

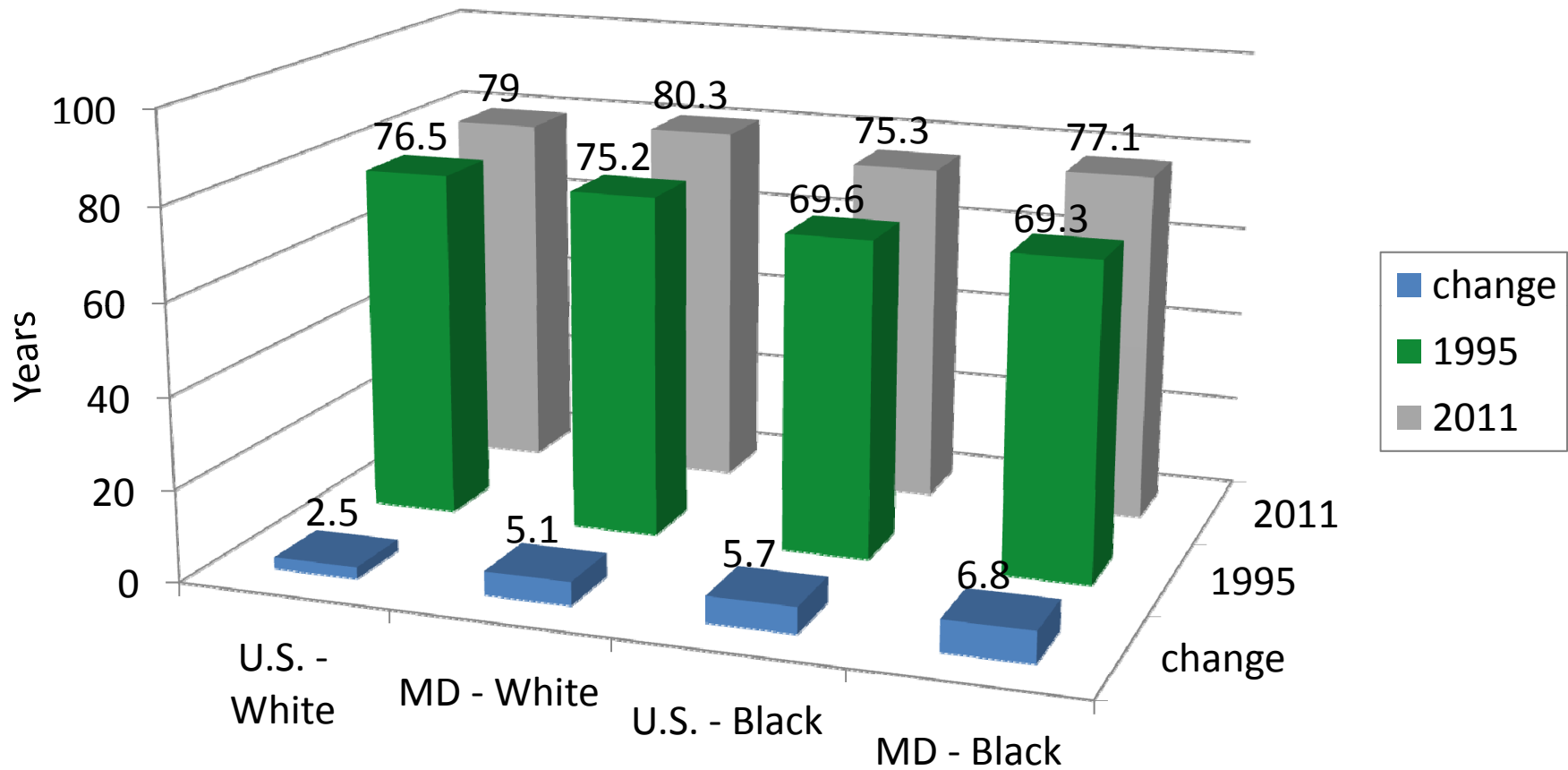
A Look Ahead: The Next Two Decades in Federal and State Health Policy

