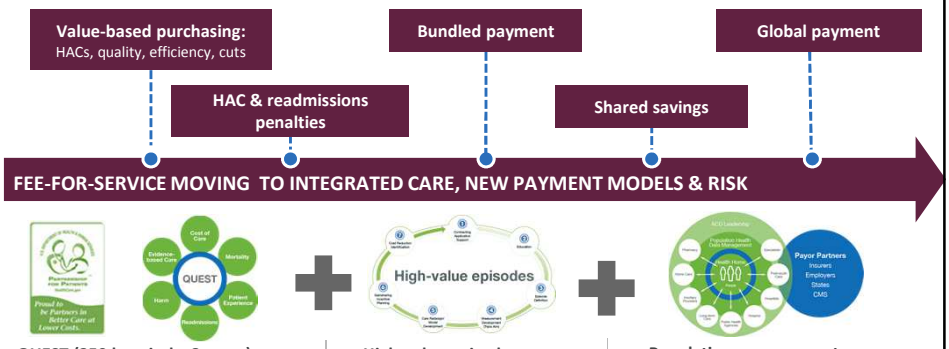
Business Model = Continually Raising the Bar

1

Quantified Performance Improvement in Value-Base Care



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% achieved savings
- 2/3 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

2

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

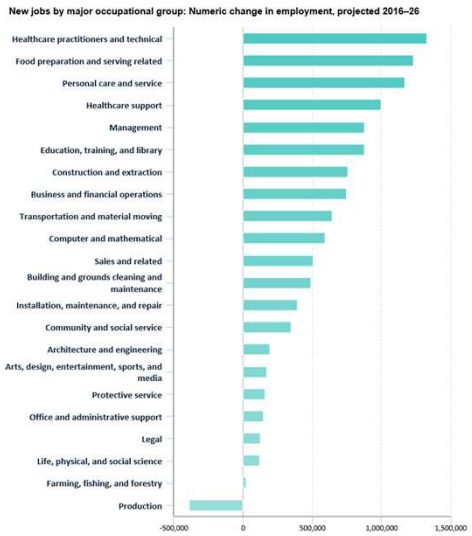
VB Payment Arrangements

- Care Transformation Costs
- Care Management Payment
- Shared Savings
- Episodes of Care Payment
- Global Payment

Value-Based Transformation

3

Healthcare Projected to Add More Jobs



Source: Projections of the labor force, 2016–26, *Career Outlook*, U.S. Bureau of Labor Statistics, November 2017.

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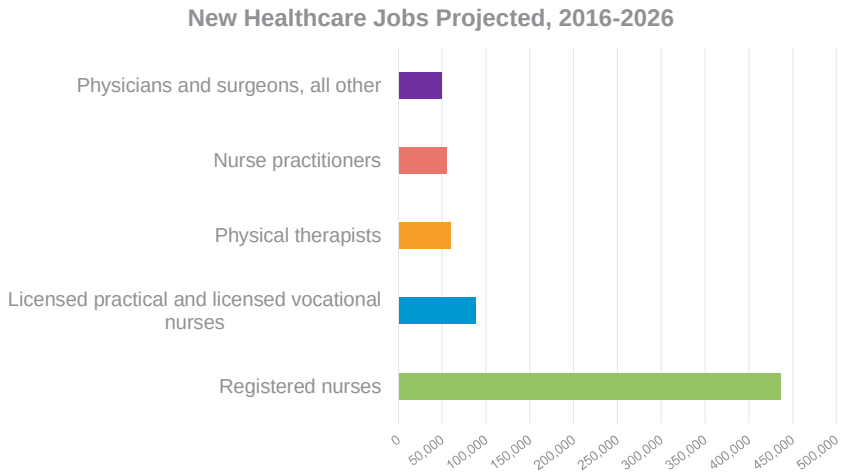
Quadruple Aim

5

Nursing Projected to Have Highest Demand



Source: Projections of the labor force, 2016–26, *Career Outlook*, U.S. Bureau of Labor Statistics, November 2017.

