


2019-2020

DIGITAL ANNUAL REPORT

Explore more of the story with 

NASHVILLE
HEALTH CARE
COUNCIL

LETTER

FROM THE CHAIRMAN



Robert A. Frist, Jr.
(Chairman)
Co-founder, CEO
and Chairman
HealthStream

The 2019-2020 fiscal year ended in the midst of a global pandemic, significant social unrest, and the worst economy since the Great Depression. Great challenges call for great leadership—and in health care—we have all seen the nation's health care industry step-up in heroic ways to fight COVID-19 and focus on the health and well-being of our communities. The Nashville Health Care Council, its leadership, and its member companies demonstrated such leadership in numerous collaborative efforts as you will read about in this annual report.

Alongside the backdrop of the coronavirus pandemic during 2020, the full-year operational performance of the Nashville Health Care Council was strong, setting a solid foundation for future growth and national leadership for the health care industry. In the 2019-2020 fiscal year, 45 companies joined the Nashville Health Care Council as new members, expanding the scope and diversity of companies represented in its roster of over 300 members.

Member companies remained highly engaged throughout the year. Over 100 notable speakers participated in a variety of targeting programming throughout the year. The prestigious Nashville Health Care Council Fellows program was held with 30 highly esteemed, executive health care leaders from across the industry. A delegation of 50 members traveled to Boston, Massachusetts through the Leadership Health Care program where innovative developments in health care delivery were explored, discussed, and shared with other industry leaders in the area. These initiatives are examples of the collaboration and thought leadership being facilitated by the Nashville Health Care Council.

The Nashville Health Care Council Board and its 30 industry-leading board members completed an extensive strategic planning initiative, setting the direction and focus on the Council and its efforts supporting the health care industry over the next five years. While the health care industry is showing substantial challenges ahead of us, I am confident in the outstanding leadership demonstrated by these board members.

The foundational objective of the Nashville Health Care Council has always been about collaborating and leading efforts that, ultimately, result in the improved health and wellbeing of all people. As Chairman of its Board, I've seen first-hand the extraordinary leadership from our nation's largest health care providers who are facing unprecedented challenges. Their leadership and the brave work being done by all of the Council's members that should give us confidence and hope.

Sincerely,

Robert A. Frist, Jr.



PURPOSE STATEMENT

To inspire global collaboration to improve health care by serving as a catalyst for leadership and innovation.

BOARD OF DIRECTORS

2019-2020

Robert (Bobby) A. Frist, Jr. (Chairman)
Co-founder, CEO and Chairman
HealthStream

Tim Adams
President and CEO
Ascension Saint Thomas Health

Lucinda (Cindy) M. Baier
President and CEO
Brookdale Senior Living

Michael Burcham
Executive Partner
Shore Capital Partners

Stuart (Stu) Clark
CEO
Premise Health

Neil de Crescenzo
President and CEO
Change Healthcare

Nancy-Ann DeParle
Partner and Co-Founder
Consonance Capital Partners

David Dill
President and CEO
LifePoint Health

Stephen F. Flatt
CEO
National HealthCare Corporation

Craig Gardella
Executive Vice President
Renasant Bank

Sam Hazen
President and CEO
HCA Healthcare

Christopher A. Holden
(Vice-Chair)
President and CEO
Envision Healthcare

R. Milton Johnson
(Immediate Past Chairman)
Former Chairman and CEO
HCA Healthcare

A.J. Kazimi
CEO
Cumberland Pharmaceuticals

Paul Kusserow
President, CEO and Chairman
Amedisys

Ken Marlow
Partner and Chair,
Healthcare Dept.
Waller

Lynn Massingale, M.D.
Executive Chairman
TEAMHealth

Jennifer Meyers
Managing Director
Marwood Group

Frank G. Morgan
Managing Director:
Equity Research
RBC Capital Markets

Debra (Debbie) Osteen
CEO
Acadia Healthcare

Colby Paxton
Area President
Gallagher

Keith Payet
CEO
UnitedHealthcare
Community Plan of Tennessee

Thomas Payne
Dean, College of Business
Tennessee Tech University

C. Wright Pinson, M.B.A., M.D.
Deputy CEO, Chief Health System Officer
Vanderbilt University Medical Center

Saurabh Sinha
CEO and Founder
emids

Dee Anna Smith
CEO
Sarah Cannon

Matt Smith
Partner
BKD

Fahad Tahir
(Fellows 2019 Class)
President and CEO
Ascension Saint Thomas Midtown & West Hospitals

Russ Thomas
CEO
Availity

Jessica Wells
(LHC Chair)
AVP, Education and Research –
Graduate Medical Education
HCA Healthcare

THE NHCC FAMILY TREE

CONTINUES TO GROW

180 Health Partners
3-D Technology Group
86Borders
Acadia Healthcare
Accenture

ACS BrightEdge Fund

AdhereHealth
Advocata
Aegis Sciences Corporation
Aligned Imaging Solutions
Alive Hospice

AllianceBernstein

Alvarez & Marsal
Alzheimer's Association
Amedisys
American Addiction Centers

American Health Partners

American Hospital Association
American Physician Partners
Amerigroup Tennessee

Ancore Health

Ankura

Aon

Apex Health Solutions

Apollo Global Management
Applied Health Analytics
Apricity Resources

Aquity

Ardent Health Services
Ascension Care Management
Ascension Saint Thomas
Aspire Health
Aspire Wellness
athenahealth
Availity

Avelead

Avondale Partners
axialHealthcare
Aya Healthcare
Bailey Southwell & Co.
Baker Donelson
Ballad Health
Bank of America
Barclays Capital
Bass, Berry & Sims
BDO USA

BehaVR

Belmont University
Berkeley Research Group
Binary Fountain
BKD
BlueCross BlueShield of Tennessee

Blue Health Intelligence

Bone and Joint Institute of Tennessee

Bradley
Brentwood Capital Advisors
Bridge Connector
Brigham Digital Innovation Lab
Brookdale Senior Living
Brown Brothers Harriman & Co.
Buffkin / Baker
Burr & Forman
Cadence Bank
Cain Brothers & Company
Canaccord Genuity
Capio
Capital Alignment Partners
Capital One Healthcare
CapStar Bank
CarePayment
Carr Riggs & Ingram

Center for Disease Control and Prevention

Center for Medical Interoperability
Centerstone
Cerner Corporation
Change Healthcare
Cherry Bekaert
Cigna-HealthSpring
Circulation
Citizens Bank
CleanSlate Centers
Clearwater

Clover Health

Cognizant
Coker Group

Commerce Bank

Community Health Systems
Compassus
Concert Genetics
Consonance Capital Partners
Contessa
Core Clinical Partners
Corizon Health
Council Capital

Courage Capital Management Covenant Health

Covenant Surgical Partners
Cranial Technologies
Cressey & Company
Crosslin Healthcare
Crowe
Cumberland Pharmaceuticals
Currie Medical Specialties
DaVita
Decode Health
Deloitte
Digital Reasoning
Diversicare Healthcare Services
Dream Technologies

DVL Seigenthaler
Earl Swensson Associates
Echo Health Ventures
eHealth
Elevation Search Solutions
emids
EnableComp
endevis Recruiting | Retention
Envision Healthcare
Epstein Becker Green
EspriGas
ETSU College of Public Health
eviCore Healthcare
EvidenceCare
Experian Health
EY
Fast Pace Health
Fifth Third Bank