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The Hilltop Institute
20th Anniversary Event
Baltimore, MD
October 23, 2014

Plan of Presentation

- Where We've Been
 - Health Status
 - Health Services
 - Health Coverage and Spending
- Where We Are
 - The ACA
 - Coverage
 - Spending
- New and Old Business
 - The Great Cost Shift
 - Inequality
 - The LTSS Crisis
- Where We're Going

Some Data: Life Expectancy at Birth



Some More Data: Death Rates by Major Causes (per 100,000)

		1994	2011	% Change
All Causes	U.S.	913.5	741.3	- 18.9%
	Maryland	826.6	715.8	- 13.4%
Cardiac	U.S.	297.5	173.7	- 41.6%
	Maryland	235.1	171.2	- 27.2%
Cancer	U.S.	211.7	169.0	- 20.2%
	Maryland	201.5	166.1	- 17.6%
Stroke	U.S.	62.6	37.9	- 39.5%
	Maryland	52.0	37.8	- 27.3%
Accidents, Homicide, Suicide	U.S.	55.2	56.7	+ 2.8%
	Maryland	50.0	42.6	- 15%
Alzheimer's	U.S.	7.7	24.7	+ 221%
	Maryland	6.8	15.1	+ 122%

Still More Data: 10 Most Common Discharge DRGS

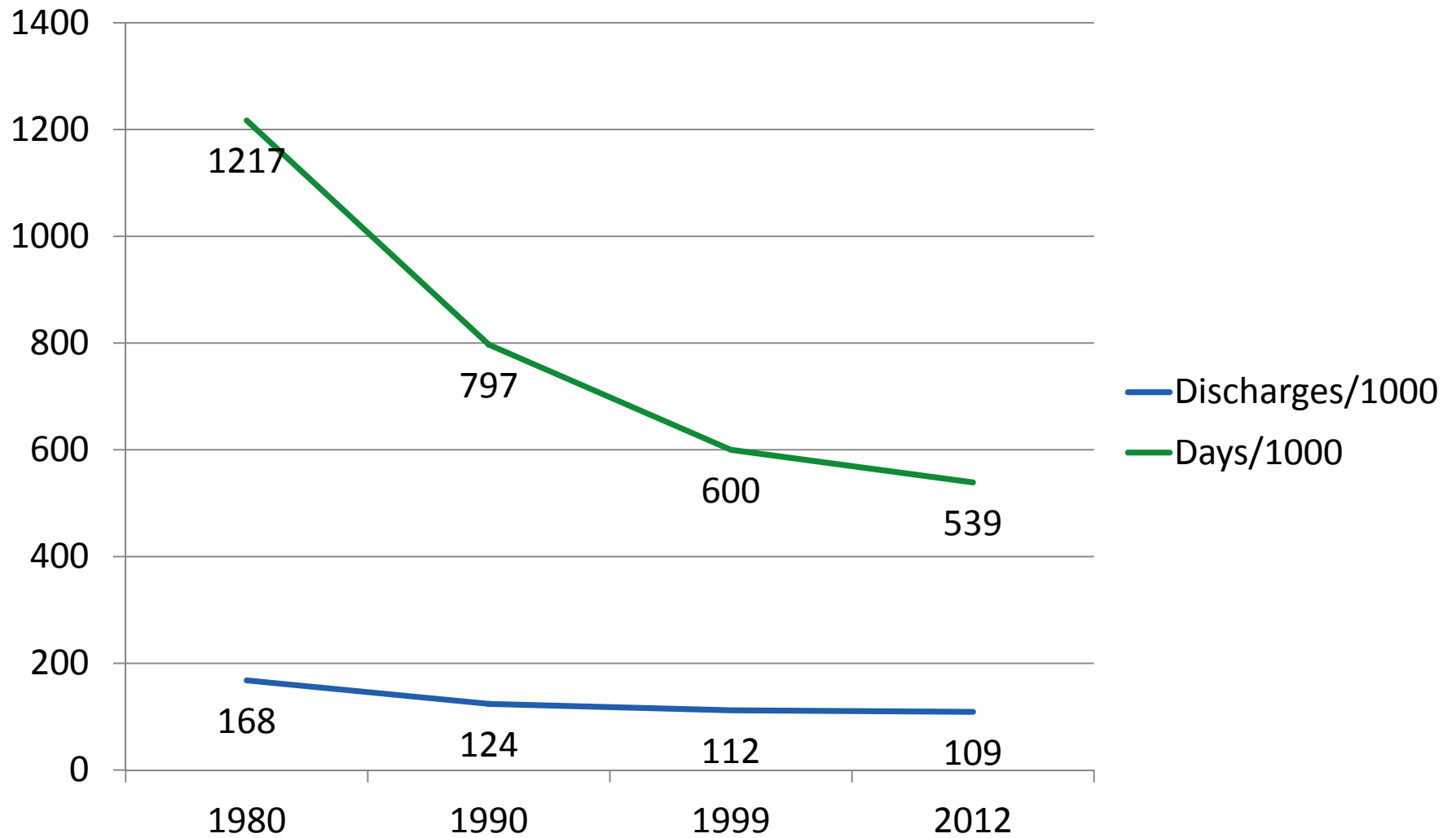
1997

- Normal newborn
- Vaginal Delivery w/o complications
- Heart failure & shock
- Psychoses
- Simple pneumonia
- Neonate w/ sig. problems
- COPD
- Stroke
- Major joint & limb
- Simple C-section

