Current Landscape of Programs of All-Inclusive Care for the Elderly (PACE)

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The Menges Group

Strategic Health Policy & Care Coordination Consulting

Background on PACE

PACE is a capitated model for providing comprehensive acute care and long-term services and supports to people 55+ years old who need nursing home-level of care and live in the community.

PACE covers all Medicare Parts A, B, and D benefits, all Medicaid-covered benefits, as well as any other care and services that an individual's interdisciplinary PACE team decides they need to improve and maintain their health.

The program aims to help people meet their health care needs in the community instead of going to a nursing home or other care facility.

Snapshot of PACE Participants

- Average age of 76 years
- 94% live in the community
- 87% are dually enrolled in Medicare and full Medicaid
  - 13% are enrolled in full Medicaid but not in Medicare
  - <1% have Medicare without Medicaid
  - <1% have neither Medicare nor Medicaid
- Many have multiple, complex medical conditions; cognitive and/or functional impairments; and significant long-term care needs

Sources: National Pace Association, "Fact Sheet"
AARP, "How the PACE Model Integrates Medical Care with Long-Term Services and Supports"

Analyzing the Current Reach of PACE

- The National PACE Association releases an updated "PACE in the States" report each month. The report lists PACE programs by state with their current census and the date they started operations.
- According to the National PACE Association, as of March 2025, 184 organizations operate PACE programs encompassing 33 states and the District of Columbia. Collectively, these organizations have over 300 PACE centers serving 82,000 participants across the country.
- We analyzed this report to assess:
  - The number of individuals currently enrolled in PACE, by state;
  - The types of parent organizations operating PACE (e.g., health system, long-term care organization, FQHC, etc.);
  - The top 10 parent organizations operating PACE programs in terms of enrollment; and
  - The degree to which parent organizations operate one vs. many PACE programs and in one vs. multiple states.

PACE Market Landscape

The figures below convey PACE enrollment by state as of March 2025.

- Only 13 states have 1,000+ enrollees, and over half of enrollees are concentrated in three states – California, New York, and Pennsylvania.
- AARP's Scorecard shows that Colorado, Massachusetts, and Pennsylvania have the highest number of PACE enrollees per 10,000 adults aged 55 and over at 27.5, 24.3, and 18.3, respectively.
- 17 states do not yet have PACE.

These data indicate a regional disparity in program access.

1. CA: 24,885 (30%)	**10. OR**: 1,989 (2%)	**19. AR**: 585 (1%)	**28. NE**: 210 (0%)
2. NY: 9,928 (12%)	**11. WA**: 1,715 (2%)	**20. SC**: 538 (1%)	**29. ND**: 201 (0%)
3. PA: 8,183 (10%)	**12. NJ**: 1,384 (2%)	**21. WI**: 495 (1%)	**30. AL**: 186 (0%)
4. MA: 5,739 (7%)	**13. TX**: 1,142 (1%)	**22. RI**: 457 (1%)	**31. MD**: 149 (0%)
5. MI: 5,698 (7%)	**14. KS**: 990 (1%)	**23. LA**: 455 (1%)	**32. MO**: 103 (0%)
6. CO: 4,853 (6%)	**15. IN**: 831 (1%)	**24. NM**: 455 (1%)	**33. DC**: 59 (0%)
7. FL: 3,208 (4%)	**16. OK**: 803 (1%)	**25. KY**: 416 (1%)	**34. IL**: 50 (0%)
8. VA: 2,138 (3%)	**17. IA**: 741 (1%)	**26. DE**: 378 (1%)	
9. NC: 2,115 (3%)	**18. OH**: 666 (1%)	**27. TN**: 271 (0%)	**Total: 82,016**

PACE Market Landscape

This table outlines the **types of parent organizations** operating PACE programs. The vast majority (94.6%) of PACE programs are operated by standalone PACE organizations, larger health systems, long-term care organizations, and FQHCs.

