

What's Driving the Demand for ACCESS AND EGRESS SOLUTIONS

in the Growing U.S. Elder Care Industry?

By Kerby Lecka

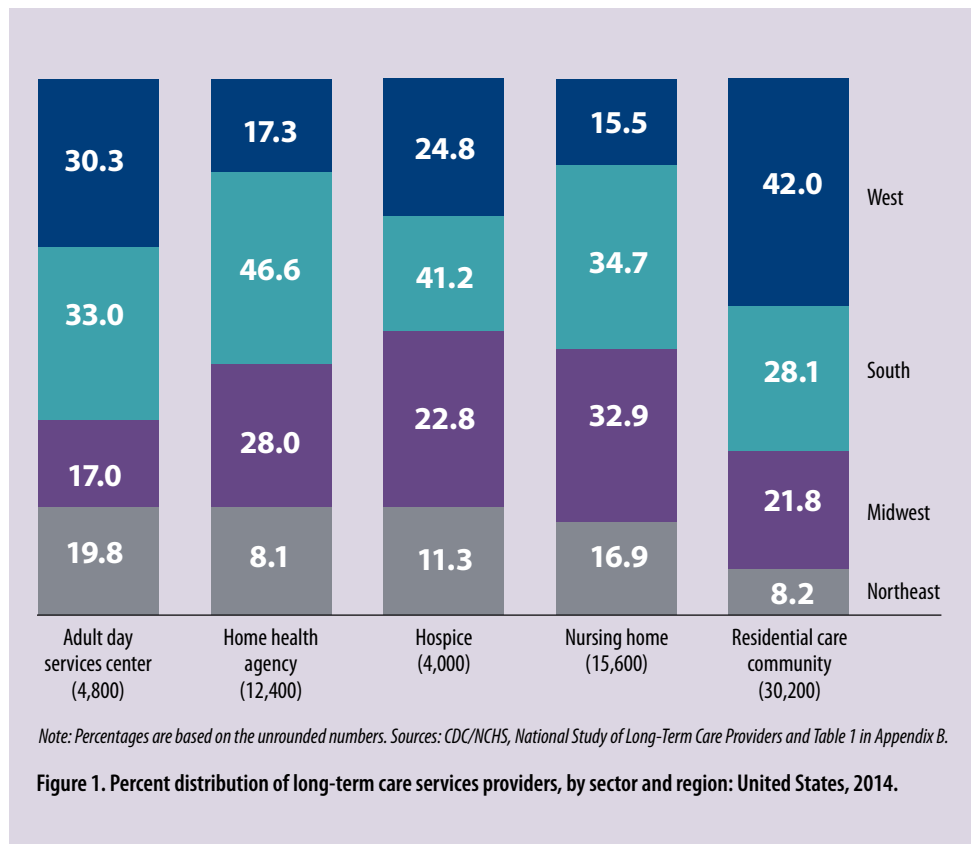
Answer: our aging population.

Americans are living longer and the population of people age 65 and older (40.2 million in the U.S. today) is already providing incredible opportunities to expand the number of facilities to serve them. People of this age tend to require assistance because of the natural decline of physical and mental capabilities.

According to the U.S. Department of Health and Human Services, 70 percent of people turning age 65 can expect to use some form of long-term care during their lives. By 2040, the U.S. population age 65 and over will double to 81.2 million or 20 percent (*one in five*) of the population.

With the aging population, it will be less common for a family member to take care of a senior as it is now, placing a greater burden on younger family members. There were 11 possible caregivers for each family member requiring care in 1990. By 2050, this ratio is projected to be four to one.¹ The care of seniors will increasingly fall on outside (non-family) service providers, hence the incredible growth in facilities housing and providing care services to seniors—skilled nursing facilities, continuing care retirement communities and assisted living facilities.

The growth in dementia-related illnesses adds to this demographic shift. According to the Alzheimer's Association, by 2050 the number of people age 65 and older with Alzheimer's disease may nearly triple, from 5.2 million to a projected 13.8 million, barring the development of



medical breakthroughs to prevent or cure the disease.

