

**Palomar Pomerado Health**  
**Strategic Planning Committee Meeting**  
 (Board Meeting with Respect to the Board Members on the Committee)

**January 26, 2004**  
**5:00 p.m. DINNER**  
**5:30 p.m. START**

⇒ **NOTE: LOCATION CHANGE**  
**POMERADO HOSPITAL**  
**CONFERENCE ROOM E**

!	Call To Order		
!	Public Comments	<u>Time</u>	<u>Page</u>
1.	* Approval of Minutes – December 18, 2003	2 Minutes	1
2.	* Strategic Planning Committee Proposed 2004 Meeting Schedule	10 Minutes	5
3.	Architectural Update on Building Plans	90 Minutes	7
4.	Committee Comments, Suggestions		

Distribution:

Alan W. Larson, M.D., Chairperson  
 Alan Conrad, M.D.  
 Michael Covert, CEO  
 Ted Kleiter  
 Bruce Krider  
 James Otoshi, M.D.  
 Marcelo Rivera, M.D.

Gerald Bracht  
 Lorie Harmon  
 Bob Hemker  
 Marcia Jackson  
 Anamaria Repetti  
 Lori Wells

**NOTE: Asterisks indicate anticipated action; action is not limited to those designated items.**

**Approval of Minutes**

**TO:** Strategic Planning Committee on January 26, 2004

**FROM:** Lorie Harmon, Secretary

**BACKGROUND:** The Secretary of the Strategic Planning Committee respectfully submits the minutes of the meeting held on December 18, 2003.

The minutes have been reviewed and approved by Marcia Jackson, Sr. Vice President, Planning, Marketing and Business Development.

**BUDGET IMPACT:** None

**STAFF RECOMMENDATION:** Approval of attached minutes.

**COMMITTEE RECOMMENDATION:**

**Individual Action:** X

**Palomar Pomerado Health**  
**JOINT MEETING OF THE BOARD OF DIRECTORS &**  
**STRATEGIC PLANNING COMMITTEE**  
**Pomerado Hospital – Conference Room E**  
**December 18, 2003**

AGENDA ITEM	DISCUSSION	CONCLUSION/ACTION	FOLLOW-UP/ RESPONSIBLE PARTY
CALL TO ORDER	5:37 p.m.		
ESTABLISHMENT OF QUORUM	Dr. Larson, Nancy Bassett, R.N., Dr. Buringrud, Michael Covert, Ted Kleiter, Bruce Krider, Dr. Kung, Dr. Rivera, and Director Scofield. Also attending were Gerald Bracht, Lorie Harmon, Bob Hemker, Marcia Jackson, Dr. Kolins, Mike Shanahan, Evelyn Warner, and Lori Wells. Guests: Craig Acosta (KSA), Tom Chessum, Craig McInroy, and Steve Yundt (Anshen & Allen), and Chris Chrisafulli, Dr. William Cory, and John Krave (KP) also attended.		
NOTICE OF MEETING	The notice of meeting was mailed consistent with legal requirements.		
PUBLIC COMMENTS	There were no requests for public comments.		
MINUTES October 16, 2003		MOTION: Motion made by Ted Kleiter, seconded by Dr. Kung, and carried, for approval as presented.	

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AGENDA ITEM	DISCUSSION	CONCLUSION/ACTION	FOLLOW-UP/ RESPONSIBLE PARTY
VISION STATEMENT REVIEW	<p>Mr. Covert solicited input from Board members, EMT, Leadership, and physician and employee groups, particularly targeting past Values in Action Award and Employees of the Month recipients, and brought their incorporated input back to this Committee for further discussion.</p> <p>Michael Covert distributed and discussed suggestions for the new PPH Vision Statement, and would like to finalize in January. It was suggested that we have a Special Board meeting in order to do so.</p>	<p><b>M. Covert to host Special Board Meeting.</b></p>	<p><b>M. Covert/C. Meaney</b></p>
ARCHITECTURAL PRESENTATION	<p>At the October Strategic Planning Committee meeting, an update on community bed need estimates and alternative building solutions was presented and discussed with the Committee. After feedback from the Committee, the architects further studied alternative and provided updates at the November and December Strategic Planning Committee meetings. The December Strategic Planning Committee meeting was expanded to a full Board meeting. Based on this information, the Committee invited the full PPH Board to the January 26 Committee meeting to further review architectural options.</p> <p>Our architectural firm, Anshen &amp; Allen, as well as representatives from Kurt Salmon Associates, presented a detailed Summary of Project Sites and Program Distribution, going over our options for new and/or existing facilities, and also reviewing land options should a new facility be one of the preferred options. Ideally, any potential site for a new PPH facility would include a landsite of 40 acres, in order to address future growth potential, including an opportunity to develop</p>		

AGENDA ITEM	DISCUSSION	CONCLUSION/ACTION	FOLLOW-UP/ RESPONSIBLE PARTY
	<p>500 beds or more. The immediate concerns include access and proximity to the population that our district serves. A more detailed study regarding land options, including growth and population demographics, will be presented at the January 26 Committee meeting.</p> <p>Many alternative solutions were presented and discussed, including expanding our existing facilities, focusing on programs and users. Sample schemes were presented, including an evaluation of operational implications. Costs associated with each option were included, and comparative analyses were performed. More detailed information regarding these options will also be presented at the January 26 Committee meeting.</p>	<p>Anshen &amp; Allen and Mike Shanahan to present at Jan. 26 Committee meeting.</p>	<p>Anshen &amp; Allen, M. Shanahan</p>
<p><b>FINAL ADJOURNMENT</b></p>	<p>8:55 p.m.</p>		
<p><b>SIGNATURES</b></p> <p>Board Secretary</p> <p>Recording Secretary</p>	<p>_____</p> <p>Nancy H. Scofield</p> <p>_____</p> <p>Lorie Harmon</p>		

**Strategic Planning Committee  
Proposed 2004 Meeting Schedule**

**TO:** Strategic Planning Committee

**MEETING DATE:** January 26, 2004

**FROM:** Marcia Jackson, Sr. VP, Planning, Marketing & Bus. Development

**BACKGROUND:** The Strategic Planning Committee Proposed 2004 Meeting Schedule to be presented, based on voting member preference. Proposed meetings to take place on the **third Tuesday of each month, with a meeting start time of 5:30 p.m.**; see attached schedule. Please note that locations may vary between facilities.

**COMMITTEE RECOMMENDATION:**

**Information:** X

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# Strategic Planning Committee

## Meeting Schedule ~ 2004

Date	Location
January 26, 2004.....	Pomerado Hospital, Meeting Room E
February 17, 2004.....	TBD
March 16, 2004.....	TBD
April 20, 2004.....	TBD
May 18, 2004.....	TBD
June 15, 2004.....	TBD
July 20, 2004.....	TBD
August 17, 2004.....	TBD
September 21, 2004.....	TBD
October 19, 2004.....	TBD
November 16, 2004.....	TBD
December 21, 2004.....	TBD

Meeting begins at 5:30 p.m., and dinner will be provided. Please allow enough time prior to the 5:30 p.m. start time to get your food and be seated.

## Architectural Update on Building Plans

**TO:** Strategic Planning Committee

**MEETING DATE:** January 26, 2004

**FROM:** Marcia Jackson, Sr. VP, Planning, Marketing & Bus. Development

**BACKGROUND:** At the October 2003 Strategic Planning Committee meeting, an update on community bed need estimates and alternative building solutions was presented and discussed with the Committee. After feedback from the Committee, the architects further studied alternatives and provided updates at the November and December Strategic Planning Committee meetings. The December Strategic Planning Committee meeting was expanded to a full Board meeting. Based on this information, the Committee invited the full PPH Board to the January 26 Committee meeting to further review architectural options.