Parent organization type	Description	#
PACE organization	Organization focused solely on PACE	64
Health system	System of hospitals, clinics, and/or providers delivering care	43
Long-term care organization	Organization offering various long-term care (e.g., hospice, residential services, home health care, adult day centers, etc.)	36
Federally Qualified Health Center	Community health center designated as FQHC	16
Nonprofit organization	Nonprofit organization focused on education and community services	3
Academic medical center	Health system integrated with a medical school	2
Area Agency on Aging	Nonprofit agency designated by the state to address needs and concerns of older adults	2
Health plan	Organization that provides health insurance	2
Partnership between 2+ organizations	Combined effort of 2+ organizations	16
Total		**184**

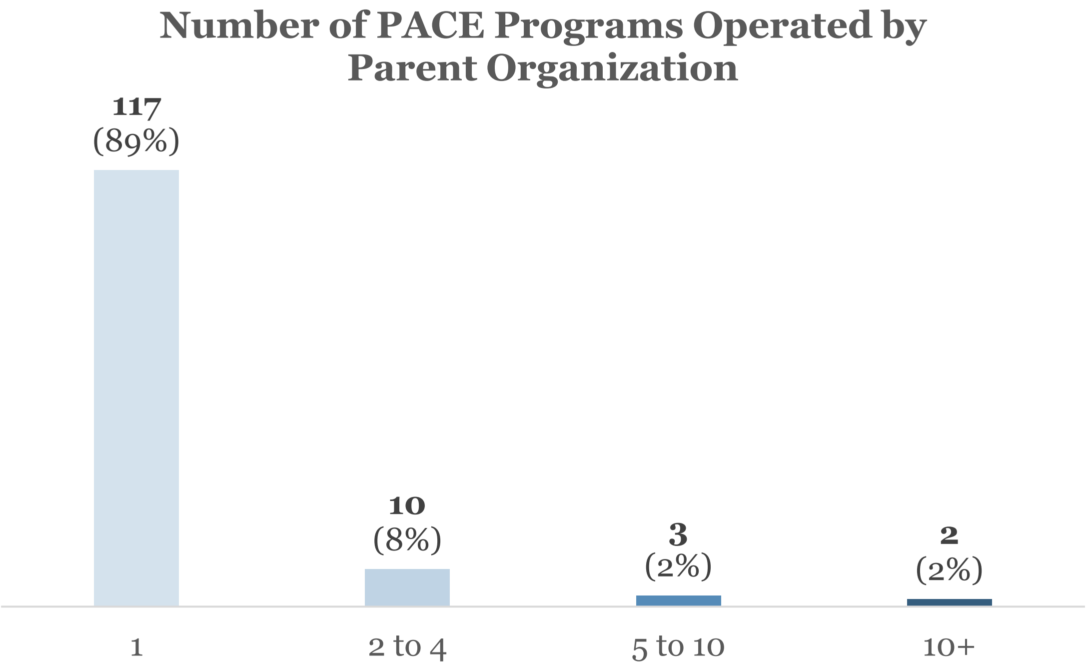
PACE Market Landscape (cont.)

