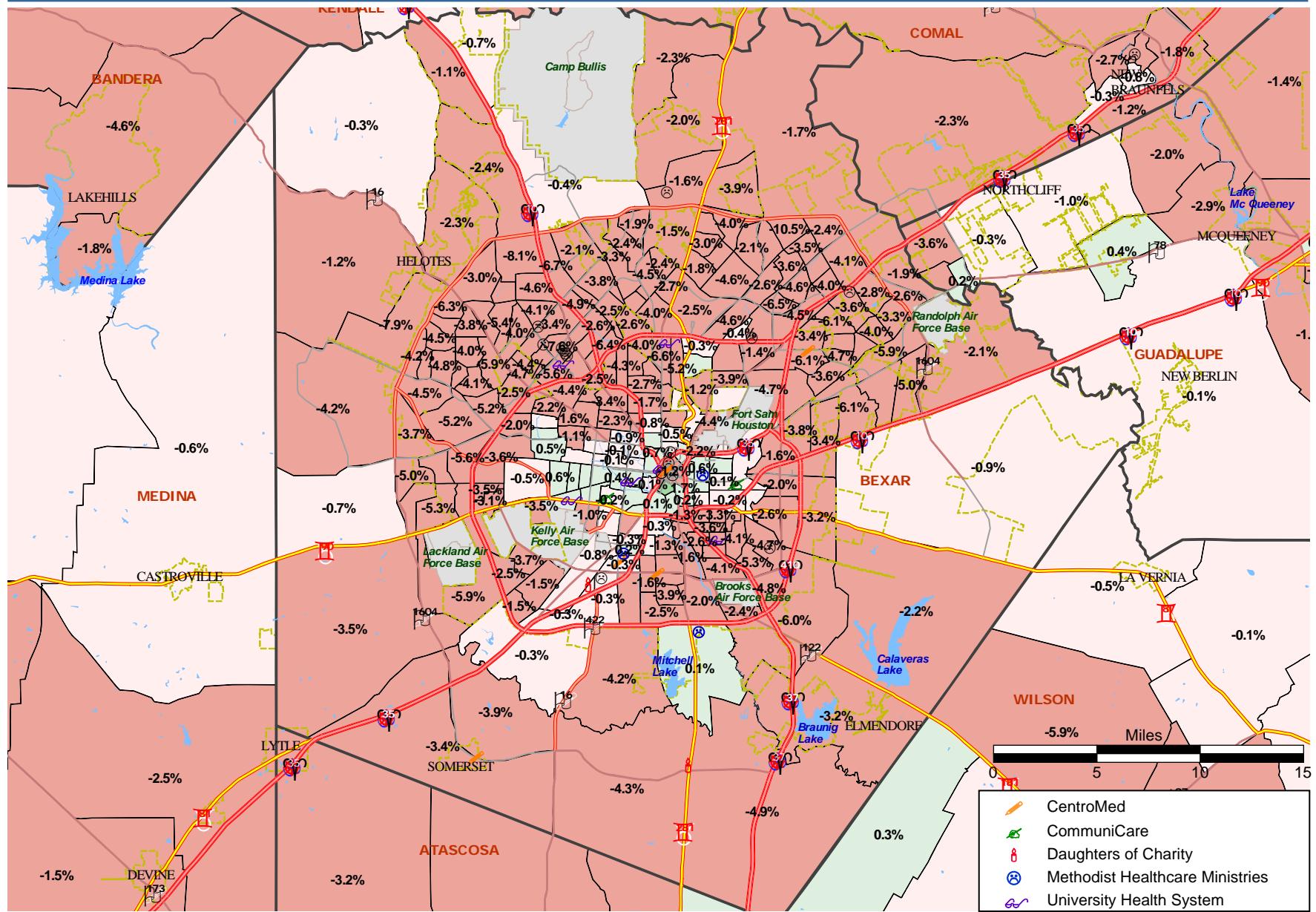
(1) Source: Claritas 2000 – 2011 database.



 TII CAPITAL
HEALTHCARE PLANNING

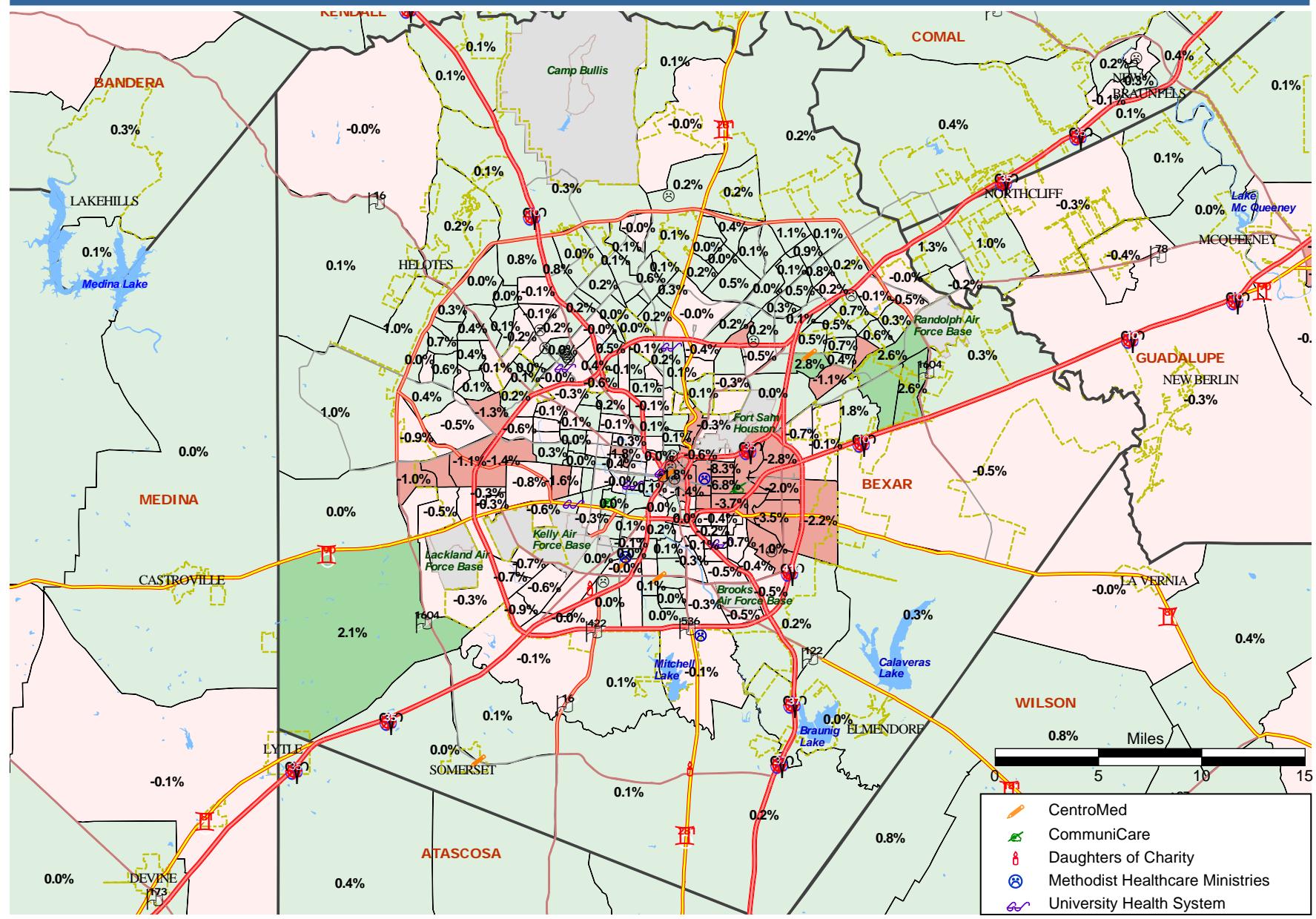
II. Demographics

2006 – 2011 Change in Percentage of Anglos⁽¹⁾



II. Demographics

2006 – 2011 Change in Percentage of African Americans⁽¹⁾



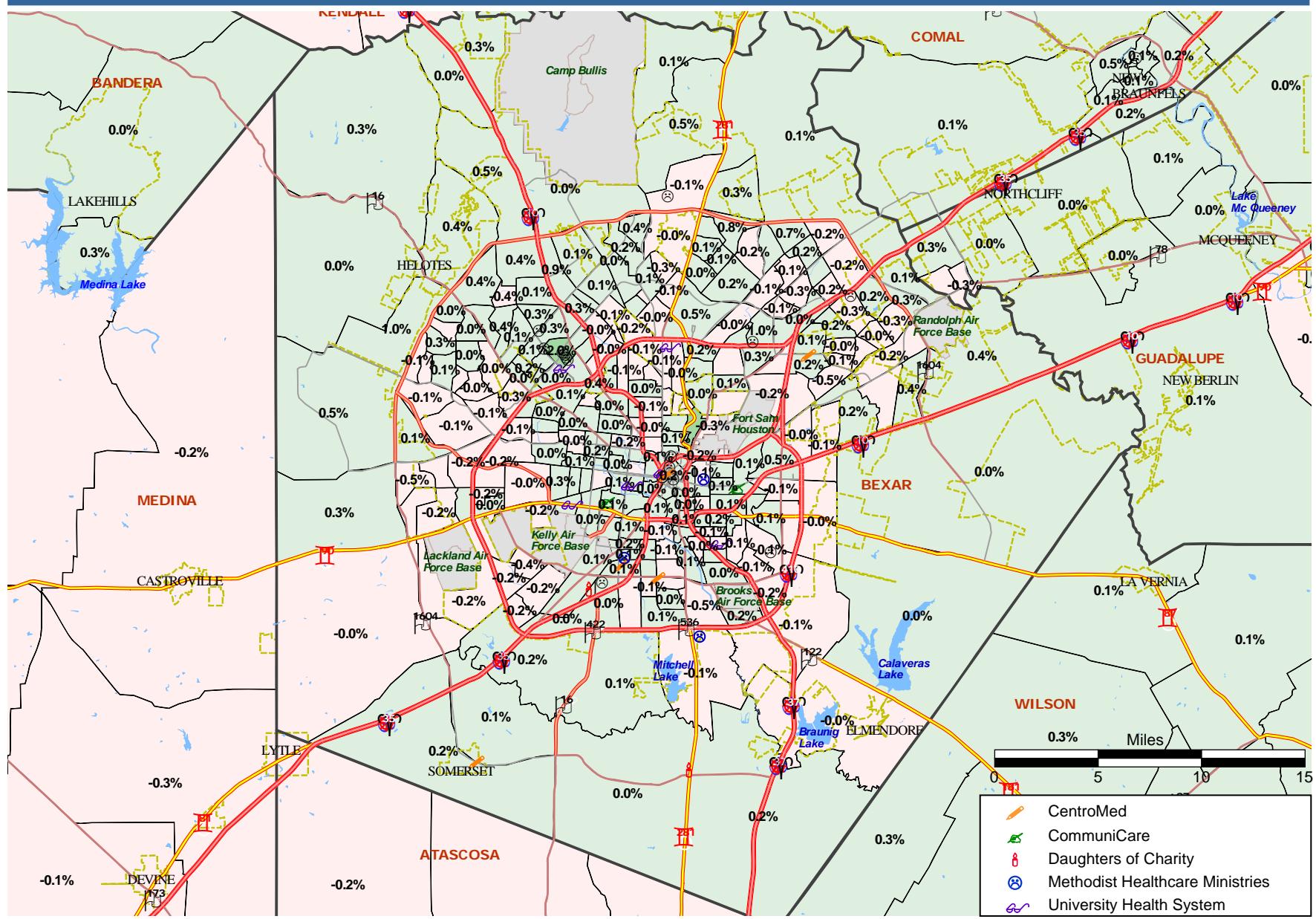
(1) Source: Claritas 2000 – 2011 database.



TII CAPITAL
HEALTHCARE PLANNING

II. Demographics

2006 – 2011 Change in Percentage of Other Ethnicities⁽¹⁾

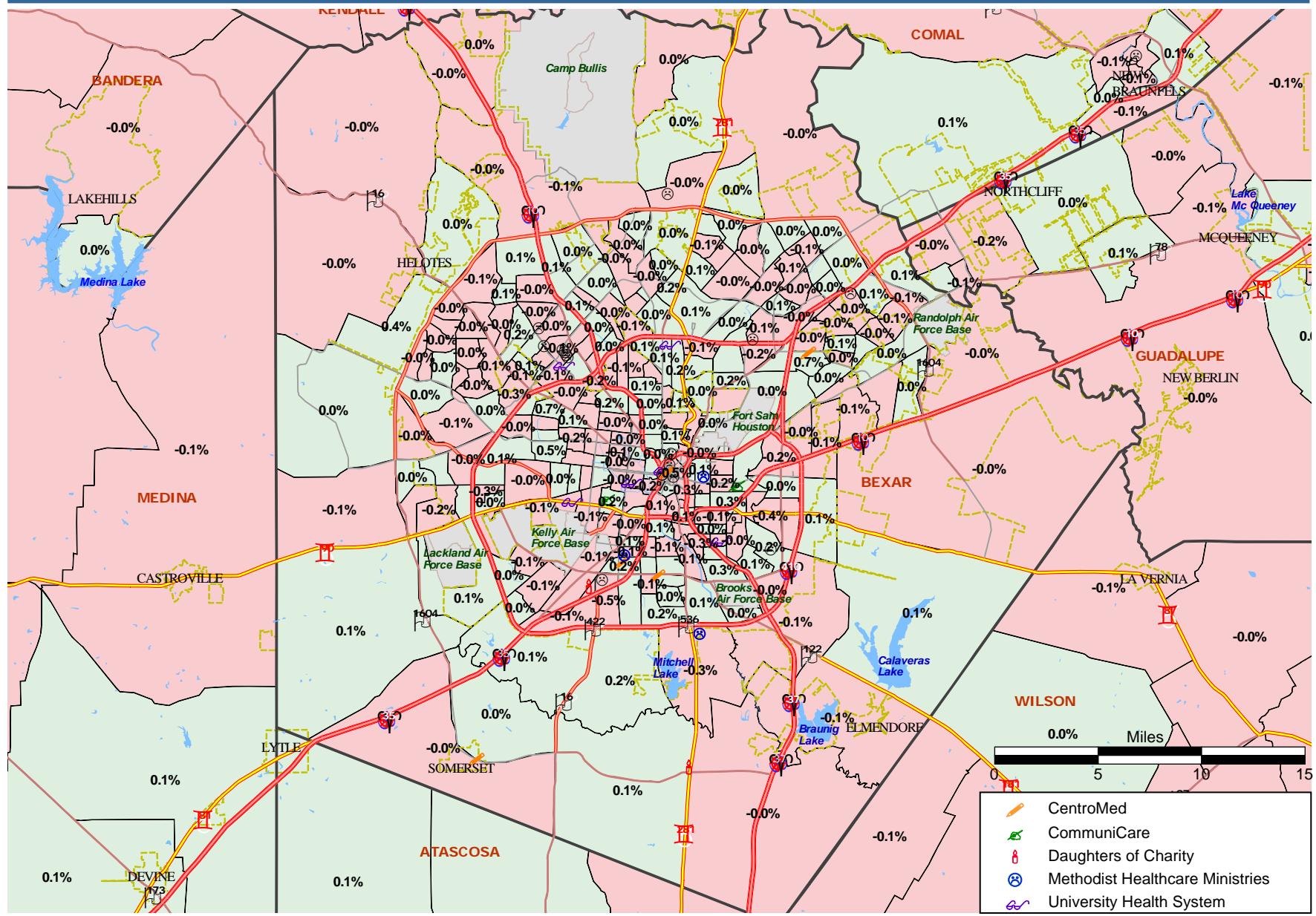


(1) Source: Claritas 2000 – 2011 database.



II. Demographics

2006 – 2011 Change in Percentage of Housing Units with No Vehicles⁽¹⁾



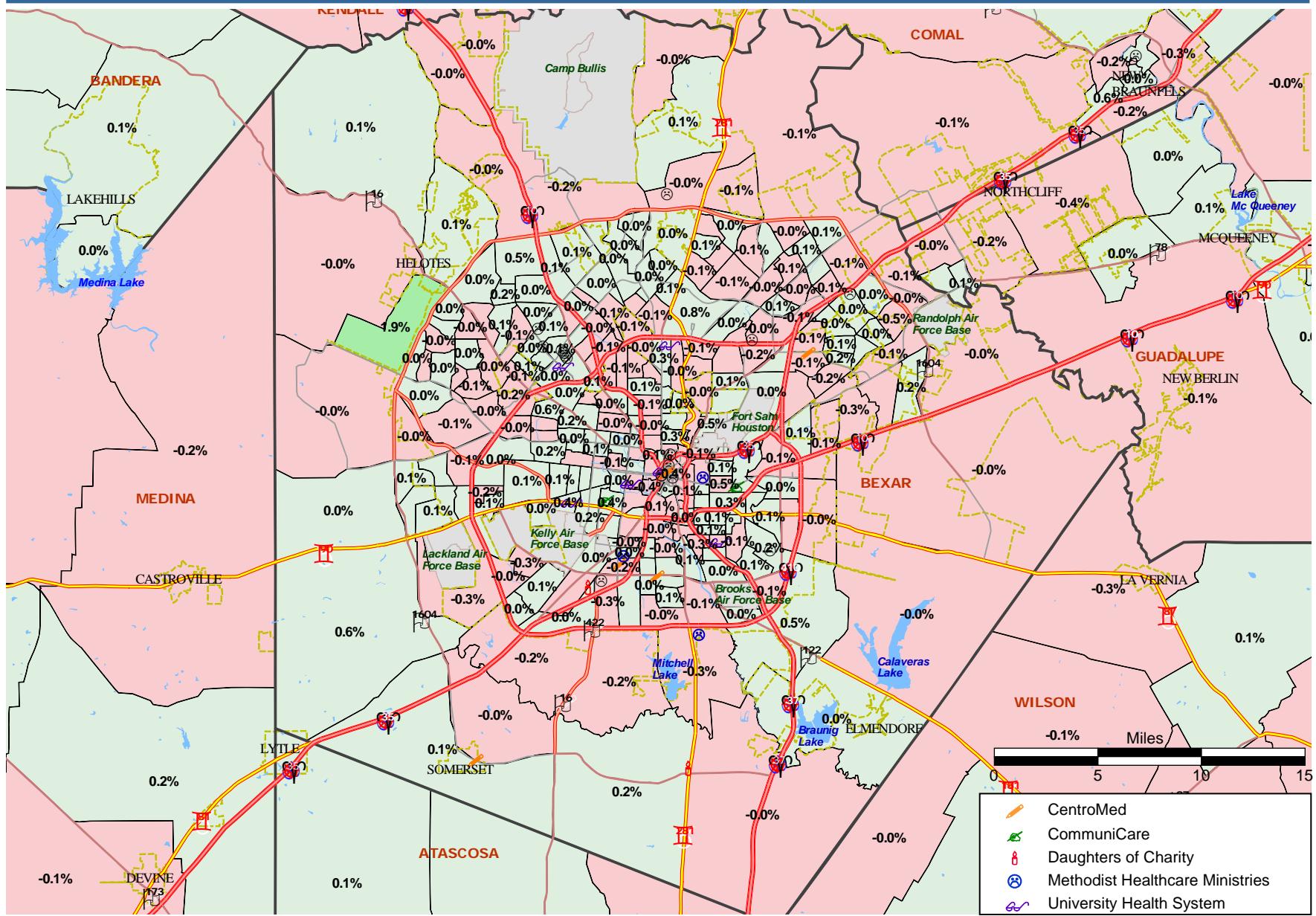
(1) Source: Claritas 2000 – 2011 database.



CAPITAL
HEALTHCARE PLANNING

II. Demographics

Change in % of Population Without High School Diploma 2006 - 2011⁽¹⁾



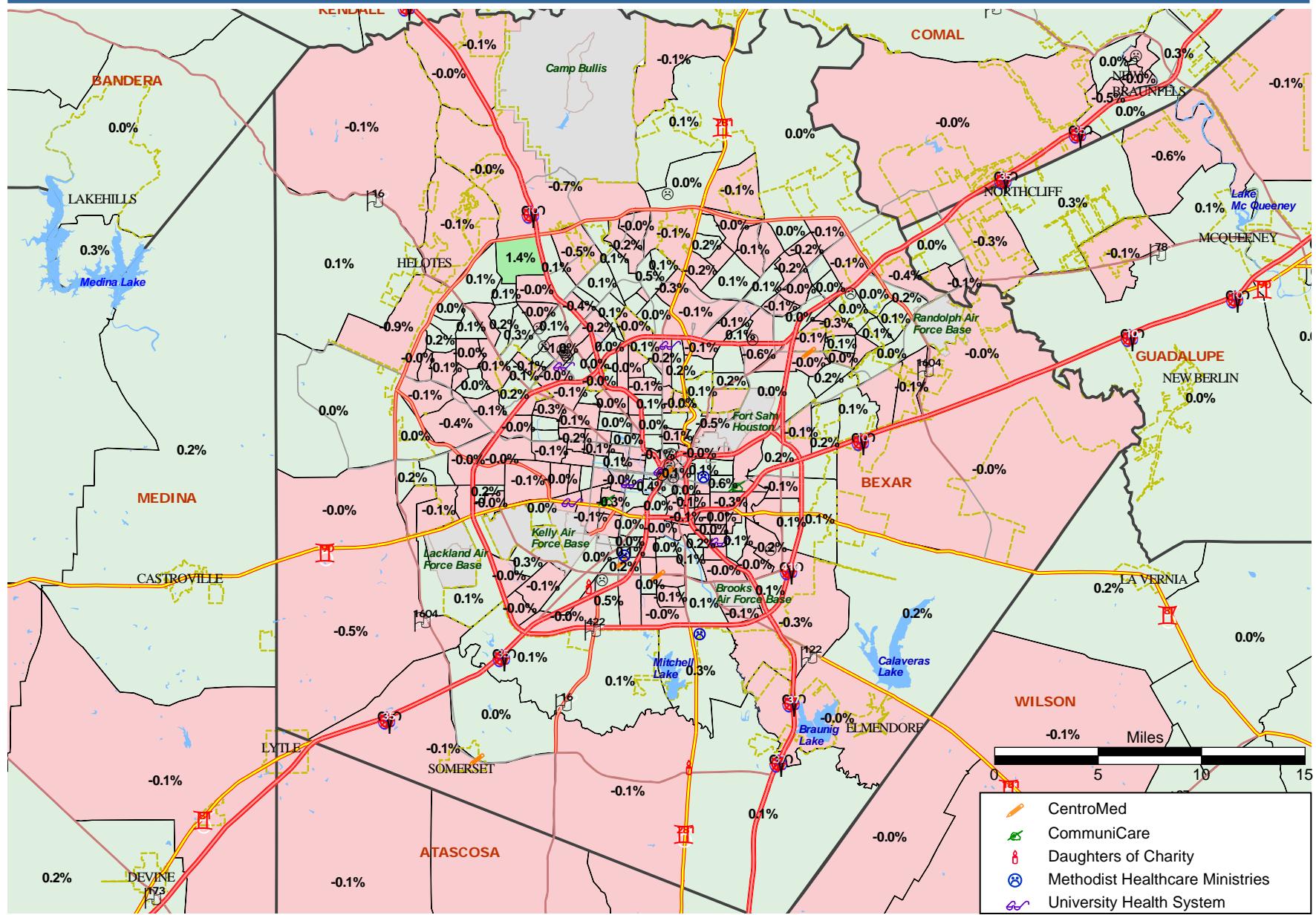
(1) Source: Claritas 2000 – 2011 database.