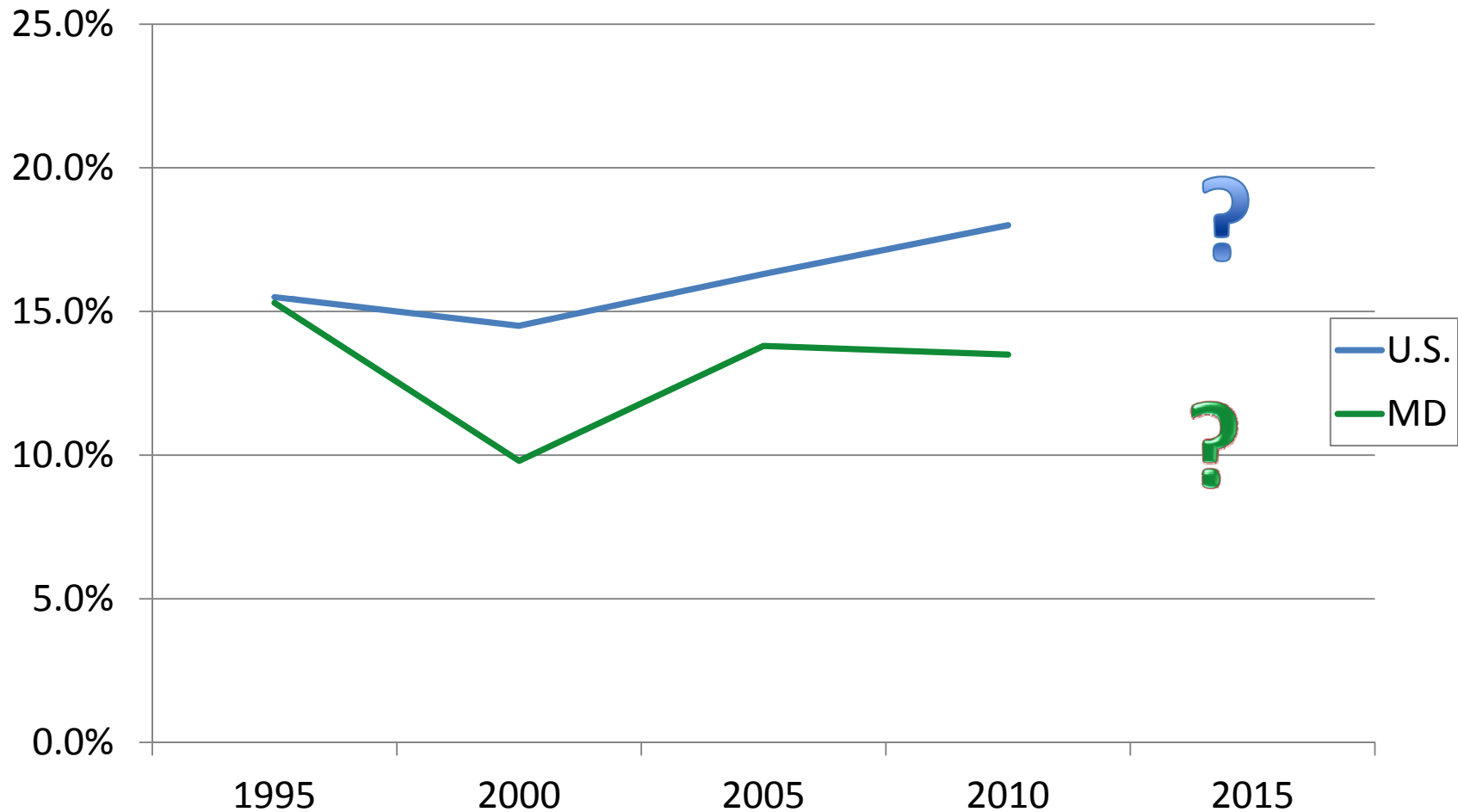
2012

- Normal newborn
- Vaginal delivery w/o complications
- Psychoses
- Major joint & limb
- Esophagitis, etc. w/o major cc
- Simple C-section