**BUDGET IMPACT:** None

**STAFF RECOMMENDATION:** For discussion only

### COMMITTEE RECOMMENDATION:

**Information:** X



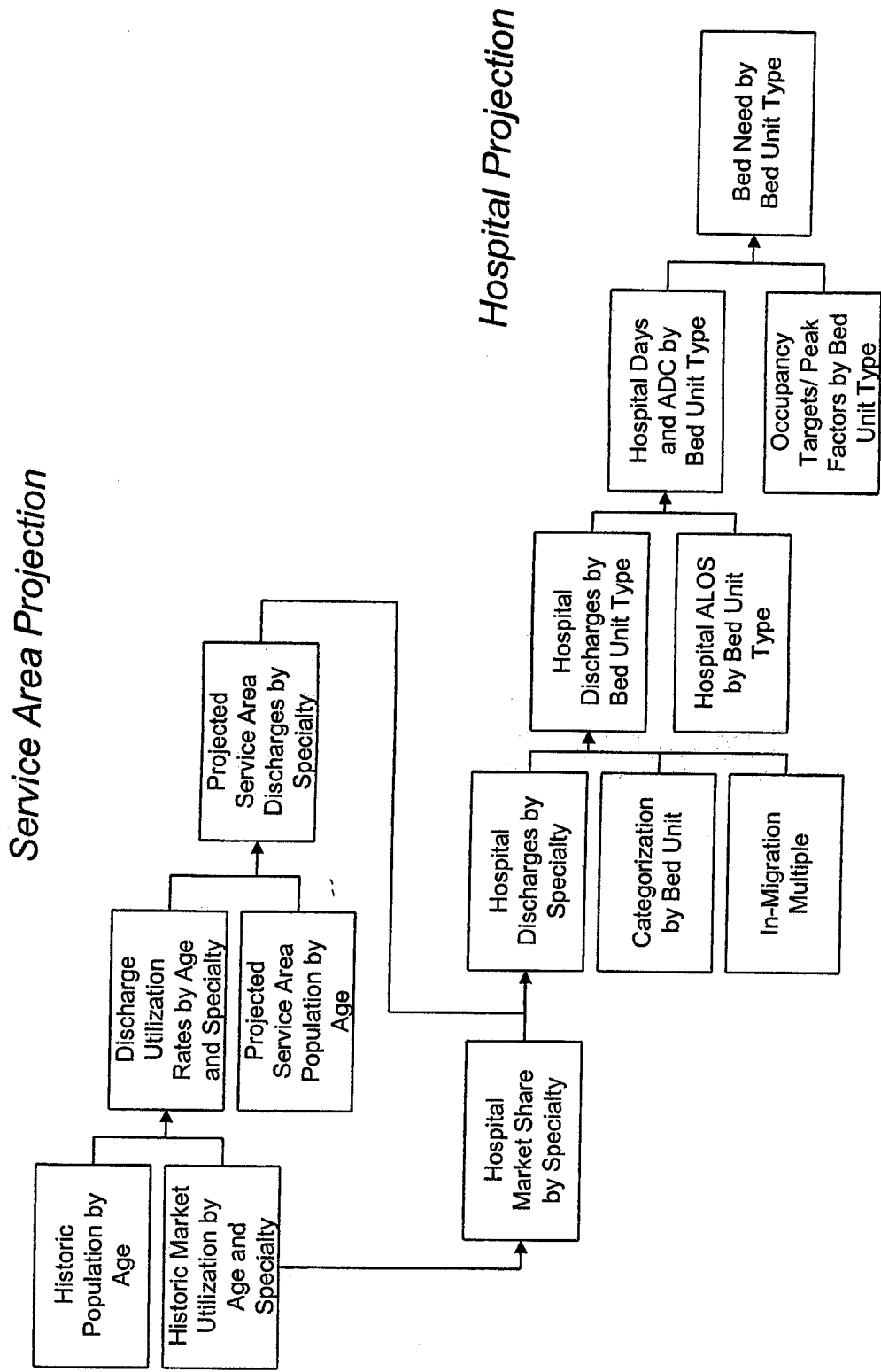
A tremendous amount of information must be taken into account in formulating our building strategy and projecting the health care needs of our communities. Dr. Larson and Director Krider have requested that this information be shared with all Board members so that you have the reference materials as you consider our options. The following materials are attached for your reference:

- Diagram of Market Forecasting Approach—this depicts the information that we use in developing our forecast for inpatient and outpatient hospital services
- Population by City and zip code—the tables show the current and projected population out to 2020; the maps show the distribution of population in 2002 and the projected growth by city
- Population by age/sex cohorts
- Patient origin by hospital—when sizing the facilities we need to plan not only for the health needs within our communities, but we also factor in that approximately 20-25% of our patients come from outside our service area
- Market share for the northern and southern portions of our district by hospital
- PMC and POM market share by zip code
- Market share by hospital by city
- PPH market share by zip code 2000-2002
- Market share by payer
- Market use rate—discharges per 1,000 population by service line
- Market use rate—patient days per 1,000 population by service line
- PMC and POM market share 2000-2002 by service line
- PPH total market share 2000-2002 by service line
- PPH product line growth scenario—this depicts specific market share growth targets by certain selected service lines
- Occupancy targets—in order to determine how many beds are needed to meet the projected average daily census, we utilized these target occupancy percentages to convert average daily census into the number of beds necessary to serve that ADC
- Projected Pomerado and Palomar (including new site) bed need by bed type

Additionally, I recognize that many Board members would have preferred that the architects provide handouts of each of their presentations. I have attached copies of several of the most pertinent slides from their many presentations. These should provide you with some reference materials that you need. If anyone would like to have copies of everything, we can make that available. Attached are the following:

- Summary of program and planning options
- Sample scheme of 434 beds at Palomar Medical Center
- Sample scheme on an expanded site at Palomar Medical Center
- Sample scheme for 120-160 beds at Pomerado Hospital
- Sample scheme for a new site
- Comparative schemes summary (2 pages)

# Inpatient Forecasting Approach



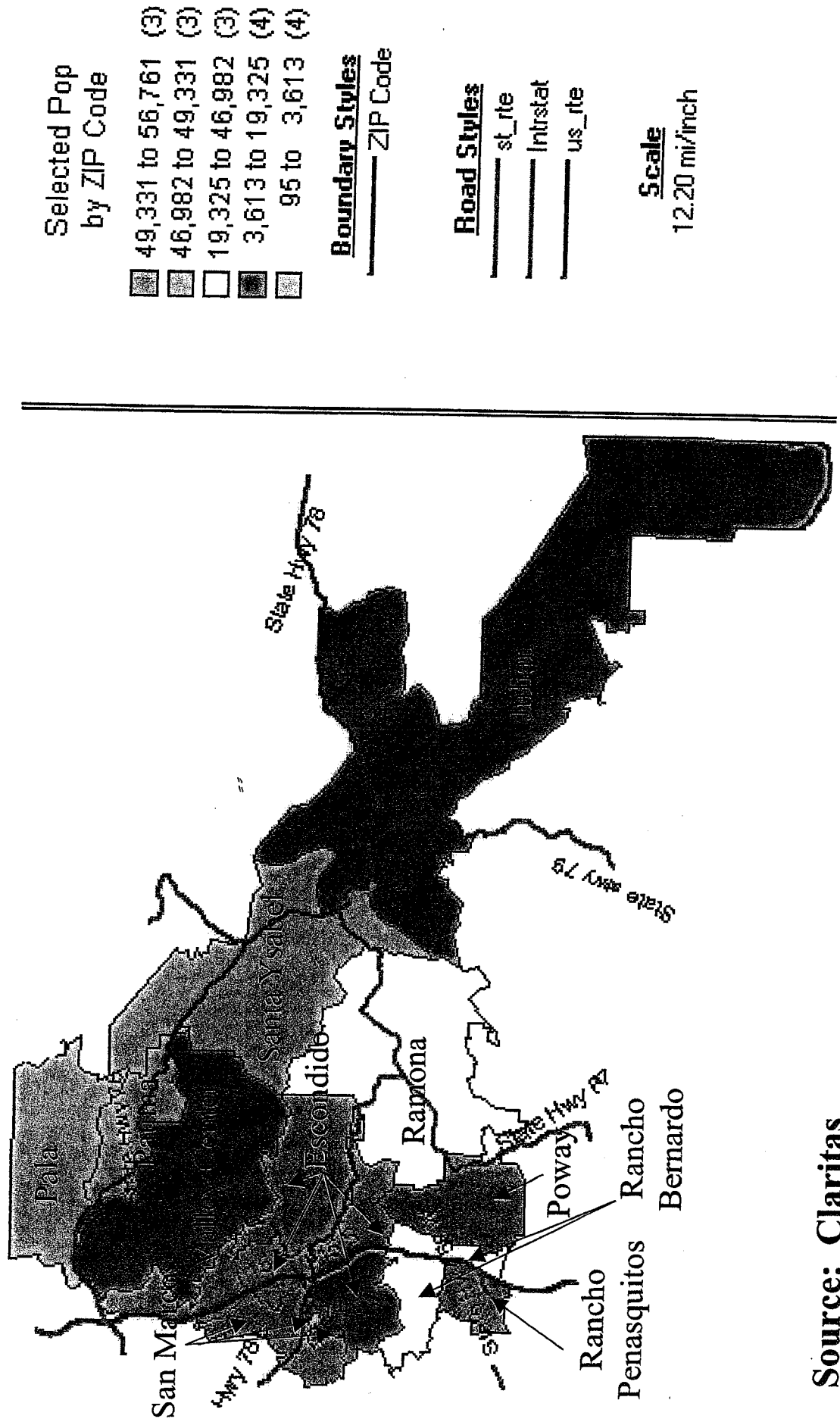
2002-2020 Population by Zip Code								
			2002 Total	2007 Total	2002-2007	2020	2002-2020	
	ZIP Code	ZIP City Name	Population	Population	% Change	Population	% Change	
North	92025	Escondido	46,982	50,753	8.0%	62,034	32.0%	
	92026	Escondido	48,845	53,082	8.7%	65,898	34.9%	
	92027	Escondido	47,768	50,295	5.3%	57,510	20.4%	
	92029	Escondido	18,536	20,089	8.4%	24,763	33.6%	
	92059	Pala	1,508	1,721	14.1%	2,427	61.0%	
	92061	Pauma Valley	2,183	2,425	11.1%	3,187	46.0%	
	92069	San Marcos	56,761	60,926	7.3%	73,242	29.0%	
	92078	San Marcos	5,743	6,552	14.1%	9,228	60.7%	
	92096	San Marcos	95	103	8.4%	126	33.1%	
	92070	Santa Ysabel	1,312	1,411	7.5%	1,706	30.0%	
	92082	Valley Center	17,434	18,213	4.5%	20,405	17.0%	
		<b>Subtotal</b>		<b>247,167</b>	<b>265,570</b>	<b>7.4%</b>	<b>320,528</b>	<b>29.7%</b>
	South	92036	Julian	3,613	3,852	6.6%	4,551	26.0%
92064		Poway	49,331	52,100	5.6%	60,051	21.7%	
92065		Ramona	34,265	37,067	8.2%	45,471	32.7%	
92127		Rancho Bernardo	19,325	20,892	8.1%	25,589	32.4%	
92128		Rancho Bernardo	46,256	50,844	9.9%	65,017	40.6%	
92129		Rancho Penasquitos	52,781	57,451	8.8%	71,618	35.7%	
	<b>Subtotal</b>		<b>205,571</b>	<b>222,206</b>	<b>8.1%</b>	<b>272,296</b>	<b>32.5%</b>	
<b>Total</b>			<b>452,738</b>	<b>487,776</b>	<b>7.7%</b>	<b>592,824</b>	<b>30.9%</b>	