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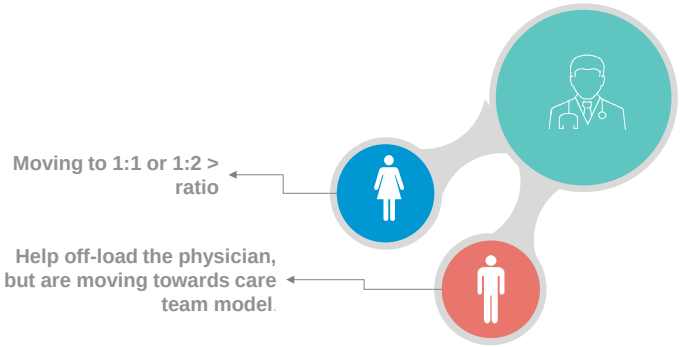
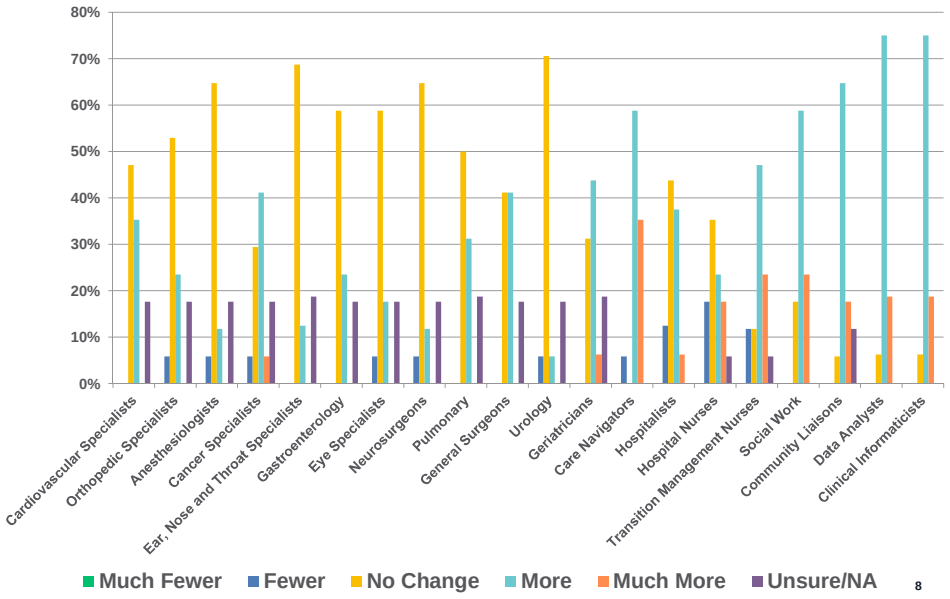
Increasing Use of Advanced Practice Providers in Team-Based Care Models