The bottom line is that demand for facilities to serve a growing population of elderly requiring care is booming. Here is the current bed capacity of U.S. facilities as of 2014:

Adult Day Services Centers

- Number of adult day services centers: 4,800
- Percent of adult day services centers with for-profit ownership: 44.2%

- Number of participants on any given day: 282,200

Residential Care Communities

- Number of residential care communities: 30,200
- Proportion of residential care communities with for-profit ownership: 81.8%
- Number of licensed beds: 1,000,000
- Number of residents: 835,200

Nursing Homes

- Number of nursing homes: 15,600
- Proportion of nursing homes with for-profit ownership: 69.8%
- Number of licensed beds: 1.7 million
- Number of residents: 1.4 million

As you can see, the number of facilities and beds must increase to meet the burgeoning demands of the aging population in the U.S. Along with this demand is the need to provide security and fire and life safety solutions specific to the needs of these facilities and the national, state and local codes and health regulations governing them. This will provide huge opportunities for those door hardware, security dealers and distributors, installers and system integrators willing to educate themselves about the skills, expertise and solutions needed to serve this market.

Security and Life Safety Considerations

Long Term Care (LTC) facilities present unique security issues different from traditional hospital and health care facility security requirements. Patients/residents in LTC facilities are more at risk to harm from their actions like wandering, confusion and disorientation, from outsiders taking advantage of their frail and weakened conditions, or from their aggressive behaviors. Extra care, attention and security are required for these reasons.

LTC facilities require varying levels of access control. Using electronic locks, keypads and card readers to protect assets is an obvious access control application. Main entries, doors to pharmacies and records rooms, and doors to supply, linen and physical therapy rooms, all have unique requirements. The function of each opening must be considered when specifying a solution. Devices could include standalone locks with wiegand keypads, and/or proximity readers, and include audit trail capability, etc. Or, electromagnetic locks, exit devices, and electric locks tied to access controls could be appropriate. Even simple controllers and ADA-compliant request-to-exit switches for control, monitoring and system logic can all be applied.

Of paramount importance to LTC facilities is access and egress control to protect patients with dementia-related conditions. Delayed egress solutions designed to allow patients freedom of movement while preventing them from leaving the safety and protection of the facility are particularly effective. Electromagnetic locks and electrified exit devices can be connected to access controls with delayed egress logic designed to provide a timed period before the lock is released and to notify staff of the attempt to open the door. In this way, the patient security can be addressed while maintaining the integrity of the facility's fire and life safety procedures.

Many delayed egress solutions will communicate with existing patient wandering systems and some integrate the delayed egress logic directly into the hardware,

eliminating the need for separate door controllers or consoles.

Long-Term Care Facilities Definitions

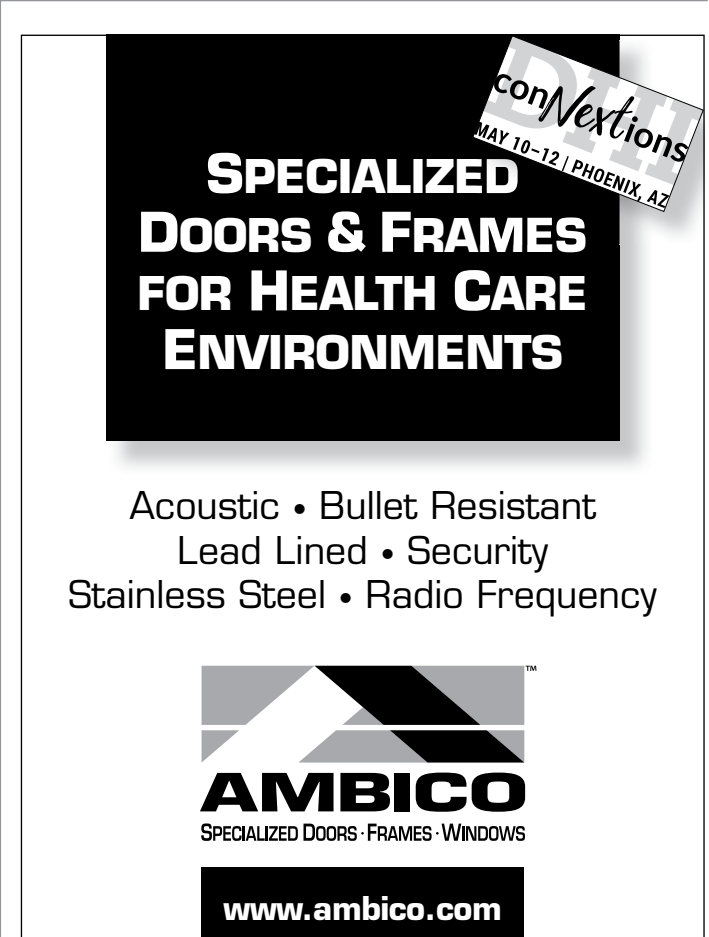
LTC facilities serving the elderly population come in a variety of shapes, sizes and functions, depending on the needs of the patients being served. "LTC facilities for seniors" is really a blanket term for any elder care facility "that provides rehabilitative, restorative, and/or ongoing skilled nursing care to patients or residents in need of assistance with activities of daily living."² LTC Facilities include nursing homes/skilled nursing facilities, assisted living facilities, continuing care retirement communities, residential care communities, and adult day care services centers.