2002-2020 Population by City					
	2002 Total	2007 Total	2002-2007	2020	2002-2020
City Name	Population	Population	% Change	Population	% Change
Escondido	162,131	174,219	7.5%	210,206	29.7%
Julian	3,613	3,852	6.6%	4,551	26.0%
Pala	1,508	1,721	14.1%	2,427	61.0%
Pauma Valley	2,183	2,425	11.1%	3,187	46.0%
Poway	49,331	52,100	5.6%	60,051	21.7%
Ramona	34,265	37,067	8.2%	45,471	32.7%
Rancho Bernardo	65,581	71,736	9.4%	90,606	38.2%
Rancho Penasquitos	52,781	57,451	8.8%	71,618	35.7%
San Marcos	62,599	67,581	8.0%	82,597	31.9%
Santa Ysabel	1,312	1,411	7.5%	1,706	30.0%
Valley Center	17,434	18,213	4.5%	20,405	17.0%
<b>Total</b>	<b>452,738</b>	<b>487,776</b>	<b>7.7%</b>	<b>592,824</b>	<b>30.9%</b>

Source: Claritas

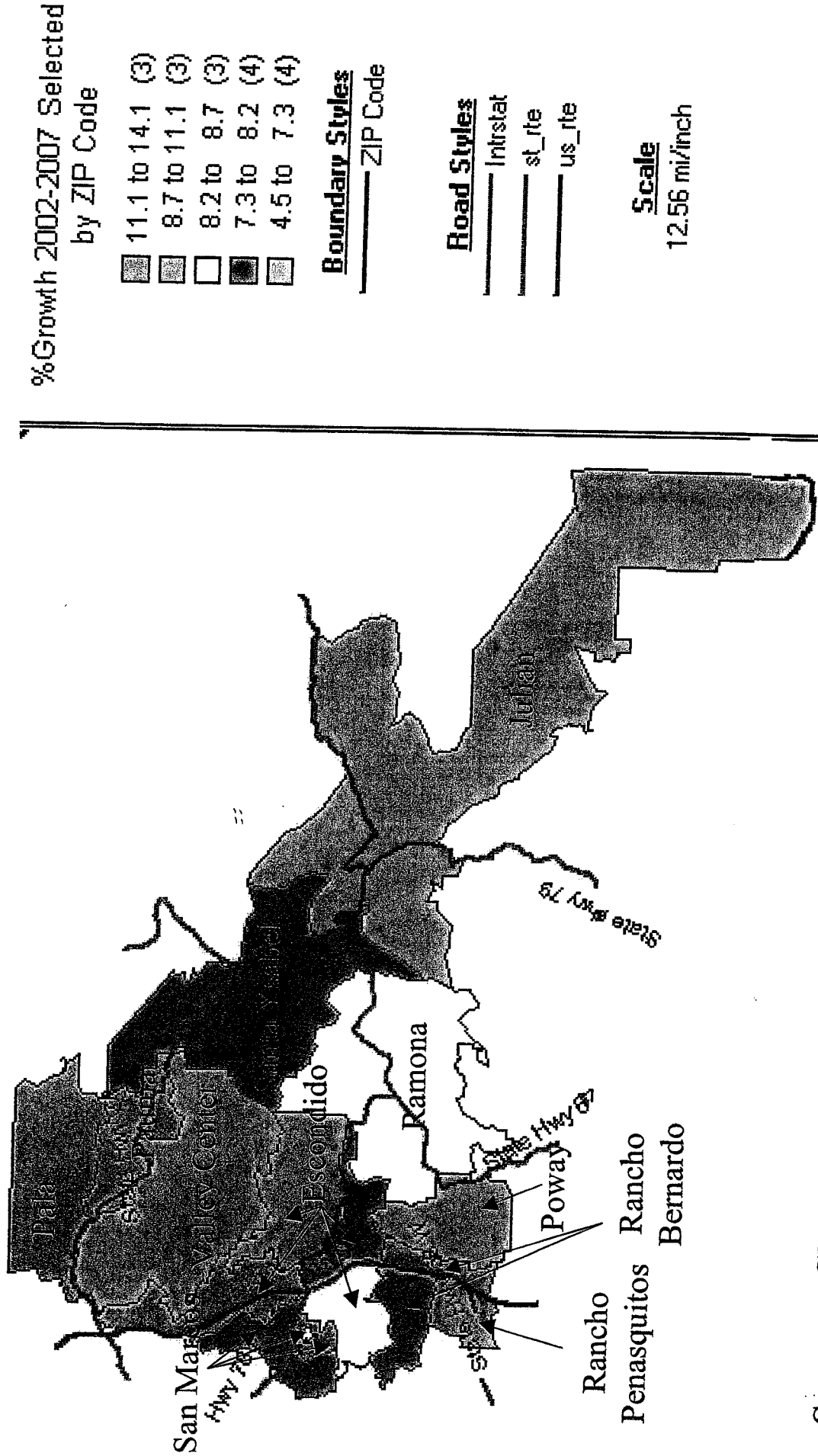
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# 2002 Population – PPH Service Area



Source: Claritas

# 2002-2007 Population Growth – PPH Service Area



Source: Claritas

2002 Demographics by Age and Sex		USA		California		San Diego County		North PPH Service Area		South PPH Service Area		Total PPH Service Area	
			% of Total		% of Total		% of Total		% of Total		% of Total		% of Total
Age < 15	Male	31,037,928	10.8%	4,066,543	11.6%	319,092	11.1%	30,311	12.3%	24,491	11.9%	54,802	12.1%
	Female	29,608,505	10.3%	3,875,748	11.0%	303,111	10.5%	28,973	11.7%	23,226	11.3%	52,199	11.5%
	Subtotal	60,646,433	21.0%	7,942,291	22.6%	622,203	21.6%	59,284	24.0%	47,717	23.2%	107,001	23.6%
Age 15-17	Male	6,280,666	2.2%	773,527	2.2%	60,208	2.1%	5,557	2.2%	5,372	2.6%	10,929	2.4%
	Female	5,967,384	2.1%	736,573	2.1%	56,525	2.0%	5,026	2.0%	4,982	2.4%	10,008	2.2%
	Subtotal	12,248,050	4.2%	1,510,100	4.3%	116,733	4.1%	10,583	4.3%	10,354	5.0%	20,937	4.6%
Age 18-24	Male	14,540,602	5.0%	1,856,356	5.3%	176,729	6.1%	12,381	5.0%	7,376	3.6%	19,757	4.4%
	Female	13,801,130	4.8%	1,695,136	4.8%	149,324	5.2%	11,136	4.5%	6,814	3.3%	17,950	4.0%
	Subtotal	28,341,732	9.8%	3,551,492	10.1%	326,053	11.3%	23,517	9.5%	14,190	6.9%	37,707	8.3%
Age 25-44	Male	42,569,281	14.8%	5,578,104	15.9%	459,205	15.9%	36,657	14.8%	28,985	14.1%	65,642	14.5%
	Female	42,275,628	14.7%	5,322,274	15.2%	433,999	15.1%	35,068	14.2%	31,503	15.3%	66,571	14.7%
	Subtotal	84,844,909	29.4%	10,900,378	31.0%	893,204	31.0%	71,725	29.0%	60,488	29.4%	132,213	29.2%
Age 45-64	Male	32,460,632	11.3%	3,664,906	10.4%	292,148	10.7%	24,666	10.0%	24,706	12.0%	49,372	10.9%
	Female	34,225,031	11.9%	3,830,030	10.9%	309,398	10.7%	25,943	10.5%	25,471	12.4%	51,414	11.4%
	Subtotal	66,685,663	23.1%	7,494,936	21.3%	601,546	20.9%	50,609	20.5%	50,177	24.4%	100,786	22.3%
Age 65-74	Male	8,301,005	2.9%	867,315	2.5%	72,292	2.5%	6,479	2.6%	4,788	2.3%	11,267	2.5%
	Female	9,973,210	3.5%	1,032,827	2.9%	87,788	3.0%	7,810	3.2%	5,818	2.8%	13,628	3.0%
	Subtotal	18,274,215	6.3%	1,900,142	5.4%	160,080	5.6%	14,289	5.8%	10,606	5.2%	24,895	5.5%
Age 75+	Male	6,470,864	2.2%	709,701	2.0%	62,733	2.2%	6,676	2.7%	4,787	2.3%	11,463	2.5%
	Female	10,856,832	3.8%	1,106,993	3.2%	97,210	3.4%	10,484	4.2%	7,252	3.5%	17,736	3.9%
	Subtotal	17,327,696	6.0%	1,816,694	5.2%	159,943	5.6%	17,160	6.9%	12,039	5.9%	29,199	6.4%
Total		288,368,698	100.0%	35,116,033	100.0%	2,879,762	100.0%	247,167	100.0%	205,571	100.0%	452,738	100.0%

Source: 2002 US Census Bureau for USA and California figures. Claritas for all others.

