

# Fostering Effective Partnerships Between Employers and Providers

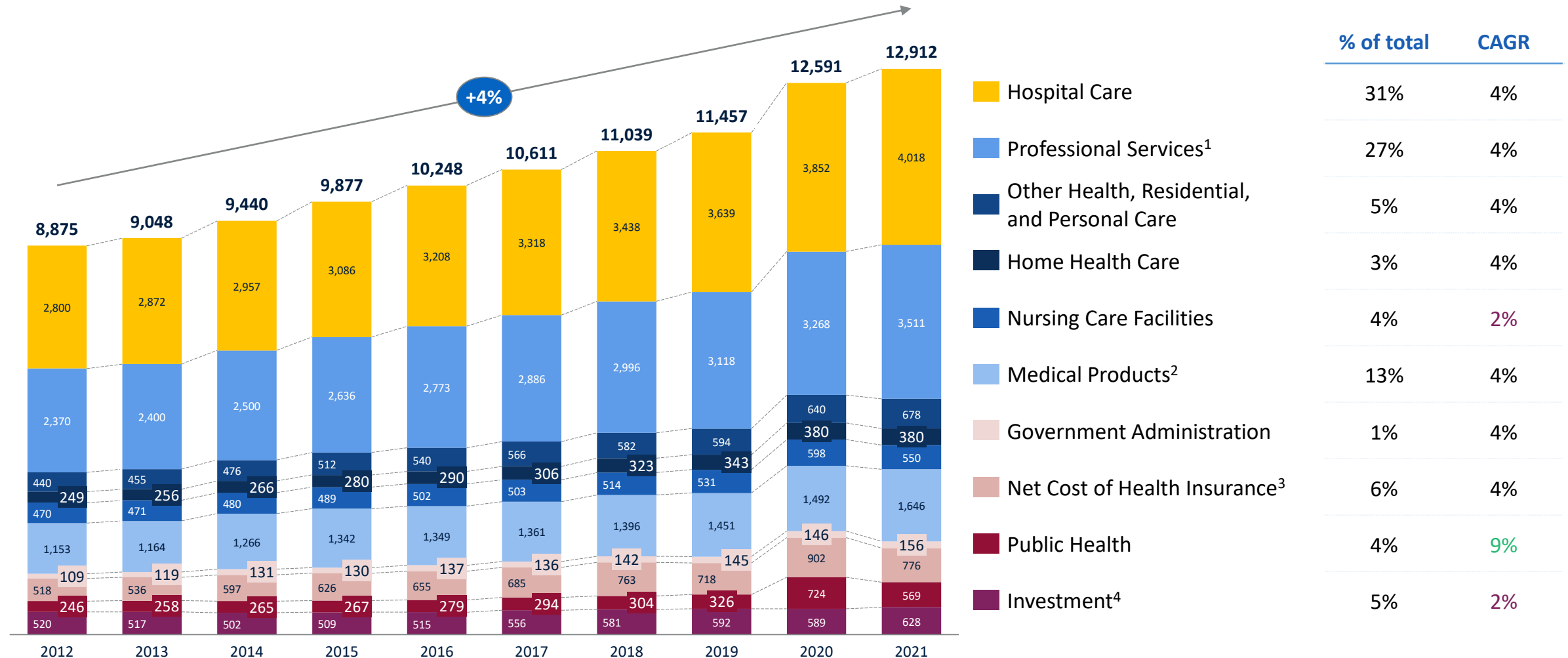
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# Rising costs, mounting pressure on all parts of the ecosystem

## National Health Expenditures, Per Capita

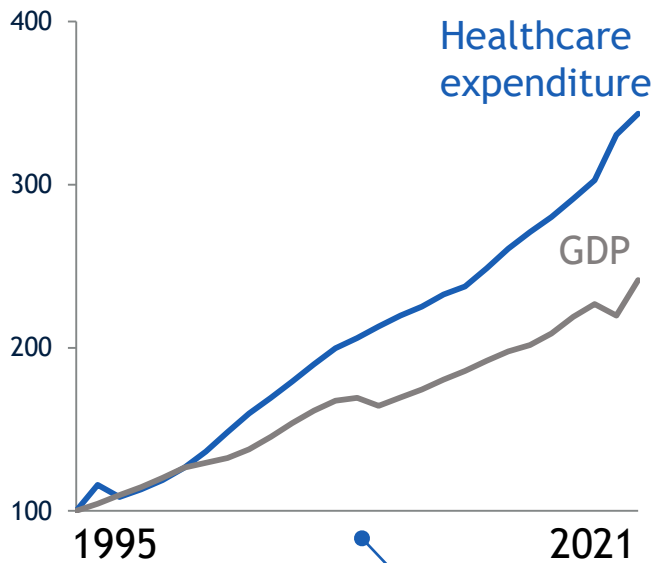


1. Physician and clinical services, other professional services, and dental services 2. Prescription drugs, durable medical equipment, and other non-durable medical products 3. Difference between CY incurred premiums earned and benefits paid for private health insurance 4. Research, structures and equipment  
Source: CMS, National Health Expenditures