Find Great People

FirstBank
First Horizon Bank
Fitch Ratings

ForeFront Telecare

Frist Cressey Ventures

FTI Consulting Health Solutions
Furst Group
Gallagher
GE Healthcare
GoCheck Kids
Gould Turner Group

Graham Healthcare Capital

Gresham Smith
Hancock Whitney Bank
Harbert Management Corporation
Harpeth Capital

Harrod Healthcare Real Estate (HHRE)

Harrow Health

Haslam College of Business, The University of Tennessee
HCA Healthcare
Health Catalyst
Healthcare Management Partners

Healthpeak Medical Office Properties

HealthStream
Heritage Group
Huguley Consulting
Humana
Huntington National Bank

IMAC Holdings

Initium Health

Interlace Health

IVX Health

Jarrard Phillips Cate & Hancock

JLL
Jumpstart Foundry
KEPRO
KPMG
Kraft Healthcare Consulting
LabCorp
Laura Campbell & Associates
LBMC
Life Science Tennessee
LifeConnect Health
LifePoint Health
Linden Capital Partners
Lipscomb University
Lirio
Lockton
Lovell Communications
Ludi
Marsh | Mercer | Oliver Wyman
Martin Ventures
Marwood Group
McDermott Will & Emery
MedChat
MEDHOST
Medical Facilities Corporation
Medical Properties Trust
Medix
Meharry Medical College
Microsoft
Mobile Mentor
Modern Healthcare
MP&F Strategic Communications
MTSU Jones College of Business
MUFG Union Bank
myNEXUS
Narus Health
Nashville Area Chamber
of Commerce
Nashville Capital Network
Nashville Entrepreneur Center
Nashville General Hospital
Nashville Technology Council
National Distribution and
Contracting
National HealthCare Corporation
National Seating & Mobility
naviHealth
Nelson Mullins
Newport Academy
NexPhase Capital
Noro-Moseley Partners
North Highland Company
Nuecura Partners
Office Resources, Inc. (ORI)
OGA
Olive
Onlife Health

OnSoble
Optum
OrboGraph
Orcutt | Winslow
Outpatient Imaging Affiliates
PatientFocus
Petra Capital Partners
Phreesia
PhyMed Healthcare Group
Physicians Realty Trust
PICA
Pinnacle Financial Partners
PNC Bank
Polsinelli
Ponder & Co.
Premise Health
Press Ganey Associates
Preverity
Privia Health
Prologics Healthcare
Psych Hubs
Psychiatric Medical Care
PwC
PYA
Qventus
Radiology Partners
Raymond James & Associates
RBC Capital Markets
RCCH Healthcare Partners
Real Time Neuromonitoring
Associates
Regions Bank
Remar
Renasant Bank
ReviveHealth
RevSpring
RLDatix
RSM
Saint Francis Healthcare
Salesforce
Salus
Santander Commercial Banking
Sante Ventures
Sarah Cannon
Select Specialty Hospital
Shareable Forms
Sharecare
Shearwater Health
Sherrard Roe Voigt & Harbison
Shore Capital Partners
Siemens Healthineers
Siloam Health
Simbiote Development
SimplifyASC
SmileDirectClub
SpecialtyCare

Spectrum Health Partners
Spero Health
Starr Investment Holdings
Stratasan
Stroudwater Associates
SunTrust Banks | SunTrust
Robinson Humphrey
Surgery Partners
Sweet Dreams Anesthesia
Synergasia Health Technologies
TATA Consultancy Services
TEAMHealth
Tend
Tennessee Department of
Health
Tennessee Hospital Association
Tennessee Medical Association
Tennessee Oncology
Tennessee Tech University
The Concinnity Company
The Disruption Lab
The Keckley Group
The Little Clinic
The SSI Group
The Viability Company
Tivity Health
T.J. Martell Foundation
Trevecca Nazarene University
Trilliant Health
Trinisys
TruStar Marketing
TwelveStone Health Partners
UBS Financial Services
UnitedHealth Group
Urgent Care Group
Ursa Health
Utilize Health
Vaco
Vanderbilt Owen Graduate
School of Management
Vanderbilt University Medical
Center
Ventas
Virsys12
VMG Health
Waller
Wells Fargo Healthcare Group
Western Kentucky University
Williamson Medical Center
WillisTowers Watson
Windrose Health Investors
Workday
Ziegler Investment Banking

LETTER

FROM THE PRESIDENT



Hayley Houvious

*President, Nashville
Health Care Council*

As I reflect on the previous year for the Council, it has been a privilege to witness the persistence and resilience of the Council staff, the board and our members as we all continue to manage our way through the COVID-19 global pandemic.

During this time, the Council has continued with its purpose of connecting and educating the industry, by pivoting and delivering content and networking experiences in virtual forums and formats. Not only has the Council made it a priority to ensure that our members have access to timely information about COVID-19 via our COVID-19 Readiness Update calls and listening sessions with public figures, we've also introduced new programming via our Brass Tacks Series that gives our members insight into the ways Council board members are leading through the crisis. We're leading by convening our community partners in Nashville and across the country to share best practices and information and to align our efforts

around economic recovery.

This type of immediate response and transformation would not have been possible without the unflagging effort of the Council staff and the strength and patience of the Council board. The Council team has demonstrated an amazing amount of adaptability, teamwork and service orientation through this turbulent time, and the Council board has been overwhelmingly supportive as we have worked to change the way in which we serve our members and navigate an uncertain future.

I'm thankful to work in such an industry with such people. Thank you to all of our members.

Sincerely,

Hayley Hovious

NASHVILLE HEALTH CARE COUNCIL

2019-2020 BY THE NUMBERS

323

CORPORATE MEMBERS

45

NEW MEMBER COMPANIES

7,200+

TOTAL EVENT ATTENDEES

78

EVENTS

100

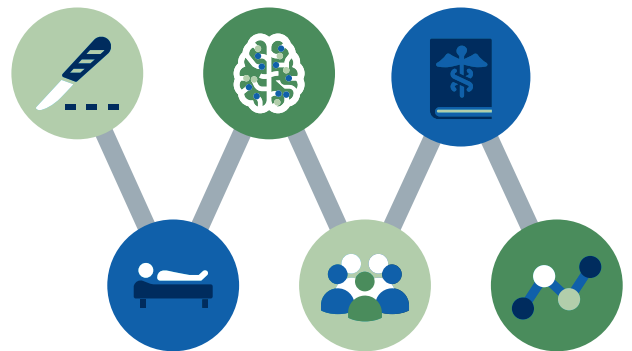
SPEAKERS FEATURED

ABOUT THE INDUSTRY

Home to more than 900 companies working in health care, Nashville is a one-of-a-kind center of leadership, innovation and health care services. With a rich tradition of entrepreneurship and executive talent, Nashville has shaped the nation's health care landscape over the past five decades and continues to improve the delivery of patient care across the globe. Today, people are looking to Nashville to create the solutions needed to revolutionize health care for everyone.