CAPITAL
HEALTHCARE PLANNING

II. Demographics

Change in % of Population With Some College 2006 - 2011⁽¹⁾



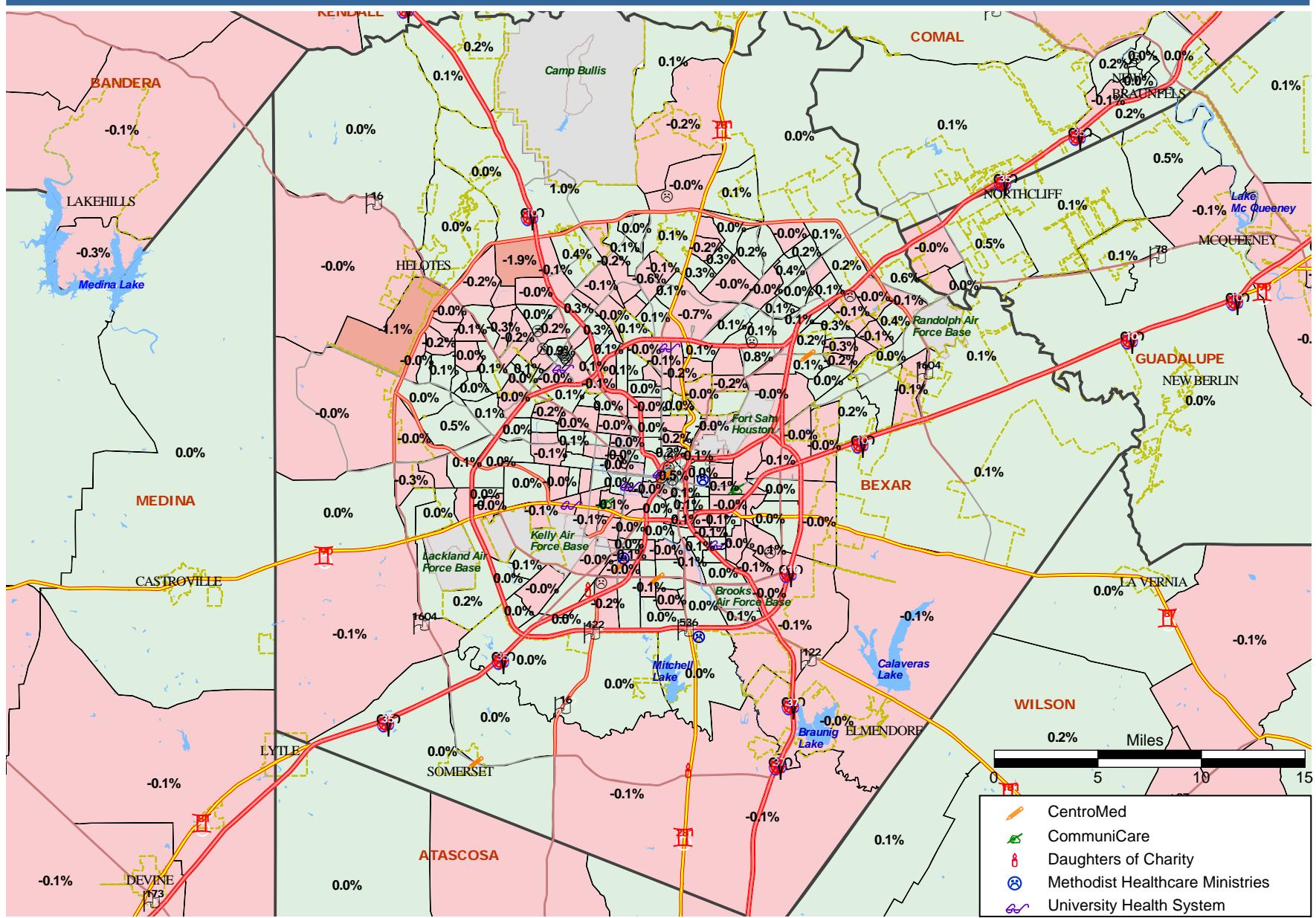
(1) Source: Claritas 2000 – 2011 database.



CAPITAL
HEALTHCARE PLANNING

II. Demographics

Change in % of Population College Degree 2006 - 2011⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

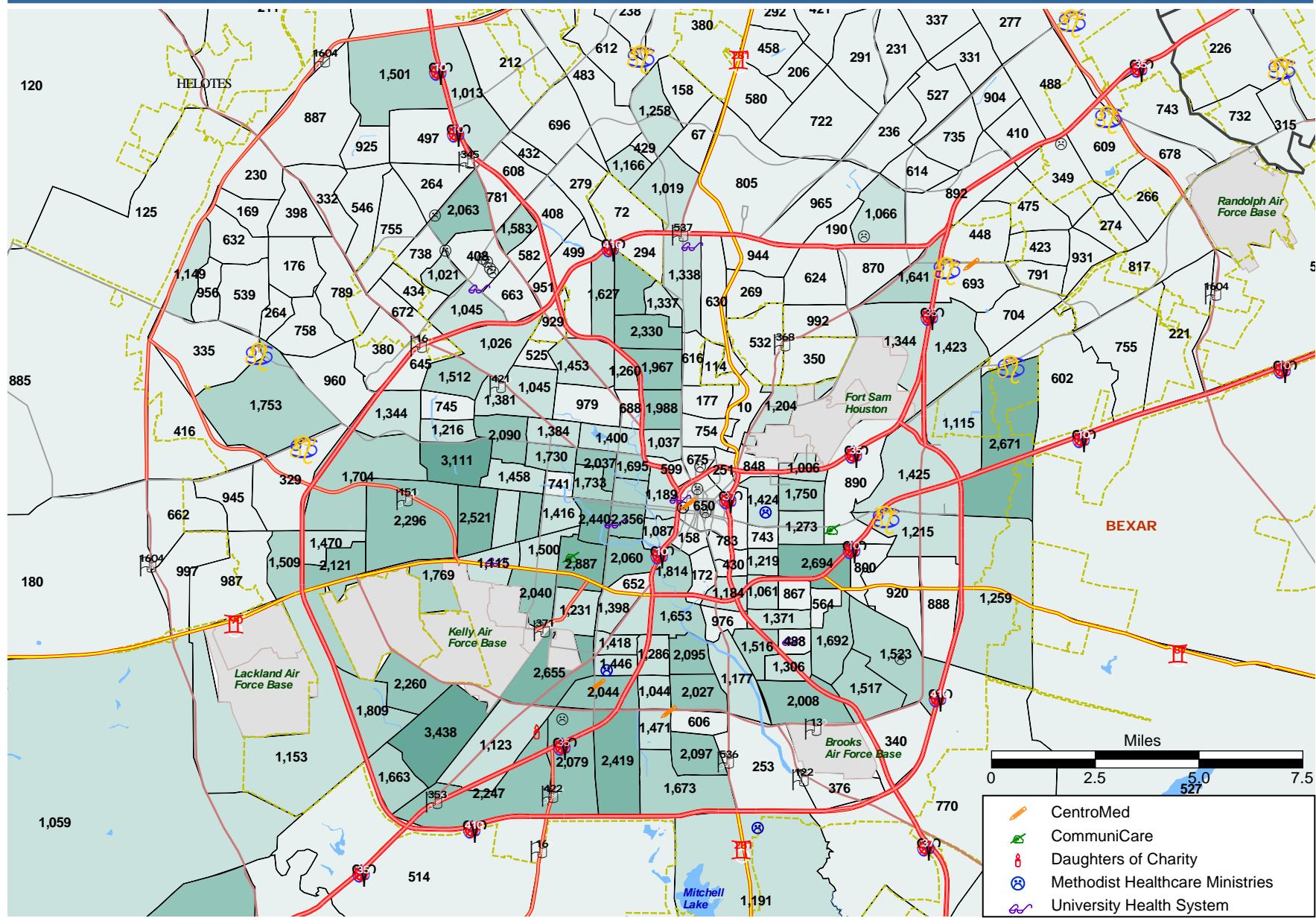


CAPITAL
HEALTHCARE PLANNING

- Hyperlinked Demographic Slides – ZOOMED SCALE

II. Demographics

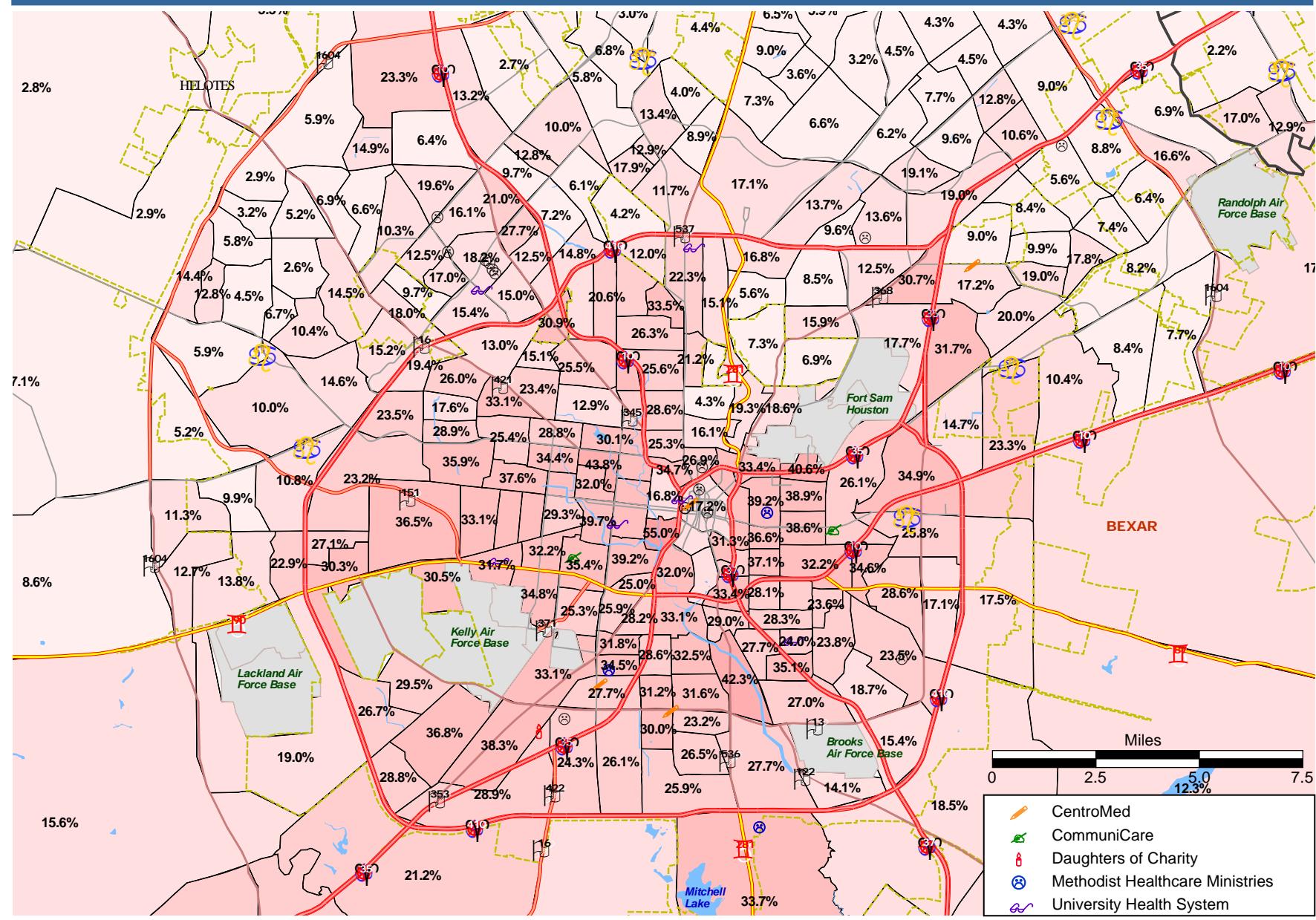
2006 Population Below 100% FPL⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

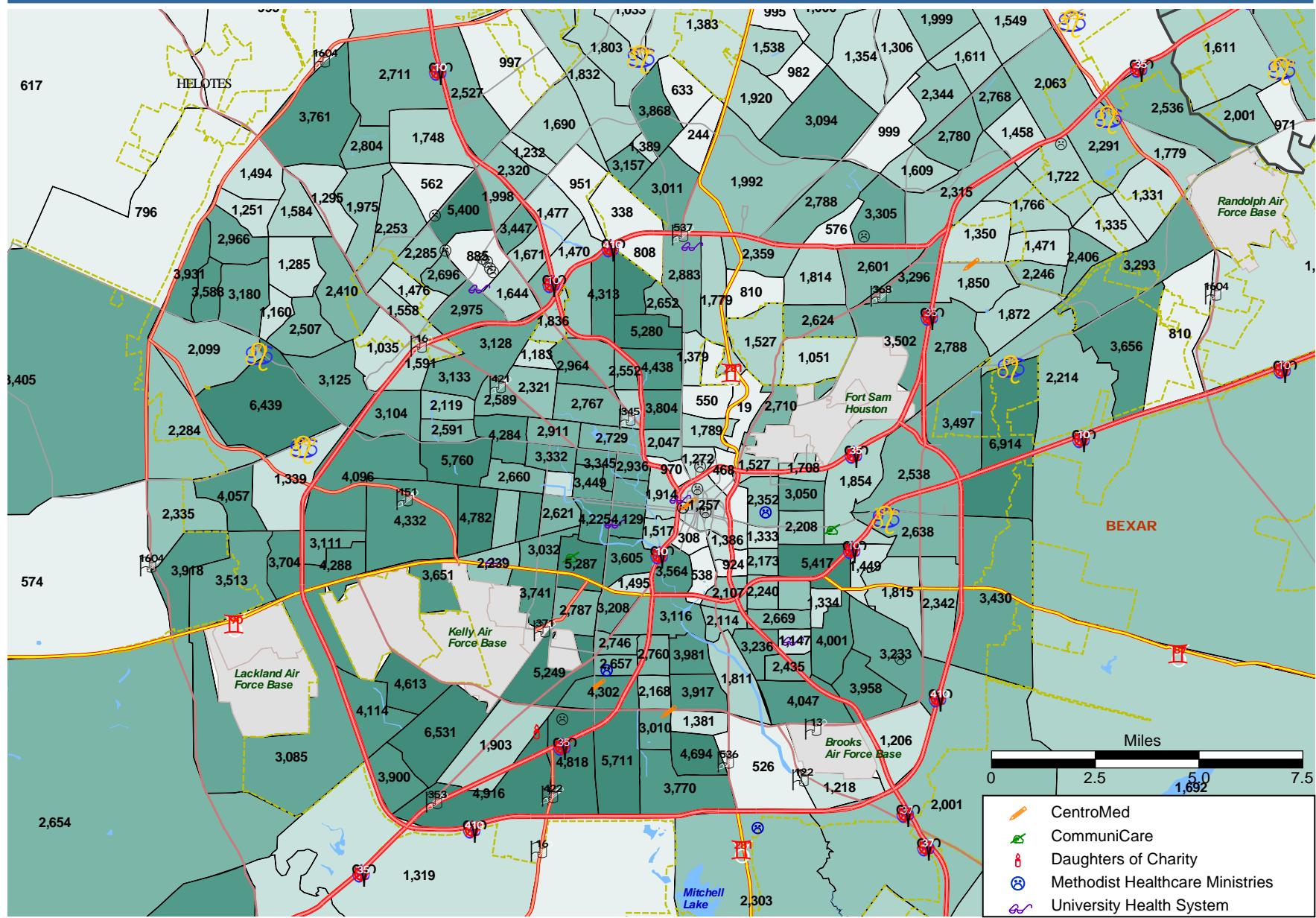
2006 Percentage of Total - Population Below 100% FPL⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

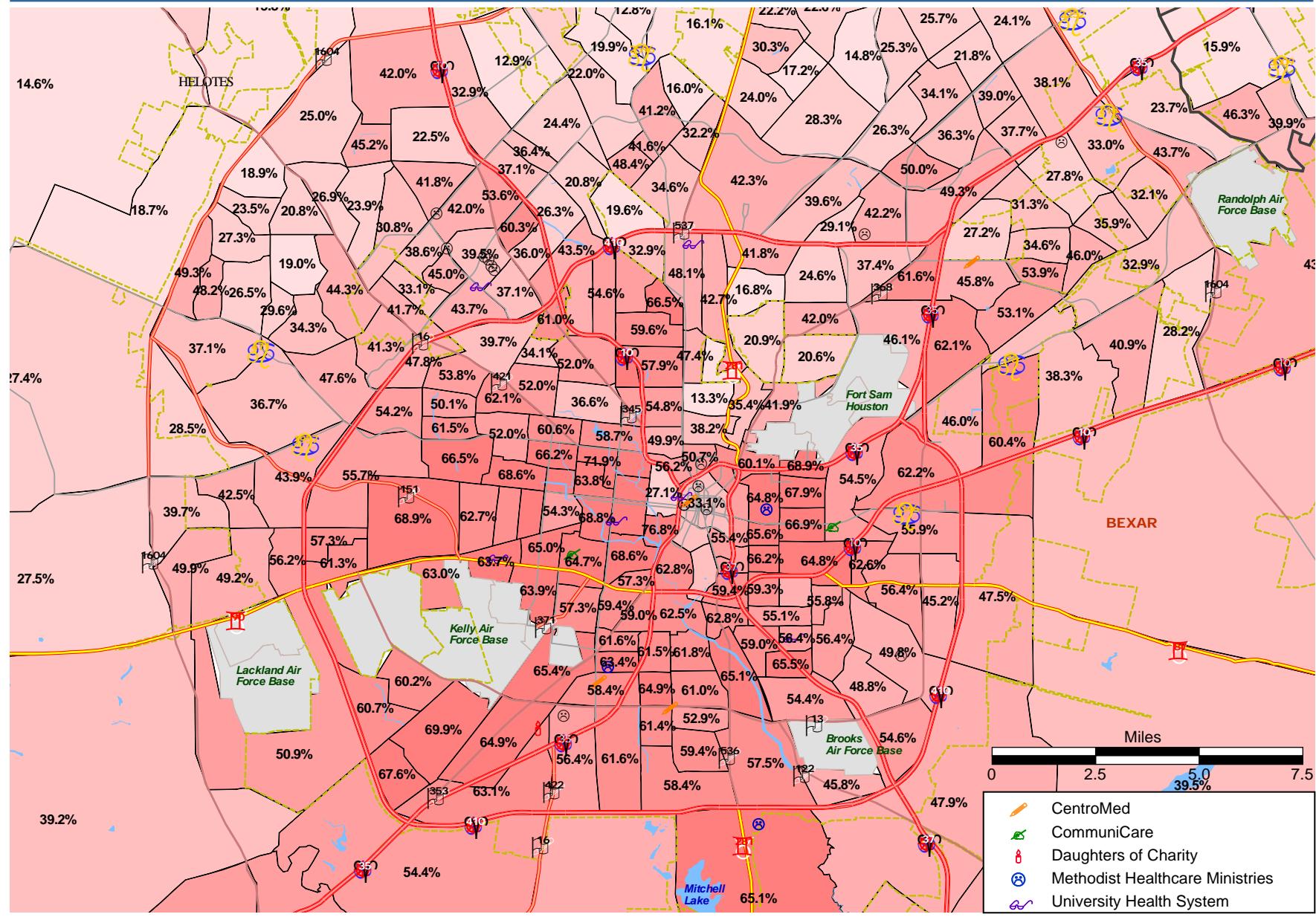
2006 Population Below 200% FPL⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

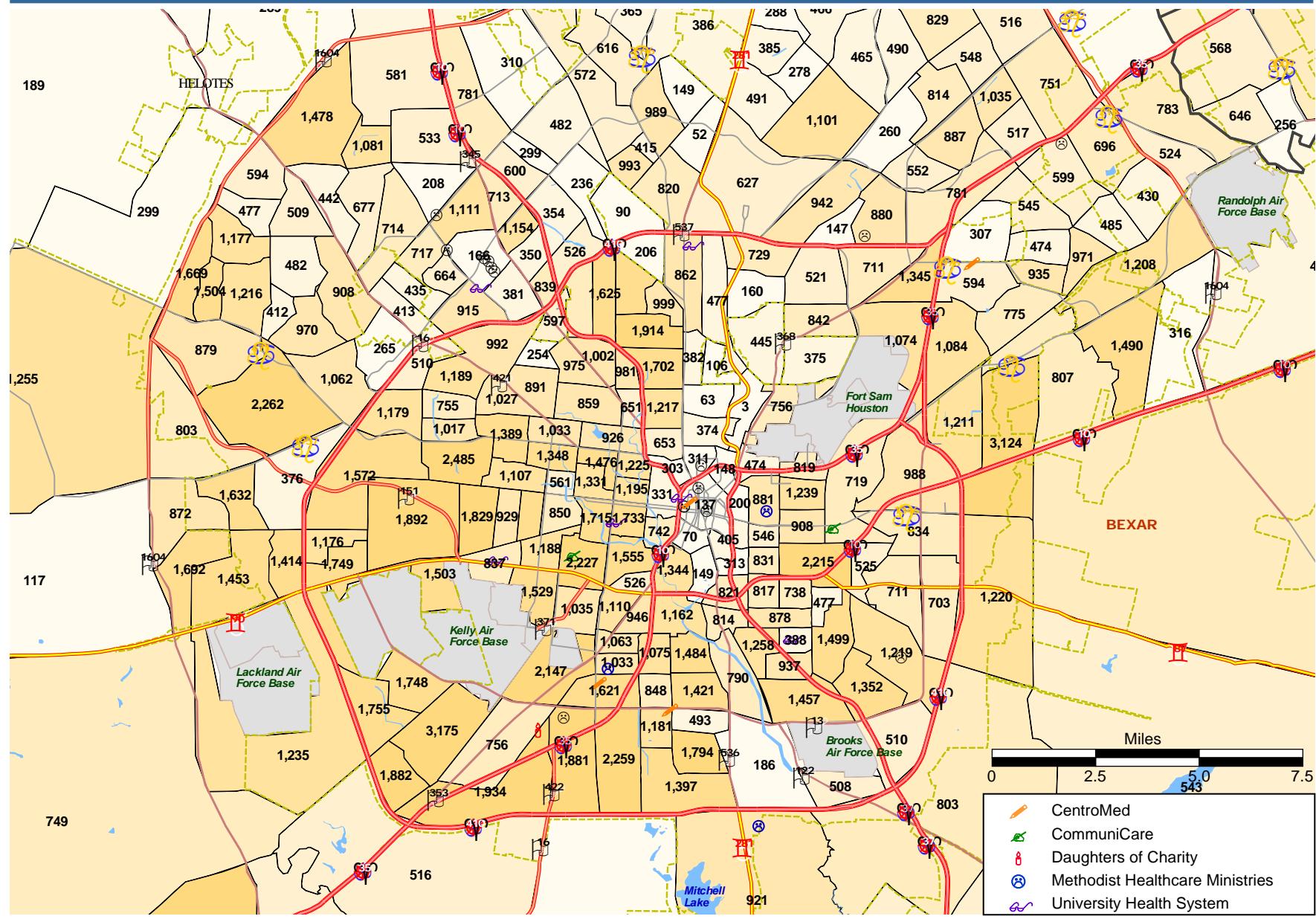
2006 Percentage of Total - Population Below 200% FPL⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

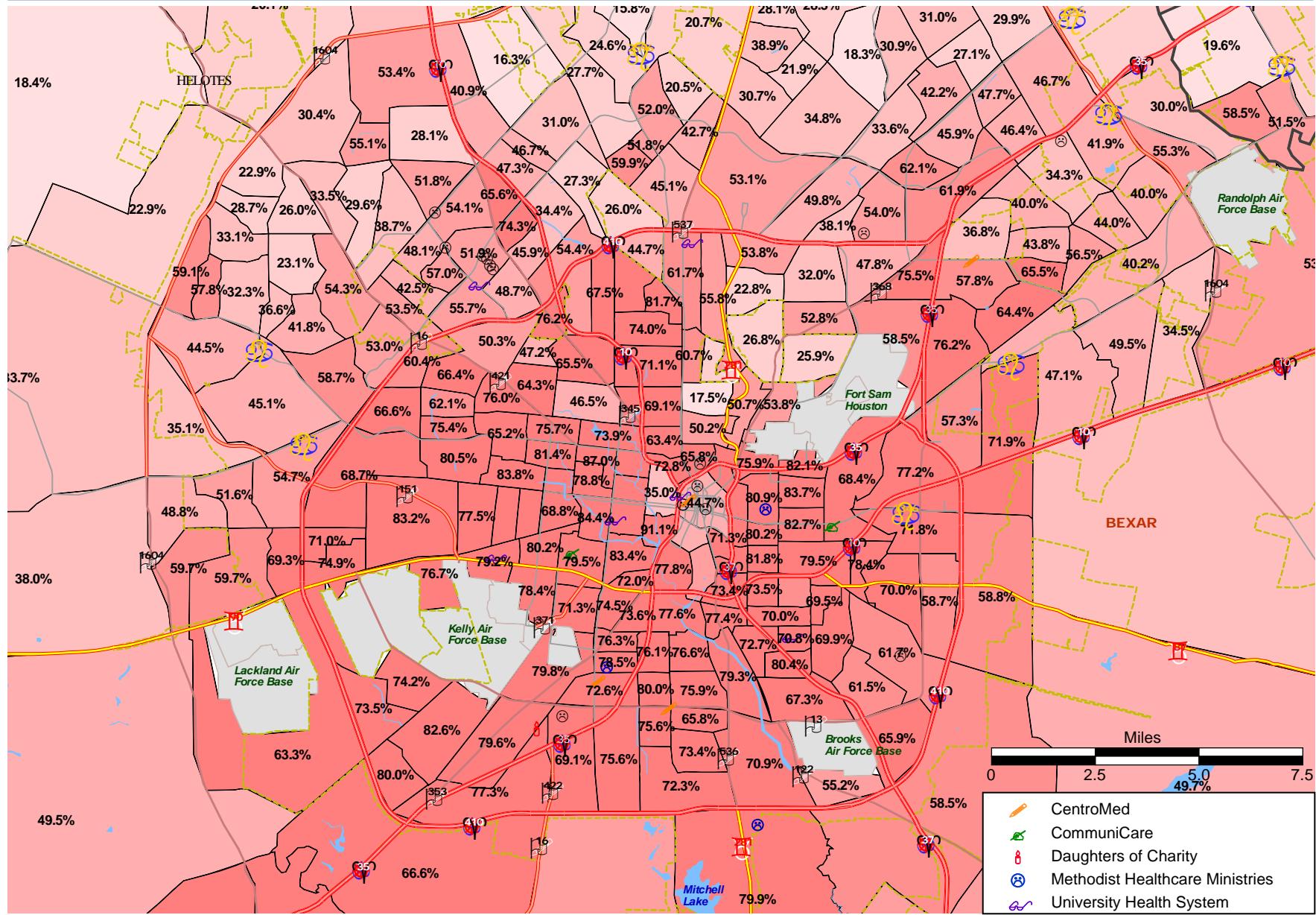
2006 Population Age 0-17 Below 200% FPL⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