Long Term Care Facility³

A facility that provides rehabilitative, restorative, and/or ongoing skilled nursing care to patients or residents in need of assistance with activities of daily living. Long-term care facilities include nursing homes, rehabilitation facilities, inpatient behavioral health facilities, and long-term chronic care hospitals.

Nursing Home/Skilled Nursing Facility⁴

A residential facility for people with chronic illness (an illness that lasts three months or more) or disability, particularly older people who have mobility and eating problems.



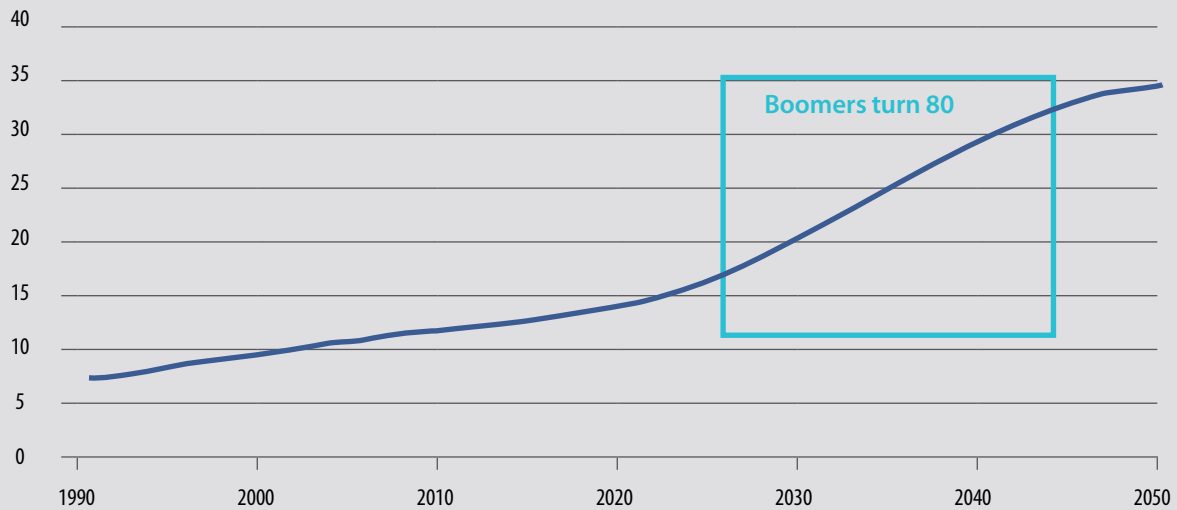
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Source: AARP Public Policy Institute calculations based on REIM (Regional Economic Models, Inc.) 2013 baseline demographic projections

Figure 2. Projected Age 80+ Population, U.S. (Millions)

Assisted Living Facility⁵

A type of long-term care facility for elderly or disabled people who can get around on their own but who may need help with some activities of daily living or simply prefer the convenience of having their meals in a central cafeteria and having nursing staff on call.

Continuing Care Retirement Community⁶

Continuing care retirement communities (CCRC) are retirement communities with accommodations for independent living, assisted living, and nursing home care, offering residents a continuum of care. A person can spend the rest of his life in a CCRC, moving between levels of care as needed. People in the senior housing industry call this "aging in place," although it does require leaving one's original residence.

Residential Care Community⁷

Care homes, also known as adult family homes, board and care homes, residential care or personal care homes, offer personalized service to small groups of adults. These residential homes provide lodging, meal services and assistance with daily living activities.

Adult Day Care Services Center⁸

An adult daycare center is typically a non-residential facility that supports the health, nutritional, social, and daily living needs of adults in a professionally staffed, group setting. These facilities provide adults with transitional care and short-term rehabilitation following hospital discharge. Adult day care centers

primarily focus on providing care for people with a specific chronic condition, including Alzheimer's Disease and related forms of dementia; additionally, these services may be available for any adult with disabilities and also the elderly population.

With a general idea of the growing market opportunities, the types of access and egress control solutions required, and the kinds of LTC facilities, door and hardware professionals can live well and do good for many years by simply bringing their invaluable security and safety expertise to LTC facilities. ■



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