Rethinking Healthcare Delivery in light of COVID-19
Our COVID-19 Journey to date

National COVID-19 Employer Town Halls

3/10 Clinical & Business Impact
4/2 Mental Health & Wellbeing
4/23 Pivot to Back to Work
5/14 Financial Impact
6/15-6/16 Leadership Summits

3/26 Policies & Benefits Issues
4/13 Social Determinants
5/4 Population Health

5/26 Healthcare Delivery

• Mobilizing Collective Action
• Total Person Health
• Achieving Value 2020

Policies & Benefits Survey
267 Respondents

Return to Work Survey
210 Respondents
**Our COVID-19 Journey to date**

**National COVID-19 Employer Town Halls**

- **3/10**
  - Clinical & Business Impact

- **4/2**
  - Mental Health & Wellbeing

- **4/23**
  - Pivot to Back to Work

- **5/14**
  - Financial Impact

- **5/26**
  - Healthcare Delivery

**COVID-19 Webcasts**

- Airbnb - Optimizing Ergonomics
- Covid-19 Legal & Regulatory Update
- Choosing Wisely in face of COVID-19
- Families First Act
- Readiness & Resilience – Preparing for 2nd Wave
- Specialized Perspectives on Return to Work
- Mental Health Fallout – Digital Tools
- Sharecare – Supporting Employees where they live, work & play

**Operating in “COVID TIME”**

- 6/15-6/16 Leadership Summits
  - Mobilizing Collective Action
  - Total Person Health
  - Achieving Value 2020

**Policies & Benefits Survey**
- 267 Respondents

**CARES Act**
- Health Policy in Transit

**Employer/Purchaser Letter to Congress**

**Return to Work Survey**
- 210 Respondents

**Priorities for Covid-19 Era**

**Leadership Summits**

- Policies & Benefits Survey
- The Path Forward for MHSU Priorities for Covid-19 Era
- Covid-19 Choosing Wisely Action Brief & Supplement
- Sharecare – Supporting Employees where they live, work & play
Moderators & participating panelists

Michael Thompson
President & CEO
National Alliance of Healthcare Purchaser Coalitions

Elizabeth Mitchell
President & CEO
Pacific Business Group on Health

Panelists

- Marissa Alert
  Johns Hopkins Healthcare Solutions
- Robert Baird, RN, MSA
  National Cancer Treatment Alliance
- Christopher Crow, MD, MBA
  Catalyst Health Network
- Mike Eisenhart, PT
  Pro-Activity
- Aslam (Ozzie) Kahn, MD
  Cigna
- Essie Quakyi
  Signify Health
- Ashley Tait- Dinger
  Florida Alliance for Healthcare Value
Opening Comments

• 40 Members
• Private employers & public agencies
• $100B spend
• 15 Million Americans

Redesigning Care Delivery  Driving Affordability  Optimizing Markets
This is Healthcare’s Moment

“This is healthcare’s moment. If you are a provider and you think you are going to go back to your business model solely based on hospital revenue and not relevant to people who want care at home, I think you will be out of business. If you are the insurer and think you can just be the middle man between the hospital and the patient, you’ll be irrelevant. If hospitals think that innovation can just be this cute little thing they do in the background but the real business is getting heads in beds, they’re nuts. I think we were always wondering what the big disruption would be that got us to join the computer generation and I think this is it. “

Stephan Klasko, President & CEO, Jefferson Health
Healthcare has been “recession-proof” for the past 40 years

Impact of COVID-19 to date

- Elective Surgery – Down
- Primary Care Visits - Down
- Specialty Care Visits – Down
- Onsite Clinics – Temporary Closures
- Medications – Up, Down, ?
- Virtual Visits – Up, Up, Up
- Mental Health – Continuing to rise

“The Great Recession”
Virtual Care has grown exponentially overnight

What took it so long?  
Benefits?  
Will it continue?

Why not before now?  
Concerns?  
In what form?

Is Social Isolation shifting focus and concerns from “over-utilization” to “under-utilization”?  
How will we address Health Inequity when risks and outcomes vary so dramatically?
Primary Care is in trouble – How can we help?

What are the risks?

How can we help?

What does the sustainable, “high value” model look like?
Institutional Care is at a crossroads

Pre-COVID-19 Purchaser Concerns

- Consolidation and vertical integration
- Inequitable pricing
- Some with high surplus, high overhead and/or high margins
- Lack of transparency or accountability for cost or quality
- Surprise billing
- Waste & inappropriate care
- Survival of rural hospitals

How have these concerns continued to exist in a market-driven system?

Will anything change going forward? For better or for worse?

What do we do now to shape a better “new normal”?

Episodes of Care
Our Collective Value Agenda

➢ *Common episodes definitions* to align and focus care management and improvement efforts

➢ *Quality & appropriateness of care* to ensure and promote the right care at the right place for the right patient

➢ *Double-sided risk* alignment to incentivize a shared commitment to success and patient centered value

➢ *Warrantied performance* to provide accountability for high performance and outcomes

➢ *Relevance for purchasers, patients & providers* to enable substantive and sustainable benefits for all stakeholders
Mental Health - a Crisis Exacerbated

- How will we meet the emerging demands during the COVID-19 era with the existing system?
- Can COVID-19 be the impetus to overcome institutional rigidity in applying evidence-based practices?
- How can technology help to mitigate and reallocate the burden on scarce clinical resources?
- Will we address the inequities of a two-tiered system?
Where does innovation and value in medication therapy fit in?

Key Rx Purchaser Policy Principles

- **Full transparency**
  Purchasers need to understand direct and indirect costs and cost offsets of each drug

- **No conflicts of interest**
  Intermediaries should act in the best interest of the benefit plan’s limited assets

- **Pricing equity**
  Need better world-wide pricing equity for all US Purchasers - not just Medicare

- **Defined value**
  Consider individualized appropriateness, real world outcomes and relative costs against other treatment options

- **Competitive market dynamics**
  As patent protections expire, policy must better enforce and support a competitive market
Open Panel Discussion

- Marissa Alert, PhD
  Johns Hopkins Healthcare Solutions

- Robert Baird, RN, MSA
  National Cancer Treatment Alliance

- Christopher Crow, MD, MBA
  Catalyst Health Network

- Mike Eisenhart, PT
  Pro-Activity

- Aslam (Ozzie) Kahn, MD
  Cigna

- Essie Quakyi
  Signify Health

- Ashley Tait-Dinger
  Florida Alliance for Healthcare Value
Upcoming Events & Contact Information

Leadership Summits (June 15-16) - Register today: https://nationalalliancehealth.swoogo.com/2020leadershipsummits/begin

For more information on our COVID-19 Employer resources, including prior webinars and Employer town halls, visit our resources page. https://www.nationalalliancehealth.org/www/resources-new/employer-resources-covid-19

Past National COVID-19 Employer Town Halls
- Clinical and business impact of COVID-19
- Benefits and policy issues of COVID-19
- Addressing Mental Health and Wellbeing in COVID-19
- Considering Social Determinants in the light of COVID-19
- Planning for a Pivot to Back to Work
- Population Health Strategy during COVID-19 Era
- Financial Impact of COVID-19

National Webcast:
COVID-19 Testing - Access & Impact
June 2 @ 1 PM ET