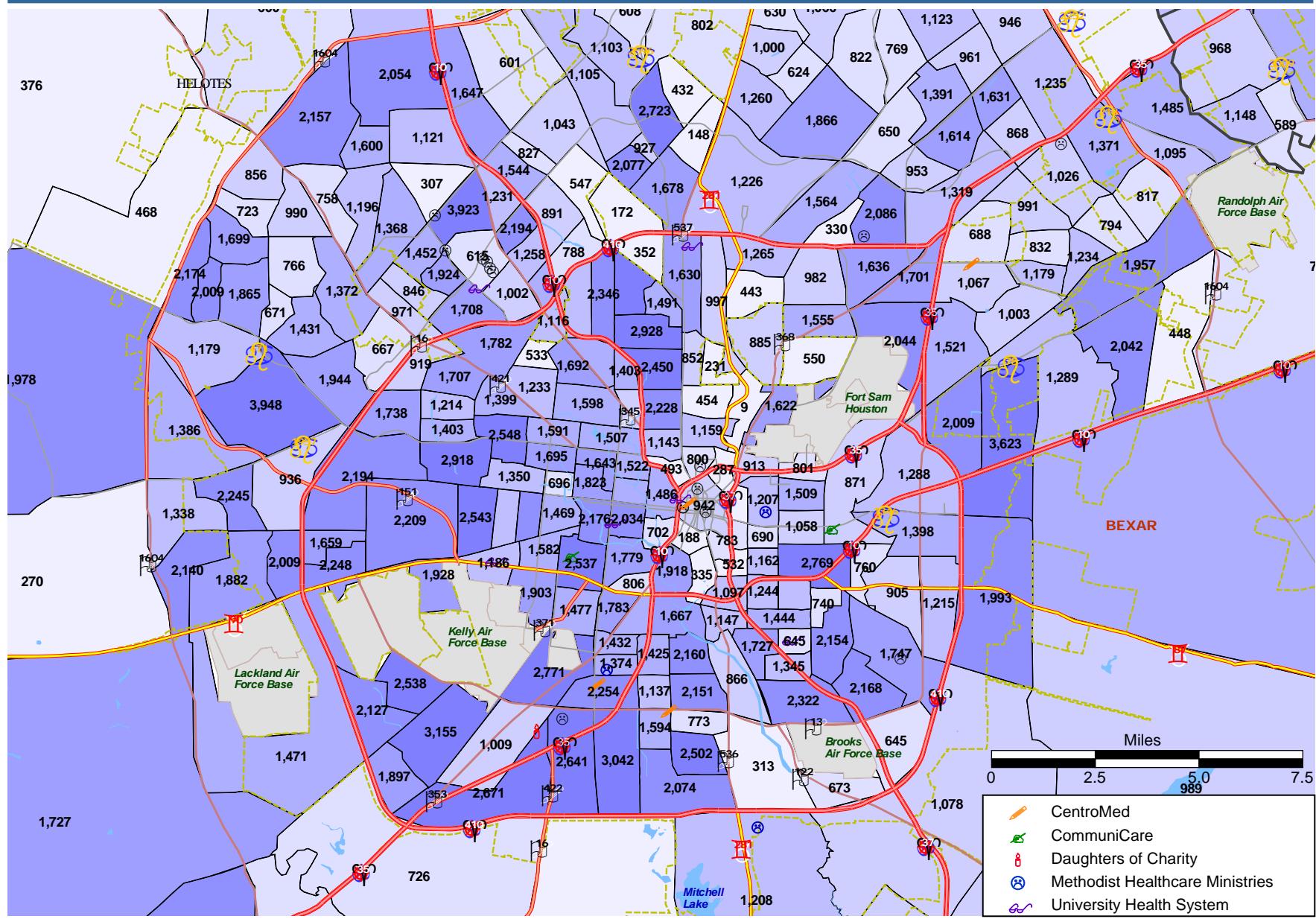
2006 Percentage of Total – Population Age 0-17 Below 200% FPL⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

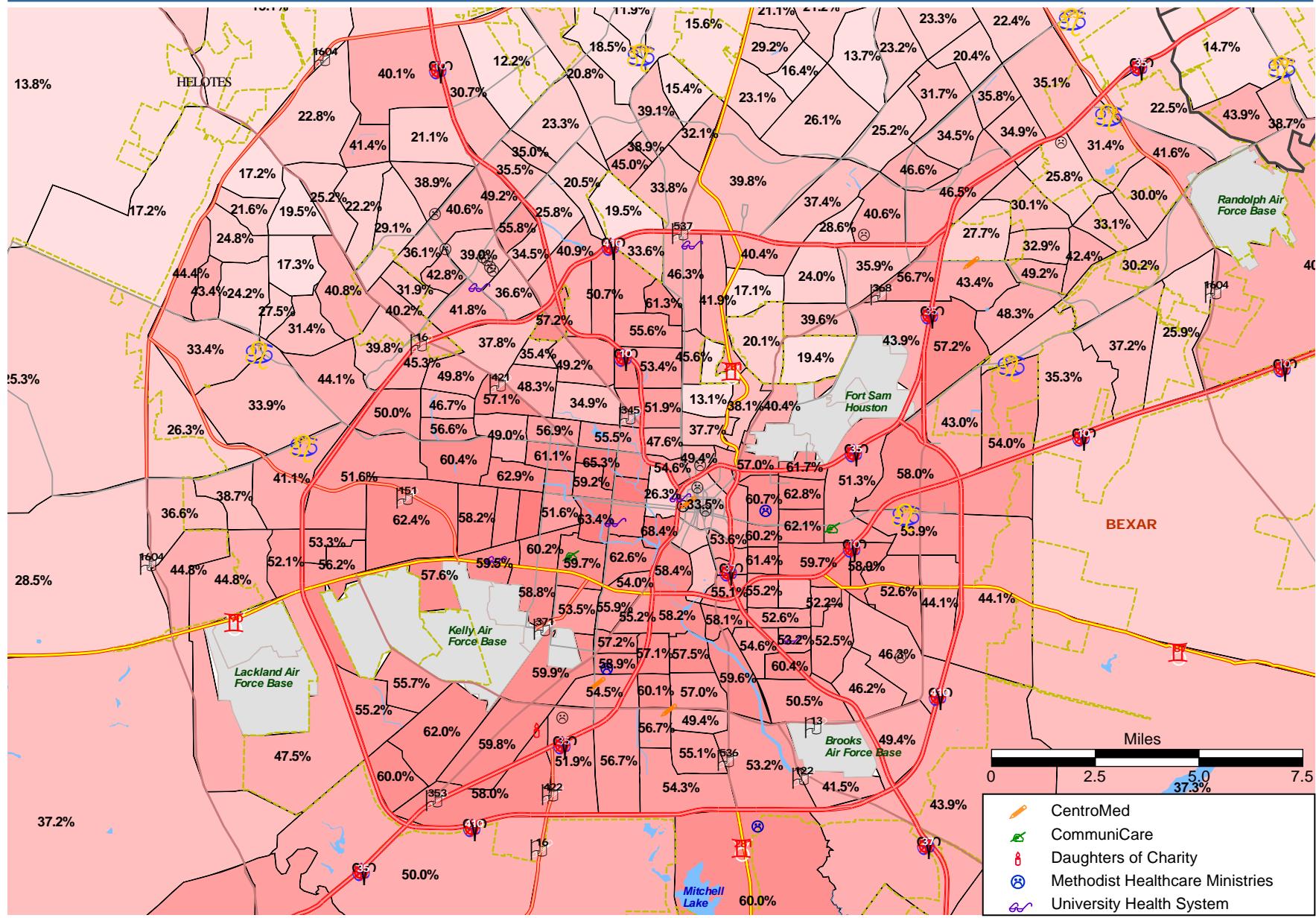
2006 Population Age 18-64 Below 200% FPL⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

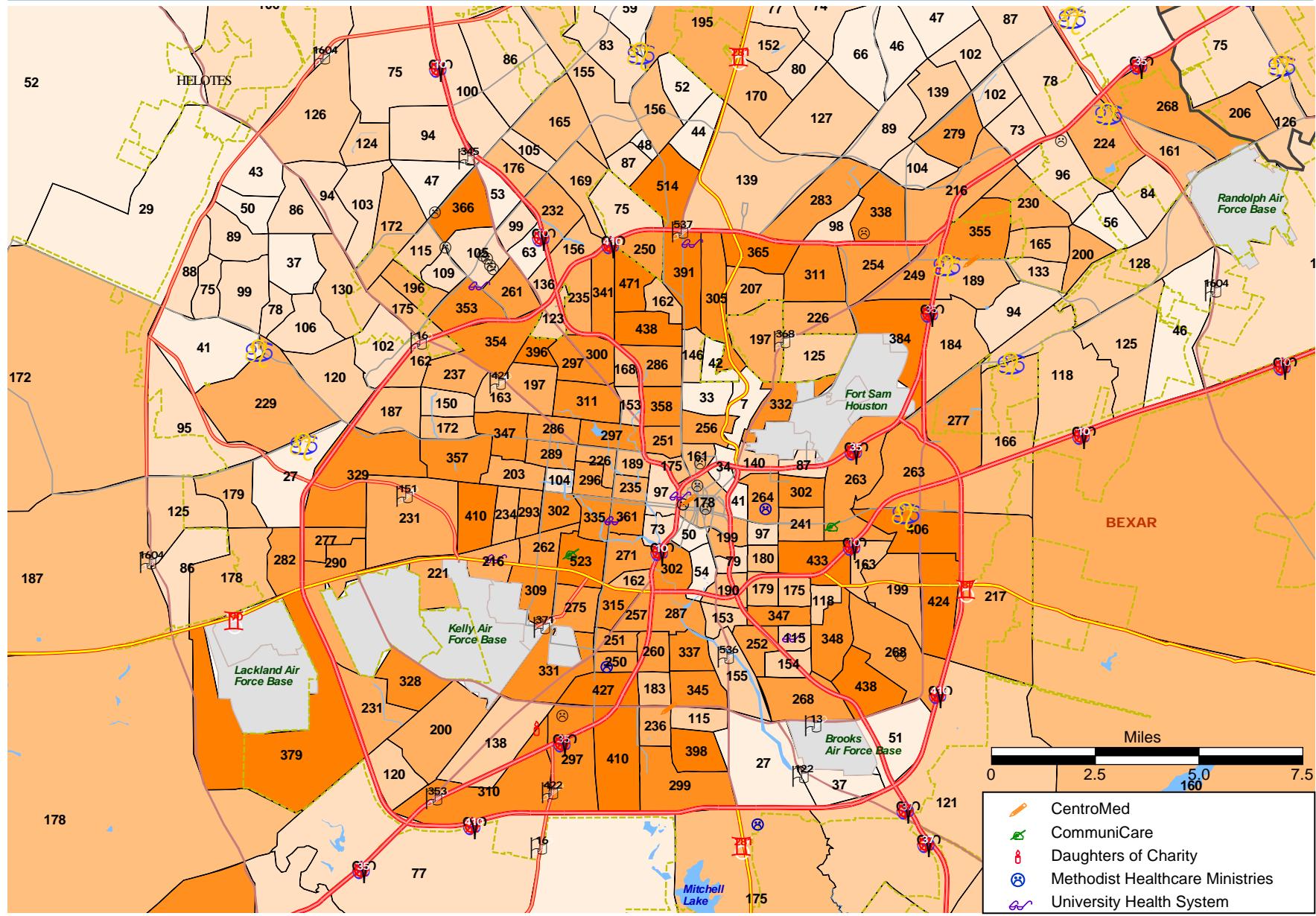
2006 Percentage of Total – Population Age 18-64 Below 200% FPL⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

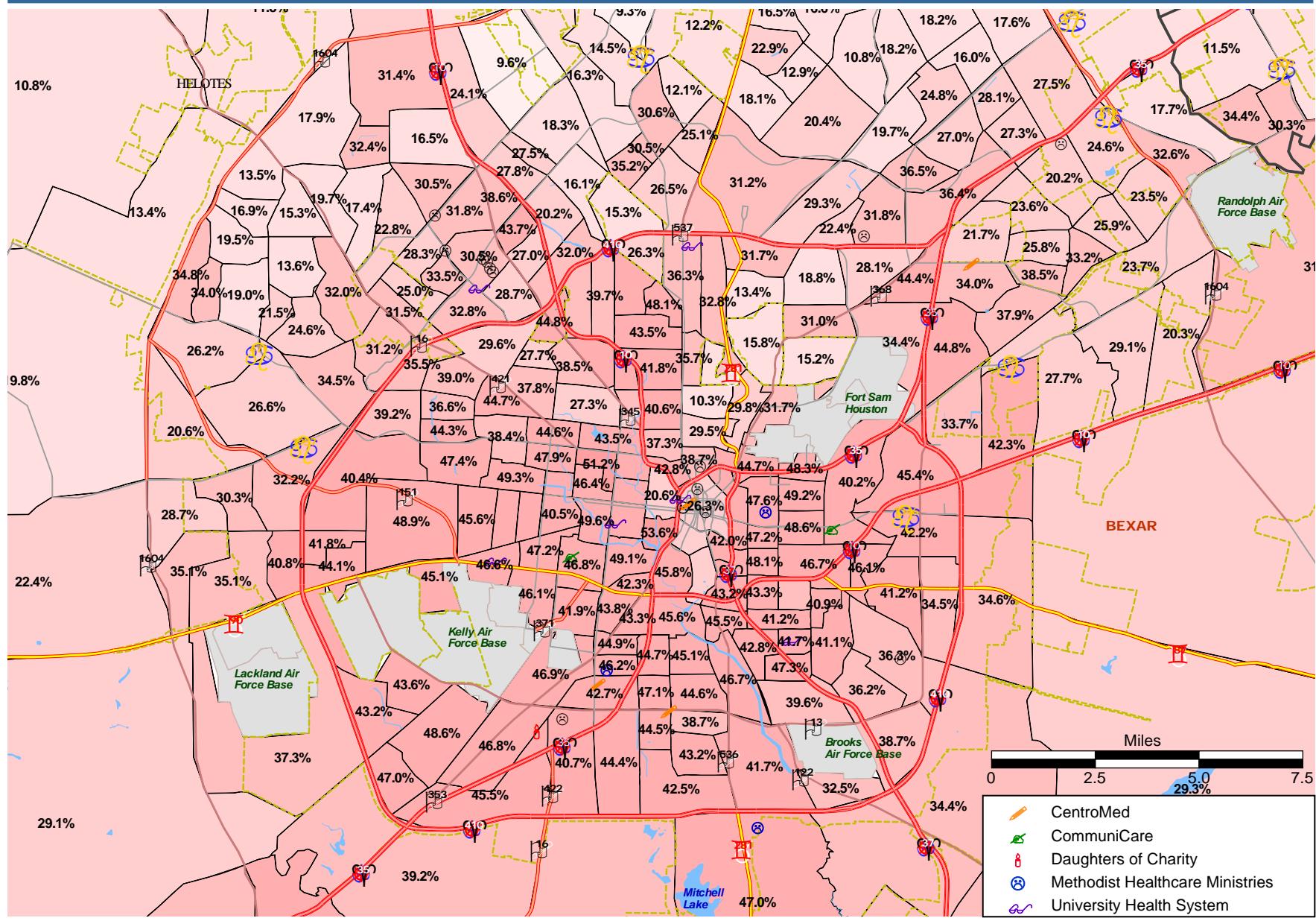
2006 Population Age 65+ Below 200% FPL⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

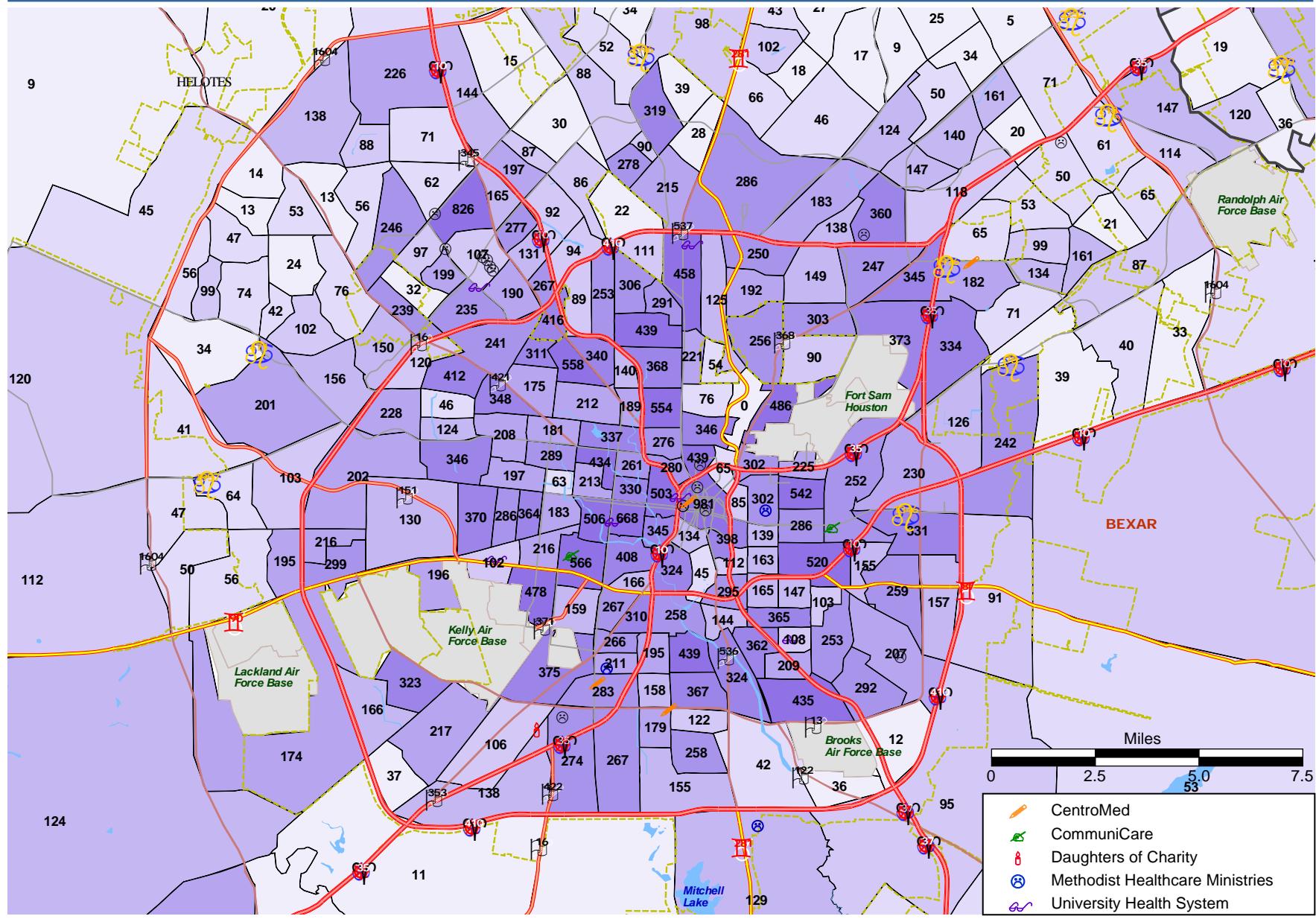
2006 Percentage of Total – Population Age 65+ Below 200% FPL⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

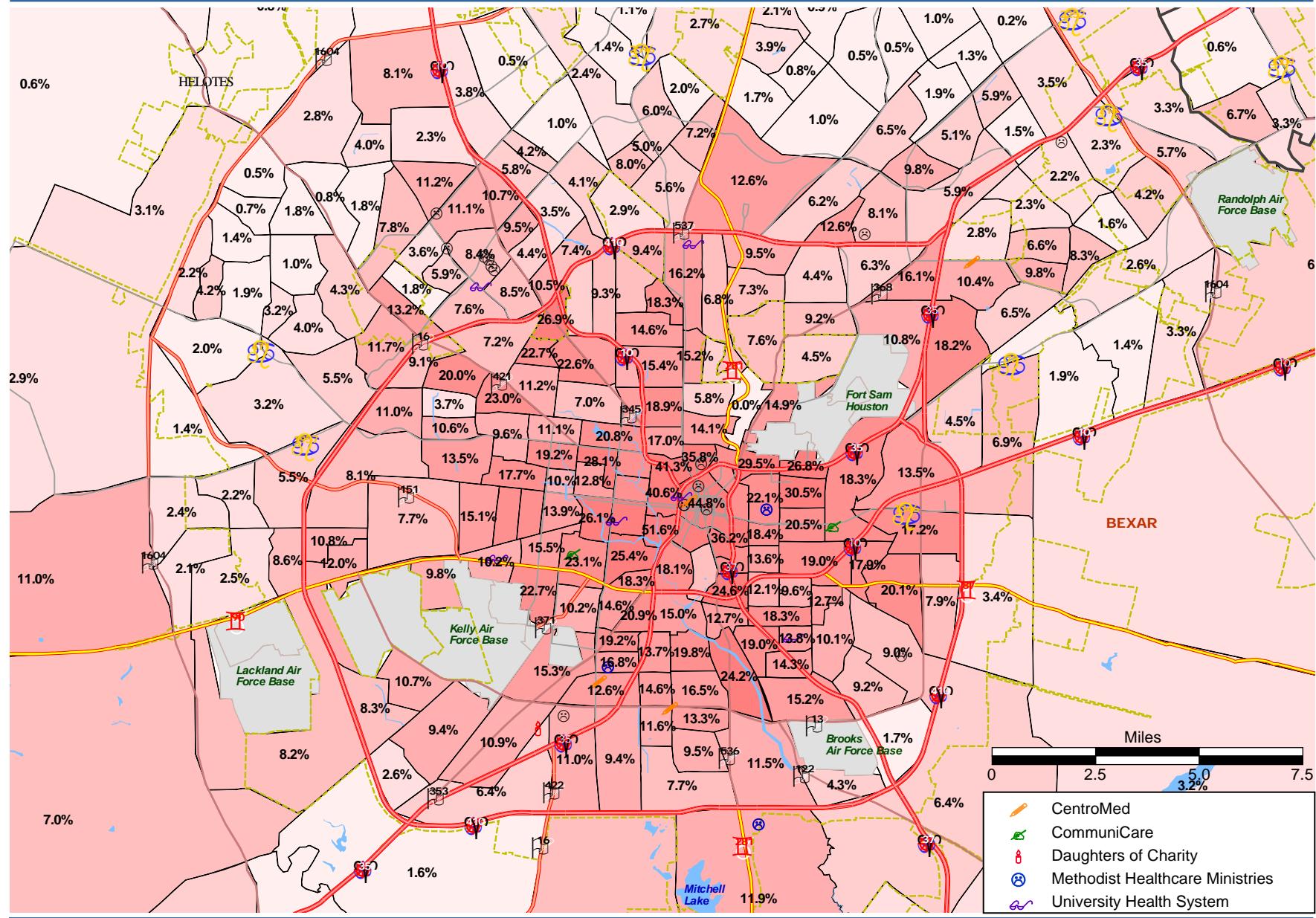
2006 Housing Units with No Vehicles Available⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

2006 Percentage of Total - Housing Units with No Vehicles Available⁽¹⁾

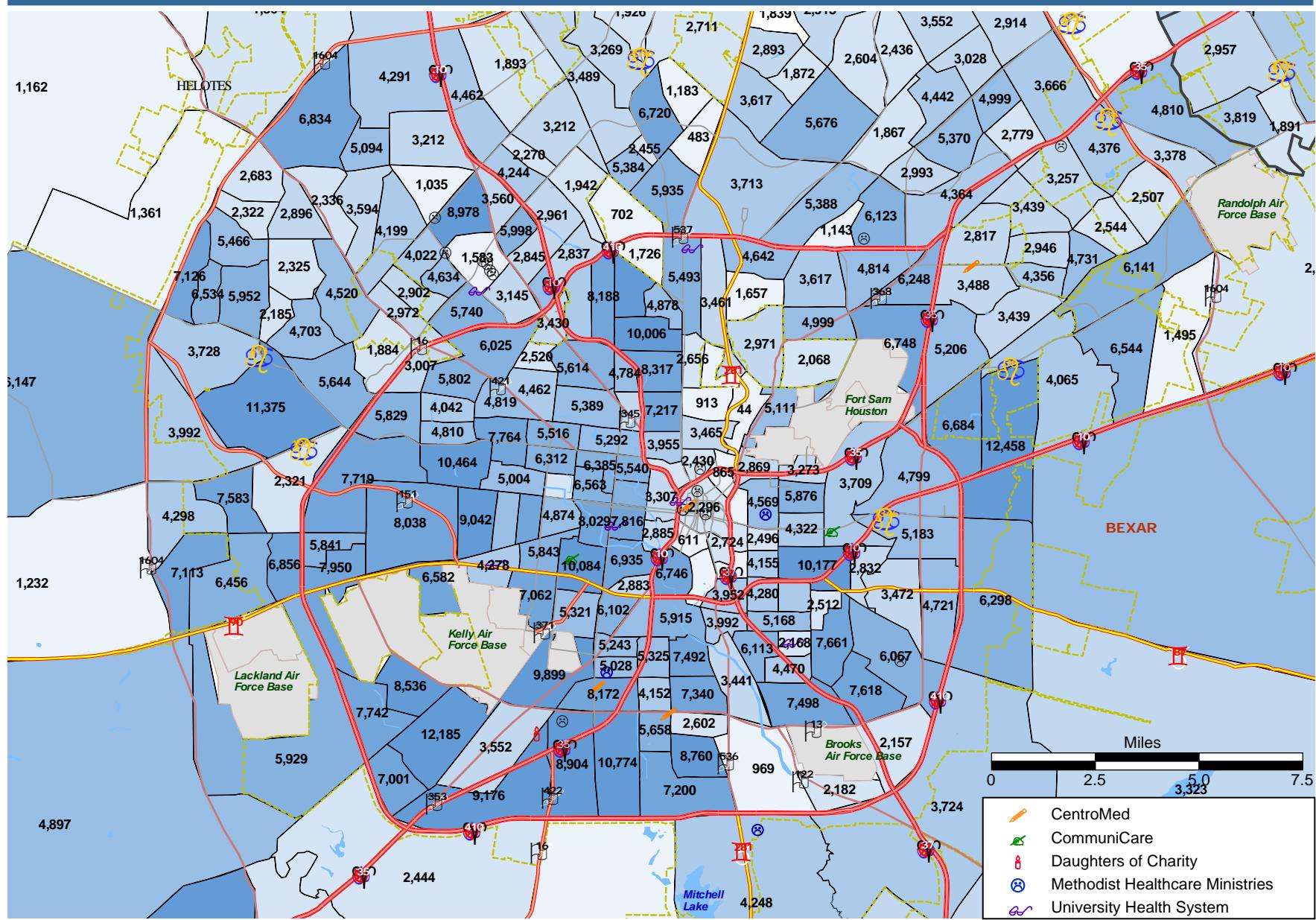


(1) Source: Claritas 2000 – 2011 database.

