



Top Market Trends in Population Health Improvement

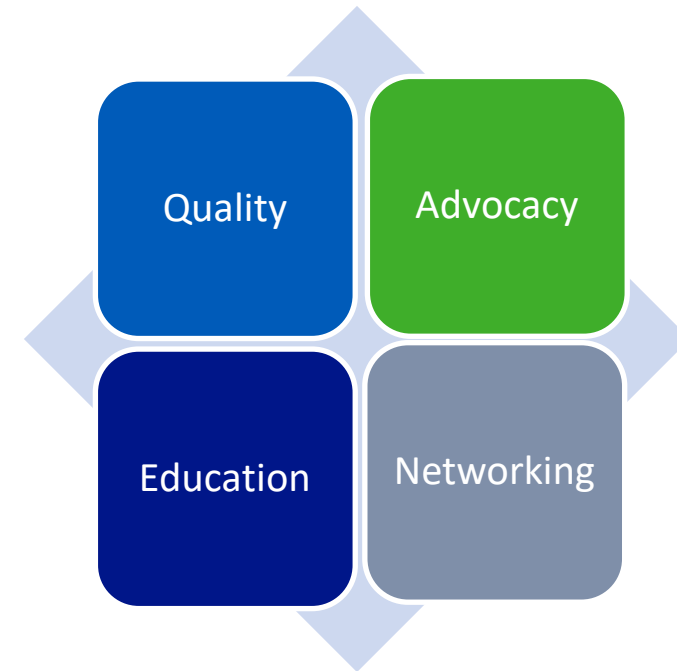


September 18, 2023

*Rose Maljanian Chairman & CEO HealthCAWS and
Chairman of the Board Emeritus PHA*

Population Health Alliance: The Premier Association for Improving Population Health

The Population Health Alliance is the industry's **only** multi-stakeholder professional and trade association totally dedicated to population health; serving our members since 1998.



