

PAST, PRESENT AND FUTURE TRENDS: A 35 YEAR PERSPECTIVE OF THE IN-HOME CARE INDUSTRY

Oregon has long been recognized as a national leader and innovator in community based options for seniors who need assistance with activities of daily living such as personal care assistance, dressing, mobility and movement, nutrition and feeding. These services do not include curative or rehabilitative services. In-home care agencies are not home health agencies and do not receive Medicare funding. Oregon was the first state to receive a federal Medicaid waiver to provide home and community based services for adults and low income seniors who otherwise would require nursing home placement in the late 1970's. Shortly thereafter in the early 1980's, privately owned businesses began to emerge providing in-home care services not only to low income seniors but also to those with financial means. The primary focus of in-home care businesses has always been to provide services to allow seniors to remain in their own home environment. In the early years, these in-home care businesses/agencies were not regulated nor licensed by the state. Consequently, there existed a vast array of business models throughout Oregon. It has only been in the past ten years that the State of Oregon has required in-home care agencies to be licensed. Licensure has raised the quality and standards for provision of services, ultimately protecting senior consumers. Approximately 175 in-home care agencies are currently licensed by the state. Most recently, the industry in Oregon has experienced an influx of franchised in-home care agencies, a new business model in the industry. Franchises now closely outnumber

those that are non-franchised owned businesses. The array of services offered however, remains somewhat consistent. As we begin to experience a demographic tsunami, resources to help seniors in the home are shrinking. The demand for in-home caregivers is expected to grow 49 percent between 2012 and 2022. The shortage of caregivers is a trend that is influencing a huge concern regarding our long term workforce. As the baby boomer generation ages, and we experience an unprecedented increase in our older population, the availability of front-line workers does not look promising. One possible solution currently under research is the development of robots performing basic tasks to meet this shortage. Recent changes and reductions in Medicare reimbursements have also impacted the industry. Seniors are being discharged earlier from the hospital often requiring a higher level of assistance. In-home agencies must ensure caregivers have a higher level of training requirements to meet these changing needs.

Fast changing technology is also impacting the future of the industry. Home care providers have the opportunity to take advantage of the latest technologies to improve care while lowering costs. We are beginning to see more remote in-home monitoring of medical and other devices (such as Fitbits, blood glucose monitoring, pharmaceuticals, and sleep



therapy devices). Home care is rapidly becoming tech enabled for example, some agencies provide iPads for client homes to track care and communicate with families. As the technology landscape grows, we will continue to see an emerging range of devices that can instantly transmit health data and other feedback to and between patients, physicians, family and home care providers.

Nearly 90 percent of seniors want to stay in their own homes as they age, according to AARP. More seniors want to manage their own care and expect a personalized customer experience with self-management options. In response, new software is being developed to evaluate, track, assess and share information. This software will enable caregivers, seniors and family members to be a well-informed team.

Reflecting back on 35 years as the owner of a home care agency, it is clear that we must prepare to embrace the challenges of a quickly changing landscape. We should expect continuous growth in the future in the number of seniors seeking home care options, growth that demands modern technology to keep up and to improve the quality of care and life for those receiving in-home care services.



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