Nashville's diverse health care ecosystem includes world leaders in:

- hospital management
- ambulatory and outpatient surgery
- long-term care
- behavioral health
- population health
- academic research
- health information technology



Local Impact

The Nashville health care industry contributes an overall economic benefit of **\$46.7 billion** and more than **270,000 jobs** to the local economy annually.



International Influence

Globally, Nashville's health care industry generates more than **\$92 billion** in revenue and more than **570,000 jobs**.

9000+

Nashville is home to more than 900 companies working in health care.

- \$1 billion VC capital
- \$92+ billion in annual revenue globally
- 17 publicly traded companies headquartered
- 570,000+ jobs globally

NASHVILLE HEALTH CARE COUNCIL

EVENTS TIMELINE



- 1-75
- 75-150
- 151-300 California
- 301-350 Texas
- 351-581 Florida
- 582 Tennessee

International Impact

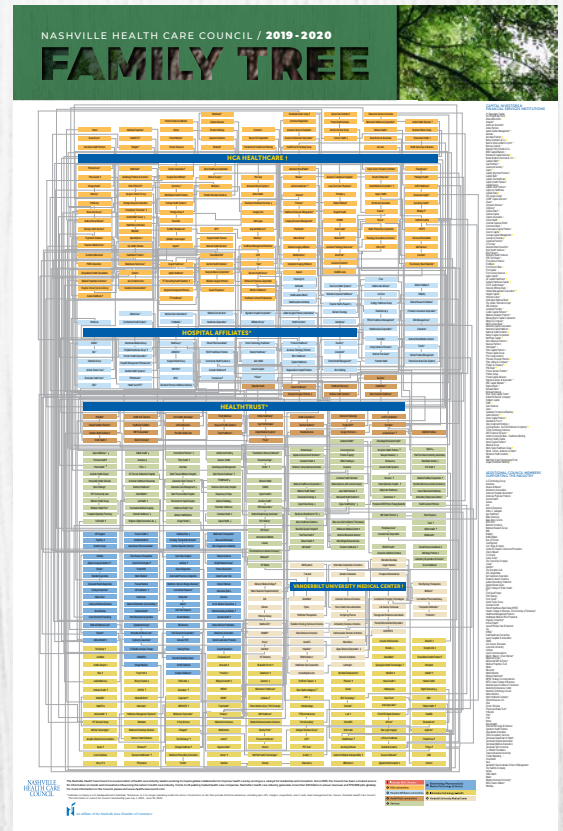
Nashville-based health care firms operate international facilities in Australia, Canada, Ireland, Israel, New Zealand, Philippines, South Korea, and other locations across the globe.

Source: 2018, September, Nashville Health Care Sector Research: Industry Impact and Contribution, National Facilities, International Presence from www.healthcarecouncil.com

International Impact

Nashville-based health care firms operate international facilities in Australia, Canada, Ireland, Israel, New Zealand, Philippines, South Korea, and other locations across the globe.

Source: 2018, September, Nashville Health Care Sector Research: Industry Impact and Contribution, National Facilities, International Presence from www.healthcarecouncil.com



The Family Tree

The Council's signature *Health Care Industry Family Tree* visually represents the entrepreneurial growth in Nashville's diverse health care industry, beginning with the founding of HCA in 1968. Additionally, each Council member is showcased on the *Family Tree*, solidifying its position in Nashville's exceptional health care ecosystem.

JULY 19

JULY 30

LHC New
Member Coffee

AUG, 19

AUGUST 7

LHC Executive Briefing
with **Dee Anna Smith**
(CEO, Sarah Cannon)



Council CIO Dinner
with **Jason Rose**
(CEO, AdhereHealth)

AUGUST 13

Council CEO Dinner
with **Sam Hazen**
(CEO, HCA Healthcare)



LEADERSHIP AND INNOVATION



In the ever-changing world of health care, the Council provides its members access to insights from the industry's most influential thought leaders throughout the year.

Delivering Value-Based Care

Robert Allen, senior vice president and COO, Intermountain Healthcare sat down with former Utah **Governor Mike Leavitt**, founder and general partner, Leavitt Partners for an in-depth conversation about innovation and delivering value-based care.

Measuring the Value in Health Care

The Council hosted a panel discussion featuring three of the world's top authorities

on quality and measurement. The panel included **Leah Binder**, president and CEO of The Leapfrog Group, a national nonprofit organization focused on the quality and safety of American health care; **Marty Makary**, M.D., surgeon and New York Times best-selling author; and **Shantanu Agrawal**, M.D., president and CEO of the National Quality Forum. The panel was moderated by **Janet Marchibroda**, senior vice president of health policy for government affairs firm, Bockorny Group and a Bipartisan Policy Center fellow.

"Measurement should not be a burden. IT solutions should be used to remove the manual effort which can make measurement difficult. And, it's our responsibility to make sure measures are 'good' and measures are scientifically sound, have consensus around them, and are useful." — **SHANTANU AGRAWAL**



AUG '19

AUGUST 21

Council Finance Executive Breakfast with **Frank Morgan** (managing director and healthcare services equity research, RBC Capital Markets)

AUGUST 22

LHC Women's Meetup

AUGUST 27

Council and Nashville Capital Network present Developing Health Care Ventures: Successful Entrepreneurs Investing in the Next Generation



NASHVILLE
CAPITAL
NETWORK

SEPT '19

Solving the Rural Health Care Puzzle: National, State and Provider Perspectives

The Council and the Bipartisan Policy Center (BPC) partnered to address rural health challenges including health disparities and the move to value-based over volume-based care. **Bill Frist**, M.D., former U.S. Senate Majority

Leader and member of BPC's Rural Health Task Force, moderated the conversation which included **Alan Levine**, executive chairman, president and CEO, Ballad Health; **Sarah Chouinard**, M.D., chief medical officer, Community Care of West Virginia; and **Stuart C. McWhorter**, commissioner, Tennessee Department of Finance.



"When you look at rural America, you see patients who are a lot sicker and older than those in urban areas. As a result, we have chronic illnesses that are less controlled and more severe. Layered on top of that now is the opioid epidemic. We don't need expensive technology to solve this problem. We need boots on the ground people who are addressing issues like behavioral health and addiction."

— SARAH CHOUINARD

SEPTEMBER 4

LHC Industry
Tour: Vanderbilt
Children's Hospital

SEPTEMBER 12

Fellows 2020
Recruitment Reception

SEPTEMBER 15-17

LHC 2019 Delegation
to Boston



SEPTEMBER 23

Council Panel
Measuring the Value
in Health Care



LEADERSHIP AND INNOVATION CONTINUED



Election 2020 and the Future of Health Care

Panelists looked at the impact of the upcoming presidential election and COVID-19 on health care, discussed policy and regulatory changes, and discussed the outlook for private equity investments. **Blake Farmer**,

senior health care reporter, Nashville Public Radio, moderated a panel which included **Paul Keckley**, Ph.D., managing editor, the Keckley Report; **Zac McCrary**, partner, ALG Research; and **Susan C. Winckler**, RPh, Esq., chief risk management officer, Leavitt Partners.