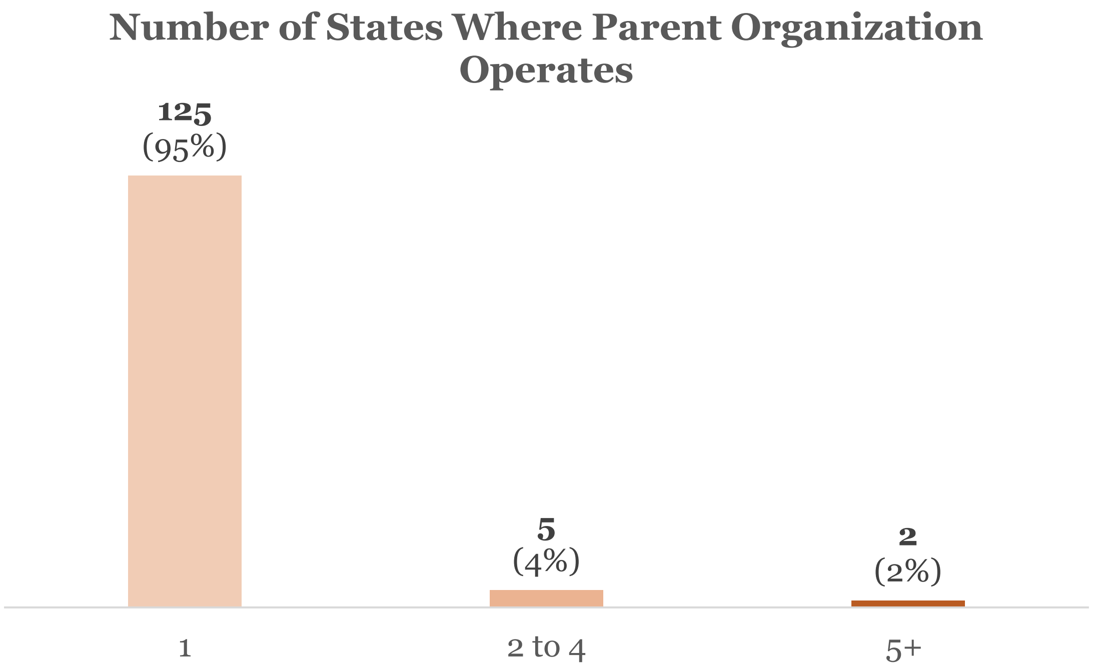
The following table conveys the **top 10 parent organizations** with regard to PACE enrollment. These organizations collectively account for nearly half (48.3%) of PACE enrollment nationwide.

Parent Organization	Parent Organization Type	State(s) of Operation	# of Sites	PACE Enrollment	% of Total Enrollment
InnovAge	PACE organization	CA, CO, FL, NM, PA, VA	11	7,371	9.0%
CenterLight Healthcare	Long-term care organization	NY	1	6,547	8.0%
AltaMed Health Services	FQHC	CA	1	4,970	6.1%
WelbeHealth	PACE organization	CA	6	4,243	5.2%
Providence Health	Health system	CA, OR, WA	3	3,466	4.2%
Trinity Health	Health system	AL, DE, FL, IN, LA, MA, MD, NC, NJ, NY, PA	13	3,155	3.8%
San Ysidro Health	FQHC	CA	1	3,014	3.7%
SeniorLIFE	PACE organization	PA	6	2,715	3.3%
Innovative Integrated Health	PACE organization	CA	1	2,024	2.5%
PACE Southeast Michigan	PACE organization	MI	1	2,022	2.5%