- Neonate w/ sig. problems
- Septicemia/severe sepsis
- Cellulitis
- C-section w/ complications

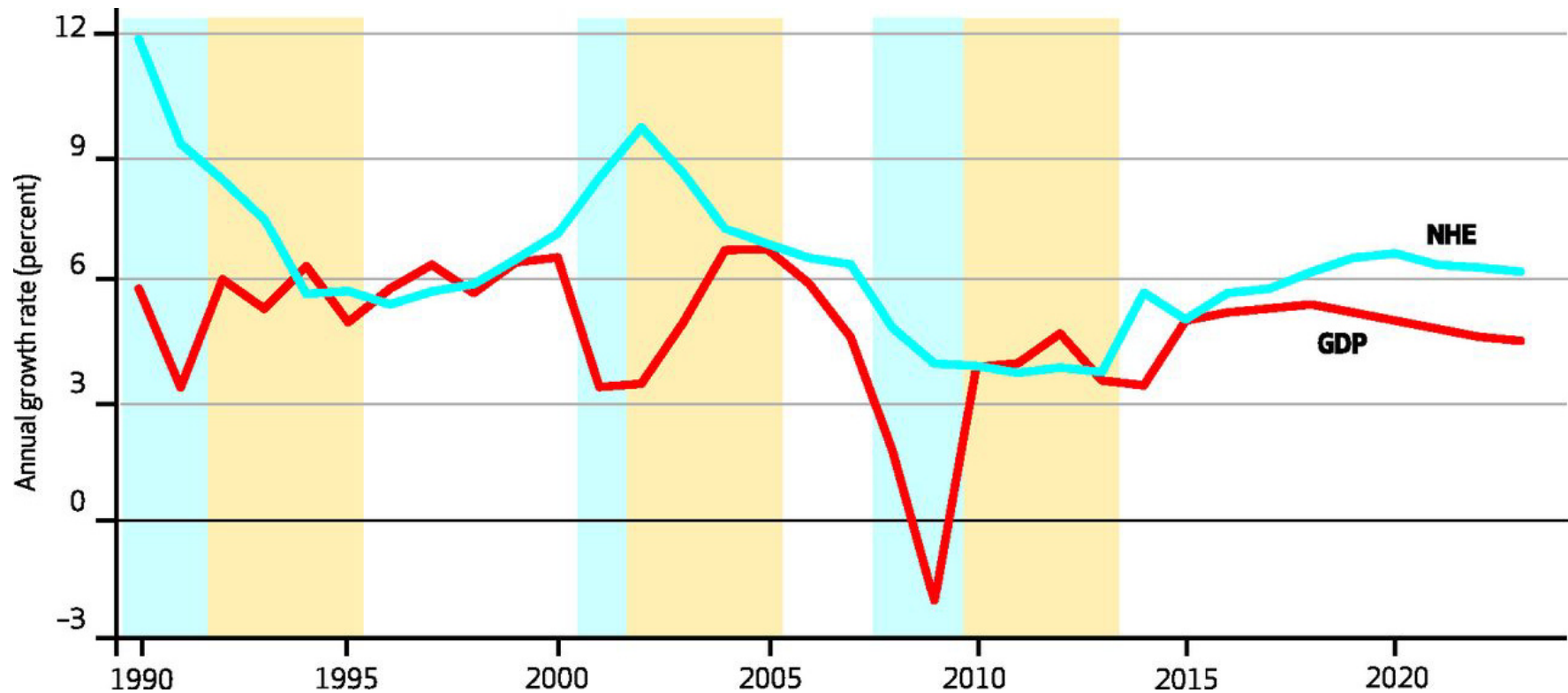
Still More Data: U.S. Hospital Utilization