“The pandemic has been an accelerant to increase access, decrease cost and increase quality of care. The numbers are staggering: Telehealth visits per year that are normally in the 2% to 3% range will triple or quadruple in a matter of months in response to the pandemic.” — **ROB REBAK**



OCT'19

OCTOBER 1

Council Annual
Golf Tournament



OCTOBER 8

Council
Chairman's Dinner

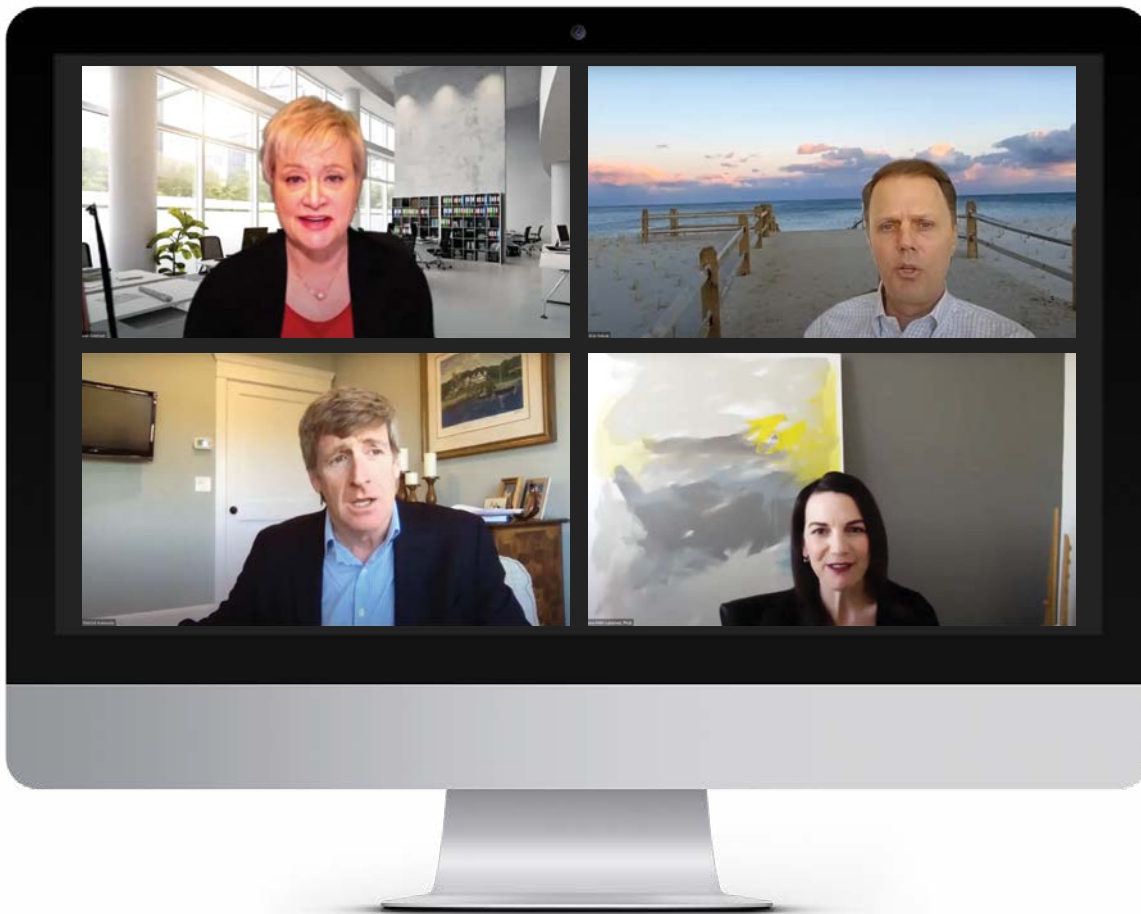
LHC New
Member Coffee



OCTOBER 9

LHC Executive
Briefing with **Chris
Holden** (CEO,
Envision Healthcare)





Virtual Models of Care: Behavioral Health in a Time of Social Isolation 🌿

Patrick J. Kennedy, former congressman (D-RI), co-founder of OneMind, and founder of The Kennedy Forum; **Rob Rebak**, CEO of ForeFront Telecare, and fellow, Nashville Health Care Council; and **Julianne Holt-Lunstad**, Ph.D., professor of psychology and neuroscience, Brigham Young University discussed the serious long-term health effects of social isolation and loneliness, the urgent need to address mental health during the COVID-19 crisis, and the role of telehealth in addressing the country's most pressing needs. **Susan Dentzer**, senior policy fellow, Duke-Margolis Center for Health Policy moderated the conversation.

View from a Pandemic: Road to Economic Recovery 🌿

Dr. Larry Van Horn, associate professor of management and executive director of health affairs, Vanderbilt University, and **Dr. Arthur Laffer**, economist and author, discussed the state of the health care industry and the nation's economy in the wake of the COVID-19 pandemic.



OCTOBER 15

Council Finance Executive Breakfast with **Marty Rash** (board member, LifePoint Health)

OCTOBER 22

Council CIO Dinner with **Manish Shah** (senior vice president and CIO, Community Health Systems)

OCTOBER 24

Council CEO Dinner with **David Dill** (president and CEO, LifePoint Health)
LHC Women's Meetup

NOV, '19

NOVEMBER 5

LHC Lunch and Learn: Cybersecurity with **Baxter Lee** (CFO, Clearwater Compliance) and **Nesrin Tift** (member, Bass, Berry and Sims)

NOVEMBER 11

Council Discussion and Executive Roundtable with **Governor Mike Leavitt** (founder, Leavitt Partners) and **Robert Allen** (senior vice president and COO, Intermountain Health Care)

Council finance programs prepare members with crucial information needed to make well-informed decisions that promote continued business growth, investment in innovation, and high-quality patient care.

Developing Health Care Ventures: Investor and Entrepreneur Collaborations



In partnership with Nashville Capital Network, the Council presented a panel featuring investor/entrepreneur pairs in high-growth health care companies, shedding

light on what makes **successful partnerships** in rapidly changing ventures.

This year's panel included **Bobby Frist**, CEO and co-founder, HealthStream; **Ken Melkus**, private investor and advisor; and **Jim Sohr**, founder and chairman, Powered Health. The discussion was moderated by **Margaret Dolan**, president and CEO, Launch Tennessee.

Wall Street's View on Prospects for the Health Care Industry

More than 600 health care executives gathered to hear top investment analysts discuss 2020 predictions for the health care industry. The esteemed analysts predicted the direction of popular health care trends, investment risks and M&A activity with focus on the potential impacts of health care legislation and the outcomes of the 2020 election.

This year's discussion was moderated by **Milton Johnson**, retired chairman and CEO, HCA Healthcare, and included **Frank G. Morgan**, managing director, RBC Capital Markets; **Ralph Giacobbe**, equity research analyst, Citigroup; and **A.J. Rice**, managing director, Credit Suisse.



"For me, I'd like to see solutions that put the patient in the center of their own health. There should be a way patients can easily provide health records to any health facility they visit."