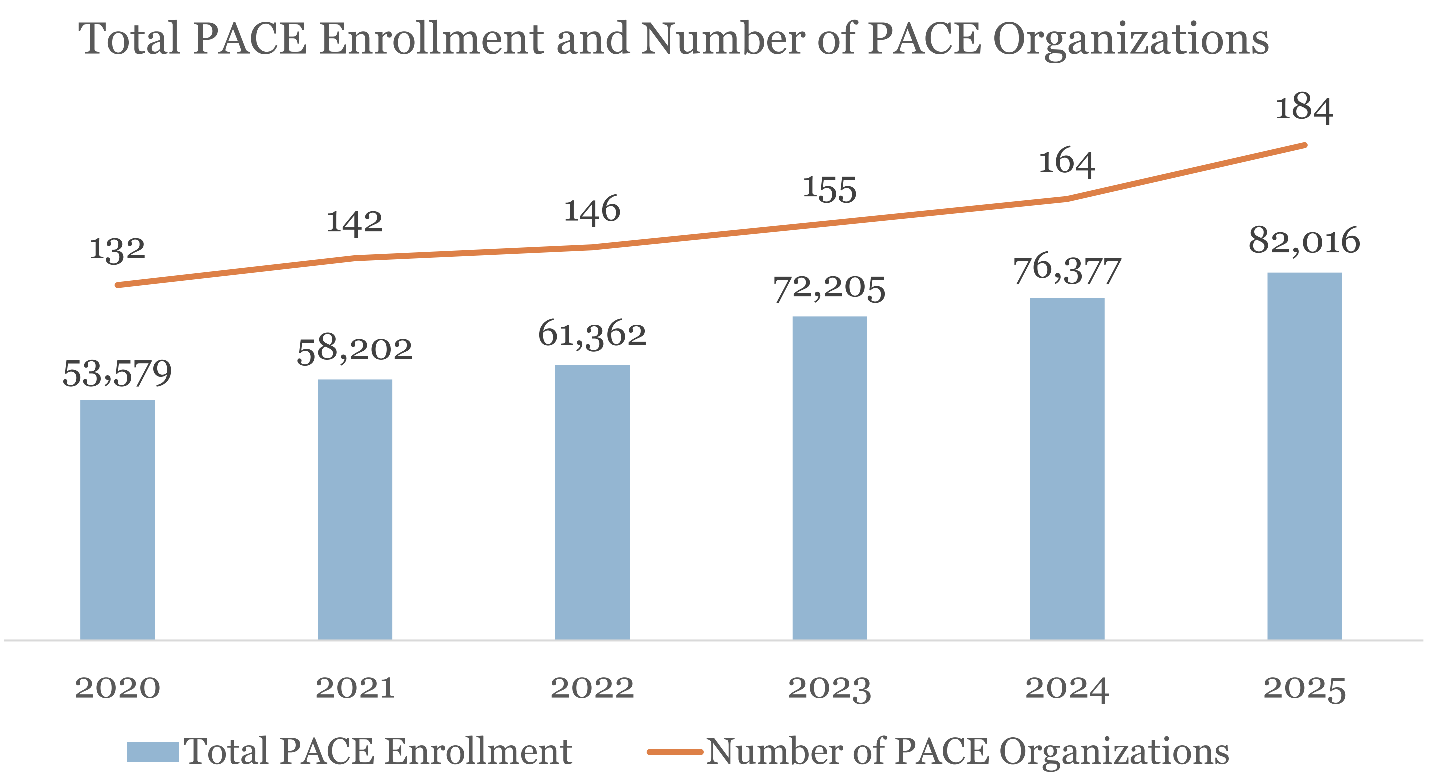
PACE Market Landscape (cont.)

The vast majority of parent organizations operate one PACE program within a single state. Of the 10 largest parent organizations (in terms of PACE enrollment), five operated one PACE program in one state; two had multiple programs in one state; and three had multiple programs in multiple states.





Growth of PACE (2020-2025)



- From 2020 to 2025, total PACE enrollment grew by 53.1%, rising from 53,579 to 82,016 individuals.
- During that same time period, the U.S. population aged 55 and older increased by only 6.3%, from 96.3 million to 102.3 million—highlighting that PACE enrollment grew at a significantly faster rate than the eligible population.

Sources: [U.S. Bureau of Labor Statistics, Population Level - 55 Yrs. & over, retrieved from FRED, Federal Reserve Bank of St. Louis]
[ATI Advisory, A Look at PACE Growth by the Numbers: States, Organizations, and Enrollment]

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Conclusion

- Today, over 300 PACE centers serve over 82,000 participants across the U.S., a significant rise from 2020, when approximately 130 centers supported 50,000 individuals.
- National enrollment is currently concentrated in California, New York, and Pennsylvania which collectively serve 52% of PACE enrollees but represent “only” 21% of the US population. Additionally, Colorado and Massachusetts have the highest number of PACE enrollees per 10,000 adults aged 55 and over at 27.5 and 24.3, respectively. Opportunities exist to extend PACE to additional geographic areas and to enhance enrollment in areas where PACE programs operate.
- The diverse types of parent organizations operating PACE programs—from standalone PACE centers to health systems, long-term care providers, and FQHCs—illustrate the adaptability of the PACE model across varied healthcare landscapes.
- Nearly half of all PACE enrollees are served by the 10 largest parent organizations, and most parent organizations operate a single PACE program within just one state. These statistics highlight a potential barrier to scalability and market expansion; additional multi-state participants appear to be needed for program growth to accelerate.

5 Slide Series Overview

Our 5 Slide Series is typically a monthly publication whereby we briefly discuss/address a selected topic outside the confines of our client engagements. The Menges Group has developed a variety of datasets that we use to support our 5 Slide Series and client projects.

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