

2020

Year in Review



NASHVILLE
HEALTH CARE COUNCIL

FELLOWS

Nashville Health Care Council Fellows



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Letter from the Director

When the 2020 Fellows began its journey together at our opening retreat in January, we never could have imagined how the world would change by the conclusion of the course. Halfway through our time together, the COVID-19 pandemic erupted, changing the world – and health care – forever.

This year more than ever, our five-month intensive program connected the industry’s brightest minds at a pivotal moment for health care. As virtual care exploded amid state lockdowns, hospitals confronted unprecedented patient surges and financial struggles. As the health care landscape shifted beneath us, our Fellows continued to meet virtually for compelling conversations and shared learning. From living rooms and hospitals around the country, we tuned in for enlightening discussions with leaders and innovators in the industry while also doing what the Fellows program has always been designed to do: connect, share, collaborate and envision the future of care. We covered policy, consumerism, transparency, virtual and in-home nontraditional care and rural health, not to mention the implications of the extraordinary disruption of the COVID-19 outbreak.

There is no more important time for health care’s top drivers of change – executives from health care companies of all sizes and sectors – to collaborate and work together toward making health care better. As we face an uncertain future, one thing’s for sure. The Fellows class of 2020 is prepared to face this ongoing crisis head-on and build upon the relationships and experience they’ve gained to lead the way toward transforming health care.

Sincerely,

A handwritten signature in black ink that reads "Yolanda James". The signature is written in a cursive, flowing style.

Yolanda James

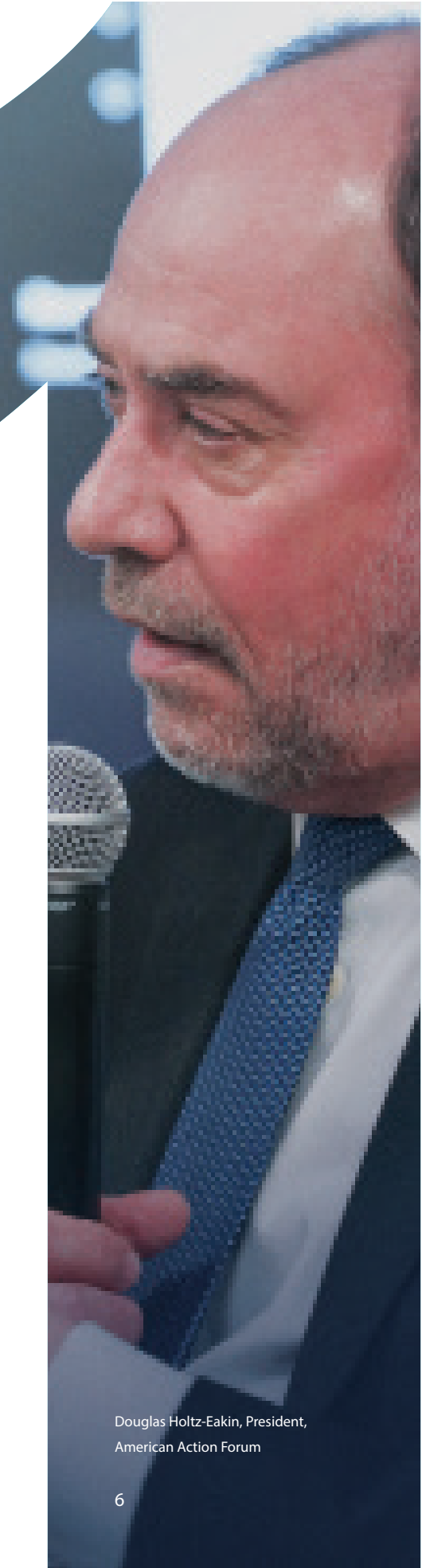
Policy Perspectives

Everything in health care is shaped by federal and state policy. In the first Fellows session, Stuart McWhorter, Commissioner of the Tennessee Department of Finance & Administration, highlighted the state of Tennessee's "methodically aggressive" approach to health care, involving telehealth pilot programs and investments in long-term early intervention programs like 3rd grade literacy, mental health support for families and childhood vaccine programs. He also urged community hospitals to evolve and seek ways to increase access to care, even if it means joining bigger health systems.