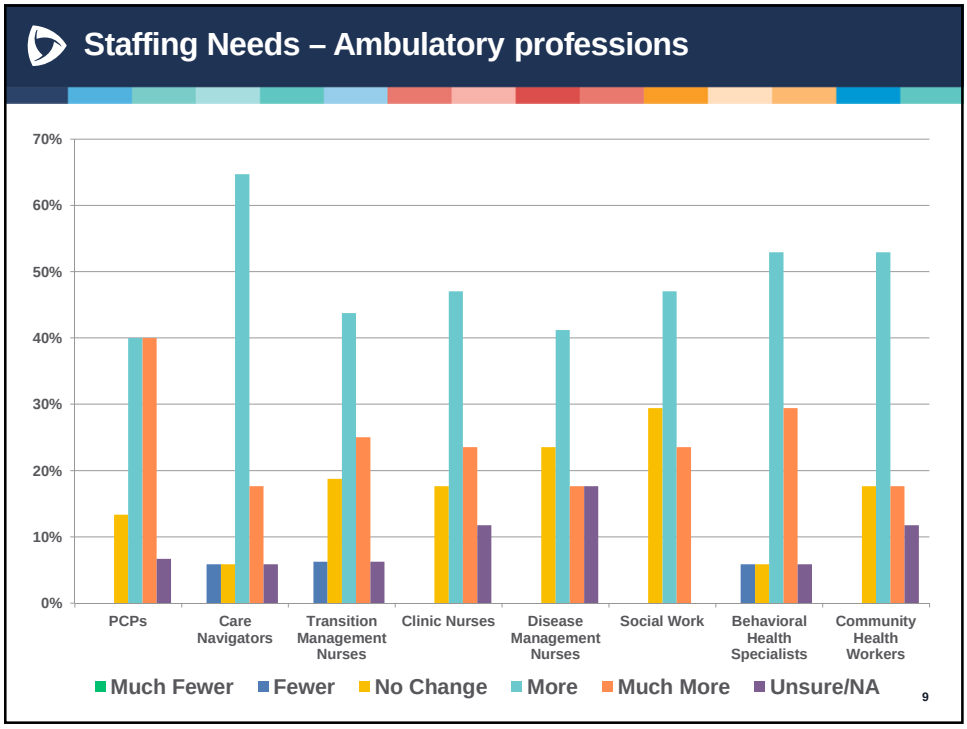


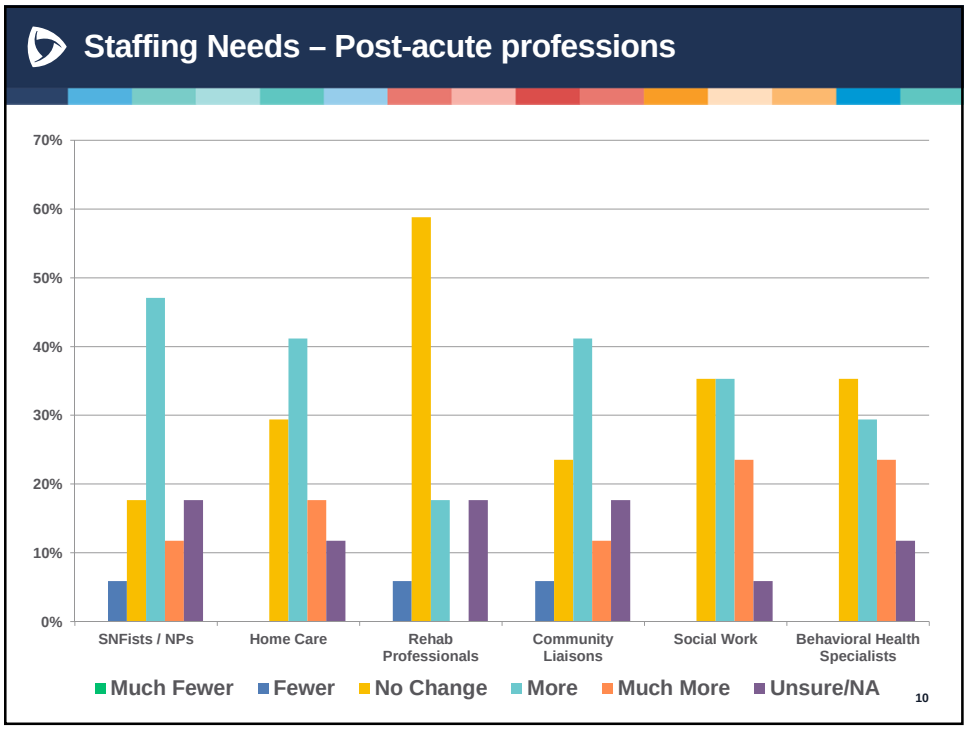
7

Staffing Needs – Inpatient professions



8


Staffing Needs – Ambulatory professions
70%
60%
50%
40%
30%
20%
10%
0%
PCPs
Care Navigators
Transition Management Nurses
Clinic Nurses
Disease Management Nurses
Social Work
Behavioral Health Specialists
Community Health Workers
Much Fewer
Fewer
No Change
More
Much More
Unsure/NA
9


Staffing Needs – Post-acute professions
70%
60%
50%
40%
30%
20%
10%
0%
SNFists / NPs
Home Care
Rehab Professionals
Community Liaisons
Social Work
Behavioral Health Specialists
Much Fewer
Fewer
No Change
More
Much More
Unsure/NA
10