- Utilization Rate Hyperlinked Slides

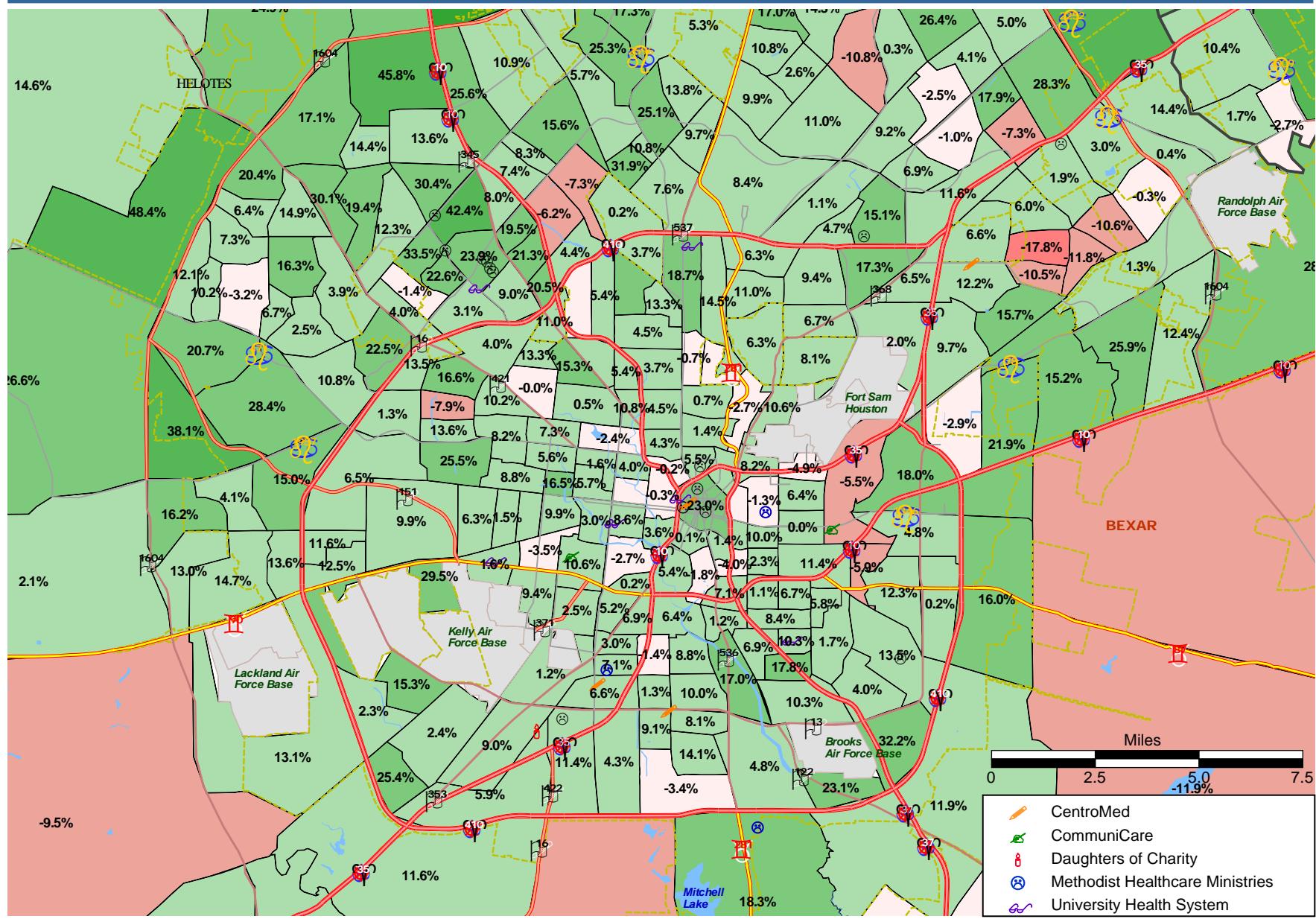
III. Utilization Rates

2005 Estimated Visits at 200% FPL⁽¹⁾



III. Utilization Rates

Percentage Growth in Estimated Visits at 200% FPL 2005 - 2011⁽¹⁾



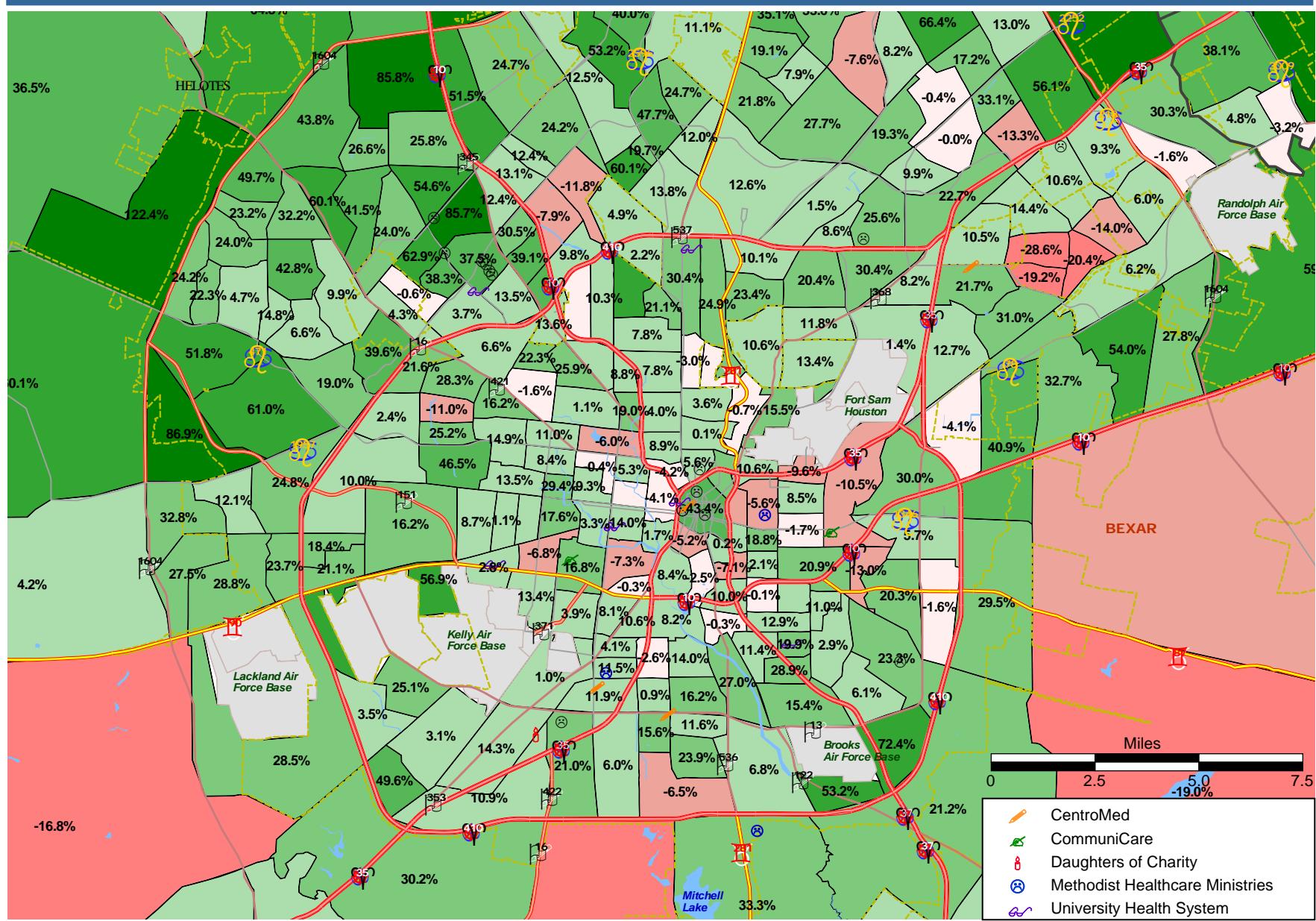
(1) Source: Capital Healthcare Planning estimated volumes.



CAPITAL
HEALTHCARE PLANNING

III. Utilization Rates

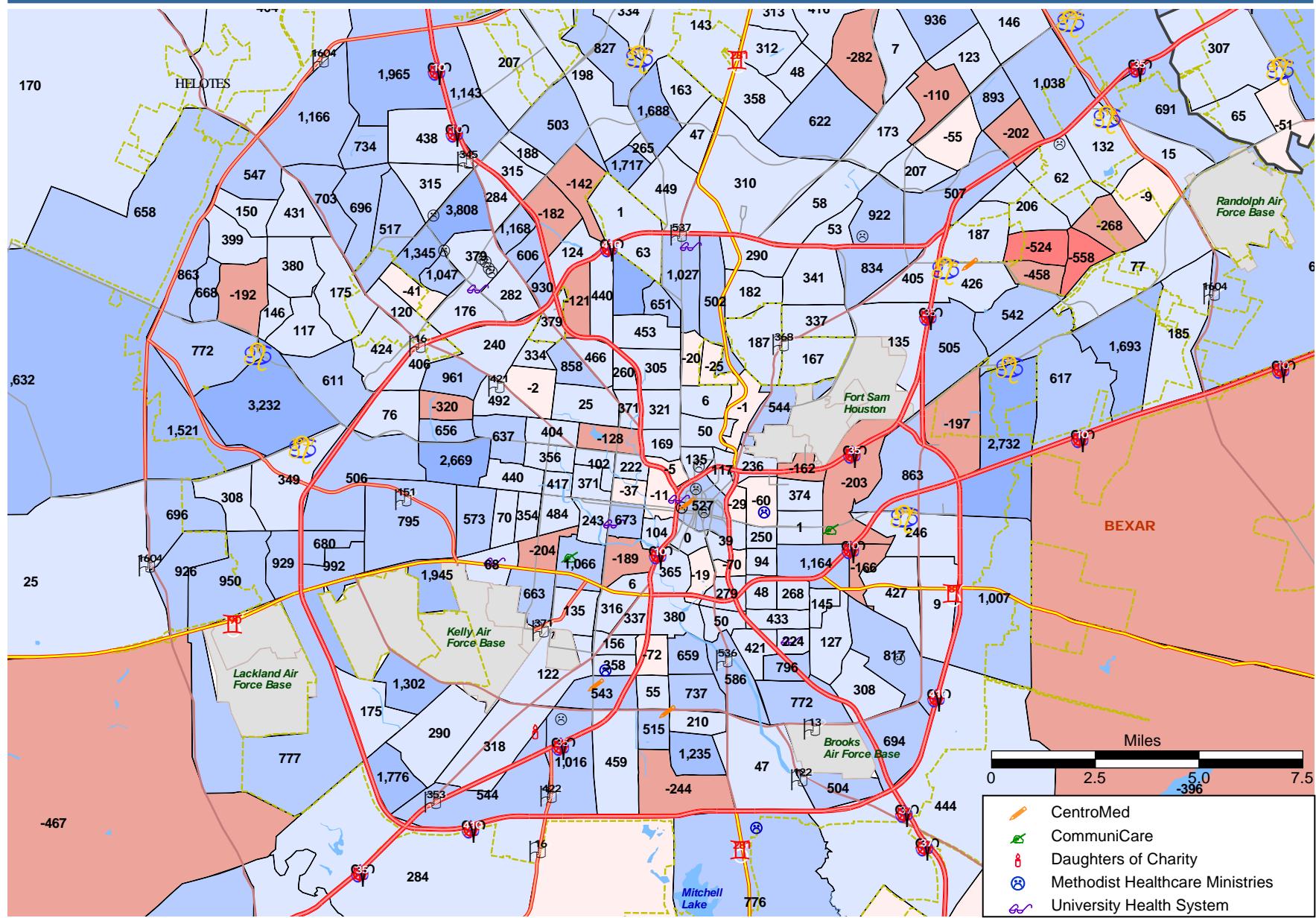
Percentage Growth in Estimated Visits at 200% FPL 2005 - 2016⁽¹⁾



(1) Source: Capital Healthcare Planning estimated volumes.

III. Utilization Rates

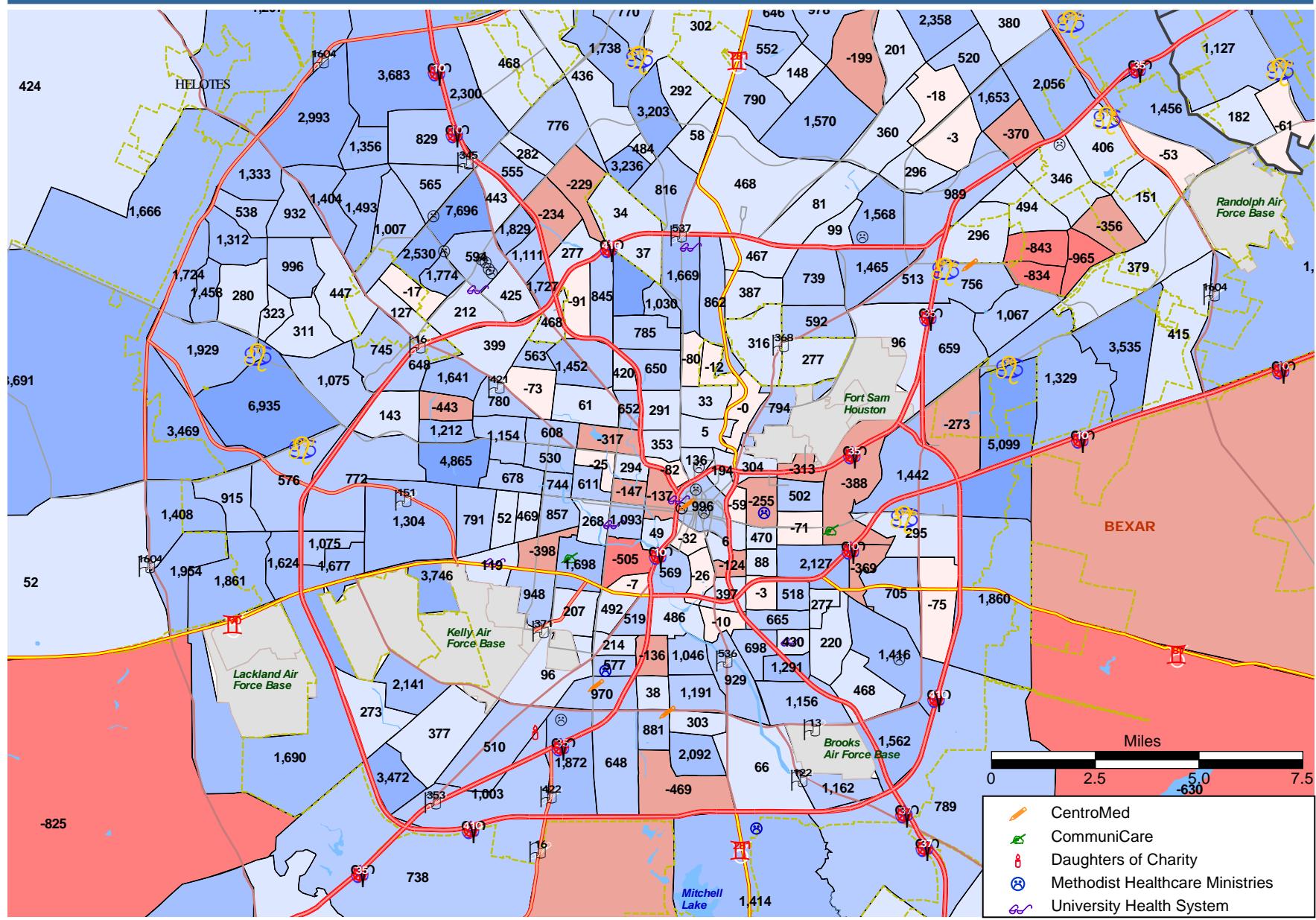
Absolute Growth in Estimated Visits at 200% FPL 2005 - 2011⁽¹⁾



(1) Source: Capital Healthcare Planning estimated volumes.

III. Utilization Rates

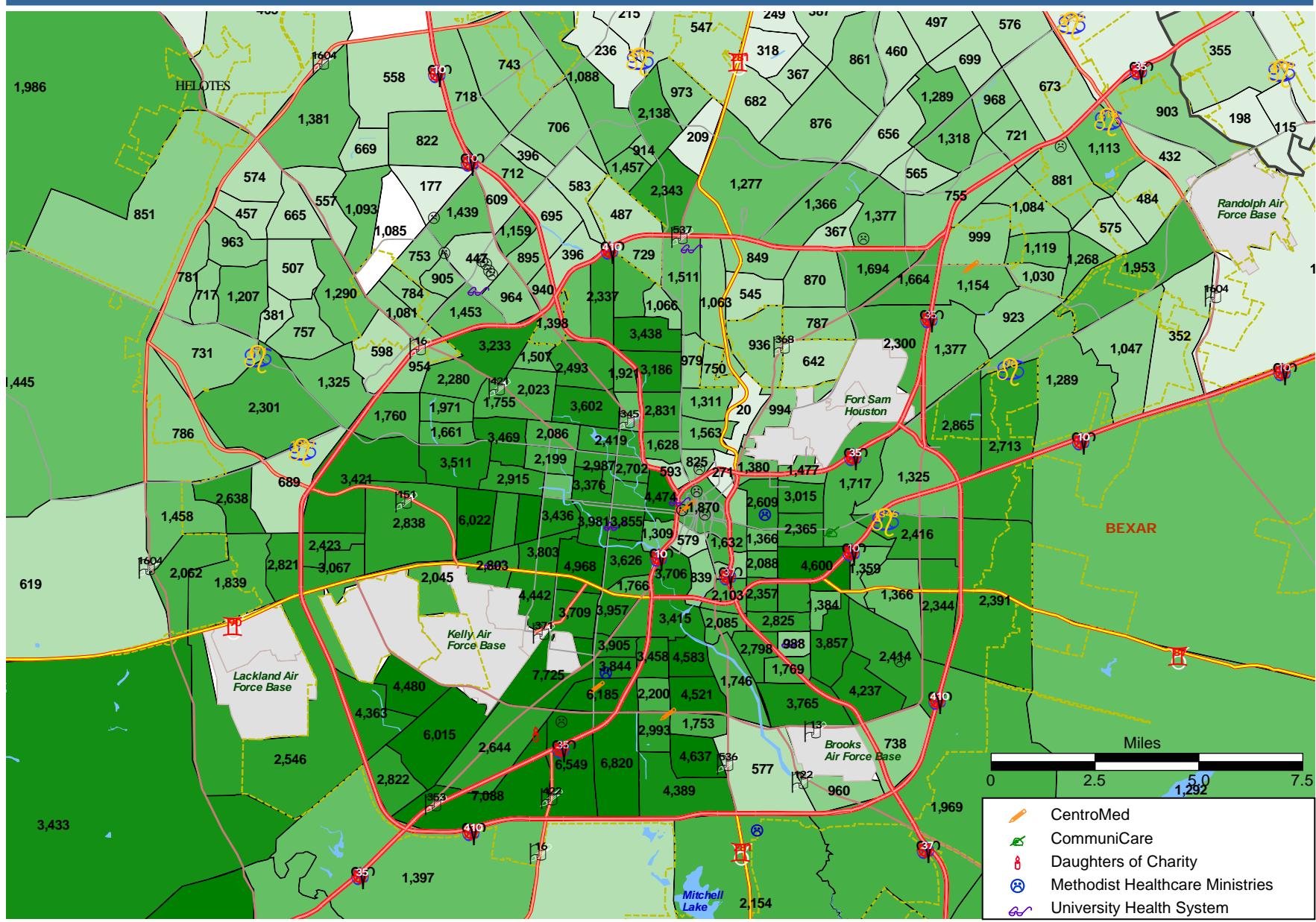
Absolute Growth in Estimated Visits at 200% FPL 2005 - 2016⁽¹⁾



(1) Source: Capital Healthcare Planning estimated volumes.

III. Utilization Rates

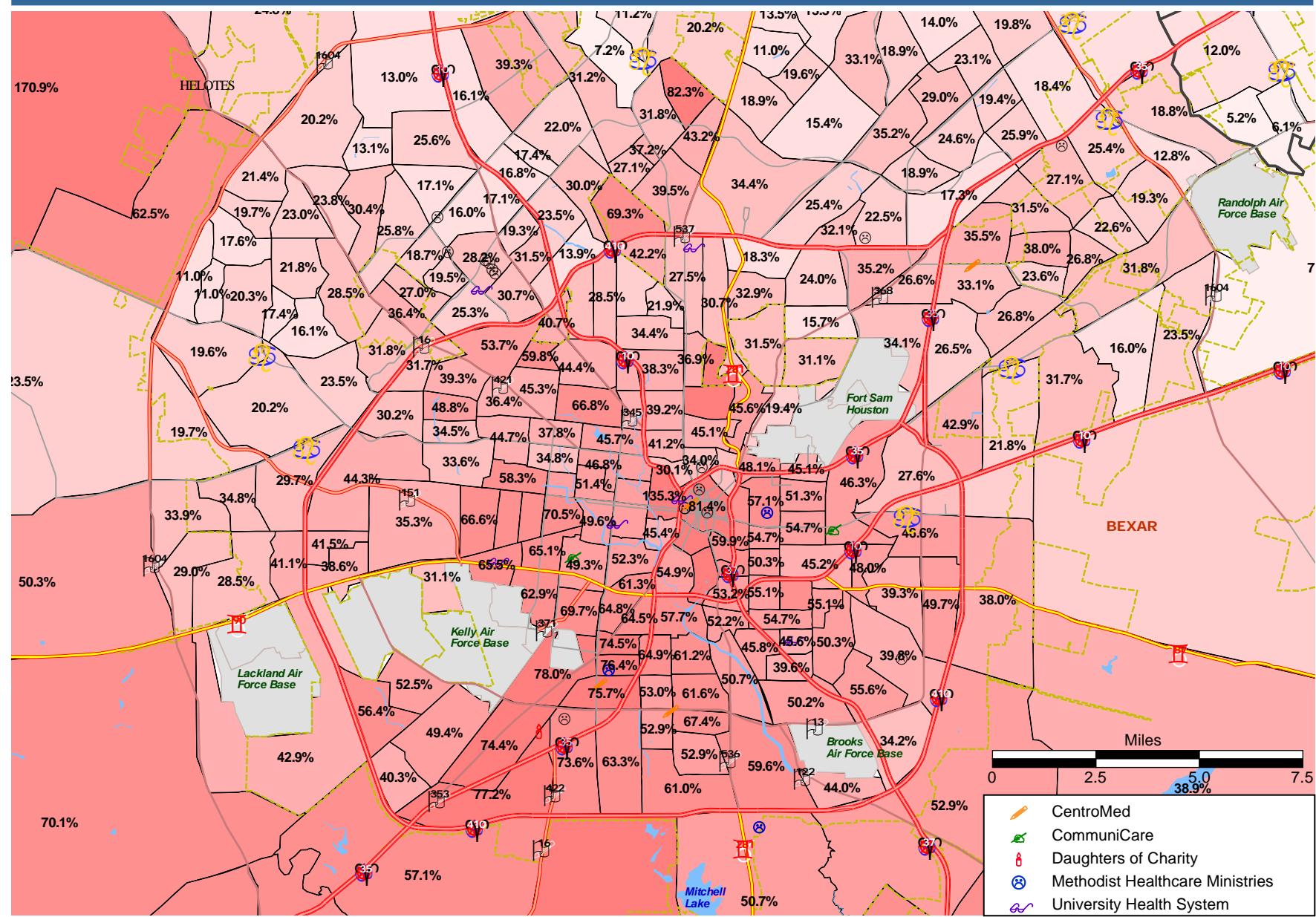
2005 Total Clinic Visits⁽¹⁾



(1) Source: Partner Organizations' databases.