<b>PATIENT ORIGIN BY ZIP CODE - FY2003</b>			
<b>PALOMAR MEDICAL CENTER</b>			
<b>City</b>	<b>Zip</b>	<b>Total</b>	<b>% Down</b>
Escondido	92026	3,830	16.8%
Escondido	92025	3,353	14.7%
Escondido	92027	3,095	13.6%
San Marcos	92069	2,598	11.4%
Rancho Bernardo	92128	970	4.2%
Escondido	92029	858	3.8%
Valley Center	92082	821	3.6%
Poway	92064	665	2.9%
Ramona	92065	551	2.4%
Rancho Penasquitos	92129	411	1.8%
Pauma	92061	305	1.3%
Rancho Bernardo	92127	222	1.0%
San Marcos	92078	160	0.7%
Julian	92036	140	0.6%
Escondido	92033	85	0.4%
Pala	92059	80	0.4%
Palomar Mountain	92060	66	0.3%
Santa Ysabel	92070	23	0.1%
San Marcos	92079	22	0.1%
<b>Subtotal</b>		<b>18,255</b>	<b>79.9%</b>
Fallbrook	92028	502	2.2%
Vista	92083	485	2.1%
Oceanside	92056	376	1.6%
Vista	92084	368	1.6%
Oceanside	92057	269	1.2%
<b>Subtotal</b>		<b>2,000</b>	<b>8.8%</b>
<b>Other</b>		<b>2,580</b>	<b>11.3%</b>
<b>Total</b>		<b>22,835</b>	<b>100.0%</b>

Source: PPH Clinical Information Systems  
Note: Normal Newborns are included

<b>PATIENT ORIGIN BY ZIP CODE - FY2003</b>			
<b>POMERADO HOSPITAL</b>			
<b>City</b>	<b>Zip</b>	<b>Total</b>	<b>% Down</b>
Rancho Bernardo	92128	1,450	18.1%
Poway	92064	1,281	16.0%
Ramona	92065	955	11.9%
Rancho Penasquitos	92129	663	8.3%
Rancho Bernardo	92127	427	5.3%
Escondido	92029	250	3.1%
Escondido	92027	219	2.7%
Escondido	92026	199	2.5%
Escondido	92025	195	2.4%
San Marcos	92069	156	2.0%
Santa Ysabel	92070	78	1.0%
Poway (PO Box)	92074	71	0.9%
Julian	92036	32	0.4%
Escondido	92033	10	0.1%
San Marcos	92078	9	0.1%
Valley Center	92082	8	0.1%
Pala	92059	1	0.0%
Pauma	92061	1	0.0%
<b>Subtotal</b>		<b>6,005</b>	<b>75.1%</b>
Mira Mesa	92126	252	3.2%
Scripps Ranch	92131	233	2.9%
Fallbrook	92028	61	0.8%
SD (Normal Heights)	92116	59	0.7%
SD (PO Box)	92150	54	0.7%
<b>Subtotal</b>		<b>659</b>	<b>8.2%</b>
<b>Other</b>		<b>1,335</b>	<b>16.7%</b>
<b>Total</b>		<b>7,999</b>	<b>100.0%</b>

Source: PPH Clinical Information Systems  
Note: Normal Newborns are included



**2002 Market Share by Hospital**

<b>North - Market Share by Hospital - 2002</b>		
<b>Facility</b>	<b>Patients</b>	<b>Market Share</b>
<b>Palomar Medical Center</b>	<b>15,814</b>	<b>58.2%</b>
Scripps Hospital	3,019	11.1%
Tri-City Medical Center	1,892	7.0%
<b>Pomerado Hospital</b>	<b>1,432</b>	<b>5.3%</b>
Sharp Hospital	1,260	4.6%
Kaiser Hospital	1,154	4.2%
Children's Hospital	1,033	3.8%
UCSD	650	2.4%
Other	939	3.5%
<b>Total</b>	<b>27,193</b>	<b>100.0%</b>

<b>South - Market Share by Hospital - 2002</b>		
<b>Facility</b>	<b>Patients</b>	<b>Market Share</b>
<b>Pomerado Hospital</b>	<b>5,186</b>	<b>30.6%</b>
Scripps Hospital	3,203	18.9%
Sharp Hospital	2,626	15.5%
<b>Palomar Medical Center</b>	<b>1,976</b>	<b>11.7%</b>
Kaiser Hospital	1,367	8.1%
UCSD	862	5.1%
Children's Hospital	838	5.0%
Other	869	5.1%
<b>Total</b>	<b>16,927</b>	<b>100.0%</b>

<b>PPH - Market Share by Hospital - 2002</b>		
<b>Facility</b>	<b>Patients</b>	<b>Market Share</b>
<b>Palomar Medical Center</b>	<b>17,790</b>	<b>40%</b>
<b>Pomerado Hospital</b>	<b>6,618</b>	<b>15%</b>
Scripps Hospital	6,222	14%
Sharp Hospital	3,886	9%
Kaiser Hospital	2,521	6%
Tri-City Medical Center	1,892	4%
Children's Hospital	1,871	4%
Other	1,808	4%
UCSD	1,512	3%
<b>Total</b>	<b>44,120</b>	<b>100%</b>

Source: OSHPD

Note: Normal Newborns are included

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Palomar Medical Center 2002 - Market Share by Zip Code					
Total PPH Service Area Zip Codes	City	Total Market Patients	% Down	PMC Patients	Market Share
92061	Pauma Valley	368	0.8%	283	76.9%
92025	Escondido	5,871	13.3%	4,177	71.1%
92027	Escondido	5,095	11.5%	3,444	67.6%
92026	Escondido	4,930	11.2%	3,181	64.5%
92082	Valley Center	1,541	3.5%	971	63.0%
92029	Escondido	1,784	4.0%	835	46.8%
92070	Santa Ysabel	135	0.3%	62	45.9%
92059	Pala	190	0.4%	84	44.2%
92069	San Marcos	6,728	15.2%	2,620	38.9%
92078	San Marcos	551	1.2%	157	28.5%
92036	Julian	285	0.6%	63	22.1%
92065	Ramona	3,167	7.2%	685	21.6%
92128	Rancho Bernardo	4,889	11.1%	499	10.2%
92127	Rancho Bernardo	1,525	3.5%	153	10.0%
92064	Poway	3,876	8.8%	382	9.9%
92129	Rancho Penasquitos	3,185	7.2%	194	6.1%
<b>Total</b>		<b>44,120</b>	<b>100.0%</b>	<b>17,790</b>	<b>40.3%</b>

North Area Zip Codes	City	Total Market Patients	% Down	PMC Patients	Market Share
92061	Pauma Valley	368	1.4%	283	76.9%
92025	Escondido	5,871	21.6%	4,177	71.1%
92027	Escondido	5,095	18.7%	3,444	67.6%
92026	Escondido	4,930	18.1%	3,181	64.5%
92082	Valley Center	1,541	5.7%	971	63.0%
92029	Escondido	1,784	6.6%	835	46.8%
92070	Santa Ysabel	135	0.5%	62	45.9%
92059	Pala	190	0.7%	84	44.2%
92069	San Marcos	6,728	24.7%	2,620	38.9%
92078	San Marcos	551	2.0%	157	28.5%
<b>Total</b>		<b>27,193</b>	<b>100.0%</b>	<b>15,814</b>	<b>58.2%</b>

South Area Zip Codes	City	Total Market Patients	% Down	PMC Patients	Market Share
92036	Julian	285	1.7%	63	22.1%
92065	Ramona	3,167	18.7%	685	21.6%
92128	Rancho Bernardo	4,889	28.9%	499	10.2%
92127	Rancho Bernardo	1,525	9.0%	153	10.0%
92064	Poway	3,876	22.9%	382	9.9%
92129	Rancho Penasquitos	3,185	18.8%	194	6.1%
<b>Total</b>		<b>16,927</b>	<b>100.0%</b>	<b>1,976</b>	<b>11.7%</b>