# To combat the pressure, there is a shift towards value-based payment...

Healthcare costs have rising rapidly, without a commensurate increase in quality of outcomes

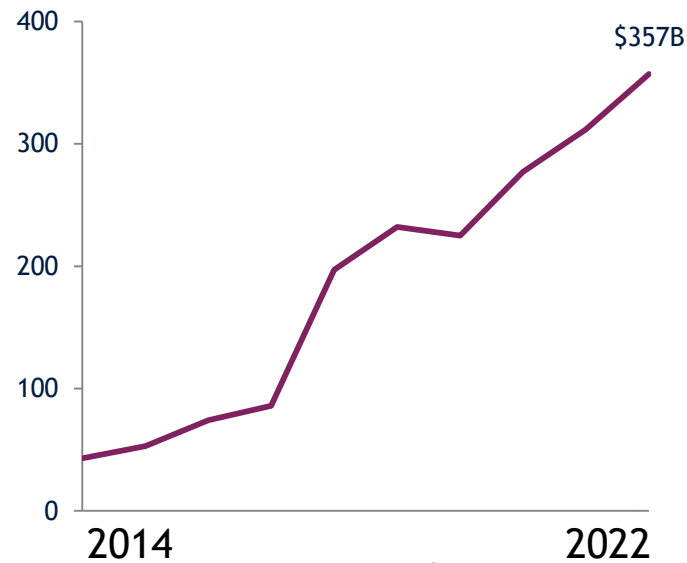
U.S. per capita indexed values (1995=100)



Rising costs due in large part to traditional **volume-based** payment models

In response, the U.S. govt has invested in value-based payment models that reward providers for quality of care...

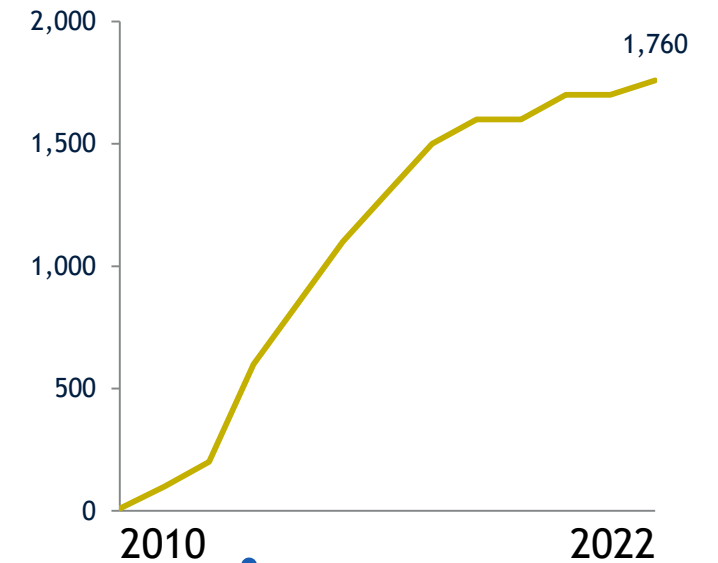
Federal spending on Medicare value-based programs (\$B)



In **value-based** payment models, providers are reimbursed based on quality outcomes and cost containment

...and commercial insurers have followed suit in an effort to reduce costs and improve outcomes

Estimated number of private-sector value-based care arrangements



# Additionally, the healthcare environment is evolving



## Tech & Scientific Innovation

- **Medical information** is increasingly available online, on social media, and contained in health apps
- The growth in **AI investments** across clinical & administrative functions is expected to further catalyze changes



## Consumerization of Care

- **Patient expectations are evolving** (e.g., receive care with minimal wait time, deeply personal relationship with provider, virtual appointment options)



## Shifting Sites of Care

- Some health systems have begun to diversify away from hospitals, instead providing care through **alternative avenues**, particularly ambulatory, as a cornerstone of their business strategy
- Over the next decade, 1/3 of all hospital volume is projected to shift into **ambulatory, home, & virtual settings**



## Future Workforce

- **Low unemployment** levels are creating workforce challenges



## Demand for Health Equity

- **Health inequities** (e.g., life expectancy) are stark and growing, both within and across communities

# Employers have an array of companies offering to help them meet these evolving dynamics...

### Health Systems

VANDERBILT UNIVERSITY MEDICAL CENTER

HCA Healthcare

HSS

Cleveland Clinic

BAPTIST HEALTH

Indiana University Health

HENRY FORD HEALTH

Baylor Scott & White HEALTH

Flagler Health+

Beaumont

ASPIRUS HEALTH

Advocate Aurora Health

### Built For Purpose

Marathon Health.

amwell

Premise Health.