Between Past and Future: Non-Elderly Americans without Health Insurance



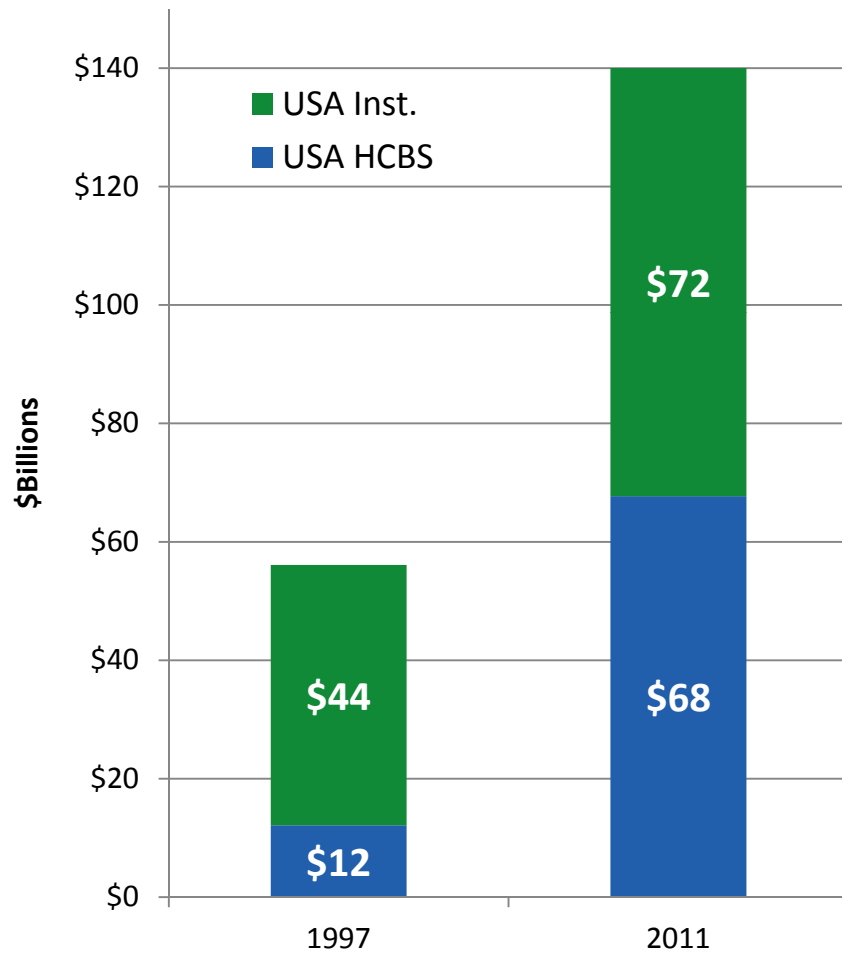
Annual Growth Rates, Gross Domestic Product (GDP) and National Health Expenditures (NHE), Calendar Years 1990–2023