Source: OSHPD

Note: Normal Newborns are included

**Pomerado Hospital 2002 - Market Share by Zip Code**

Total PPH Service Area Zip Codes	City	Total Market Patients	% Down	POM Patients	Market Share
92064	Poway	3,876	8.8%	1,427	36.8%
92128	Rancho Bernardo	4,889	11.1%	1,616	33.1%
92065	Ramona	3,167	7.2%	998	31.5%
92127	Rancho Bernardo	1,525	3.5%	456	29.9%
92036	Julian	285	0.6%	80	28.1%
92070	Santa Ysabel	135	0.3%	34	25.2%
92129	Rancho Penasquitos	3,185	7.2%	609	19.1%
92029	Escondido	1,784	4.0%	207	11.6%
92078	San Marcos	551	1.2%	35	6.4%
92026	Escondido	4,930	11.2%	296	6.0%
92025	Escondido	5,871	13.3%	302	5.1%
92027	Escondido	5,095	11.5%	243	4.8%
92082	Valley Center	1,541	3.5%	73	4.7%
92069	San Marcos	6,728	15.2%	230	3.4%
92061	Pauma Valley	368	0.8%	12	3.3%
92059	Pala	190	0.4%	0	0.0%
<b>Total</b>		<b>44,120</b>	<b>100.0%</b>	<b>6,618</b>	<b>15.0%</b>

North Area Zip Codes	City	Total Market Patients	% Down	POM Patients	Market Share
92070	Santa Ysabel	135	0.5%	34	25.2%
92029	Escondido	1,784	6.6%	207	11.6%
92078	San Marcos	551	2.0%	35	6.4%
92026	Escondido	4,930	18.1%	296	6.0%
92025	Escondido	5,871	21.6%	302	5.1%
92027	Escondido	5,095	18.7%	243	4.8%
92082	Valley Center	1,541	5.7%	73	4.7%
92069	San Marcos	6,728	24.7%	230	3.4%
92061	Pauma Valley	368	1.4%	12	3.3%
92059	Pala	190	0.7%	0	0.0%
<b>Total</b>		<b>27,193</b>	<b>100.0%</b>	<b>1,432</b>	<b>5.3%</b>

South Area Zip Codes	City	Total Market Patients	% Down	POM Patients	Market Share
92064	Poway	3,876	22.9%	1,427	36.8%
92128	Rancho Bernardo	4,889	28.9%	1,616	33.1%
92065	Ramona	3,167	18.7%	998	31.5%
92127	Rancho Bernardo	1,525	9.0%	456	29.9%
92036	Julian	285	1.7%	80	28.1%
92129	Rancho Penasquitos	3,185	18.8%	609	19.1%
<b>Total</b>		<b>16,927</b>	<b>100.0%</b>	<b>5,186</b>	<b>30.6%</b>

Source: OSHPD

Note: Normal Newborns are included

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**2002 Market Share by Hospital by City**

<b>Escondido - Market Share by Hospital - 2002</b>		
<b>Facility</b>	<b>Patients</b>	<b>Market Share</b>
<b>Palomar Medical Center</b>	<b>11,637</b>	<b>65.8%</b>
Scripps Hospital	1,304	7.4%
<b>Pomerado Hospital</b>	<b>1,048</b>	<b>5.9%</b>
Sharp Hospital	799	4.5%
Kaiser Hospital	684	3.9%
Children's Hospital	645	3.6%
Tri-City Medical Center	492	2.8%
UCSD	413	2.3%
Other	658	3.7%
<b>Total</b>	<b>17,680</b>	<b>100.0%</b>

**Zip Codes**  
 92025  
 92026  
 92027  
 92029

<b>Julian - Market Share by Hospital - 2002</b>		
<b>Facility</b>	<b>Patients</b>	<b>Market Share</b>
<b>Pomerado Hospital</b>	<b>80</b>	<b>28.1%</b>
Sharp Hospital	67	23.5%
<b>Palomar Medical Center</b>	<b>63</b>	<b>22.1%</b>
Scripps Hospital	23	8.1%
UCSD	19	6.7%
Kaiser Hospital	16	5.6%
Children's Hospital	9	3.2%
Other	8	2.8%
<b>Total</b>	<b>285</b>	<b>100.0%</b>

**Zip Codes**  
 92036

<b>Pala &amp; Palomar Mtn - Market Share by Hospital - 2002</b>		
<b>Facility</b>	<b>Patients</b>	<b>Market Share</b>
<b>Palomar Medical Center</b>	<b>84</b>	<b>44.2%</b>
Fallbrook Hospital District	27	14.2%
Sharp Hospital	14	7.4%
Southwest Healthcare System-Murrieta	11	5.8%
Scripps Hospital	18	9.5%
Children's Hospital	8	4.2%
Tri-City Medical Center	8	4.2%
Centinel Hospital Medical Center	5	2.6%
Other	15	7.9%
<b>Total</b>	<b>190</b>	<b>100.0%</b>

**Zip Codes**  
 92059  
 92060

Pauma - Market Share by Hospital - 2002		
Facility	Patients	Market Share
<b>Palomar Medical Center</b>	<b>283</b>	<b>76.9%</b>
Scripps Hospital	20	5.4%
Sharp Hospital	13	3.5%
<b>Pomerado Hospital</b>	<b>12</b>	<b>3.3%</b>
Children's Hospital	10	2.7%
Kaiser Hospital	7	1.9%
UCSD	7	1.9%
Other	16	4.3%
<b>Total</b>	<b>368</b>	<b>100.0%</b>

Zip Codes  
92061

Ramona - Market Share by Hospital - 2002		
Facility	Patients	Market Share
<b>Pomerado Hospital</b>	<b>998</b>	<b>31.5%</b>
<b>Palomar Medical Center</b>	<b>685</b>	<b>21.6%</b>
Sharp Hospital	392	12.4%
Scripps Hospital	311	9.8%
Kaiser Hospital	303	9.6%
Children's Hospital	190	6.0%
UCSD	120	3.8%
Other	168	5.3%
<b>Total</b>	<b>3,167</b>	<b>100.0%</b>

Zip Codes  
92065

Rancho Bernardo - Market Share by Hospital - 2002		
Facility	Patients	Market Share
<b>Pomerado Hospital</b>	<b>2,072</b>	<b>32.3%</b>
Sharp Hospital	930	14.5%
Scripps Hospital	879	13.7%
<b>Palomar Medical Center</b>	<b>652</b>	<b>10.2%</b>
Kaiser Hospital	451	7.0%
UCSD	299	4.7%
Children's Hospital	233	3.6%
Aurora San Diego	104	1.6%
Other	794	12.4%
<b>Total</b>	<b>6,414</b>	<b>100.0%</b>

Zip Codes  
92127  
92128

Rancho Penasquitos - Market Share by Hospital - 2002		
Facility	Patients	Market Share
Scripps Hospital	788	24.7%
Sharp Hospital	681	21.4%
<b>Pomerado Hospital</b>	<b>609</b>	<b>19.1%</b>
Kaiser Hospital	270	8.5%
UCSD	258	8.1%
Children's Hospital	196	6.2%
<b>Palomar Medical Center</b>	<b>194</b>	<b>6.1%</b>
Other	189	5.9%
<b>Total</b>	<b>3,185</b>	<b>100.0%</b>

Zip Codes  
92129

<b>San Marcos - Market Share by Hospital - 2002</b>		
<b>Facility</b>	<b>Patients</b>	<b>Market Share</b>
<b>Palomar Medical Center</b>	<b>2,777</b>	<b>38.2%</b>
Scripps Hospital	1,541	21.2%
Tri-City Medical Center	1,363	18.7%
Kaiser Hospital	370	5.1%
Sharp Hospital	317	4.4%
Children's Hospital	286	3.9%
<b>Pomerado Hospital</b>	<b>265</b>	<b>3.6%</b>
UCSD	179	2.5%
Other	181	2.5%
<b>Total</b>	<b>7,279</b>	<b>100.0%</b>

Zip Codes  
92069  
92078

<b>Santa Ysabel - Market Share by Hospital - 2002</b>		
<b>Facility</b>	<b>Patients</b>	<b>Market Share</b>
<b>Palomar Medical Center</b>	<b>62</b>	<b>45.9%</b>
<b>Pomerado Hospital</b>	<b>34</b>	<b>25.2%</b>
Sharp Hospital	8	5.9%
Scripps Hospital	8	5.9%
Kaiser Hospital	7	5.2%
Children's Hospital	6	4.4%
Other	10	7.4%
<b>Total</b>	<b>135</b>	<b>100.0%</b>

Zip Codes  
92070

<b>Valley Center - Market Share by Hospital - 2002</b>		
<b>Facility</b>	<b>Patients</b>	<b>Market Share</b>
<b>Palomar Medical Center</b>	<b>971</b>	<b>63.0%</b>
Scripps Hospital	128	8.3%
Kaiser Hospital	86	5.6%
Children's Hospital	78	5.1%
Sharp Hospital	77	5.0%
<b>Pomerado Hospital</b>	<b>73</b>	<b>4.7%</b>
UCSD	47	3.0%
Other	81	5.3%
<b>Total</b>	<b>1,541</b>	<b>100.0%</b>

