Business Model = Continually Raising the Bar

Analyzing, & Designing
Helping our members and staff know the opportunities, trends and implications

Improving policy
Capturing the data-driven, evidence-based insights to craft next generation policy

Testing & Scaling
Designing and scaling models that differentiates them and raises the bar for the nation

Quantified Performance Improvement in Value-Base Care

Value-based purchasing:
HACs, quality, efficiency, cost

Bundled payment

Global payment

HAC & readmissions penalties

Shared savings

FEE-FOR-SERVICE MOVING TO INTEGRATED CARE, NEW PAYMENT MODELS & RISK

QUEST (350 hospitals, 8 years)
- 198,000 deaths avoided
- $17 billion saved
- 5.4% fewer readmissions (3 yrs.)
- Performing 45% better on VBP

Partnership for Patients (450 hospitals, 4 years)
- 74,693 readmissions avoided
- 28,214 harms prevented
- $1.03 billion cost avoided
- Work with thousands of physicians

High-value episodes
- Reduced higher-cost post-acute care utilization by 12% and re-admissions by 30%
- 75% will receive shared savings payments
- > half achieved more than 10% savings

Population management
- 6% of ACOs each yr. since 2012
- Since 2012 performed 2X better than all other ACOs
- Superior quality performance
- Achieved 3X more shared savings than all other ACOs in 2015
Integrating VBC Redesign & New VBP Arrangements

**VB Care Redesign**
- Patient Centered Medical Home
- Clinical Integration
- Care Management
- Post-Acute Care
- Electronic Health Record
- Data analytics

**Care redesign must not outpace changes in payment**

**VB Payment Arrangements**
- Care Transformation Costs
- Care Management Payment
- Shared Savings
- Episodes of Care Payment
- Global Payment

Value-Based Transformation

Healthcare Projected to Add More Jobs

**The Role of the Health Care Workforce in Delivery System Reform**

**Quadruple Aim**
- Improved Patient Outcomes
- Improved Patient Experience
- Lower Cost of Care
- Satisfied Providers

**Nursing Projected to Have Highest Demand**

<table>
<thead>
<tr>
<th>Profession</th>
<th>Job Projected (2016-2026)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physicians and surgeons, all other</td>
<td></td>
</tr>
<tr>
<td>Nurse practitioners</td>
<td></td>
</tr>
<tr>
<td>Physical therapists</td>
<td></td>
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<tr>
<td>Licensed practical and licensed vocational nurses</td>
<td></td>
</tr>
<tr>
<td>Registered nurses</td>
<td>500,000 - 550,000</td>
</tr>
</tbody>
</table>

The Role of the Health Care Workforce in Delivery System Reform

Moving to 1:1 or 1:2 > ratio
Help off-load the physician, but are moving towards care team model

Increasing Use of Advanced Practice Providers in Team-Based Care Models

Staffing Needs – Inpatient professions
Staffing Needs – Ambulatory professions

Staffing Needs – Post-acute professions