Fellows also discussed federal health care spending. Because health care is such a significant piece of the US budget, it touches

every other aspect of the federal government's outlays. According to Douglas Holtz-Eakin, President of the American Action Forum, "All federal dollars end up being health dollars." With a looming debt crisis, our leaders need to come together to have a real conversation about how to lower costs and provide quality care, he said.

Hedgeye Risk Management's Emily Evans discussed policy issues to watch for 2020, including the push for price transparency, people getting kicked off the Medicaid rolls, the plateauing of commercially insured medical consumers while Medicare Advantage and Medicaid grow, and surprise billing and high-cost drug controversies. She also discussed the ongoing tug-of-war around the Affordable Care Act.



Douglas Holtz-Eakin, President,
American Action Forum



Emily Evans, Managing Director,
Hedgeye Risk Management



Stuart McWhorter, Commissioner, Department of
Finance & Administration, State of Tennessee



Fellows Alumni Reception

FEBRUARY 20, 2020





Bill Kampine, Co-Founder/Senior Vice President,
Analytics and Innovation, Healthcare Bluebook

Focusing on Consumers

In session two, Fellows discussed efforts to move health care into the world of traditional market forces. Fellows Co-chair Larry Van Horn, Ph.D. discussed our nation's dysfunctional health care economics: prices are negotiated privately between payers and providers, excluding the patient. This is evident, Van Horn said, in the wild variation in prices for identical services at facilities in close proximity to each other: "It's like having gas at \$2.50 and then \$12 down the street," he said. These inflated costs are a result of non-value-add services, Van Horn said – such as overhead, nursing staff or administration.

Fellows heard from a number of industry leaders who are working to normalize the economics of health care by making it more "shoppable" and consumer-centric. Co-founder and Senior Vice President Bill Kampine of Healthcare Bluebook seeks to promote price transparency for employers who pay to commercially insure their employees. MDSave, led by

Co-founder and CEO Paul Ketchel, M.D., sells services and bundles offered by providers direct to consumers. SmileDirectClub's CFO Kyle Wailes explained how the company's offers teeth-straightening products direct to consumers at a price that undercuts traditional orthodontists, while Embold Health's Matt Resnick, M.D. talked about creating clarity around who provides the highest value care in order to reduce wasteful spending. And Atlas MD is an insurance-free practice offering high-value, low-cost services based on a monthly membership, led by Josh Umbehrr, M.D.

All these speakers share a common focus on delivering what the consumer wants – rather than what providers or payers want. They also all use traditional marketing to go directly to consumers and employers, and get creative in how they use data and analytics to target people seeking health services, eliminate waste and drive efficiencies in health care.



Matt Resnick, M.D.
Chief Medical Officer, Embold Health



Larry Van Horn, Ph.D.,
Fellows Co-Chair

How has the program changed your life and altered your thinking?

I have developed a strong set of personal and professional relationships over the years that I can draw upon for counsel and guidance as we navigate the future.

How does the Fellow's program foster strong learning, collaboration and interaction among the participants?

The Fellows program is nationally unique. It is a forum for executives to discuss the evolution of the industry from all perspectives, facilitated by the co-chairs. Across the days in the program, we navigate an inquiry into market forces that builds session over session. Part of what makes the experience unique is the relationship between Sen. Frist and Prof. Van Horn that creates a safe environment to challenge current thought, and foster the consideration of new ideas. The Fellows co-chairs leverage their relationships in the business and policy communities to bring national leaders to the class to enhance the conversation.

Why are only 30 Fellows accepted every year?