Zip Codes  
92082



**Market Share by Payor 2000 - 2002**

Payor	2002		
	Total Patients	PMC	POM
		Market Share	Market Share
County Indigent Programs	520	55.8%	7.1%
Medi-Cal	7,760	65.2%	7.9%
Medicare	15,042	43.3%	20.0%
Other Government	365	10.7%	9.9%
Other Indigent	47	0.0%	0.0%
Other Payer	20	5.0%	0.0%
Private Coverage	18,682	26.3%	14.8%
Self Pay	1,253	64.6%	10.5%
Workers Compensation	431	35.7%	5.3%
<b>Total</b>	<b>44,120</b>	<b>40.3%</b>	<b>15.0%</b>

Payor	2001		
	Total Patients	PMC	POM
		Market Share	Market Share
County Indigent Programs	450	46.4%	6.7%
Medi-Cal	6,734	66.6%	6.6%
Medicare	15,036	43.1%	20.3%
Not Reported / Reported in Err	3	0.0%	0.0%
Other Government	348	18.7%	8.0%
Other Indigent	38	0.0%	0.0%
Other Payer	15	0.0%	0.0%
Private Coverage	18,412	27.4%	15.9%
Self Pay	1,382	68.7%	9.8%
Workers Compensation	467	32.5%	4.7%
<b>Total</b>	<b>42,885</b>	<b>40.6%</b>	<b>15.5%</b>

Payor	2000		
	Total Patients	PMC	POM
		Market Share	Market Share
County Indigent Programs	353	29.5%	4.0%
Medi-Cal	6,733	66.9%	6.9%
Medicare	14,545	44.2%	18.8%
Other Government	256	15.6%	10.5%
Other Indigent	58	0.0%	0.0%
Other Payer	52	0.0%	0.0%
Private Coverage	18,628	28.2%	15.5%
Self Pay	1,685	63.6%	12.5%
Workers' Compensation	401	35.7%	6.7%
(blank)	9	0.0%	0.0%
<b>Total</b>	<b>42,720</b>	<b>41.1%</b>	<b>14.9%</b>

Source: OSHPD

Note: Normal Newborns are included



# Market Use Rates, PPH Service Area

- Decrease in area utilization rates have small impact on future bed need

Market Use Rates by Service Line (Discharges/1,000 Pop) PPH Service Area

Service	2000	2001	2002	CAGR
Alcohol & Drug Abuse	0.9	0.8	0.9	-4%
CardioVascular\Thoracic Surgery	4.3	4.3	2.6	-22%
Cardiovascular Diseases	8.7	8.9	10.6	10%
ENT	0.7	0.7	0.8	2%
General Medicine	11.5	11.7	12.1	3%
General Surgery	8.3	8.3	8.6	2%
Gynecology	2.5	2.4	2.4	-2%
Neonatology	3.8	3.8	3.8	0%
Nephrology/Urology	3.0	3.1	3.2	4%
Neuro Sciences	5.2	5.1	5.0	-2%
Normal Newborns	11.5	10.9	11.2	-1%
Obstetrics Del	14.5	13.8	14.1	-1%
Obstetrics ND (Nondelivered)	1.2	0.9	1.1	-4%
Oncology	3.0	2.9	2.8	-3%
Ophthalmology	0.1	0.2	0.1	-6%
Orthopedics	9.3	9.6	9.6	2%
Psychiatry	4.4	4.7	4.8	4%
Pulmonary Medical	6.8	6.5	6.3	-4%
Rehabilitation	0.5	0.8	0.8	26%
Total	100.0	99.3	100.8	0.4%

Source: OSHPD 2000-2002



# Market Use Rates, PPH Service Area

- Decrease in area utilization rates have small impact on future bed need

Market Use Rates by Service Line (Pt Days/1,000 Pop) PPH Service Area

Service	2000	2001	2002	CAGR
Alcohol & Drug Abuse	5.0	4.8	4.6	-3.6%
Cardio\Vascular\Thoracic Surgery	23.7	21.3	19.9	-8.4%
Cardiovascular Diseases	32.9	39.1	35.5	3.9%
ENT	1.7	1.5	1.6	-1.8%
General Medicine	68.8	66.6	72.1	2.4%
General Surgery	61.8	64.7	67.6	4.6%
Gynecology	6.5	6.3	6.0	-3.9%
Neonatology	20.8	22.9	22.3	3.6%
Nephrology/Urology	12.8	12.8	16.9	14.9%
Neuro Sciences	60.2	51.3	47.4	-11.3%
Normal Newborns	19.9	19.5	20.5	1.4%
Obstetrics Del	32.9	31.8	32.4	-0.8%
Obstetrics ND (Nondelivered)	3.0	2.7	2.6	-5.9%
Oncology	17.2	16.6	16.7	-1.5%
Ophthalmology	0.3	0.5	0.4	6.9%
Orthopedics	74.5	58.3	66.2	-5.7%
Psychiatry	41.0	45.2	45.0	4.8%
Pulmonary Medical	49.0	48.1	42.6	-6.8%
Rehabilitation	10.6	15.0	12.1	7.0%
<b>Total</b>	<b>543</b>	<b>529</b>	<b>532</b>	<b>-0.9%</b>

Source: OSHPD 2000-2002

(1) National trend based on decreasing length of stay and evolving trend to use stents. Assumed to level off over time  
 (2) Increase due to major utilization increase for seniors 20+ days/1,000 in a single year

(3) Significant decrease occurred between 2000 and 2001 for age cohort 45-64. Remained steady between 2001-2002. Decrease between 2001 and 2002 attributed to decrease in 65+ cohort



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# PPH Market Share, 2000-2002

PMC Market Share by Service Line, 2000-2002

Product Line	2000	2001	2002	Chg
Alcohol & Drug Abuse	18%	24%	20%	2%
Cardio\Vascular\Thoracic Surgery	37%	39%	38%	2%
Cardiovascular Diseases	45%	42%	42%	2%
ENT	21%	27%	23%	2%
General Medicine	40%	40%	39%	1%
General Surgery	37%	36%	35%	3%
Gynecology	31%	31%	30%	1%
Neonatology	38%	34%	33%	5%
Nephrology/Urology	40%	36%	40%	0%
Neuro Sciences	46%	49%	44%	2%
Normal Newborns	50%	51%	51%	1%
Obstetrics Del	48%	47%	48%	0%
Obstetrics ND (Nondelivered)	41%	34%	42%	1%
Oncology	27%	29%	27%	0%
Ophthalmology	19%	17%	12%	1%
Orthopedics	37%	35%	33%	4%
Psychiatry	30%	29%	28%	2%
Pulmonary Medical	46%	45%	47%	2%
Rehabilitation	16%	48%	52%	36%
<b>Total</b>	<b>41%</b>	<b>41%</b>	<b>40%</b>	<b>1%</b>

POM Market Share by Service Line, 2000-2002

Product Line	2000	2001	2002	Chg
Alcohol & Drug Abuse	3%	5%	2%	-1%
Cardio\Vascular\Thoracic Surgery	4%	4%	5%	2%
Cardiovascular Diseases	19%	21%	16%	-2%
ENT	11%	13%	12%	1%
General Medicine	15%	17%	17%	2%
General Surgery	14%	14%	14%	1%
Gynecology	21%	20%	16%	-5%
Neonatology	12%	12%	9%	-3%
Nephrology/Urology	13%	16%	16%	4%
Neuro Sciences	15%	13%	16%	2%
Normal Newborns	17%	18%	17%	0%
Obstetrics Del	16%	17%	16%	0%
Obstetrics ND (Nondelivered)	10%	6%	7%	-3%
Oncology	15%	12%	16%	1%
Ophthalmology	17%	21%	18%	0%
Orthopedics	16%	18%	17%	1%
Psychiatry	9%	8%	7%	2%
Pulmonary Medical	18%	18%	18%	0%
Rehabilitation	0%	0%	0%	0%
<b>Total</b>	<b>15%</b>	<b>16%</b>	<b>15%</b>	<b>0%</b>

Note: All percentages rounded to nearest whole number  
Includes Kaiser volume



# PPH Market Share, 2000-2002

## Total PPH Market Share by Service Line, 2000-2002

Product Line	2000	2001	2002	Chg
Alcohol & Drug Abuse	21%	28%	22%	1%
Cardio\Vascular\Thoracic Surgery	41%	43%	44%	3%
Cardiovascular Diseases	63%	63%	59%	-5%
ENT	32%	40%	35%	3%
General Medicine	55%	56%	57%	1%
General Surgery	51%	50%	48%	-3%
Gynecology	53%	51%	46%	-6%
Neonatology	51%	46%	42%	-8%
Nephrology/Urology	52%	52%	57%	4%
Neuro Sciences	61%	62%	60%	0%
Normal Newborns	67%	68%	68%	2%
Obstetrics Del	64%	64%	63%	-1%
Obstetrics ND (Nondelivered)	51%	40%	49%	-2%
Oncology	42%	42%	43%	1%
Ophthalmology	37%	38%	30%	-7%
Orthopedics	53%	53%	50%	-2%
Psychiatry	39%	37%	34%	-4%
Pulmonary Medical	64%	64%	66%	2%
Rehabilitation	16%	48%	52%	36%
<b>Total</b>	<b>56%</b>	<b>56%</b>	<b>55%</b>	<b>-1%</b>