III. Utilization Rates

2005 Total Clinic Utilization Rates⁽¹⁾



(1) Source: Partner Organizations' databases.

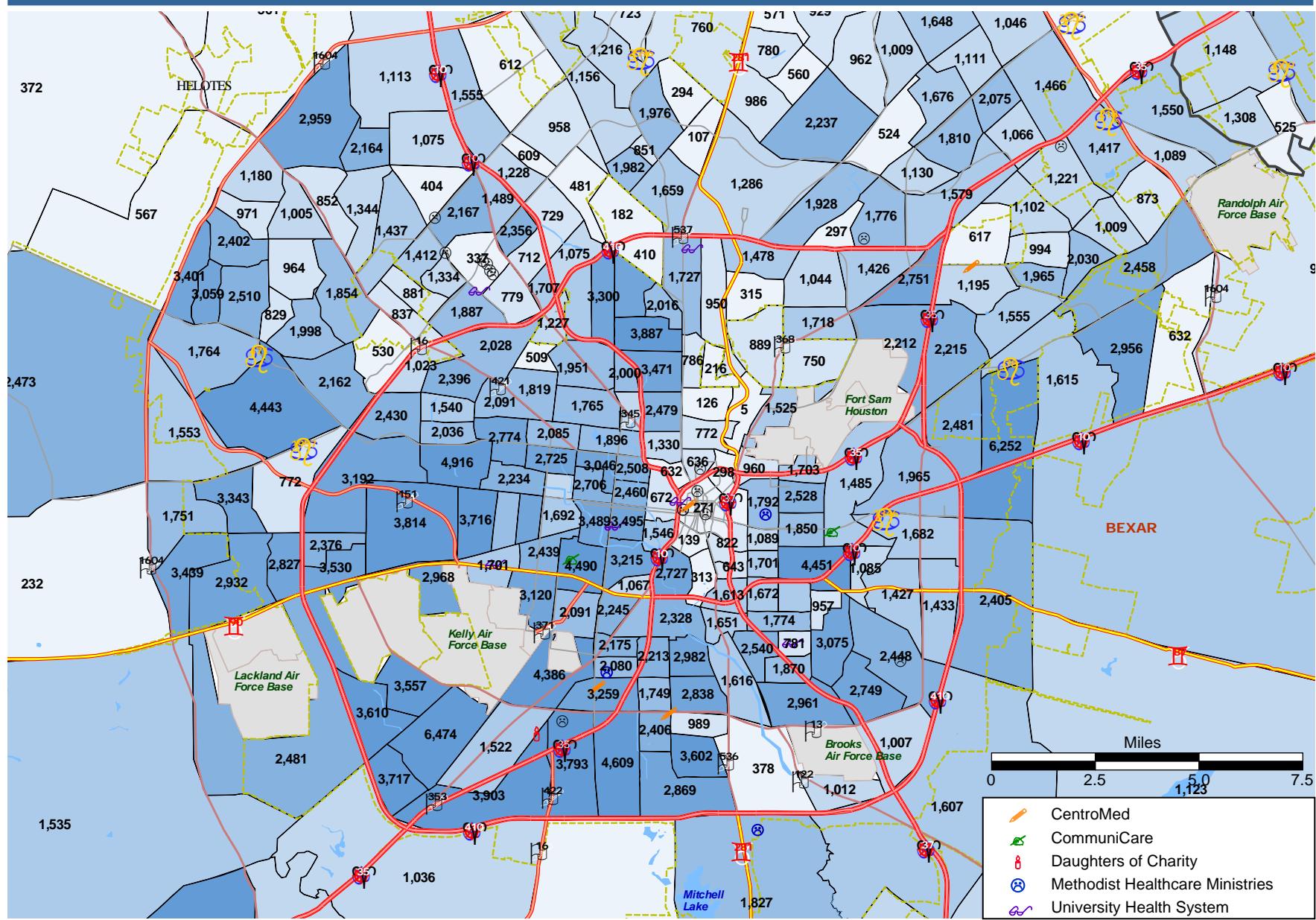
(2) Source: Capital Healthcare Planning estimated volumes.



CAPITAL
HEALTHCARE PLANNING

III. Utilization Rates

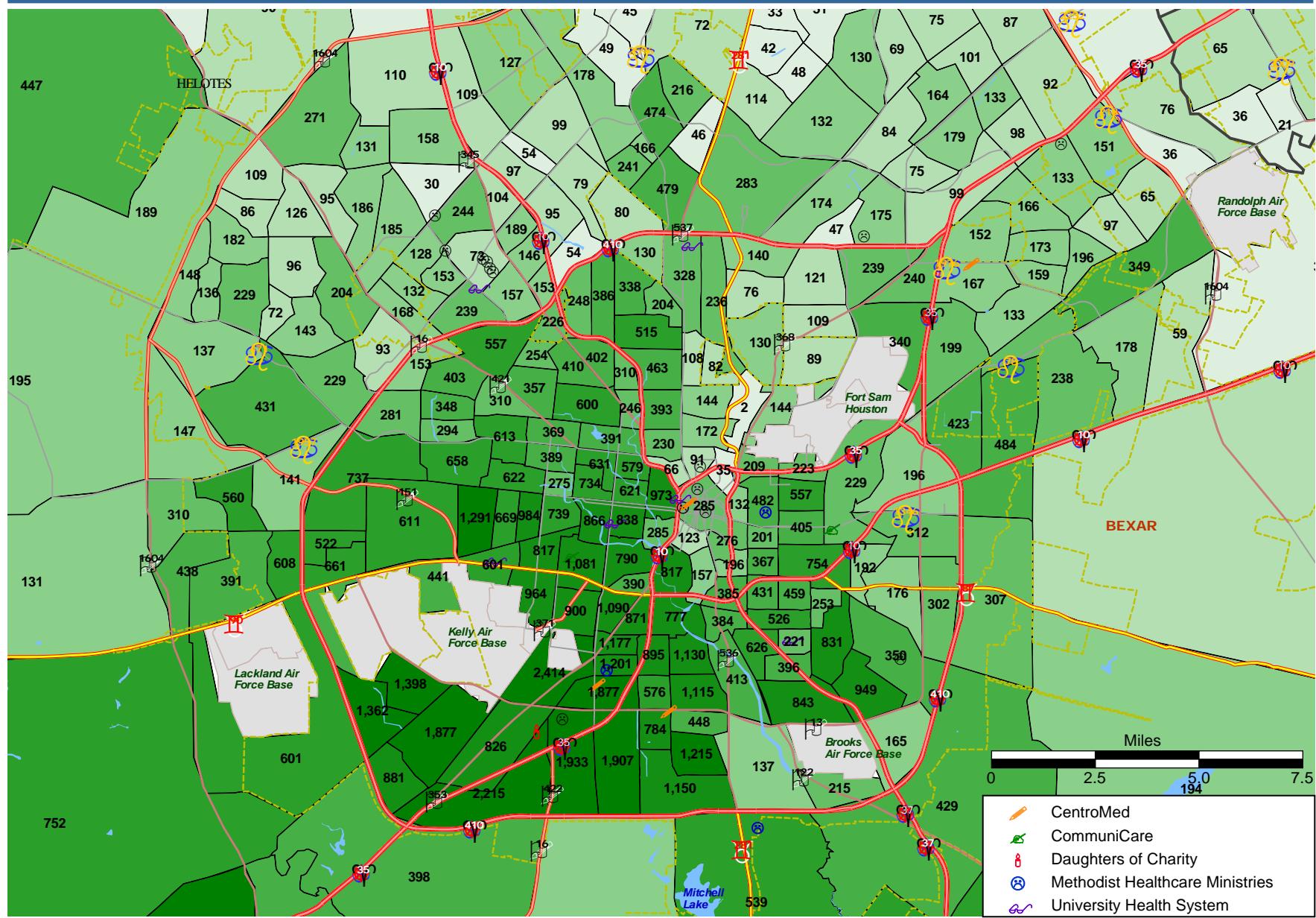
2005 Estimated Visits Age 0-17 at 200% FPL⁽¹⁾



(1) Source: Capital Healthcare Planning estimated volumes.

III. Utilization Rates

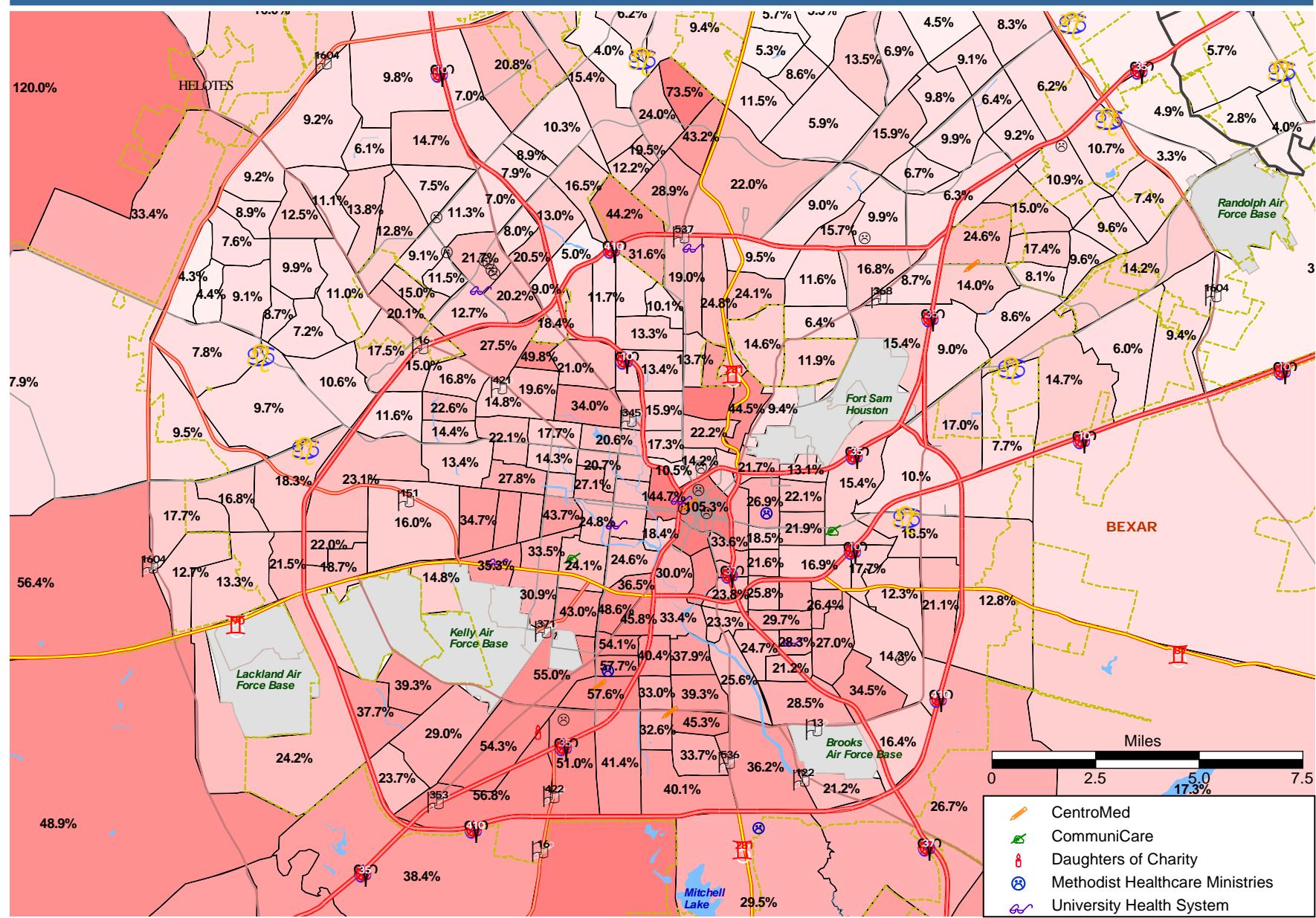
2005 Total Clinic Visits Age 0-17⁽¹⁾



(1) Source: Partner Organizations' databases.

III. Utilization Rates

2005 Total Clinic Utilization Rates Age 0-17⁽¹⁾



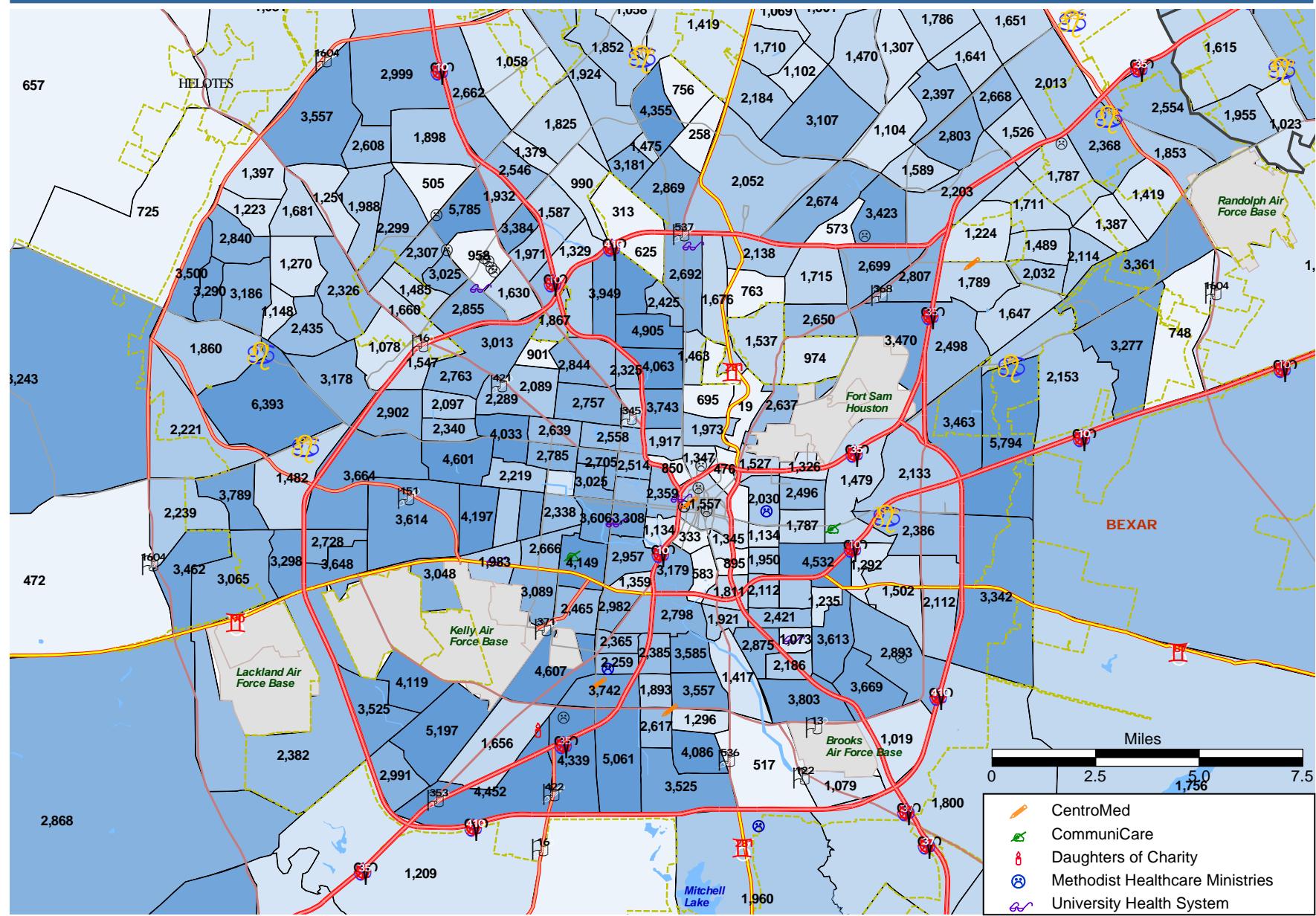
(1) Source: Partner Organizations' databases.
 (2) Source: Capital Healthcare Planning estimated volumes.



 TII CAPITAL
HEALTHCARE PLANNING

III. Utilization Rates

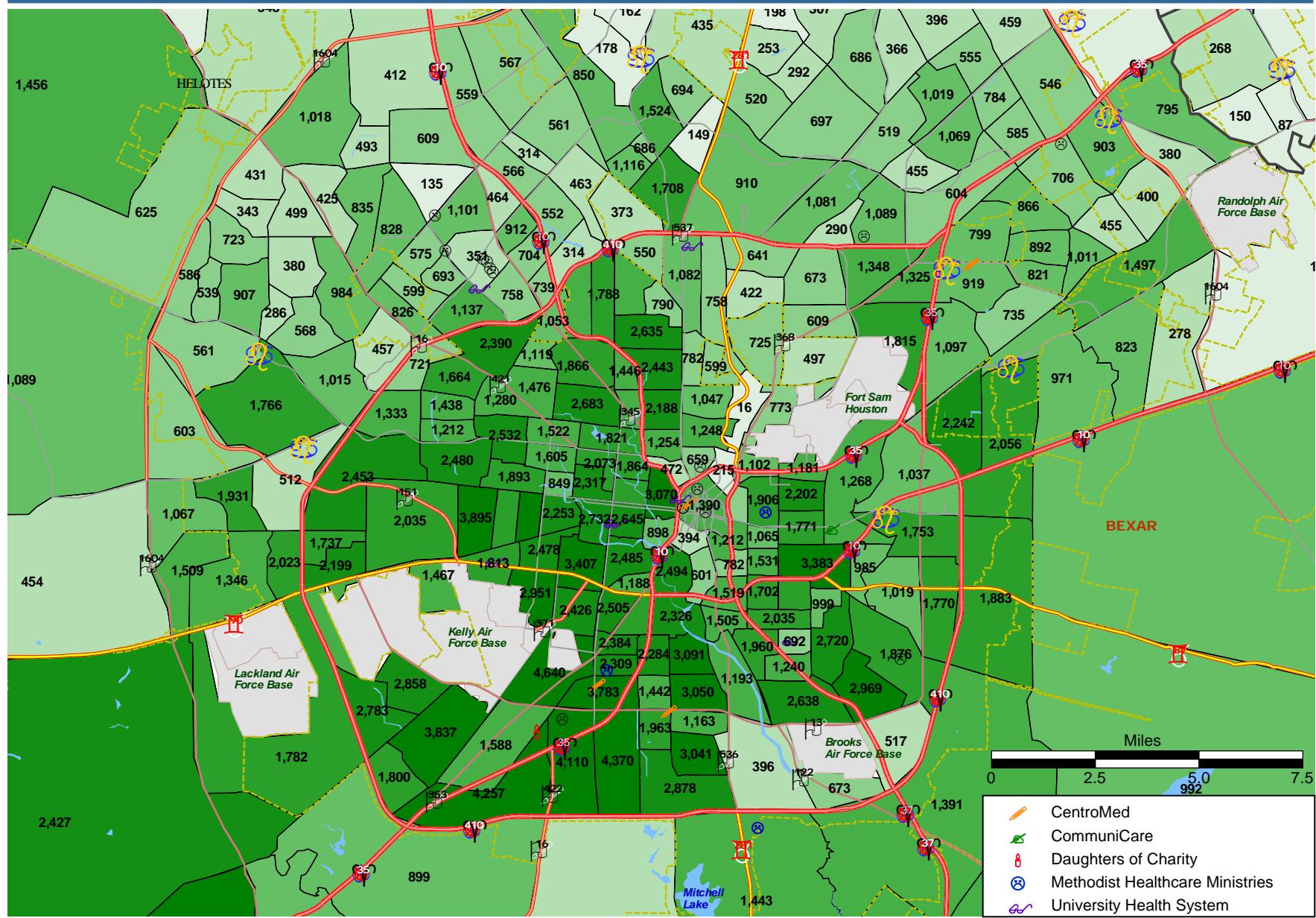
2005 Estimated Visits Age 18-64 at 200% FPL⁽¹⁾



(1) Source: Capital Healthcare Planning estimated volumes.

III. Utilization Rates

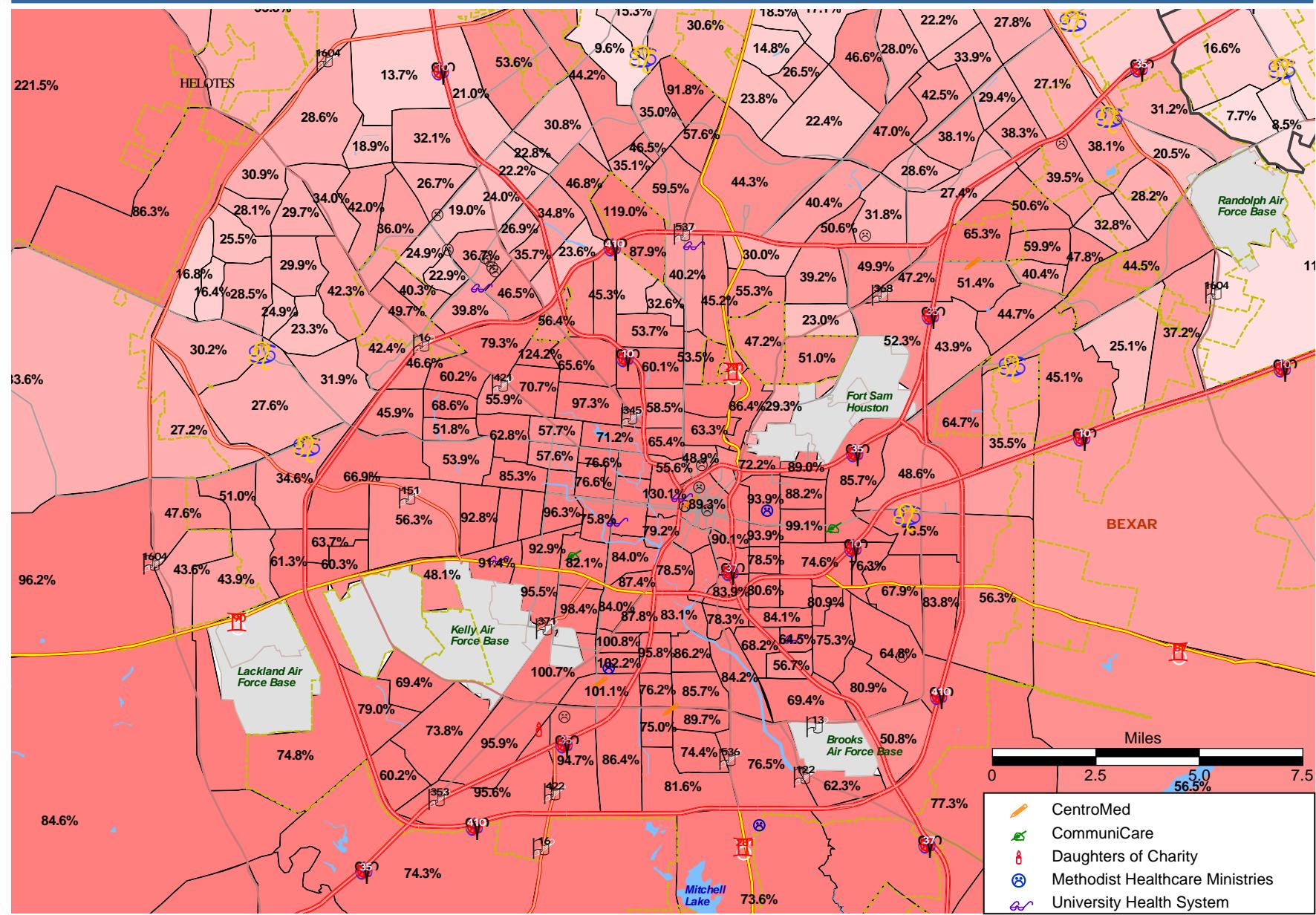
2005 Total Clinic Visits Age 18-64⁽¹⁾



(1) Source: Partner Organizations' databases.