PHA's PHM Framework Underpin All Successful Value-based Care Initiatives

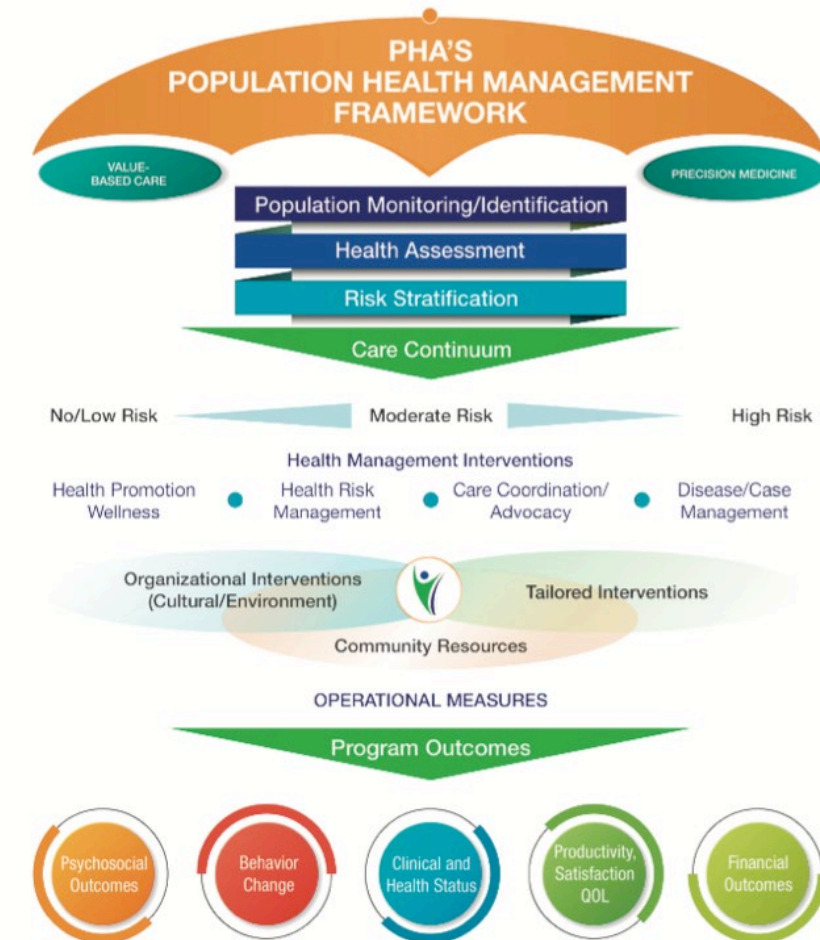
Population Health Improvement Framework

Mainstay Framework Elements

Upfront Analytics: Case ID and risk stratify for targeted interventions

Interventions: Multimodal Consumer Focused, EVB, High Tech to High Touch

Outcomes Focus: Value from improved quality, care experience and cost savings



© PHA PHM Framework 2010 Population Health Alliance - PHM Umbrella for VBC 2018 RMaljanian