- JIM SOHR

NOVEMBER 14

Fellows Alumni Dinner with former **U.S. Senator Bill Frist, M.D.** and **Larry Van Horn, Ph.D.**



NOVEMBER 19

LHC Industry Tour: Second Harvest Food Bank of Middle Tennessee





“The coronavirus can be seen as an accelerant for future investment trends, such as primary care, home care and digitizing health care services. The reality is, whether it’s mental or physical health, the coronavirus has changed the dynamic between the clinician and the patient.” - **ANN LAMONT**

Financing the Deal

During this virtual event, members heard from expert finance executives on current and future investment trends. The panel provided inside perspectives on the state of the market, the impact of the coronavirus on deal flow and trending sectors to watch. **Tom Wylly**, senior

partner, Brentwood Capital Advisors moderated the panel comprised of **Geoffrey C. Clark**, senior managing director, Starr Investment Holdings; **Bruce Crosby**, co-founder and managing partner, Health Velocity Capital; **Ann Lamont**, co-founder and managing partner, Oak HC/FT; and **Scott Poole**, partner, Ridgemont Equity Partners.



“Medicare for All is of key interest to investors. The candidates promoting it will have their moment in the sun between now and March 3, Super Tuesday. Our period of maximum volatility is probably in the next four to six weeks.” - **A.J. RICE**

DEC '19

DECEMBER 3

Council Board-
Hosted Holiday
Reception



DECEMBER 10

LHC Holiday and
Awards Reception



JAN '20

JANUARY 9

Council Board
Strategic
Planning Session



INSPIRING COLLABORATION



Through small-group opportunities, Council members are exposed to high-level guest speakers in an intimate, candid environment, allowing them to make valuable connections and share ideas that will drive their businesses and the industry forward.

Partnerships and Outreach

The Council works to build strong relationships across the health care community by partnering with a number of nationally recognized organizations.



In February, the Council partnered with ACG New York for the 11th Annual Health Care Conference in New York City, allowing members to network with private capital providers, M&A advisers, and corporate executive in the Big Apple.



The Council and the Bipartisan Policy Center (BPC) partnered to shine a light on rural health

care challenges and the move to value-based over volume-based care. The BPC's rural health task force draws upon a wide range of political and industry perspectives and includes health care experts, business leaders, physicians, former elected officials, and other key stakeholders.



The Council is a founding member of Together.Health, and works collaboratively to share best practices, inform stakeholders, and leverage existing resources to fuel the creation and adoption of digital health innovation. Together.Health uses the power of community to accelerate the development and implementation of innovative digital health solutions.

JANUARY 15

LHC New Member Coffee

JANUARY 21

LHC Executive Briefing with **Dr. Mike Cuffe** (president, Physician Services Group, HCA Healthcare)



JANUARY 24-25

2020 Fellows Opening Retreat

JANUARY 29

Council presents Wall Street's View on Prospects for the Health Care Industry



JANUARY 30

LHC Women's Meetup

“Continuing our partnerships, especially during the COVID-19 pandemic, has been essential to our mission of inspiring global collaboration. There hasn’t been a more crucial time where collaboration and innovation on a large scale has been more necessary than now.”

- HAYLEY HOVIOUS

PRESIDENT, NASHVILLE HEALTH CARE COUNCIL



Exclusive Gatherings

This year, featured guest speakers for executive gatherings included, among others:

Rob Allen, Senior Vice President and Chief Operating Officer, Intermountain Healthcare and

Governor Mike Leavitt, Founder and Chairman, Leavitt Partners; former Administrator of the Environmental Protection Agency and Secretary of Health

and Human Services, George W. Bush Administration; former Governor of Utah

Jason Rose, Chief Executive Officer, AdhereHealth

David Dill, President and Chief Executive Officer, LifePoint Health

Don Rucker M.D., National Coordinator of Health Information Technology, U.S. Dept. Health and Human Services

Sam Hazen, Chief Executive Officer, HCA Healthcare

Bill Rutherford, Executive Vice President and Chief Financial Officer, HCA Healthcare

Frank G. Morgan, Managing Director and Healthcare Services Equity Research, RBC Capital Markets

Manish Shah, Senior Vice President and Chief Information Officer, Community Health Systems

Marty Rash, Board Member, LifePoint Health

FEB'20

FEBRUARY 5

LHC Lunch and Learn: Consumerism with **Dr. Marc Watkins** (chief medical officer, Kroger Health)



FEBRUARY 6

Council Finance Executive Breakfast with **Bill Rutherford** (executive vice president and CFO, HCA Healthcare)

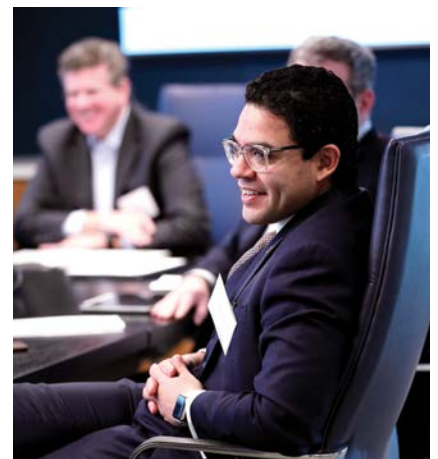
Fellows Alumni Dinner with **Douglas Holtz-Eakin, Ph.D.** (president, American Action Forum)

FEBRUARY 11

Council CIO Dinner with **Don Rucker M.D.** (national coordinator, health information technology, U.S. Dept. Health and Human Services)



GROWTH INITIATIVES



FEBRUARY 13

Council and the Bipartisan Policy Center present panel and roundtable discussion on Solving the Rural Health Care Puzzle: National, State and Provider Perspectives