Note: All percentages rounded to nearest whole number  
Includes Kaiser volume



# Product Line Growth Scenario Outcome: PPH Market Share

## Growth Scenario Market Share: PPH

Product Line	2004	2005	2010	2011	2012	2013
Alcohol & Drug Abuse	22%	22%	22%	22%	22%	22%
Cardiovascular/Thoracic Surgery	45%	46%	51%	52%	54%	55%
Cardiovascular Diseases	59%	60%	63%	64%	64%	65%
ENT						
General Medicine	35%	35%	35%	35%	35%	36%
General Surgery	57%	57%	57%	57%	57%	57%
Gynecology	47%	48%	62%	53%	48%	48%
Neonatology	42%	42%	42%	42%	42%	42%
Nephrology/Urology	57%	57%	57%	57%	57%	57%
Neuro Sciences	60%	60%	60%	60%	60%	60%
Normal Newborns	68%	68%	68%	68%	68%	68%
Obstetrics Del	64%	66%	71%	73%	74%	75%
Obstetrics ND (Nondelivered)	48%	48%	48%	48%	48%	48%
Oncology	44%	45%	48%	49%	50%	50%
Ophthalmology	28%	28%	28%	28%	28%	28%
Orthopedics	50%	50%	50%	50%	50%	50%
Psychiatry	35%	35%	35%	35%	35%	35%
Pulmonary Medical	66%	66%	66%	66%	66%	66%
Rehabilitation	52%	52%	52%	52%	52%	52%
<b>Total</b>	<b>56%</b>	<b>56%</b>	<b>57%</b>	<b>58%</b>	<b>58%</b>	<b>58%</b>

Note: Market Share includes Kaiser



# Occupancy Targets

Bed Unit Type	Occupancy Target
Medical/Surgical	85%
LDR	350 births per year
Post Partum	70%
Pediatrics	75%
Intensive Care	70%
Psychiatric	85%
NICU	85%

- 10% peak adjustment factor applied for all bed types
- Obstetrics days used to compute post partum adjusted to reflect that portion of obstetrics stay that occurs in post partum rather than delivery room or elsewhere

$$(\text{Ave. Occupancy Target}) \times (\text{Peak Load}) = \text{beds}$$



# PMC Projected Bed Need and Building Size

Bed Type	2020 Bed Need*	2020 Proposed Bed Development
Med/Surg	307	360
ICU	62	60
Peds	13	13
LDRs	18	18
Postpartum	40	43
NICU	11	11
Psych	22	23
Rehab	12	16
Total	485	544

\* Bed need without significant market share and in-migration growth



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# POM Projected Bed Need and Building Size

Bed Type	2020 Bed Need*	2020 Proposed Bed Development
Med/Surg	79	114
ICU	13	16
LDRs/Antepartum	7	11
Postpartum, Antepartum, GYN	13	24
NICU	2	4
Total	114	169



\* Bed need without significant market share and in-migration growth  
 Assumes psychiatry services consolidate at PMC



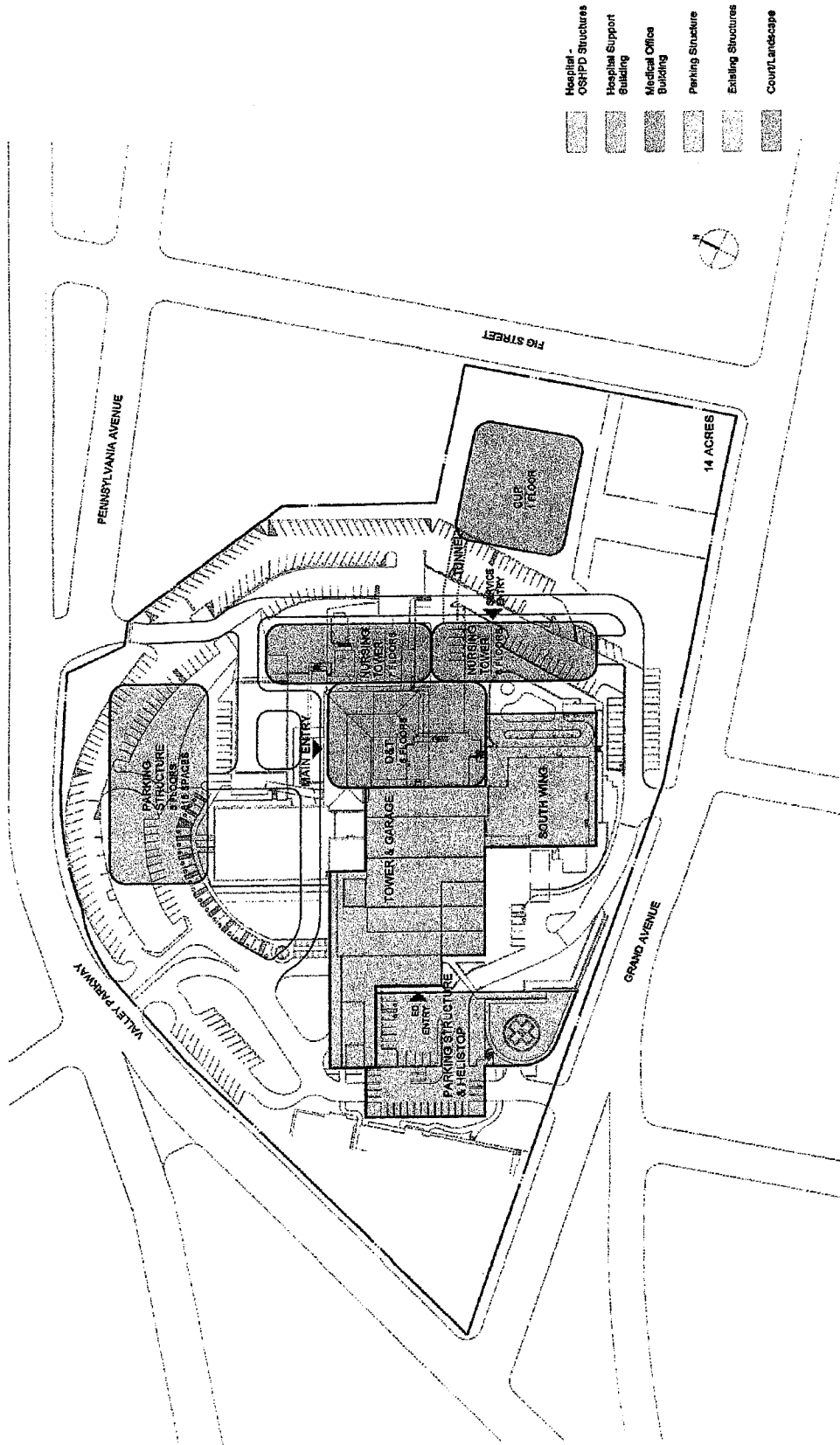
# Summary of Program & Planning Options



Schemes	# Hospitals/Beds	Palomar	Pomeroado	New Site
A (Base)	2 / 594	434 Beds	160 Beds	---
A1	2 / 594	434 Beds (Expanded Site)	160 Beds	---
B	2 / 594	vacate	160 Beds	434 Beds
C	2 / 594	vacate	100 Beds (No Changes)	494 Beds
D	3 / 594	160 Beds	100 Beds (No Changes)	334 Beds
D1	3 / 594	120 Beds	120 Beds	354 Beds
D2	3 / 594	87 Beds	120 Beds	387 Beds
D3 R	3 / 600	178 Beds (Retrofit)	120 Beds	302 Beds
D3 NT	3 / 600	178 Beds (New Tower)	120 Beds	302 Beds
D5	3 / 594	225 Beds	120 Beds	250 Beds
E (Benchmark)	1 / 594	vacate	vacate	594 Beds