HealthCAWS

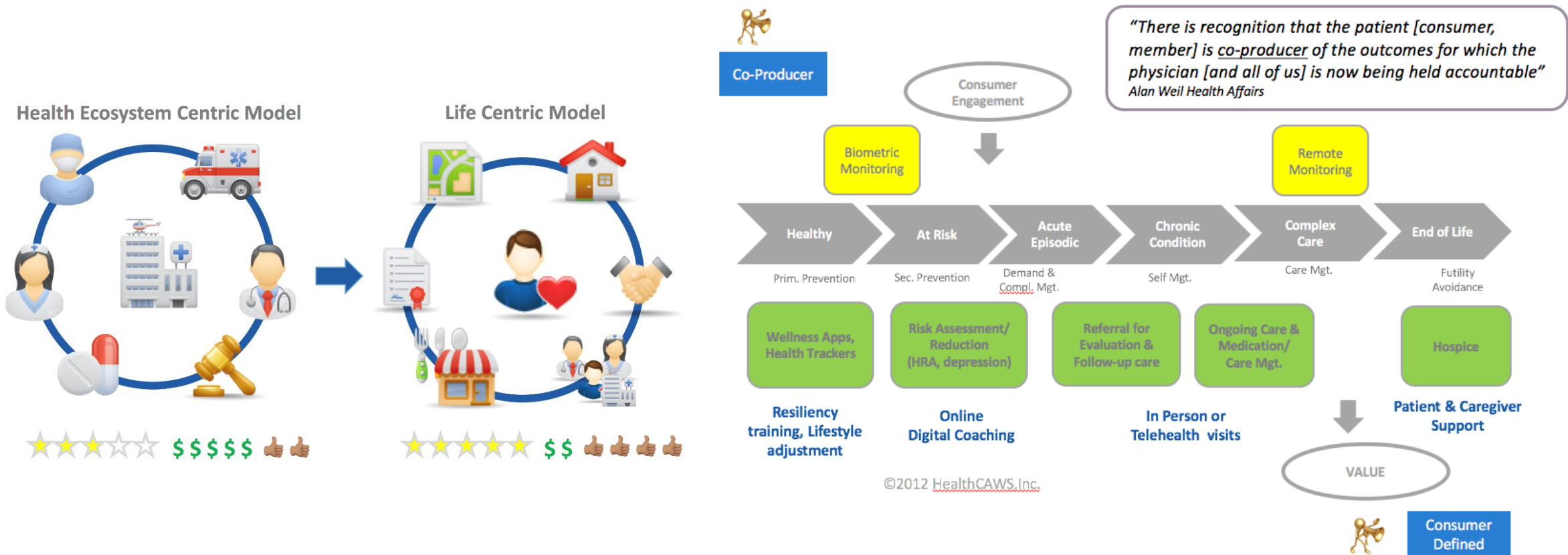
MY PERSONAL TOP MARKET TRENDS

Macro Trends Across Health Solutions

- Value-based Care Strategies
 - Penetration reported to be relatively low 6-33% (MGMA, KLAS, large payer)
 - Target penetration growth ACOs, payers, CMMI-100% Medicare in VBC by 2030
 - Outcomes better for physicians with downside risk vs. FFS and upside only (Humana JAMA)
- Investments Unprecedented in Primary Care
 - Who's investing-Large payers/Retail (e.g. CVS/Aetna, Cigna, Walgreens, Amazon) and PE
 - Why-Trusted quarterback of team proactive care to avoid acute care, avoid duplication and unnecessary costly diagnostics and specialty referral
- Consumer Strategies - Digital Engagement to Redesign High Touch
 - Multi stakeholder investing in consumer experience-digital first plus high touch
 - Retail care promising access, convenience, same quality, and better experience
 - Home care preference - hospital at home, Rehab versus SNF, Homecare prevention



Life Centric Focus Across the Continuum of the Consumer Journey



MY TOP 5 Pop Health Focused Area Trends

- Chronic Condition Prevention and Management
- Behavioral Health Care Integrated
- Senior Health
- Social Care and Health Equity
- Workforce



Trends in Chronic Care Prevention and Management

Chronic conditions continue on the rise

- **Chronic care** continues to monopolize spend and combined with behavioral health according to the CDC, accounts for 90%
- Root cause risk factors-growing rates of **obesity** at 42% new treatment continuum

Expanded avenues for accessing BH care

- BH tele-visits nearly 57% today while only 10% of all outpt visits (KFF, Chartis Group)
- Retail- Mind 24/7 BH Urgent Care walk-in access and VillageMD/Walgreens with BH
- 988 Suicide prevention hotline early success and Narcan available without a script
- Unprecedented access to alcohol requiring more screening and treatment

Care Management Strategies are Evolving

- Whole person Med-BH-Social pairing high tech/high touch-focus consumer journey
- Sophisticated analytics including CGHD to identify need and tailor interventions
- Integration with workflow-care planning and connected devices



<https://www.cdc.gov/chronicdisease/pdf/infographics/chronic-disease-H.pdf>



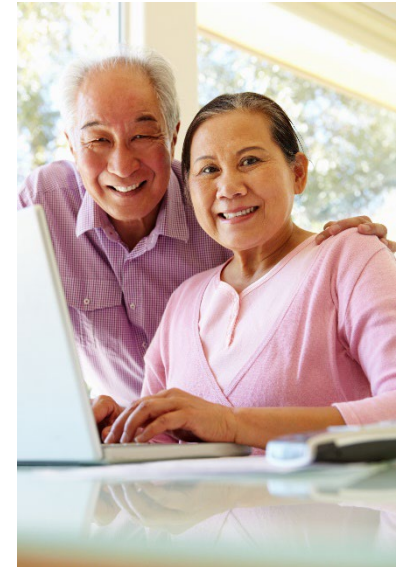
Senior Health Aging of a Population With Preferences

Senior Preference for Home

- Seniors continue to express a **preference** for remaining at home 88% according to Scan Health study and 77% in an AARP survey

Value-based care and MA Recognize Critical Levers

- Uptake in Medicare Advantage continues, now over 50%.
- In VBC all inclusive, well-coordinated care including proactive home health approaches, in person and virtual to mitigate 17B of 26B in avoidable Medicare spend on readmissions and avoidable declines in health
- Other Critical levers include:
 - assistance with ADLs • environmental changes • concierge services to schedule appointments for follow-up care • transportation • smart devices for fall and wander prevention • fitness and nutrition • companions to combat loneliness



Who will win the day

Those that combine high touch and high tech while delivering outcomes and a great experience.