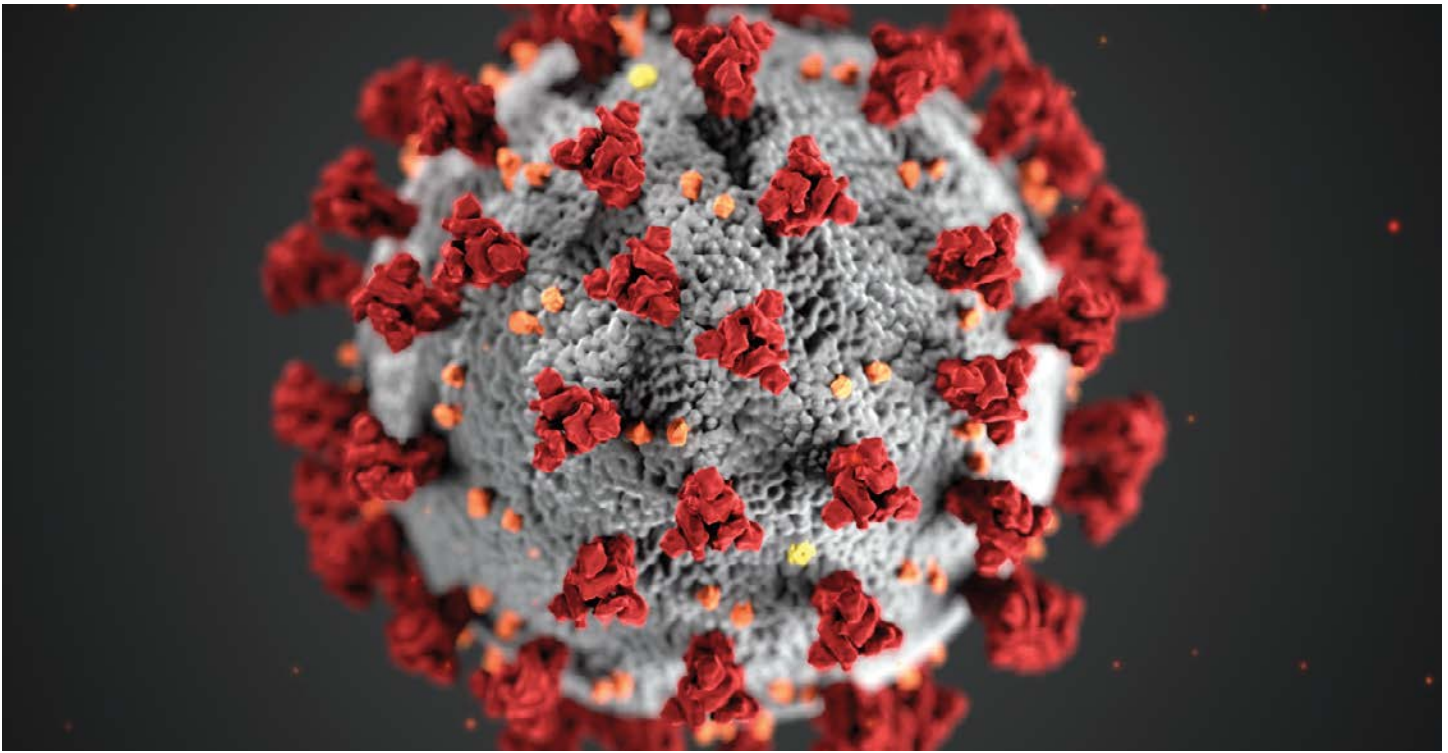


FEBRUARY 20

Fellows Alumni and 2020 Class Reception

MAR'20





Council Board Five-Year Strategic Planning

In January, more than 25 board members participated in a half-day strategic planning session that provided invaluable support and direction to the Council staff. The board contributed their input on the most vital topics of 2020 and beyond. Breakout topics included membership makeup, product and revenue growth, workforce and talent development, and health care industry growth.

COVID-19 Response

As the COVID-19 pandemic affected people and economies around the globe, the Nashville Health Care Council closely monitored the spread of virus and remained in close communication with public health officials, member companies and partners to determine the actions it should take to maintain operations and help limit the spread of the virus.

In response, and after only a week of preparation, Nashville Health Care Council operations transitioned to the virtual space. All Council, Council Fellows, and Leadership Health Care events went virtual or were postponed. Within the same time, Council staff transitioned to remote work with little to no disruption to workflow.

Recognizing that Council members were uniquely positioned to offer a national perspective on the COVID-19 pandemic, the **Nashville Health Care Council COVID-19 Readiness Team** was announced on March 6. Convening virtually on more than 14 occasions within the 2019-2020 fiscal year and with more than 206 representatives of participating member companies, this team of Council members, partners, and public health experts came together to take on the unknowns of the virus.

MARCH 10

LHC Industry
Tour: Behavioral
Care Center

MARCH 25

Council Virtual Panel
Discussion: Election
2020 and the Future
of Health Care

APRIL '20

APRIL 16

LHC Virtual Lunch
and Learn: Making
Business Happen
in Health Care with
Gail Peace (founder
and CEO, Ludi)

APRIL 22

Council Virtual
Models of Care:
Behavioral
Health in a Time
of Social Isolation

APRIL 23

Council Virtual
Investor Meetup

MAY '20

MAY 6

Council Listening
Session with
**U.S. Senator
Lamar Alexander**
(R-TN)



HEALTH CARE BRASS TACKS

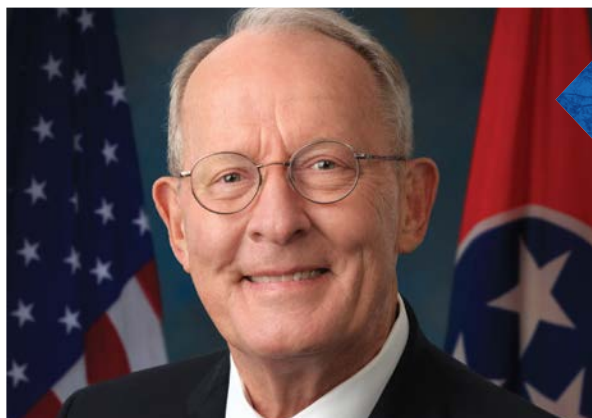
NASHVILLE
HEALTH CARE
COUNCIL



"I learned that something as simple as a three- or four-minute video, recorded in my backyard, could remind employees that we're all in this together."

- **DAVID DILL**

PRESIDENT, CEO, LIFEPOINT HEALTH



"What will solve the problem are tests, treatments, and vaccines."

- **U.S. SENATOR
LAMAR ALEXANDER**

MAY 7

Council Virtual
Investor Meetup

MAY 12

Council Health Care
Brass Tacks with **Neil de
Crescenzo** (president and
CEO, Change Healthcare)



MAY 13

Council Industry
Roundtable:
Communications
and Marketing

MAY 14

LHC Virtual Women's Meetup

Fellows Virtual Alumni Event with
Tony Briningstool, M.D. (senior vice
president and chief medical officer,
American Physician Partners)

COVID-19 Programming and Collaboration

As the COVID-19 pandemic began to critically impact the health care industry, collaboration deepened within the industry and among Council members. The Council continued to advance content and networking experiences by introducing new virtual programming via listening sessions with public figures, such as **U.S. Senator Lamar Alexander** (R-TN) and **Brad Smith**, deputy administrator and director, Centers for Medicare and Medicaid Services.

In addition, the new **Brass Tacks** event series gave insight into how Council board members lead through the crisis and featured **Neil de Crescenzo**, president and CEO, Change Healthcare; **Stu Clark**, CEO, Premise Health; and **David Dill**, president and CEO, LifePoint Health.

The Council team also convened community partners in Nashville and across the country to align efforts around economic recovery, investors to track market changes, and Council member communications leads to collaborate on disseminating important information.

COVID-19 Readiness Team Speakers in 2019-2020 Fiscal Year

Dr. Michael C. Caldwell, MPH as Metro Nashville's Director of Health

Molly Cate, Founding Partner and Chief Innovation Officer, Jarrard, Phillips Cate & Hancock

Dr. John Dreyzehner, MPH, FACOEM is the Director of the Center for Preparedness and Response, Centers for Disease Control and Prevention (CDC)

David Jarrard, President and CEO of Jarrard, Phillips Cate & Hancock

Dr. Lisa Koonin, Senior Advisor, Health Care Systems Coordination Team, Centers for Disease Control

Dr. Clem Lewin, Ph.D., Associate Vice President R&D Strategy, Sanofi Pasteur

Dr. Veronica Mallett, Senior Vice President for Health Affairs, and Dean, School of Medicine, Meharry Medical College

Dr. Kelly Moore, President, Vaccine Advisor; Associate Director, Immunization, Education and Action Coalition; Adjunct Professor, Vanderbilt University Medical Center

Anna-Gene O'Neal, Division President - Health Care Services, Brookdale Senior Living

Dr. Jonathan Perlin, President of Clinical Services and Chief Medical Officer, HCA Healthcare

Dr. Lisa Piercey, MBA, FAAP, Commissioner, Tennessee Department of Health

Christopher Rhem, Chief Medical Officer, LifePoint Health

Dr. Kenneth Sands, Chief Epidemiologist and Chief Patient Safety Officer, HCA Healthcare