We have found over the years that a class size of 30 is optimal in multiple respects. First, it fosters a productive classroom discussion environment with active engagement. Second, we find that limiting the class size to 30 increases the networking contact amongst the Fellows. As the size increases beyond 30 Fellows, both desirable program components are reduced.

How did the program change your perspective as a business leader?

Over the last eight years I have had the benefit of connecting with more than 200 industry executives. I have broadened my perspectives and have a deeper granular perspective on the business challenges in many of the sectors that comprise the health care economy as well as their interdependencies. This has fostered many new ideas around how new business models are possible.

SESSION THREE

Into the Operating Room

For the third Fellows session, the class boarded a shuttle to Vanderbilt University Medical Center, where they scrubbed up to observe surgical procedures – from a kidney transplant to a robotic urethroplasty – and shadow nurses across the hospital.

In the OR, Fellows admired the coordinated, effortless teamwork, and were surprised at how calm the environment was and the laser-focus of the clinicians. There’s no atmosphere like that of an OR, founder and co-chair Sen. Bill Frist told the class: “It’s a very protected place, it’s a place of trust, it’s a place of perfection, it’s a place of affirmation. You don’t see

that anywhere else. That’s the privilege you have of being a surgeon or nurse.”

Fellows also had an opportunity to shadow nurses in areas ranging from the hematology unit to the burn floor. Some observed that most of nurses’ time was spent in documentation or at a computer terminal rather than at the bedside, and others reported the nurses seemed stretched thin. Noting that nurses are the primary contact between a patient and the health care provider, Van Horn challenged the Fellows to consider whether there’s an opportunity to re-envision the role of a nurse.

Ultimately, Van Horn told the group, the clinicians don’t care about economics, trade-offs or efficiencies that are part of the business side of health care.

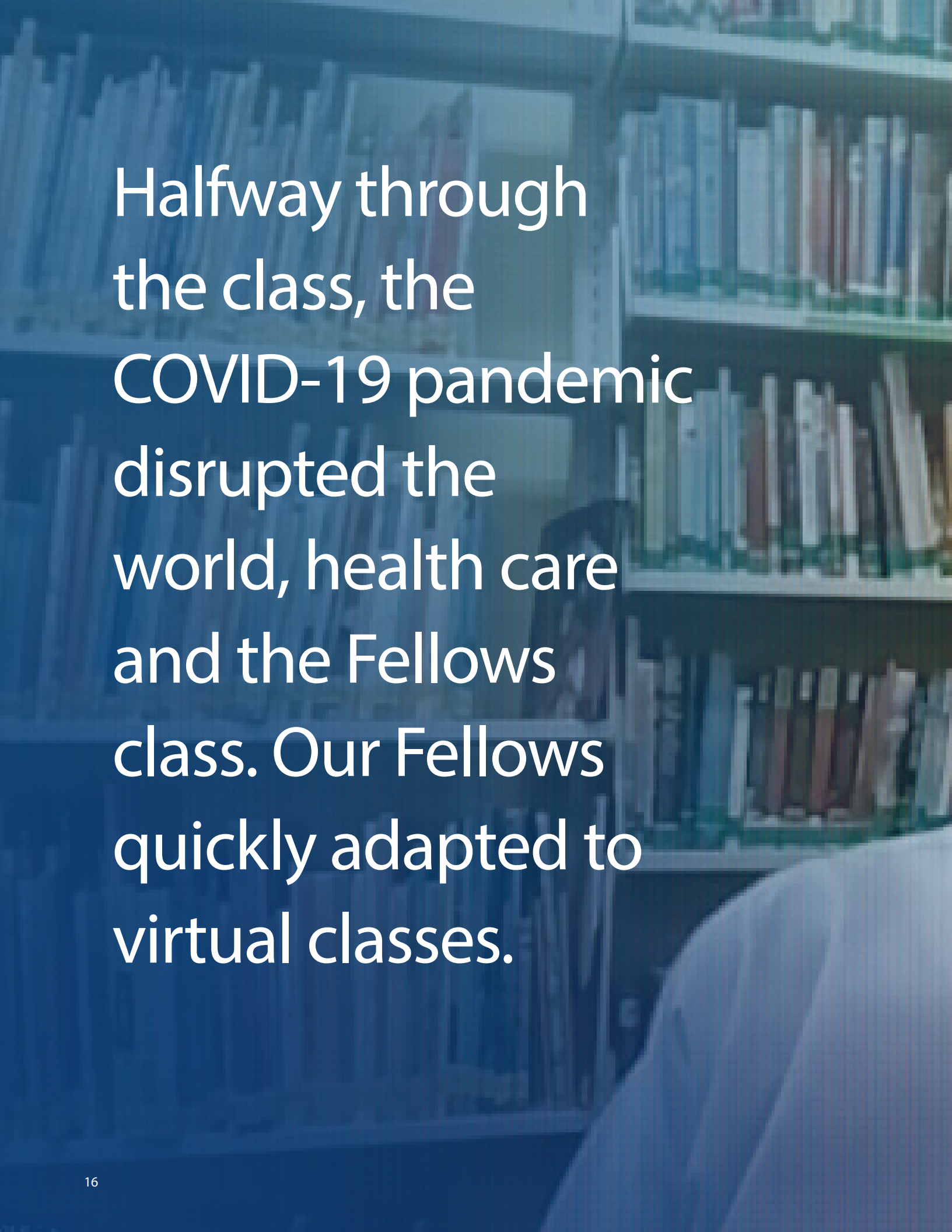
“Part of the lesson today is to understand the folks who are delivering care, what motivates them, what do they care about,” Van Horn said. “Part of our role is to figure out how do we create an environment that empowers them to be excellent in doing what they do, so they don’t have to worry about supply chain or unit economics, and we can let them do what they’re great at.”