III. Utilization Rates

2005 Total Clinic Utilization Rates Age 18-64⁽¹⁾



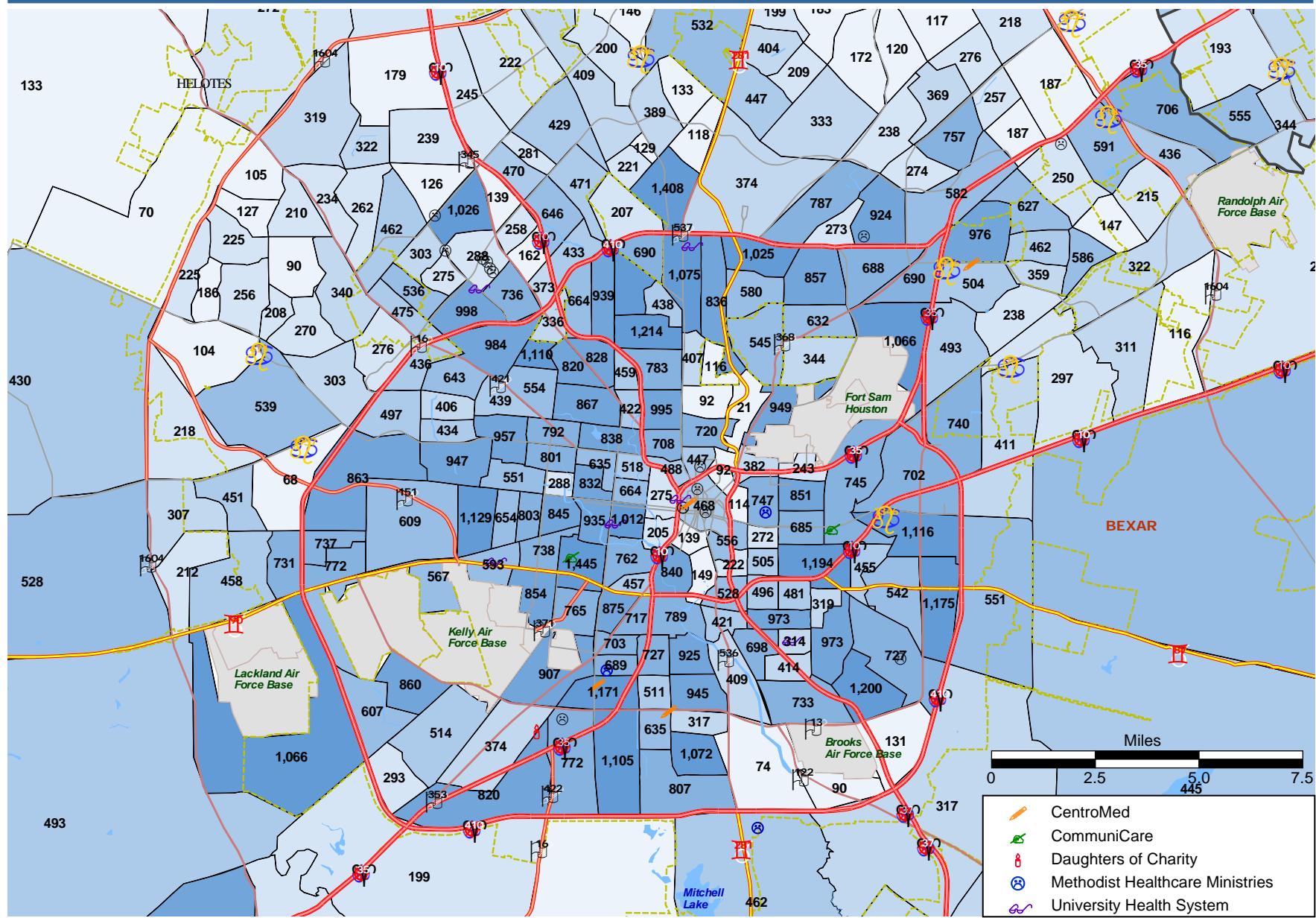
- (1) Source: Partner Organizations' databases.
(2) Source: Capital Healthcare Planning estimated volumes.



CAPITAL
HEALTHCARE PLANNING

III. Utilization Rates

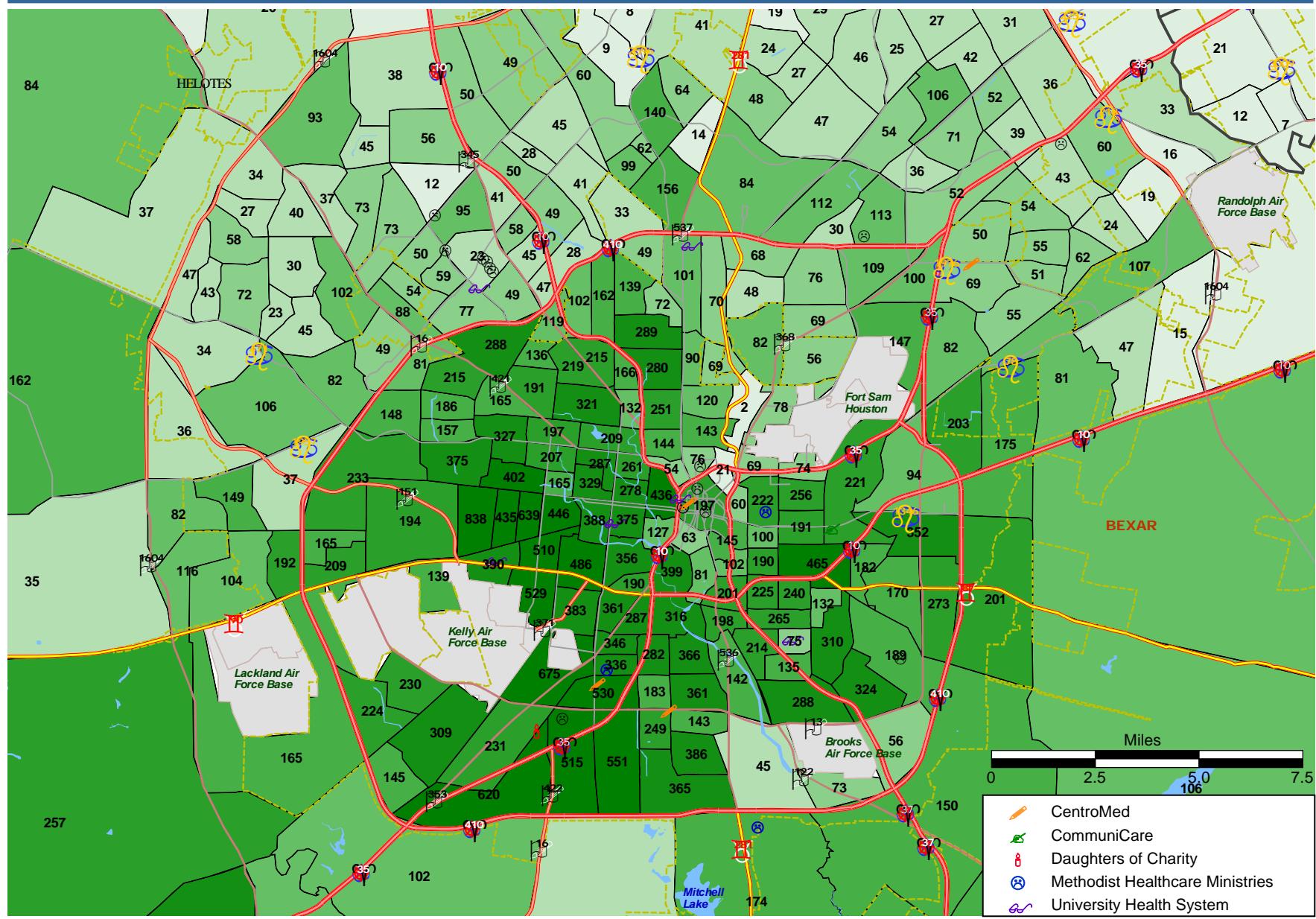
2005 Estimated Visits Age 65+ at 200% FPL⁽¹⁾



(1) Source: Capital Healthcare Planning estimated volumes.

III. Utilization Rates

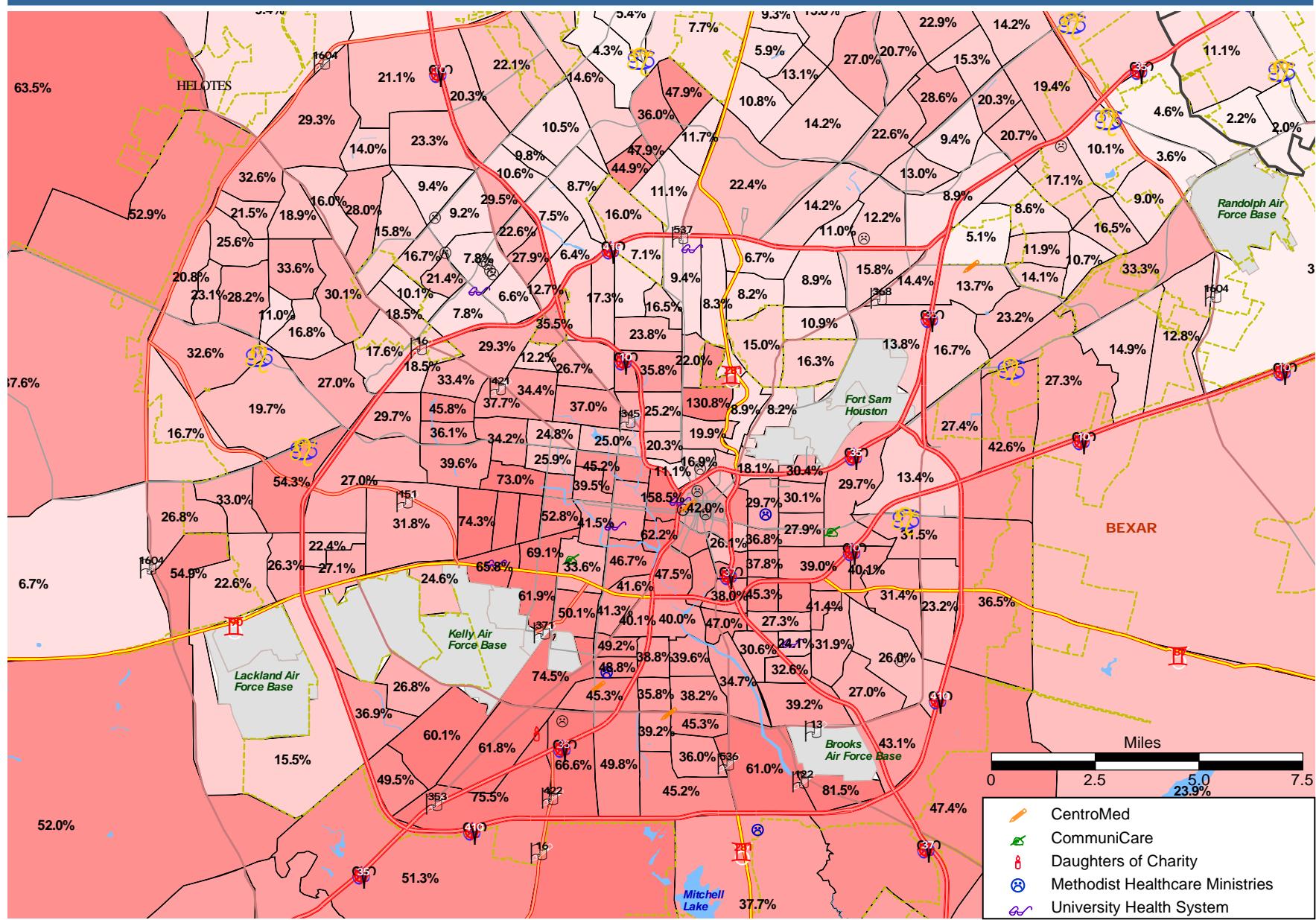
2005 Total Clinic Visits Age 65+⁽¹⁾



(1) Source: Partner Organizations' databases.

III. Utilization Rates

2005 Total Clinic Utilization Rates Age 65+⁽¹⁾



(1) Source: Partner Organizations' databases.

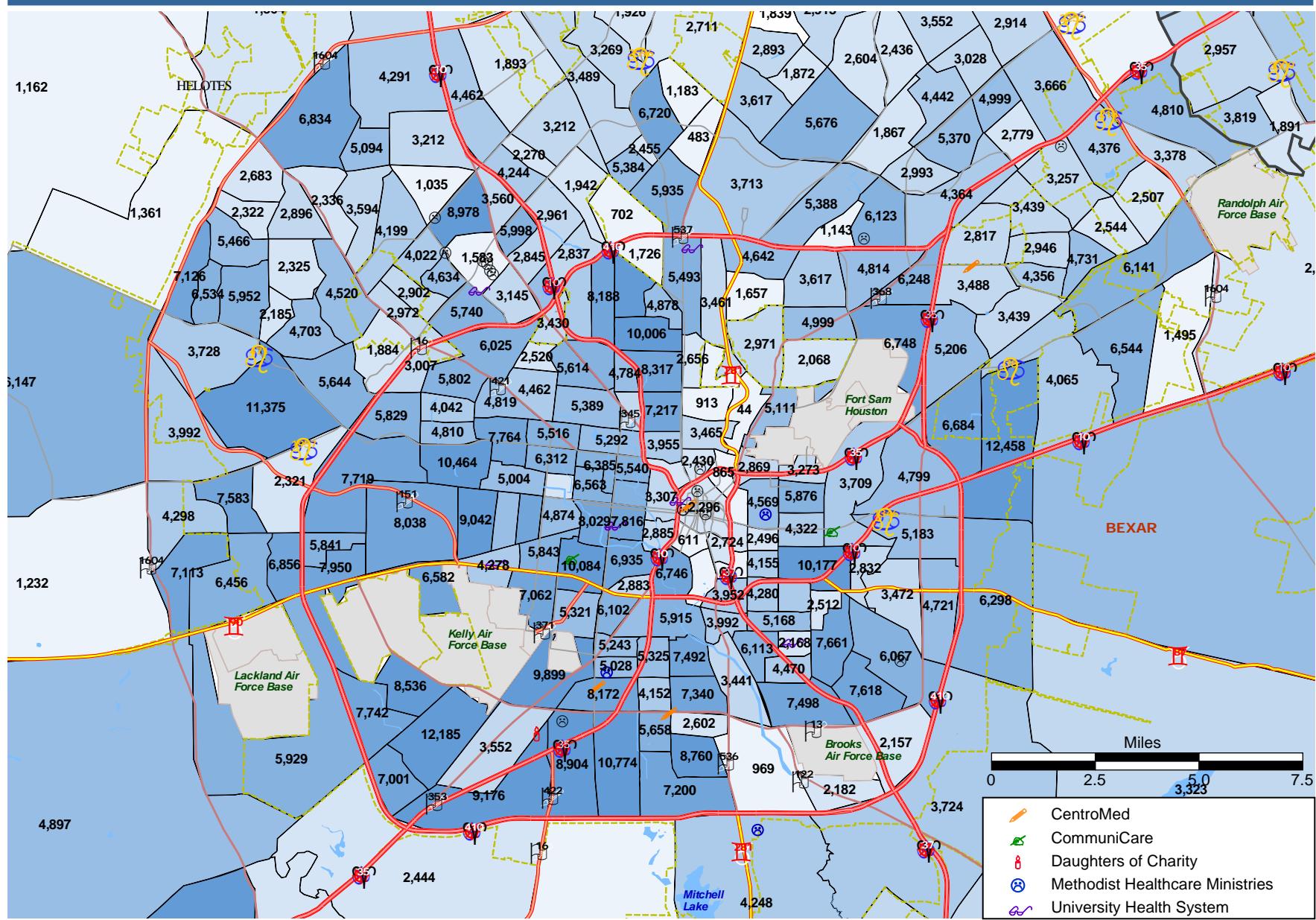
(2) Source: Capital Healthcare Planning estimated volumes.



CAPITAL
HEALTHCARE PLANNING

III. Utilization Rates

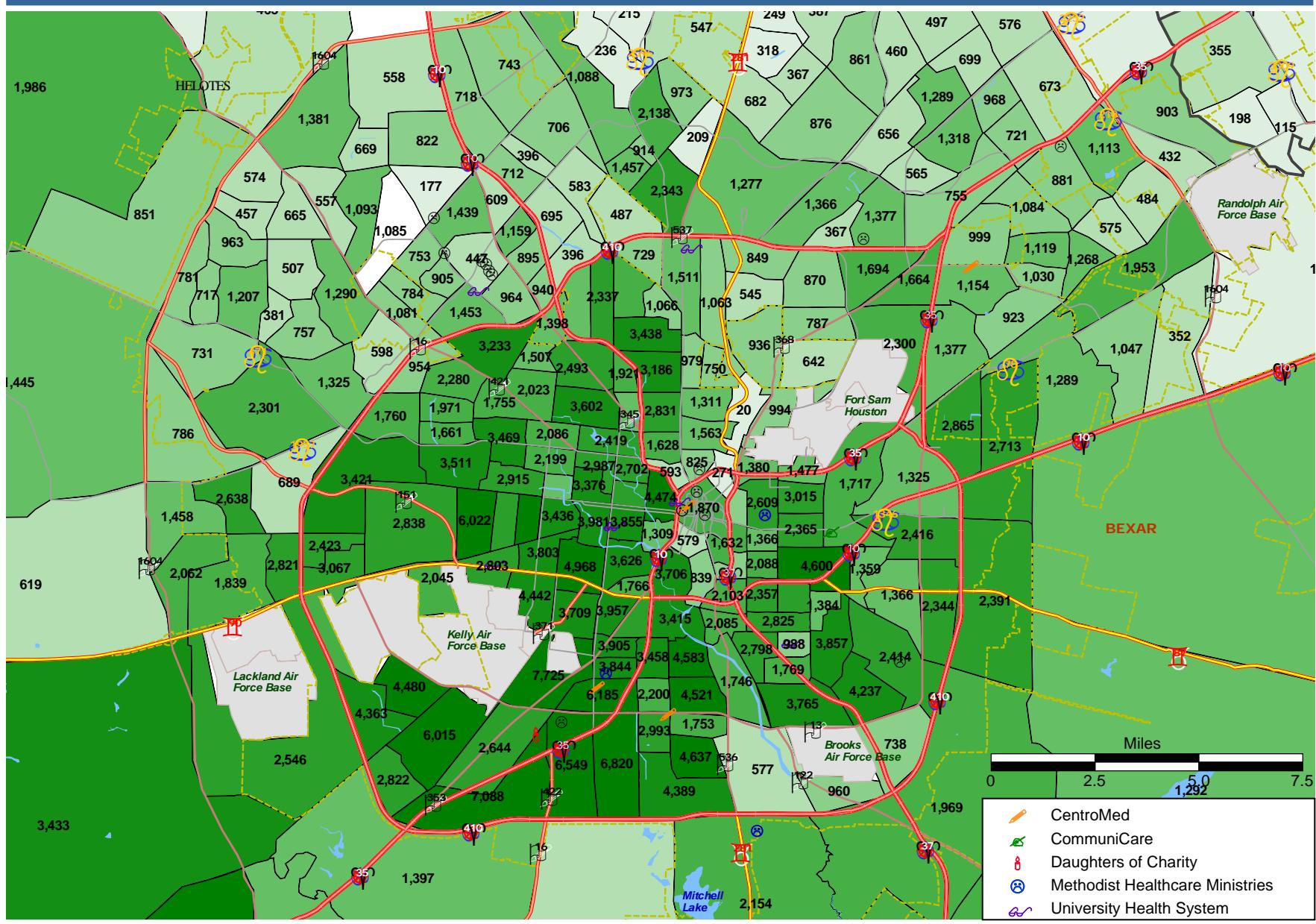
2005 Estimated Visits at 200% FPL⁽¹⁾



(1) Source: Capital Healthcare Planning estimated volumes.

III. Utilization Rates

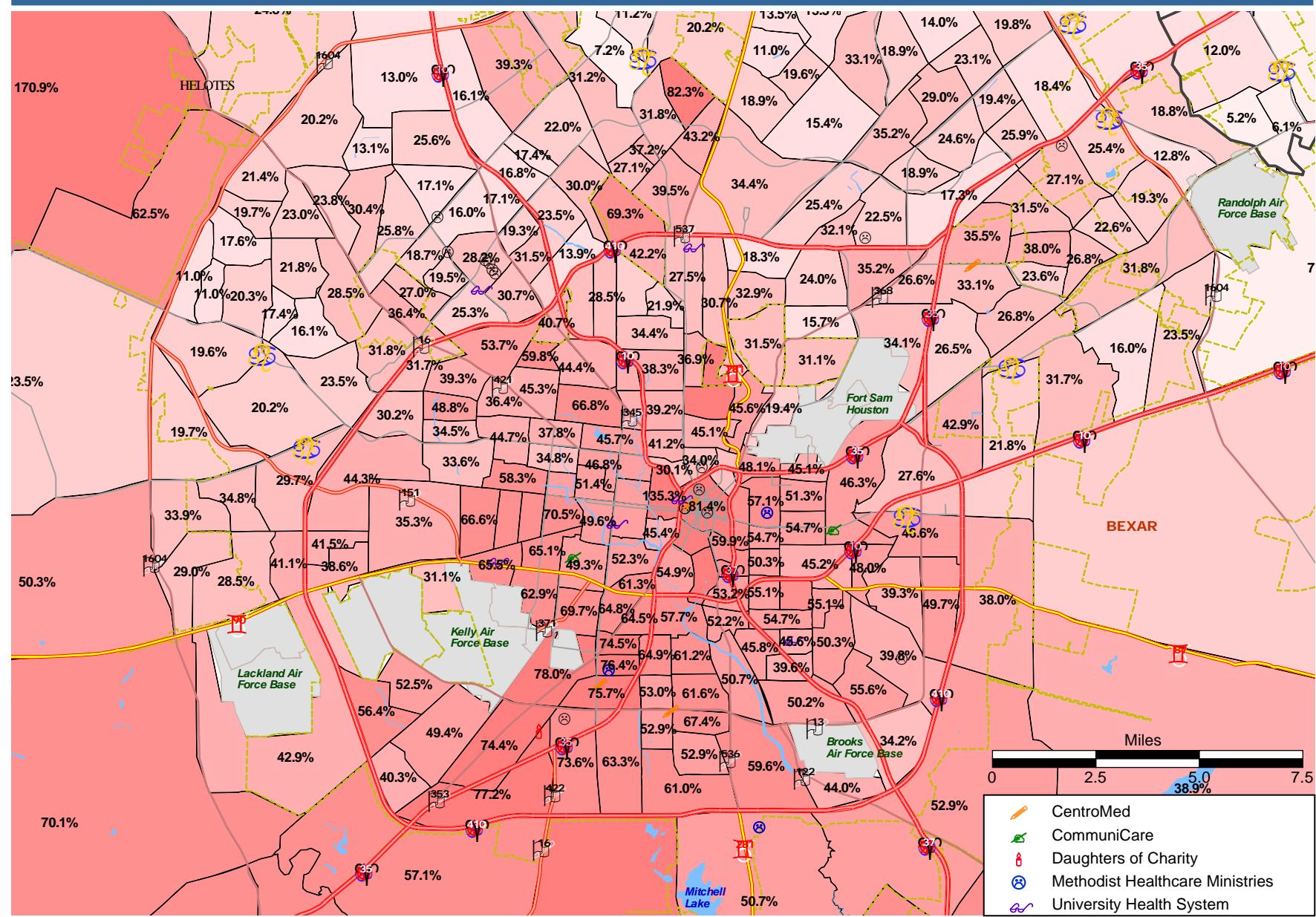
2005 Total Clinic Visits⁽¹⁾



(1) Source: Partner Organizations' databases.

III. Utilization Rates

2005 Total Clinic Utilization Rates⁽¹⁾



(1) Source: Partner Organizations' databases.

(2) Source: Capital Healthcare Planning estimated volumes.