Dr. William Schaffner, Professor, Preventative Medicine, Health Policy, Division of Infectious Diseases, Vanderbilt University Medical Center

Monica Schoch-Spana, Ph.D., Senior Scholar, Senior Scientist, Johns Hopkins Bloomberg School of Public Health

Dr. Lynn T. Simon, MBA, President, Clinical Operations and Chief Medical Officer, Community Health Systems

Teresa Sparks, Executive Vice President and Chief Financial Officer, Envision Healthcare

Becky Stoll, Pandemic Preparedness Unit, Centerstone

Fahad Tahir, President and CEO, Ascension Saint Thomas Midtown and Saint Thomas West Hospitals

Dr. Eric Toner, Senior Scholar and Senior Scientist, Johns Hopkins Center for Health Security

MAY 19

LHC Virtual Discussion: Managed Care and Reaching Patients in the New Normal with **Robert Garnett** (president and CEO, Amerigroup Tennessee) and **Nesrin Tift** (member, Bass, Berry and Sims)

MAY 21

Council Presents Financing the Deal: Deal-Making Trends and Strategies for Health Care Companies

Council Post-Event Small Group Discussion: Financing the Deal

MAY 27

Council Industry Roundtable: Communications and Marketing

JUNE '20

JUNE 2

Health Care Brass Tacks with **Stu Clark** (CEO, Premise Health)



GROWTH

INITIATIVES CONTINUED



Diversity, Equity and Inclusion Efforts

This year marked a time when the U.S. was at a crux between undeniable racial, economic, and public health tensions following the unjust death of George Floyd by officers of the Minneapolis Police Department. In response, the Nashville Health Care Council board made

a commitment to address racial inequities in health care and hosted The Business of Discussing Race: A Terminology Toolkit featuring **Duane Reynolds**, founder and CEO, Just Health Collective. an open event to equip Nashville's industries with the terminology to navigate impactful discussions about race, equity and more.



"The journey starts here, and I challenge each of you to continue learning, and to guide your organizations to a more just and equitable system."

- **DUANE REYNOLDS**



JUNE 2

LHC Health Care 101 Session 1: Health Care Economic Landscape with **Michael Burcham** (executive partner, Shore Capital)

JUNE 9

LHC Health Care 101 Session 2: Pharma and PBMs with **Miram Paramore** (president, OptimizeRX)
Council Listening Session with **Brad Smith** (deputy administrator and director, CMS)



JUNE 10

Council Panel View from a Pandemic: The Road to Economic Recovery with **Larry Van Horn, Ph.D.** and **Art Laffer, Ph.D.**

JUNE 17

Council Virtual Investor Meetup
LHC Health Care 101 Session 3: The Payer Perspective with **Darin Gordon** (president and CEO, Gordon and Associates)

"We are proud to be board members of the Nashville Health Care Council because the Council has the opportunity to make a difference by educating members, while also finding better ways to support communities and people of color. As a board, we commit to being a part of positive change."

NASHVILLE HEALTH CARE COUNCIL 2019-2020 BOARD OF DIRECTORS COMMITMENT TO ACTION STATEMENT



Jessica Wells, chair, Leadership Health Care, released a statement recognizing, "we have the responsibility to foster a culture of equality and equity in order to help drive necessary change within our industry." The LHC Board promptly created a **Diversity, Equity and Inclusion Taskforce** and committed to researching all LHC initiatives and activities in order to make improvements that provide a consistent and valuable experience for all members.

Council Fellows Co-chair former **U.S. Senate Majority Leader Bill Frist, M.D.**, challenged all Fellows Alumni to #1 listen and engage and #2 share ideas for solutions and #3 exchange ideas or projects which the Fellows alumni network can discuss and put into action to fight systemic racism. Additionally, a reflective dialogue session was held with Fellows alumni with **Culture Shift Team**, a multicultural training firm.

Health Career Connect

In January, the Council launched an online job forum for non-clinical health care careers. Health Career Connect is designed to be the hub for employers and jobseekers looking

to fill those non-clinical roles that bolster the health care industry's success. While the job board primarily serves Nashville-based companies, it is open to all employers seeking to fill non-clinical roles.

Health Career Connect was developed to help attract national talent to benefit the Nashville health care community, and to deliver on the Council's mission of inspiring global collaboration to improve health care.



HEALTH CAREER CONNECT

powered by the Nashville Health Care Council

JUNE 18

Virtual Fellows Alumni Event with **Veronica Mallett, M.D.** (executive director, Center for Women's Health Research, professor of Obstetrics and Gynecology, Meharry Medical College)



JUNE 23

Health Care Brass Tacks with **David Dill** (president and CEO, LifePoint Health)

LHC Health Care 101 Session 4: The Provider and Physician Services Role with **Leif Murphy** (president and CEO, TEAMHealth)

JUNE 25

Council Presents the Business of Discussing Race: A Terminology Toolkit with **Duane Reynolds** (founder and CEO, Just Health Collective)

LEADERSHIP HEALTH CARE



Join • Grow • Lead

An initiative of the Council to foster Nashville's next generation of health care leaders, Leadership Health Care (LHC) provides

its members with exclusive educational programs and networking opportunities. With membership of more than 600 up-and-coming health care industry professionals from hundreds of organizations, LHC is the foremost organization for emerging leaders in the field.

Boston Delegation

A delegation of more than 50 LHC members visited Boston, Mass. in September 2019 to get an inside look at the state of health care innovation. This marked LHC's 18th annual delegation trip, which featured discussions with **Scott Bailey**, chief growth officer, MassChallenge; **Amanda Bakerlee**, chief product officer and founding team member, Medumo; **Bill Carpenter**, former chairman and CEO, LifePoint Health; **Jacob Cohen**, co-founder and COO, Medumo; **Payal Agrawal Divakara**, principle, 406 Ventures; **Nick Dougherty**, managing director, MassChallenge HealthTech; **Kelly Hall**, senior director, Health Care Transformation and Innovation, Massachusetts Health Policy Commission;

Stephen Konya, senior innovation strategist, Office of the National Coordinator for Health IT, U.S. Department of Health & Human Services; **Aneesha Mehta**, principal, Bain Capital; **Ashley Reid**, founder and CEO, Wellist; **Laurance Stuntz**, director, Massachusetts eHealth Institute; and **Rick Weisblatt**, chief innovation and strategy officer, Harvard Pilgrim Health Care.

LHC Awards

2019 LHC award winners included Supporting Organization of the Year **Bass, Berry and Sims**; Health Care Emerging Leader of the Year **Drake Jarman**, SVP Sales, Stratasan; and Ambassador of the Year **Rachel Johnson**, financial analyst, HCA Healthcare.

“Being involved with and serving LHC for the past ten years has been both professionally and personally rewarding. I have had the pleasure of meeting and working with some of the most innovative leaders in health care throughout my LHC tenure. I am excited about the advancements and opportunities LHC will champion for Nashville health care professionals.”