Social Care & Health Equity Assumptions and Success Strategies

Assumptions

- Health Equity means everyone achieves their personal best outcomes; with personal best only adjusted for untreatable genetic or disease factors
- When multiple health equity and Social care factors exist the risk of a less than personal best outcome multiples, requiring heightened awareness and added supports; COVID-19 has and a recession will widened the gap



Maya Angelou 1951-2014



Approaches for Success-3 Doors

ACCESS

Partner with community orgs; Leverage outreach workers to find/bring people in & navigators to enroll in benefits

TREATMENT

One standard of care for all, individualized to Med-BH-SDoH need and culture; advocates to promote goals and preferences

OUTCOMES

Follow-up and iterate; verify all complex levers (SDoH) addressed; measure by groups to insure all are benefiting



Innovative Workforce Solutions

- Improve the Pipeline-Nursing Education Programs
 - Campaigns and funding to attract new nursing program applicants
 - Creative models to expand pool of nursing educators
- Recruit Nurses into Direct Care Roles
 - Demonstrate quality priority and supports to attract the best nurses
 - Create experience and culture nurses talk about, others want to be part of
- Retention programs
 - Learning and career advancement
 - Clinical promotions not just management
 - Reimbursement for subspecialty degrees and certificate learning
 - Time to feel good about improving patients health and outlook
 - Reduced administrative burden automation and integration with natural clinical workflows
 - Care extenders with appropriate escalation protocols



Bottom line- attract the next generation into healthcare and recruit and retain good nurses by creating a better experience for them to deliver value and be valued

Staying Ahead of Trends :

Focus on Consumer Needs and Partnerships



Ease of Use



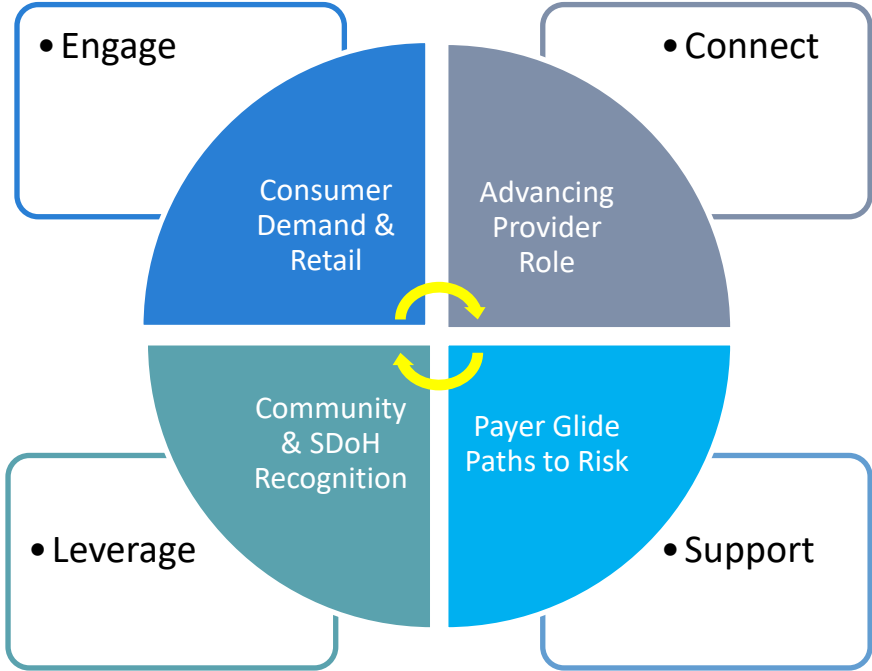
Convenience



Meals on Wheels



Independent Health and YMCA



©HealthCAWS 2018-2023



Telemedicine



New Access Points



CMMI ACO Reach

Thank you



Contact:

Rose Maljanian

Chairman & CEO HealthCAWS

Chairman of the BOD Emeritus PHA

rmaljanian@healthcaws.com

(m) 860-573-1824



INNOVATION SUMMIT
October 25-26, 2023

Discount Codes

ONSITE 50% off
PHA50

ONLINE 98% off
PHA98

<https://phainnovationsummit.com>