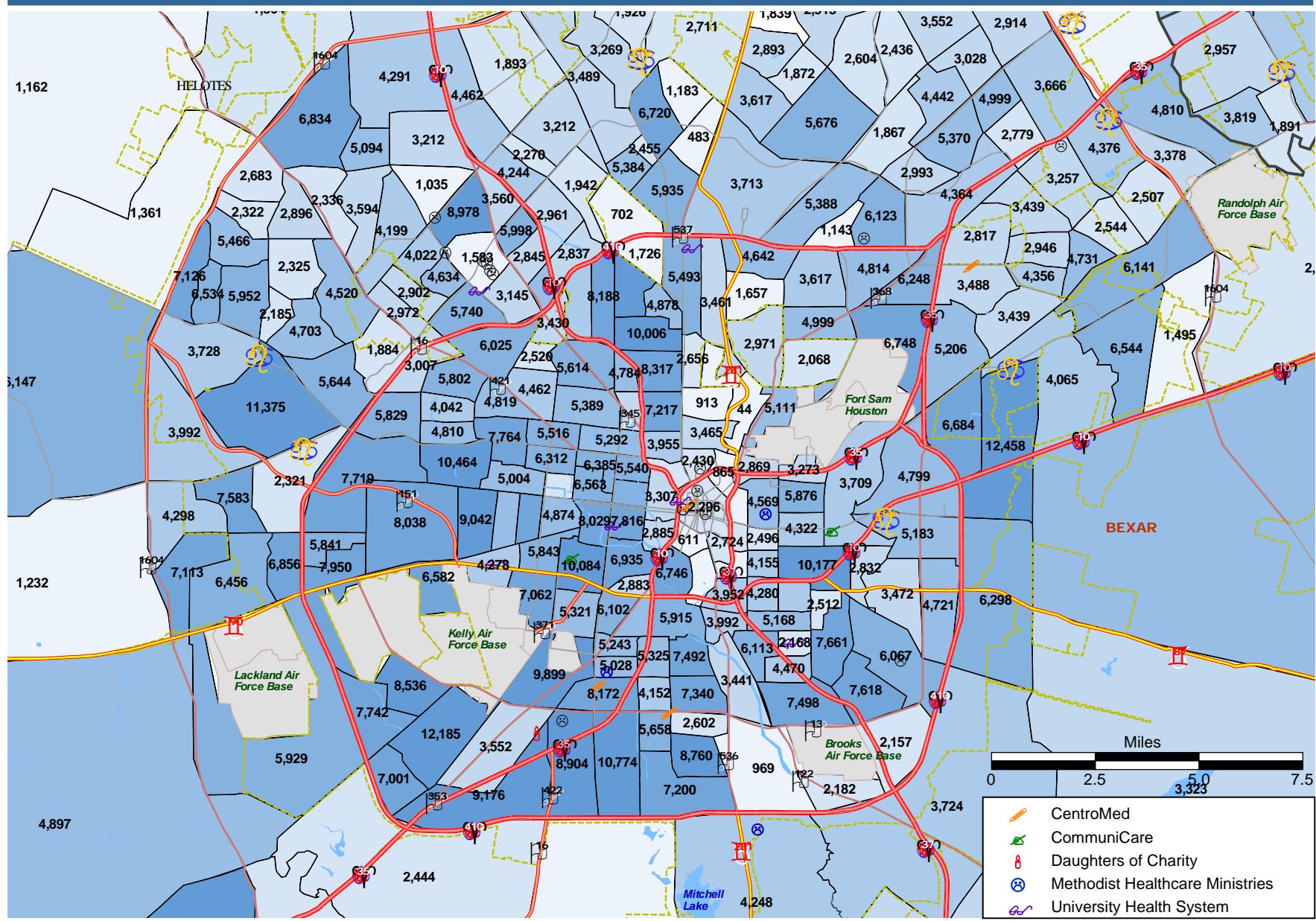


CAPITAL
HEALTHCARE PLANNING

- Demand Analysis Hyperlinked Slides

IV. Demand Analysis

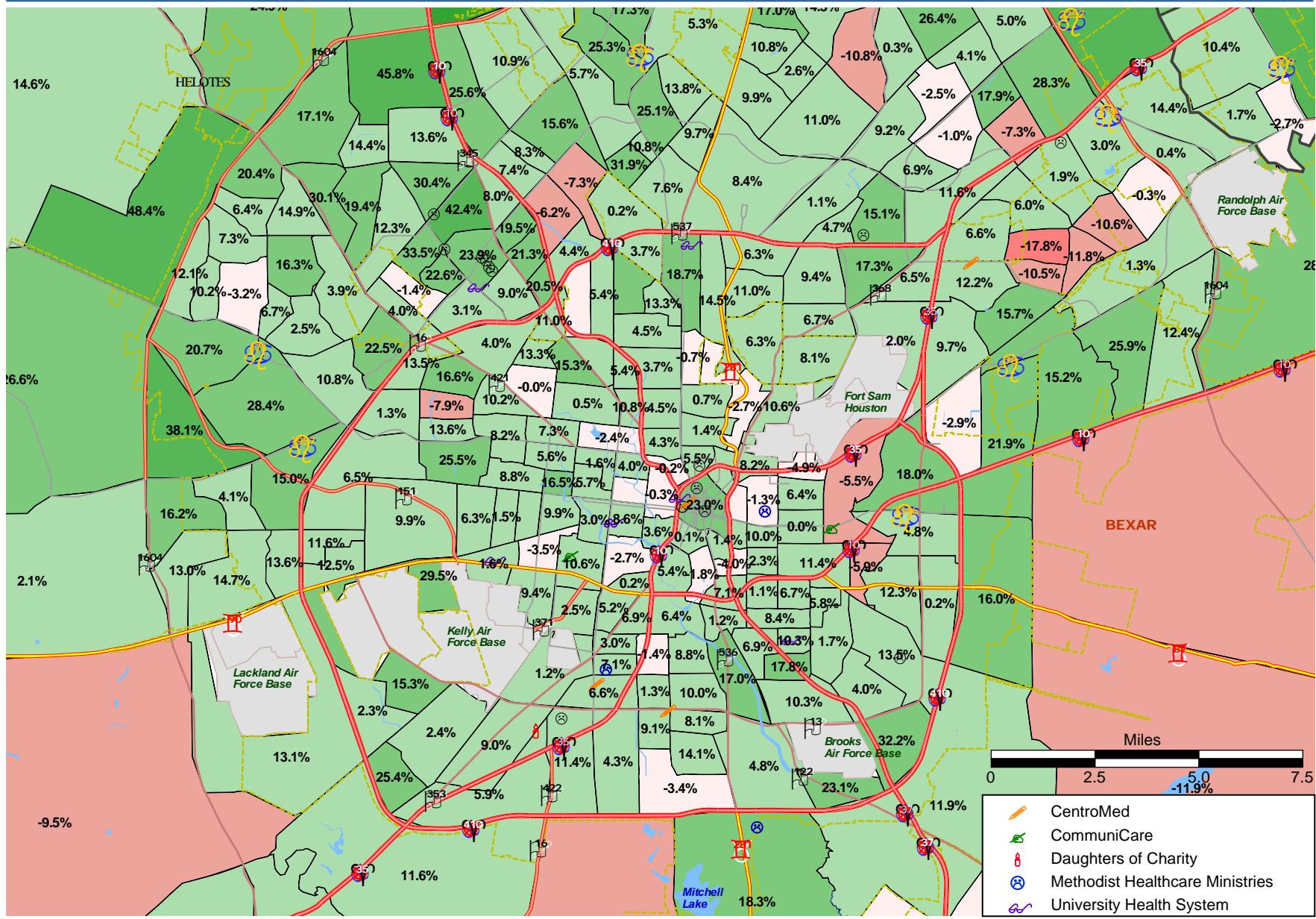
2005 Estimated Visits at 200% FPL⁽¹⁾



(1) Source: Capital Healthcare Planning estimated volumes.

IV. Demand Analysis

Percentage Growth in Estimated Visits at 200% FPL 2005 - 2011⁽¹⁾



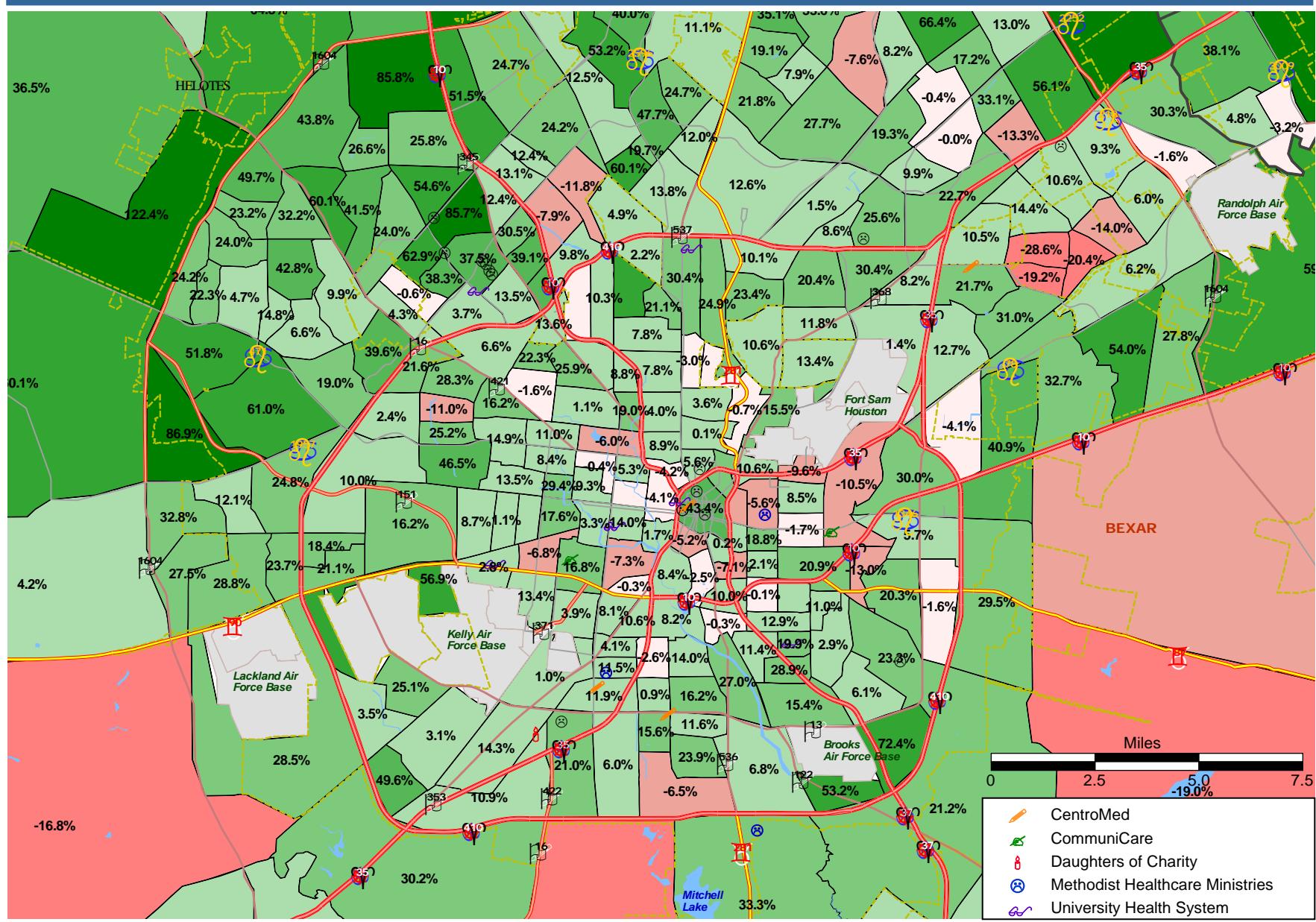
(1) Source: Capital Healthcare Planning estimated volumes.



CAPITAL
HEALTHCARE PLANNING

IV. Demand Analysis

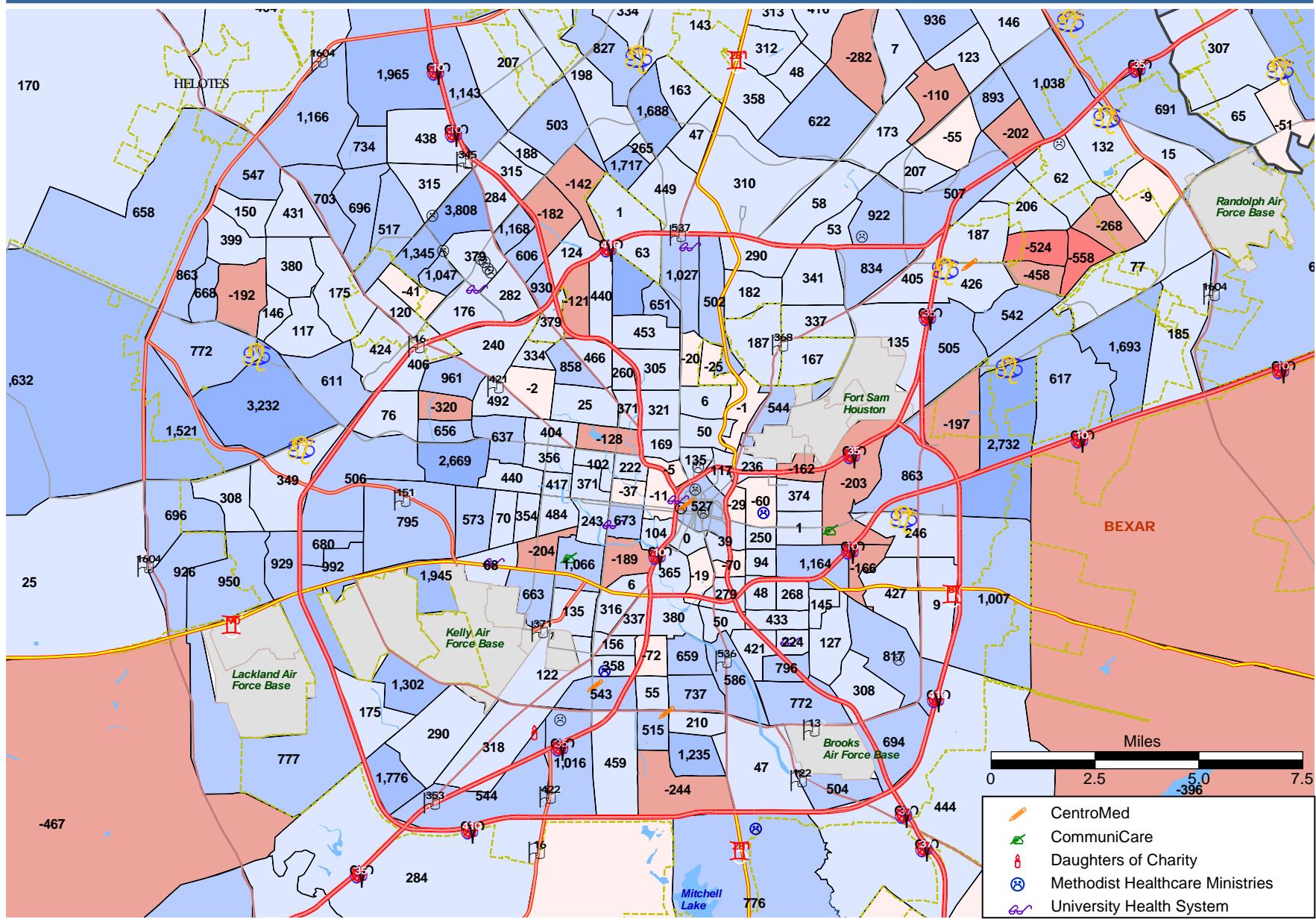
Percentage Growth in Estimated Visits at 200% FPL 2005 - 2016⁽¹⁾



(1) Source: Capital Healthcare Planning estimated volumes.

IV. Demand Analysis

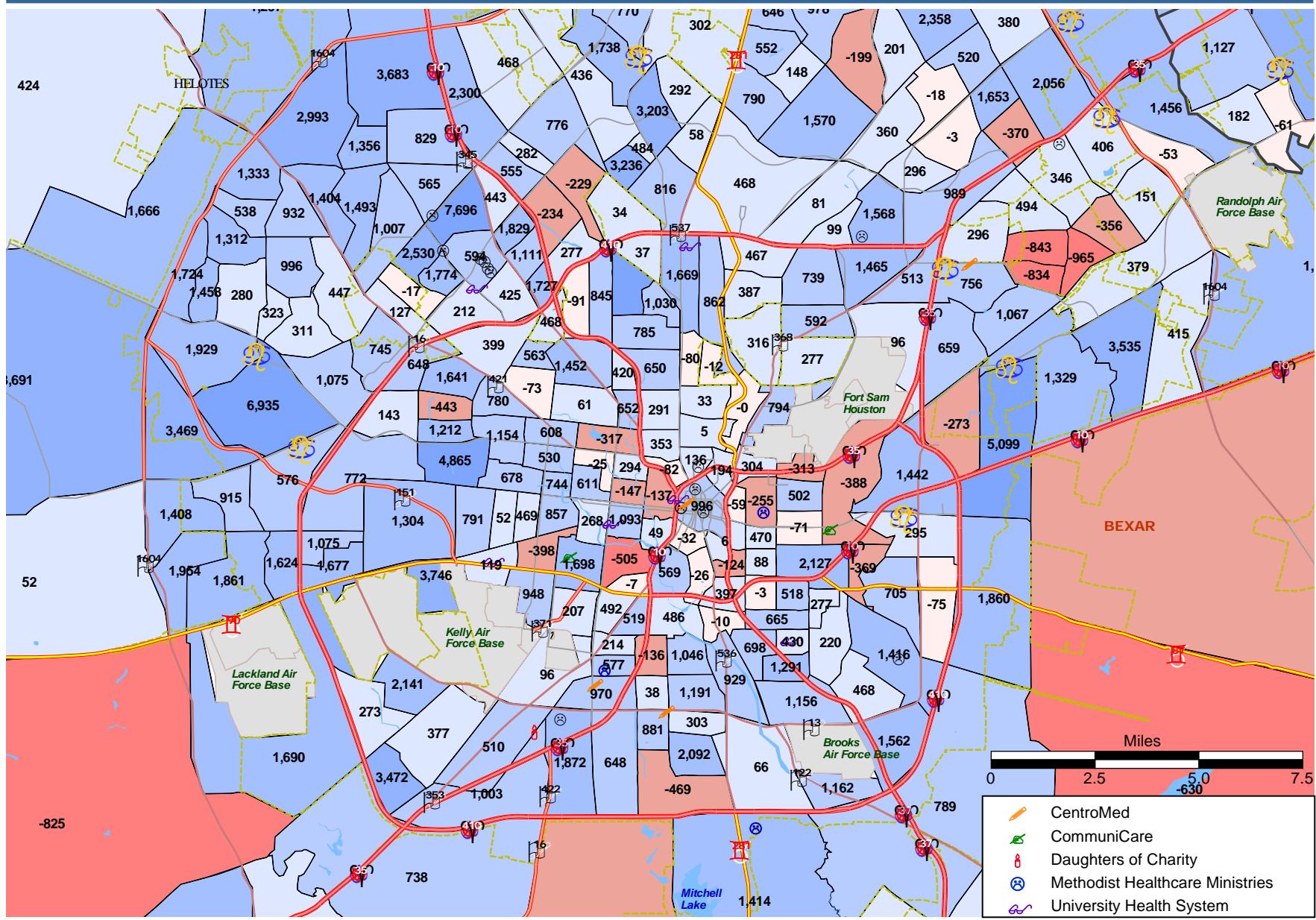
Absolute Growth in Estimated Visits at 200% FPL 2005 - 2011⁽¹⁾



(1) Source: Capital Healthcare Planning estimated volumes.

IV. Demand Analysis

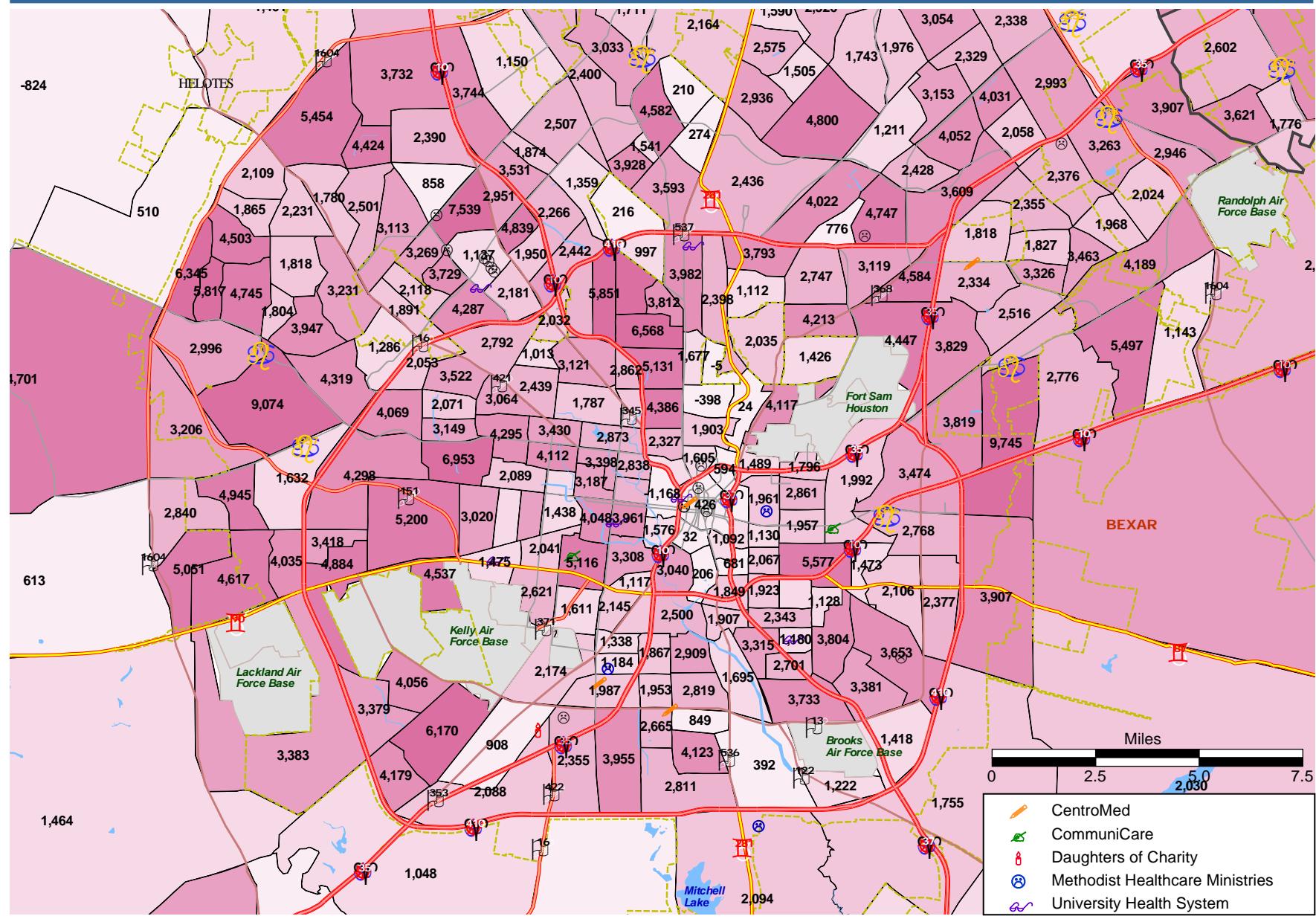
Absolute Growth in Estimated Visits at 200% FPL 2005 - 2016⁽¹⁾



(1) Source: Capital Healthcare Planning estimated volumes.

V. Conclusions

2005 Visits Not Seen at Partner Organizations' Clinics



(1) Source: Partner Organizations' Databases.