PALOMAR POMEROADO HEALTH

# Sample Scheme - 434 Beds at Palomar

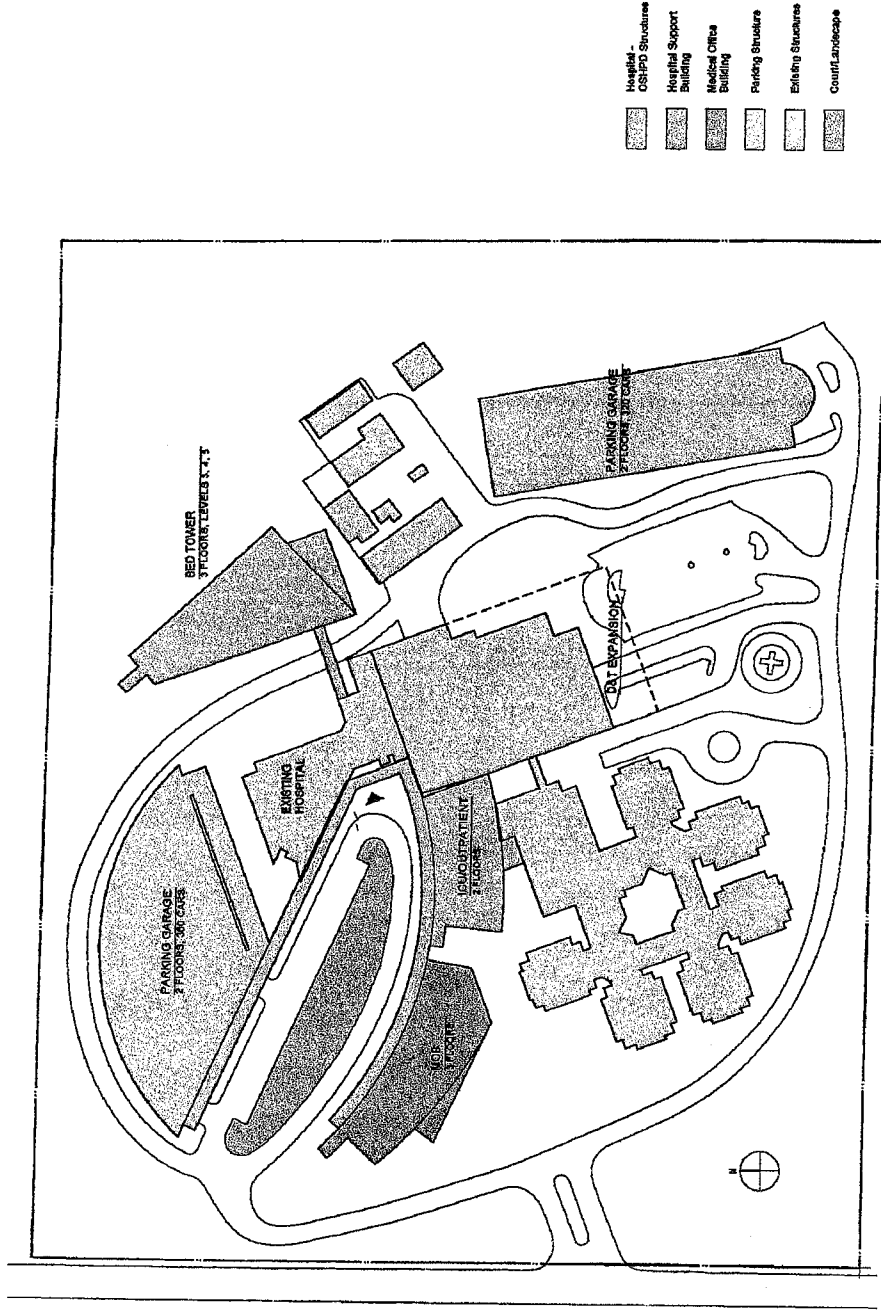


Site area: 14 acres (existing)

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# Sample Scheme - 120 to 160 Beds at Pomarado



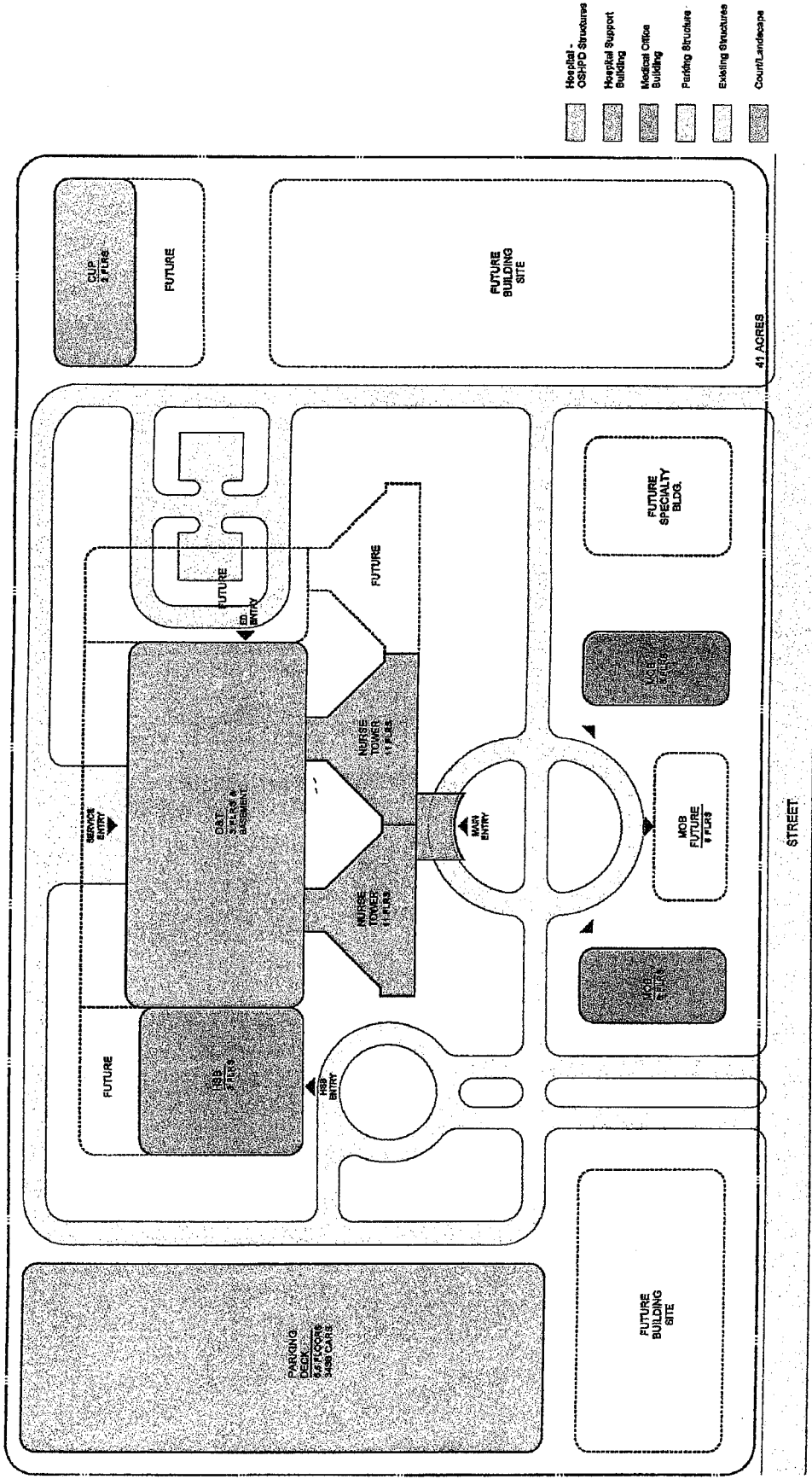
- Hospital - Outpatient Structures
- Hospital Support Building
- Medical Office Building
- Parking Structure
- Existing Structures
- Court/Landscape

Site area: 30 acres

# PALOMAR POMARADO HEALTH

ANSHEN + ALLEN

# Sample Scheme - 594 Beds at New Site



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Site area: 40 to 50 acres

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ANSHEN + ALLEN

# Comparative Schemes- 594 to 600 Total Beds

	A (Base)		A1	D2	D3 (New)	E (Benchmark)
<b>PALOMAR</b>	OSHPD Hospital Non-OSHPD Bldg.	434 Beds ---	434 Beds 94,000 BGSF	87 Beds ---	178 Beds ---	---
<b>POMERADO</b>	OSHPD Hospital Non-OSHPD Bldg.	160 Beds ---	160 Beds ---	120 Beds ---	120 Beds ---	---
<b>NEW SITE</b>	OSHPD Hospital Non-OSHPD Bldg.	---	---	387 Beds 115,000 BGSF	302 Beds 95,000 BGSF	594 Beds 96,000 BGSF
<b>PROJECT COST *</b>	Total	\$685.4 M	\$666.4 M	\$654.4 M	\$650.4 M	\$751.4 M
	Per Bed	\$1.153 M	\$1.121 M	\$1.101 M	\$1.084 M	\$1.265 M
	Compared to Base	---	(\$19 M)	(\$31 M)	(\$35 M)	+\$66 M
	Land	\$0	\$15 M	\$68 M	\$68 M	\$82 M
<b>DATE COMPLETE</b>	Palomar	2011	2011	2013	2011	---
	Pomerado	2009	2009	2009	2009	---
	New Site	---	---	2009	2009	2009
<b>NOT INCLUDED</b>		MOB \$	MOB \$	MOB \$	MOB \$	MOB \$

Note: \* Preliminary estimates based on input from Davis Langdon Adamson and Rudolph & Sletten

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# Comparative Schemes - 594 to 600 Total Beds

		A (Base)	A1	D2	D3	E
		\$685.4 M	\$666.4 M	\$654.4 M	\$650.4 M	\$751.4 M
<b>PALOMAR</b>	OSHPD Hospital Non-OSHDP Bldg.	434 Beds ---	434 Beds 94,000 BGSF	87 Beds ---	178 Beds ---	---
<b>POMERADO</b>	OSHPD Hospital Non-OSHDP Bldg.	160 Beds ---	160 Beds ---	120 Beds ---	120 Beds ---	---
<b>NEW SITE</b>	OSHPD Hospital Non-OSHDP Bldg.	---	---	387 Beds 115,000 BGSF	302 Beds 95,000 BGSF	594 Beds 130,000 BGSF
<b>EVALUATION</b>						
Scale 1 to 5 (5 = Best)						
	Asset Utilization	5	5	5	5	1
	Risk Factor/ Disruption	1	1	3	3	5
	Future Growth	1	3	5	5	5
	Schedule	3	3	3	4	5
	Operations	4	4	2	3	5
	Cost	3	3	4	4	1
	<b>TOTAL POINTS</b>	17	19	22	24	22

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