one medical

Concentra

Catalyst HEALTH GROUP

FMH first stop health

crossover

EDISON HEALTHCARE

SurgeryPlus

BARI net

### Consultants/Coalitions

wtw

Mercer

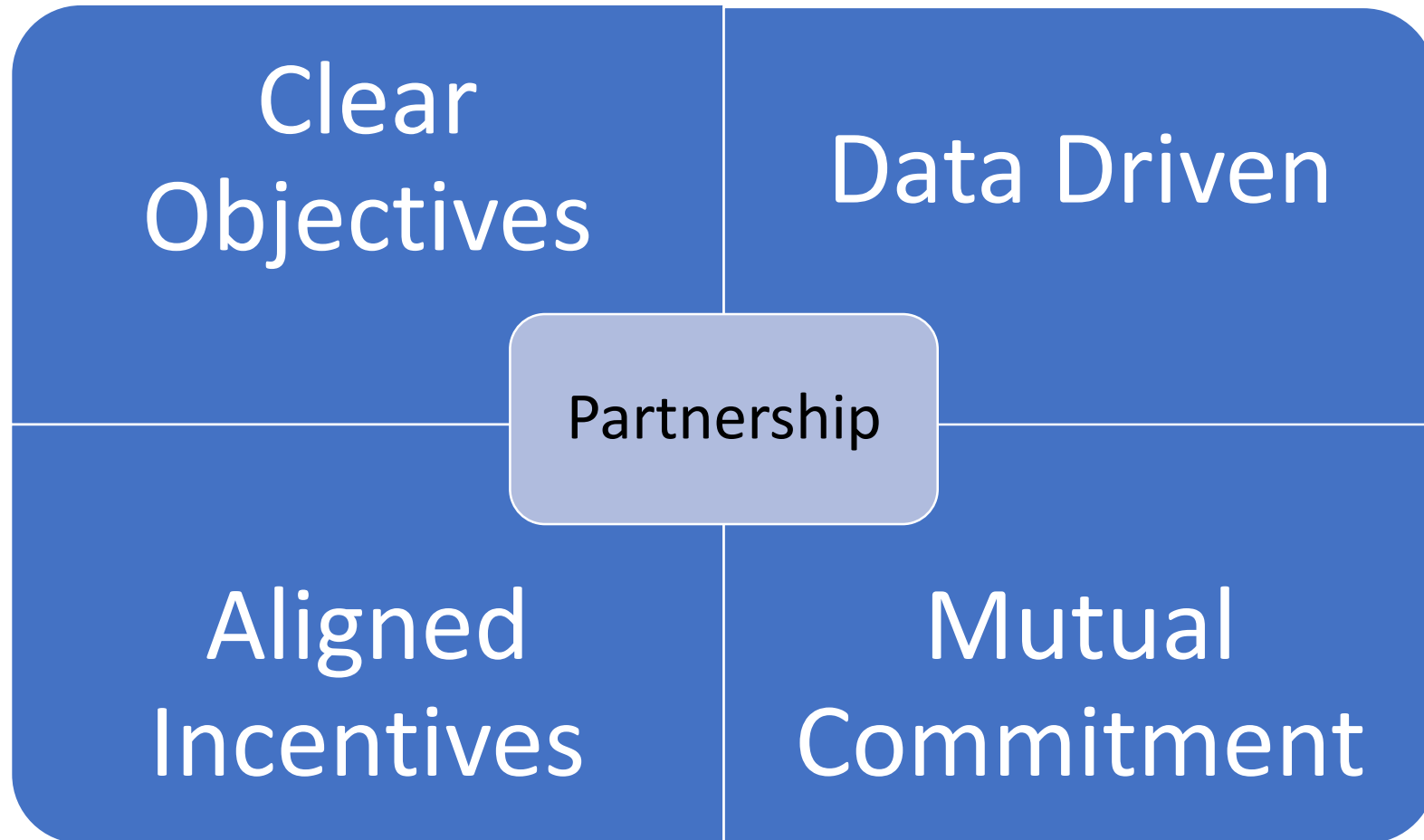
PB GH Purchaser Business Group on Health



...With a multitude of solutions being offered

- Virtual Care
- Employer Based Clinics
- Public Safety Medical
- Network Options
- Occupational Health
- Wellness
- Sports Performance
- Disease Management
- Executive Health
- Industrial Therapy
- Commercial Bundles

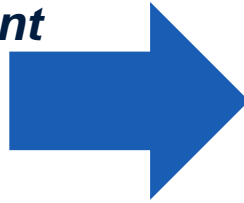
How can employers work with providers to address these issues?



# Case Study: Onsite clinic with a large manufacturer

***ENHANCED SERVICE: THE CONCIERGE  
PRIMARY CARE CLINIC to provide excellent  
medical care for the community:***

- ***Small panel***
- ***Physician Compensation***
- ***Same day access / virtual***
- ***Low / No cost***



**Impact:**

- **17% fewer emergency room visits**
- **15% decrease in inpatient admits (hospitalizations)**
- **36% reduction in outpatient visits**
- **49% reduction in urgent care visits**
- **12.7% reduction in illness burden scores**

- ***Strong Commitment***
- ***Willingness to evolve relationship***

# A Way Forward / Q&A

Develop solutions together  
*(and be wary of shiny objects...)*

- Understand employer's needs
- Understand provider's capabilities
- Review data, communicate and evolve

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