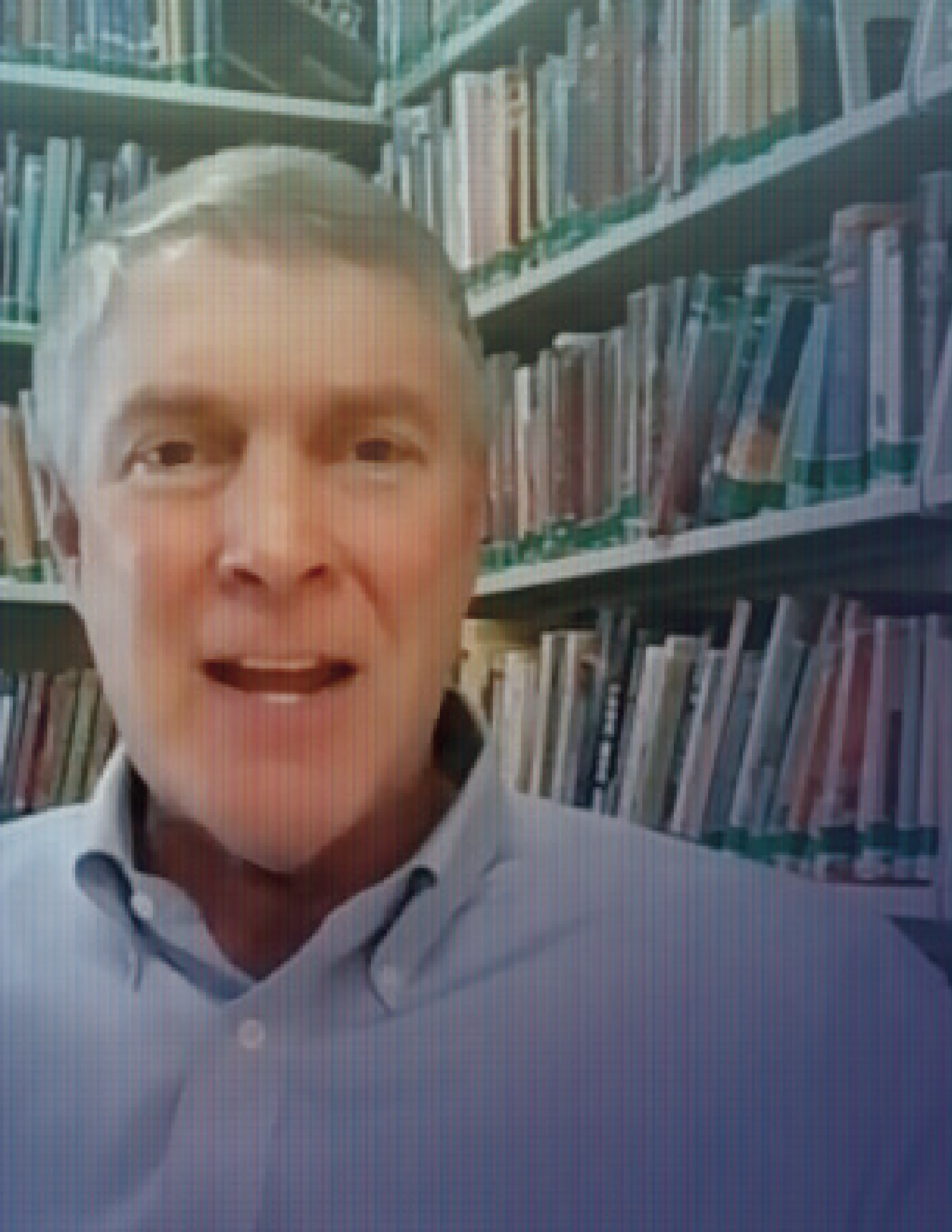


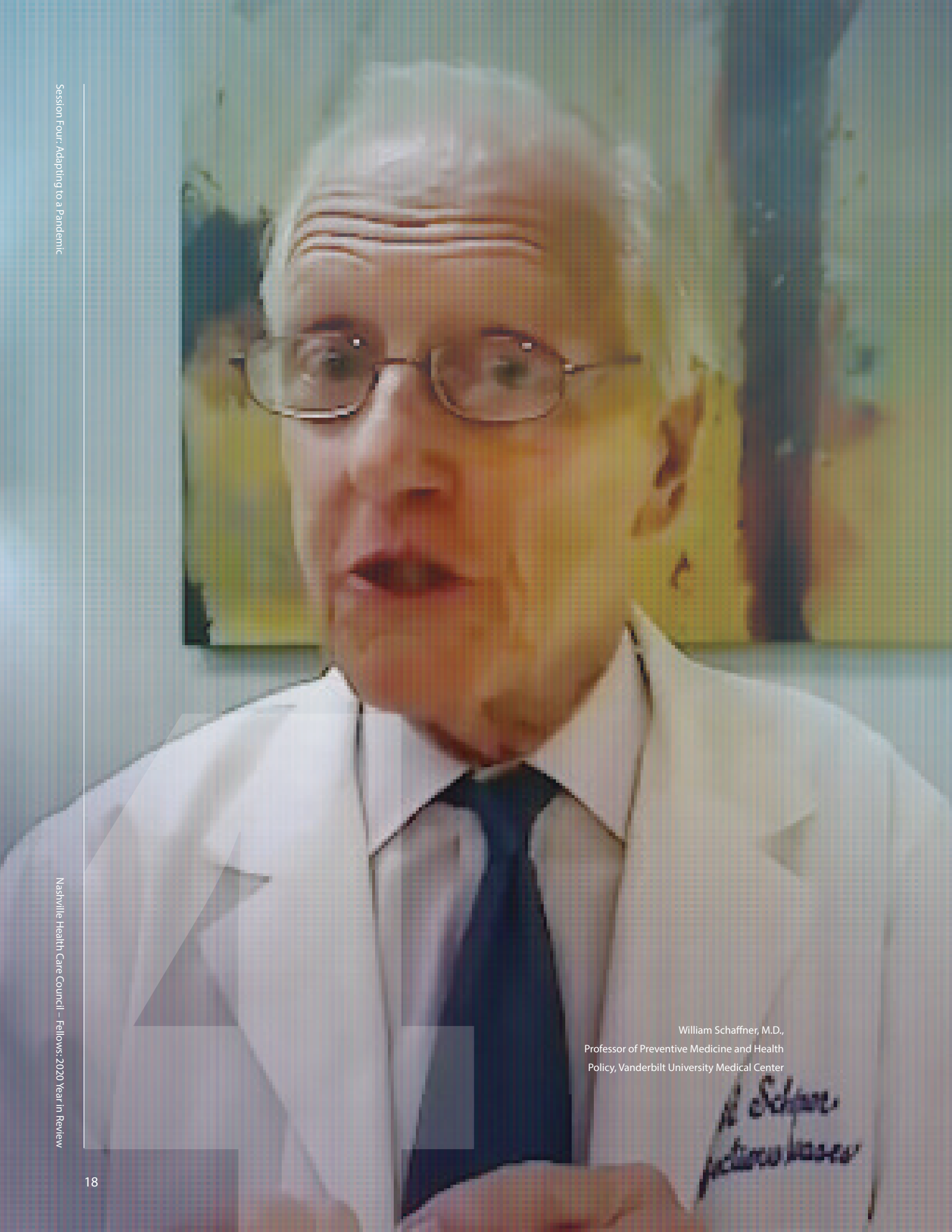
Fellows class of 2020 participates in clinical immersion at Vanderbilt University Medical Center.