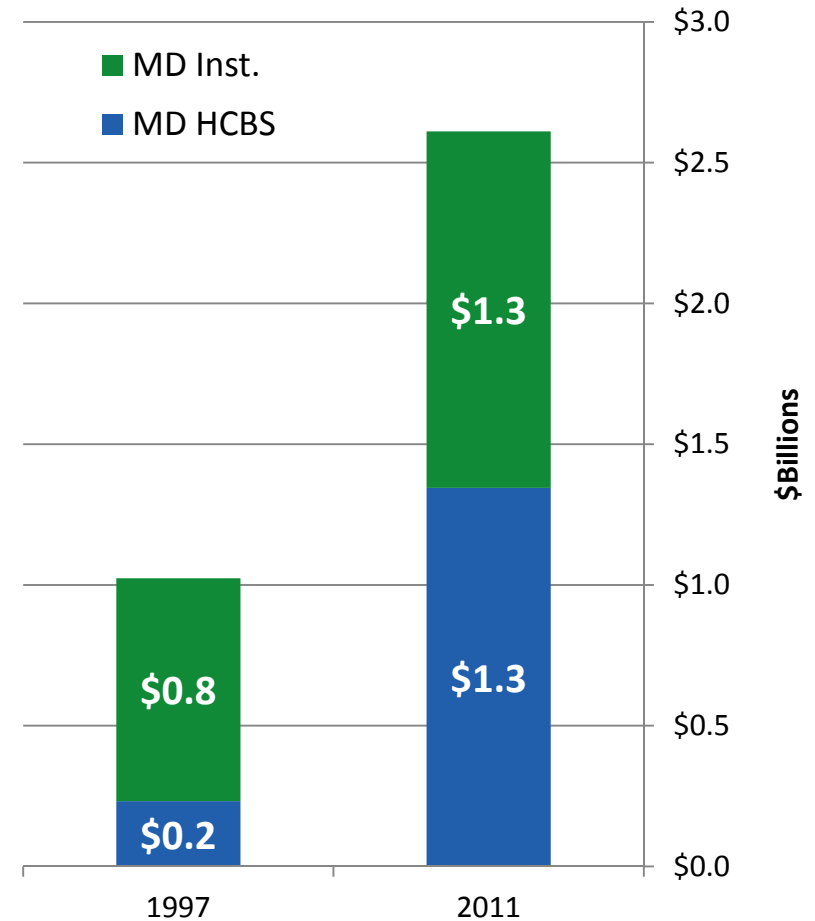
Source: Sisko, A. M. et al. (2014). National health expenditure projections, 2013–23: Faster growth expected with expanded coverage and improving economy. *HealthAffairs*, 33(10), 1841-1850.

Last Data Slide: The Transformation of Long-Term Care

United States



Maryland



**So, we've solved (sort of) coverage;
We've broken the back (maybe) of the
health care cost tiger;
And we've reformed long-term care
(kind of).**

What's left to worry about?

What I Worry About

- Enterovirus 68
- Will Matt Harvey recover fully from Tommy John surgery?
- Do I have enough money to retire?

What I Worry About

That's of Some Relevance to The Hilltop Institute

- The great cost-shift
 - Have we “solved” coverage by impoverishing 1/3 of the covered population?



What Else I Worry About

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- The new inequality
 - Disparities by SES and census tract, in addition to race



What Else I Worry About

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- Patient quality, safety, and self-determination in the new long-term care
 - Moving from a highly regulated sector to the Wild West



What Will the Future Bring?