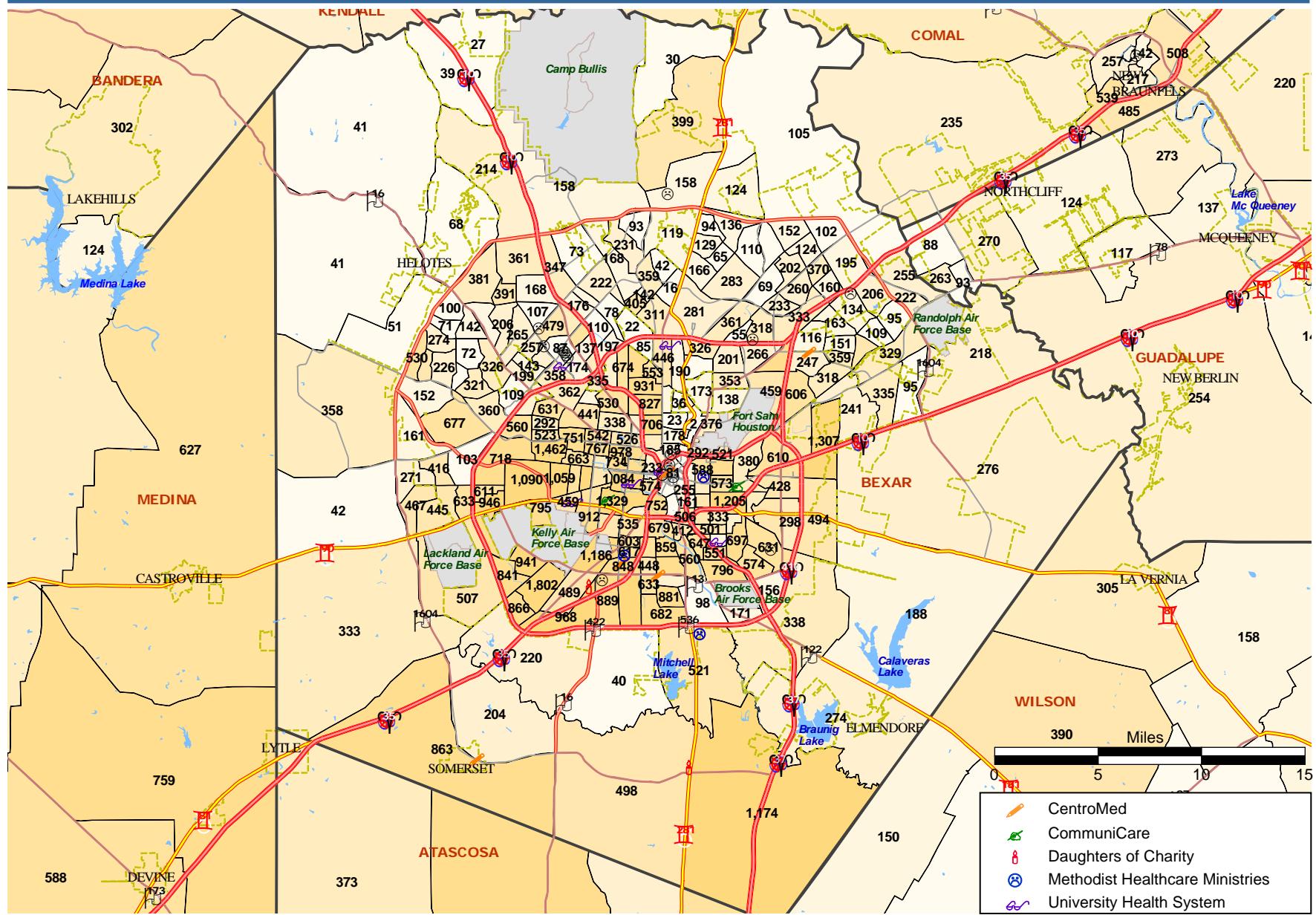


CAPITAL
HEALTHCARE PLANNING

- Slides Deleted From Presentation

II. Demographics

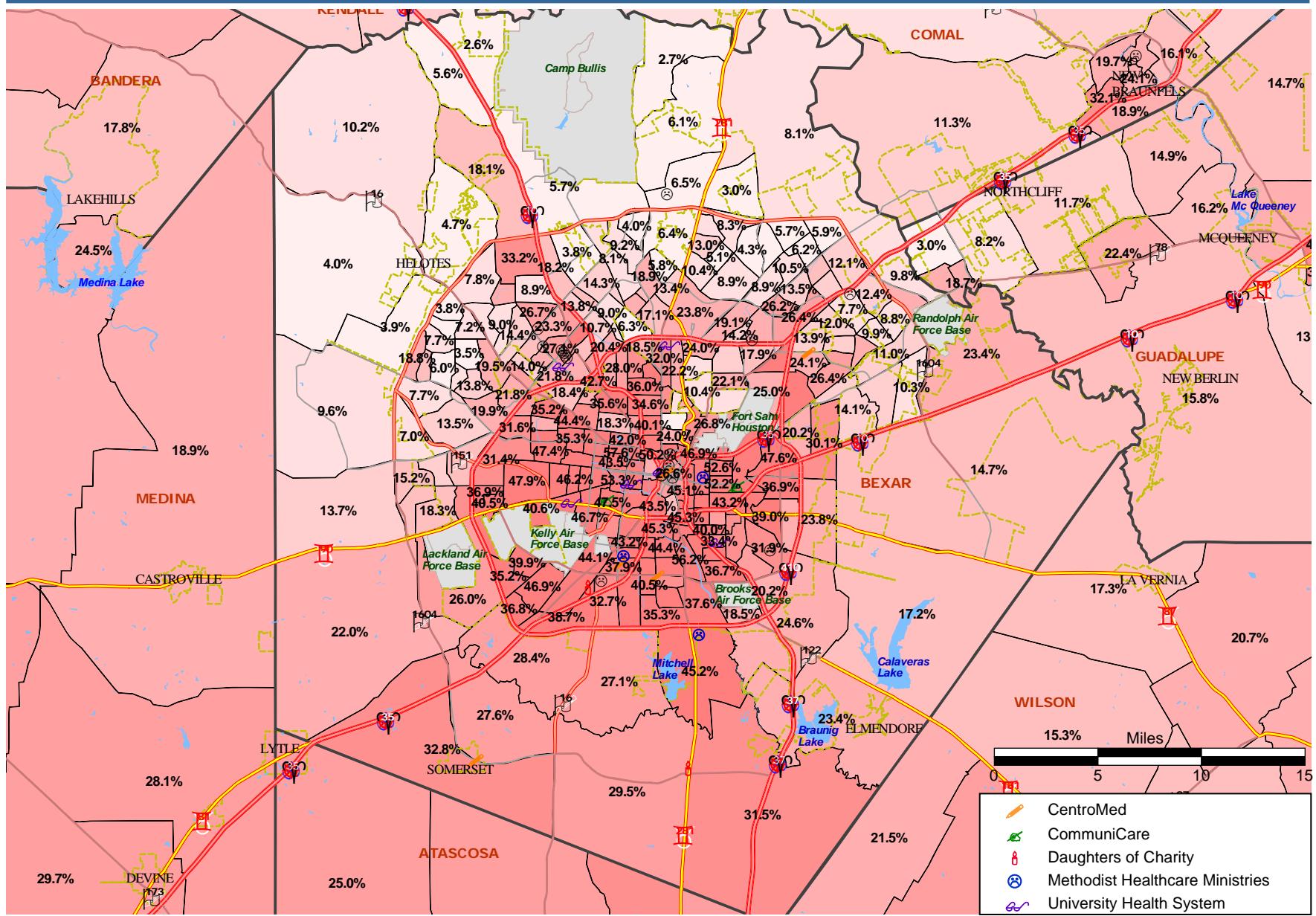
2006 Population Age 0-17 Below 100% FPL⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

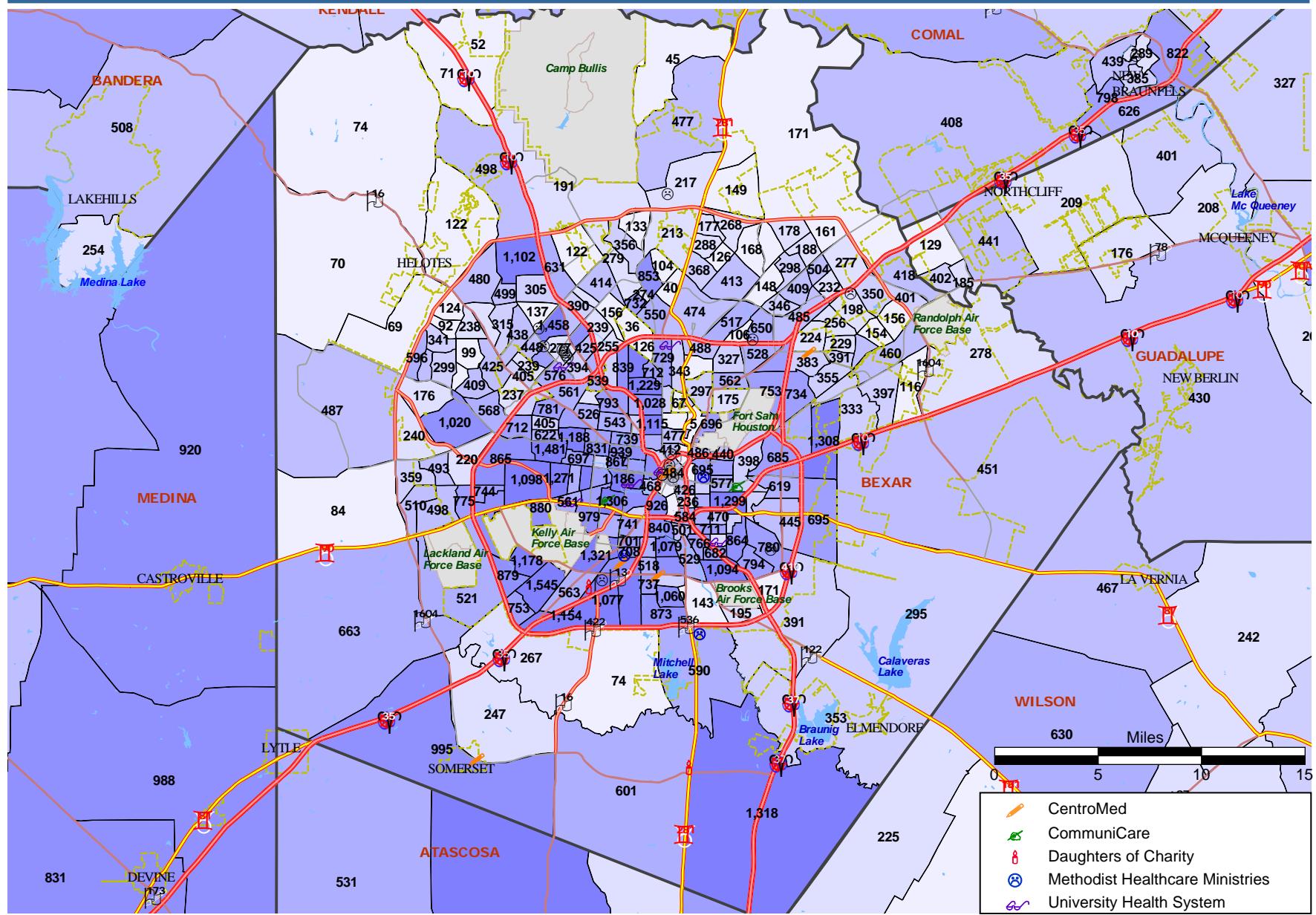
II. Demographics

2006 Percentage of Total – Population Age 0-17 Below 100% FPL⁽¹⁾



II. Demographics

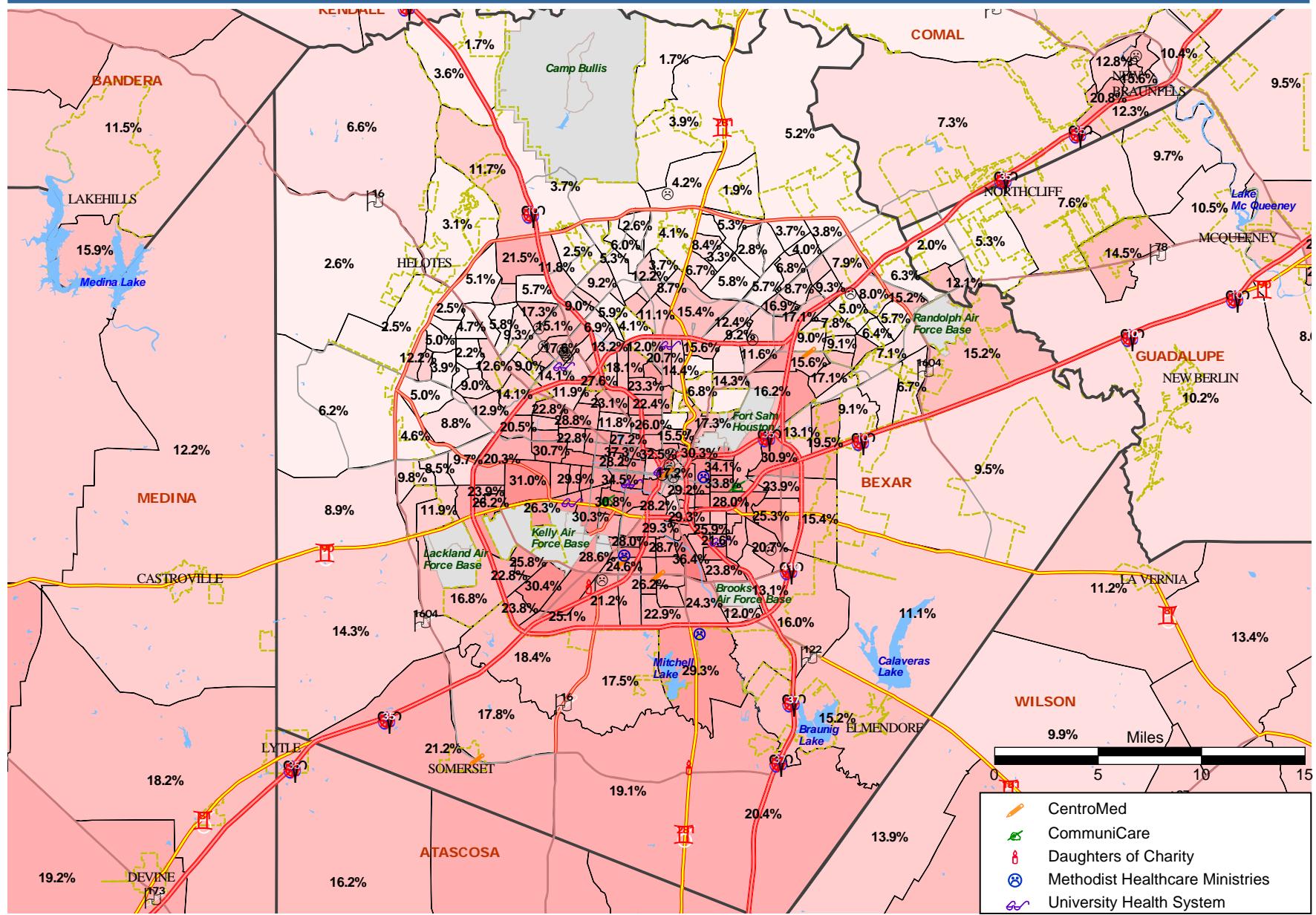
2006 Population Age 18-64 Below 100% FPL⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

II. Demographics

2006 Percentage of Total – Population Age 18-64 Below 100% FPL⁽¹⁾



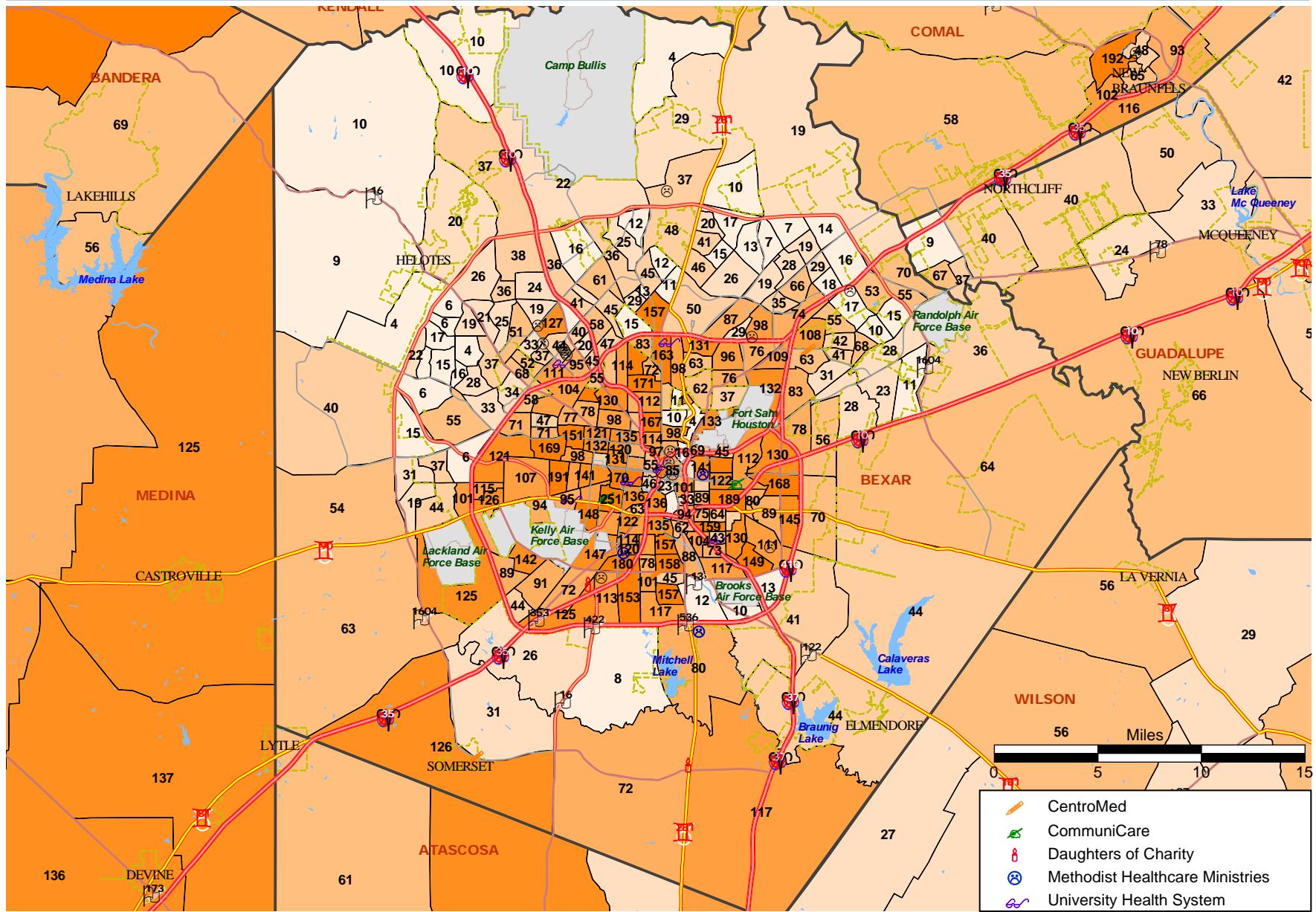
(1) Source: Claritas 2000 – 2011 database.



 TII CAPITAL
HEALTHCARE PLANNING

II. Demographics

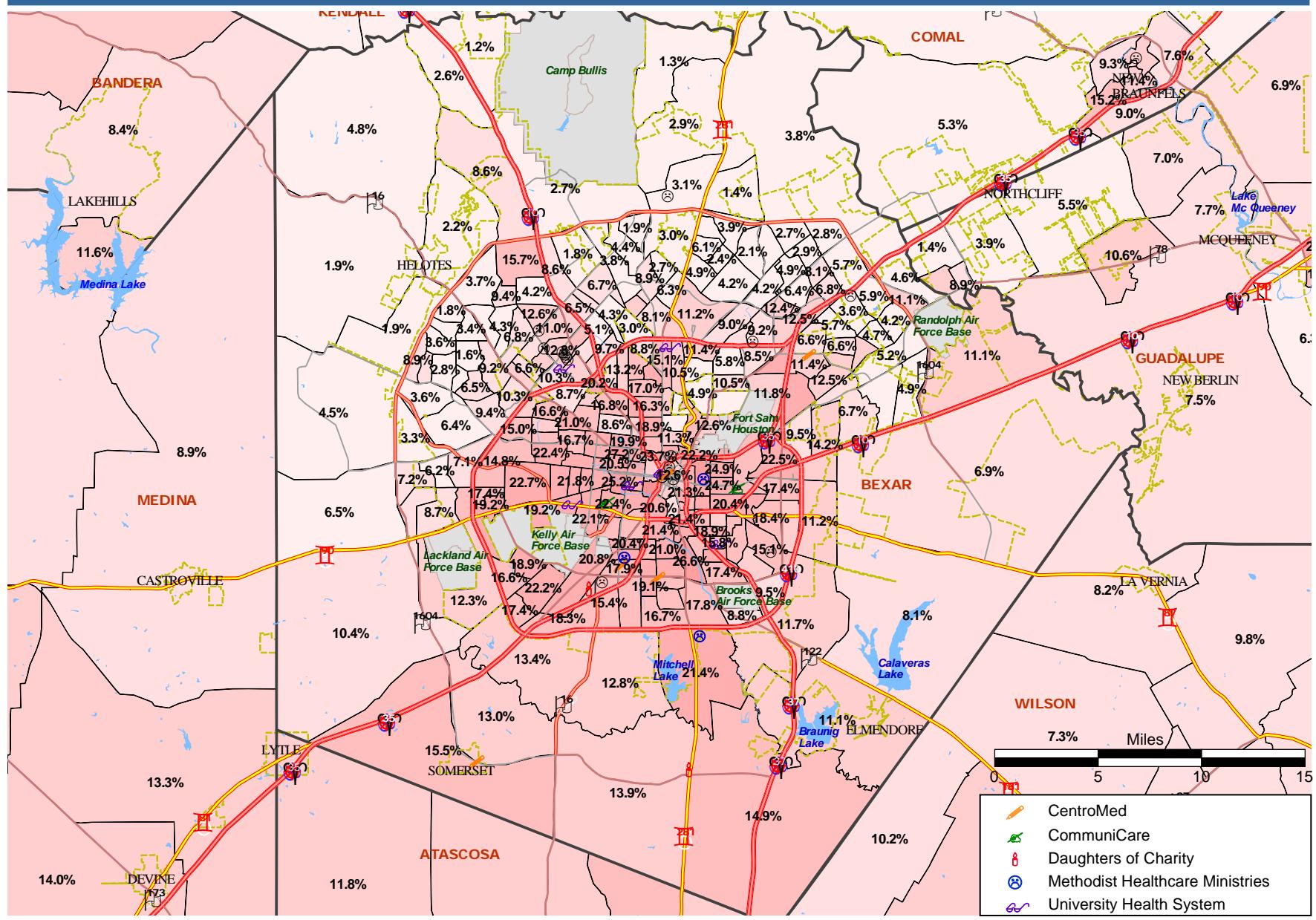
2006 Population Age 65+ Below 100% FPL⁽¹⁾



(1) Source: Claritas 2000 – 2011 database.

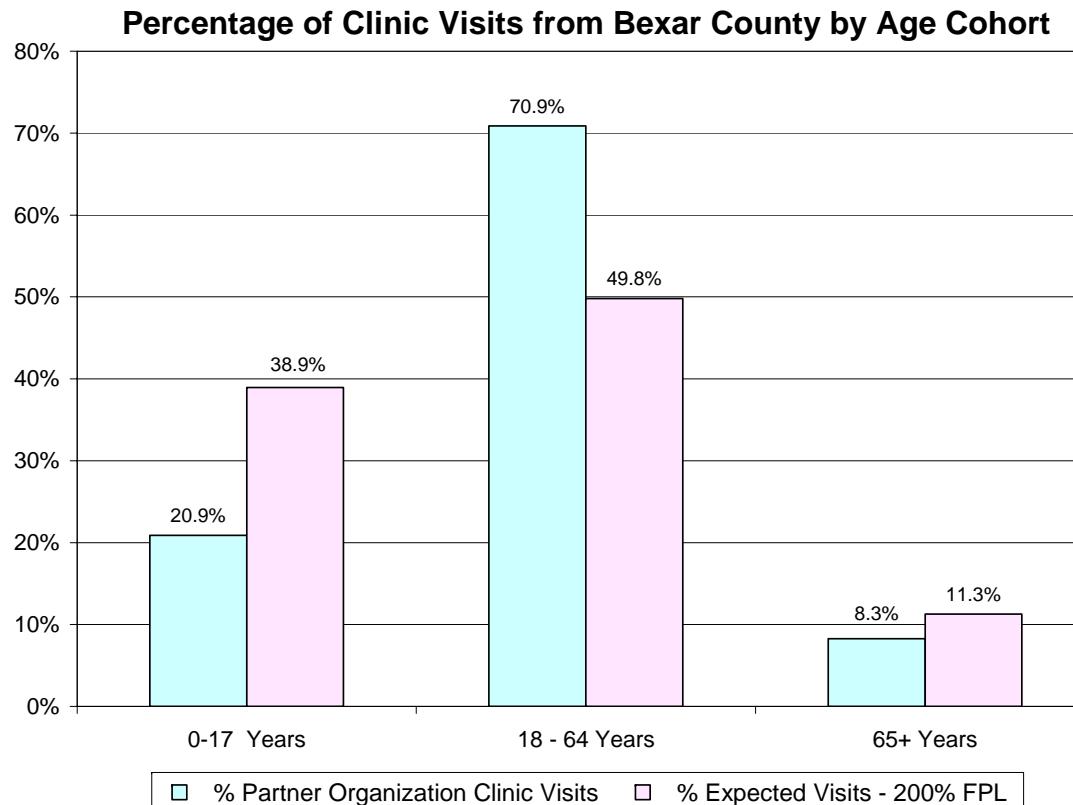
II. Demographics

2006 Percentage of Total – Population Age 65+ Below 100% FPL⁽¹⁾



III. Utilization Rate

Clinic Visits by Age Cohort – Bexar County⁽¹⁾



- Distribution of patients visiting Clinics skewed towards 18 – 64 age cohort... when compared to expected 200% FPL visits:
 - 17.8% lower in the 0 – 17 age cohort
 - 21.1% higher in the 18 – 64 age cohort
 - 3.0% lower in the 65+ age cohort
- Not surprising... more options for patients in the lower and higher age cohorts... e.g. Medicaid, Medicare, SCHIP
- Age distribution varies significantly between Partner Organizations

(1) Source: Partner Organizations' databases.

III. Utilization Rate

Clinic Visits by Age Cohort – Bexar County⁽¹⁾

- Percentage 2005 Visits from Bexar County by Organization

Partner Organization	0-17 Years	18 - 64 Years	65+ Years	Total
University Health System	12.3%	77.7%	10.0%	100.0%
CentroMed	36.3%	58.9%	4.7%	100.0%
CommuniCare	27.2%	65.1%	7.8%	100.0%
Methodist Healthcare Ministries	20.9%	70.9%	8.3%	100.0%
Daughters of Charity	31.7%	61.6%	6.7%	100.0%
Total - Partner Organizations	20.9%	70.9%	8.3%	100.0%
Expected Visits - 200% FPL	38.9%	49.8%	11.3%	100.0%

(1) Source: Partner Organizations' databases.