- JESSICA WELLS

AVP EDUCATION & RESEARCH, GRADUATE MEDICAL EDUCATION,
HCA HEALTHCARE, AND LHC BOARD CHAIRMAN, 2019-2020



Industry Tours and Receptions

Opportunities for hands-on learning and networking are offered through LHC membership. This year, members toured **Vanderbilt Children's Hospital**, **Second Harvest Food Bank of Middle TN**, the **Behavioral Health Center** and connected with peers at the holiday reception and women's meetups.



Executive Briefing Series, Lunch and Learns

LHC hosts events throughout the year to educate members about current health care issues and trends, while providing valuable leadership development and mentorship opportunities.

LHC welcomed **Dee Anna Smith**, CEO, Sarah Cannon; **Chris Holden**, president and CEO, Envision Healthcare; and **Dr. Mike Cuffe**,



president, Physician Services Group, HCA Healthcare as speakers for its *Executive Briefing* series.

This year's LHC *Lunch and Learn* series featured *Cybersecurity* with **Baxter Lee**, CFO Clearwater Compliance and **Nesrin Tift**, member, Bass, Berry and Sims; *Consumerism* with **Dr. Marc Watkins**, CMO, Kroger Health; *Making Business Happen in Health Care* with **Gail Peace**, founder and CEO, Ludi, Inc.; and *Managed Care and Reaching Patients in the New Normal* with **Rob Garnett**, president and CEO Amerigroup Tennessee and **Nesrin Tift**, member, Bass, Berry and Sims.

Health Care 101

Health Care 101 offered LHC members a broad overview of the health care industry and covered the health care economic landscape, pharma and PBM's, the payer perspective and the role of the provider and physicians. Featured speakers included **Michael Burcham**, executive director, Shore Capital; **Miriam Paramore**, president, OptimizeRx; **Darin Gordon**, president and CEO, Gordon and Associates; and **Leif Murphy**, president and CEO TEAMHealth.

SMO T FELLOWS



The Council's Fellows initiative is a nationally unique and proven leadership program that connects health care's brightest minds, most influential leaders and top drivers of change.

The 2020 class brought together a group of 30 executive leaders passionate about creating solutions to the greatest challenges facing health care today. Co-chaired by former U.S. Senate Majority Leader **Bill Frist, M.D.** (founder, Council Fellows) and Vanderbilt Owen Graduate School of Management Professor **Larry Van Horn, Ph.D.**, Council Fellows offers a customized curriculum and forum to exchange industry experiences with peers who lead top health care organizations.

Fellows 2020 Class

Rob Allen, Senior Vice President and Chief Operating Officer, Intermountain Healthcare

Mark Baum, CEO, Harrow Health, Inc.

Phil Billington, Senior Vice President, Internal Audit Services, HCA Healthcare

Christopher Booker, Partner, Frist Cressey Ventures

Carlos Bustamante, Ph.D., Venture Partner, F-Prime Capital

Amy Casseri, Vice President, Women's and Children's Services, HCA Healthcare

Geoffrey Clark, Senior Managing Director, Starr Investment Holdings, LLC

Marten den Haring, Chief Operating Officer, Lirio

Ryan Donnelly, Associate Vice President, Growth Strategy, Premise Health

Vicki Estrin, Senior Managing Director, Ankura Consulting Group

Robert Garnett, President and CEO, Amerigroup Tennessee

Amanda Halford, M.D., Vice President and Chief Medical Informatics Officer, Covenant Health

Larson Douglas Hudson, CEO and Co-Founder, Tend

Anne Kelly, Ed.D., RN, Chief Quality and Compliance Officer, Acadia Healthcare

William Krause, Vice President, Health System Ventures, Change Healthcare

Tommy Lewis, Chief Operating Officer, Tivity Health

Jillian Marcus, Chief Compliance Officer, Envision Healthcare

Morgan McDonald, M.D., Deputy Commissioner for Population Health, Tennessee Department of Health

Mary Sue Patchett, Executive Vice President, Community and Field Operations, Brookdale Senior Living

David Penson, M.D., Urology and Urologic Oncology Chair and Professor, Vanderbilt University Medical Center

Jennifer Peters, General Counsel, LifePoint Health

Rob Rebak, CEO, Forefront Telecare

Michelle Robertson, RN, Chief Operating Officer and Chief Nursing Officer, Saint Thomas Health

Allison Scripps, Director, Patient Centered Medical Home Initiative, BlueCross BlueShield of Tennessee

Christa-Marie Singleton, M.D., Senior Medical Advisor, Population Health and Healthcare Office, Centers for Disease Control and Prevention

Laird Smithson, Chief Operating Officer, Rehabilitation Services, Kindred Healthcare

Susan Sonnier, Vice President, Strategy and Development, UnitedHealthcare Community Plan of Tennessee

Praveen Soti, President, emids Technologies

Beth Witte, Vice President, Internal Audit, Community Health Systems

Haipeng "Mark" Zhang, D.O., Medical Director, Brigham Digital Innovation Hub, Brigham and Women's Hospital



"I am fortunate to have spent time enhancing my executive leadership skills and networking with leaders from other health systems and sectors in the health care industry. It's inspiring to join forces with such brilliant senior executives from across the state and nation to advance health care."

- MANDY HALFORD M.D.
VICE PRESIDENT AND CHIEF MEDICAL
INFORMATICS OFFICER, COVENANT HEALTH



The 2020 Fellows faculty included, among others:

Doug Holtz-Eakin, Ph.D., President, American Action Forum

Andy Ellner, M.D., MSc, Founder and CEO, Firefly Health

Bill Kampine, Co-Founder and SVP of Analytics and Innovation, Healthcare Bluebook

Ed Park, Co-Founder and CEO, Devoted Health

Susan Salka, CEO, AMN Healthcare Services, Inc.

William Schaffner, M.D., Professor, Infectious Diseases and Health Policy, Vanderbilt University Medical Center

David Sides, COO, Teladoc Health

Marty Makary, M.D., Surgeon, Professor of Health Policy and Author



CAROLINE YOUNG



JOSH UMBEHR



BILL KAMPINE



WILLIAM SCHAFFNER

FELLOWS ALUMNI ASSOCIATION



Council Fellows has an enduring impact on its graduates, and the Fellows Alumni Association ensures members continue the momentum of collaboration long after their graduation. 🌱

In addition to ongoing networking and information sharing throughout the year, members of the Fellows Alumni Association take advantage of roundtable discussions with nationally known health care visionaries.

Alumni Activities

- Alumni Dinner with **Bill Frist** and **Larry Van Horn**
- **Doug Holtz-Eakin, Ph.D.**, President, American Action Forum
- **Veronica Mallett, M.D.**, Executive Director for the Center for Women's Health Research and Professor of Obstetrics and Gynecology, Meharry Medical College School of Medicine, Class of 2018
- **Tony Briningstool, M.D.**, Senior Vice President and Chief Medical Officer, American Physician Partners, Class of 2019





"Many of the relationships I made in the program have been sustaining sources of shared interests and strategic opportunities. Health care is a small industry—we often meet executives evolving in their careers and moving in and out of our immediate circle. In that way, both the content and the connections from the program have been an advantage and a blessing."

- MICHAEL CUFFE

PRESIDENT AND CHIEF EXECUTIVE OFFICER, PHYSICIAN SERVICES GROUP,
HCA HEALTHCARE, NASHVILLE, CLASS OF 2015



THANK YOU

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