Halfway through the class, the COVID-19 pandemic disrupted the world, health care and the Fellows class. Our Fellows quickly adapted to virtual classes.





William Schaffner, M.D.,
Professor of Preventive Medicine and Health
Policy, Vanderbilt University Medical Center

W. Schaffner
William Schaffner

Adapting to a Pandemic



Session four arrived amid a time of global upheaval, as lockdowns and social distancing policies stemming from the COVID-19 pandemic forced the Fellows program to move to virtual classes. Fellows tuned in remotely via Zoom to hear from Vanderbilt's renowned infectious disease expert Dr. William Schaffner.

Schaffner answered the Fellows' pressing questions about the coronavirus, and discussed its still-unknown effect, such as whether the virus's spread would slow in warmer summer weather. The long-term impact on hospitals and health system loomed large, especially the financial losses due to halted elective surgeries and procedures.

Dr. Jonathan Perlin, Chief Medical Officer and President of Clinical Services at HCA Healthcare, also provided his

perspective on the pandemic. He explained how the health care giant's models were used to triangulate data sets – from urban density to cell phone movement – to determine where to land supplies like ventilators and meet the surge across the enterprise. Health care after the pandemic, he said, will never be the same.

Even at this relatively early stage of the pandemic, Fellows heard how the crisis accelerated telemedicine tools and at-home care. They learned about BehaVR, Aaron Gani's startup, which aims to develop software that can treat, manage and prevent behavioral health conditions. And Dr. Patrick Conway, Senior Executive in Residence at Optum, shared that telehealth and new models of care won't give up ground after the crisis subsides.

Perspectives in TeleHealth, Plans and Staffing

Taking place at the height of the COVID-19 pandemic, it was evident in session five that the upheaval caused by the virus could serve as the tipping point for new and creative approaches to health care that innovators have been pursuing for years. Fellows heard from David Sides, Chief Operating Officer for Teladoc Health, who explained the rapid expansion in virtual care as people avoid potential virus exposure in brick-and-mortar settings. But, he said, there are more expansion opportunities on the way: from behavioral health to critical care settings like “telestroke” care or virtual oncology.

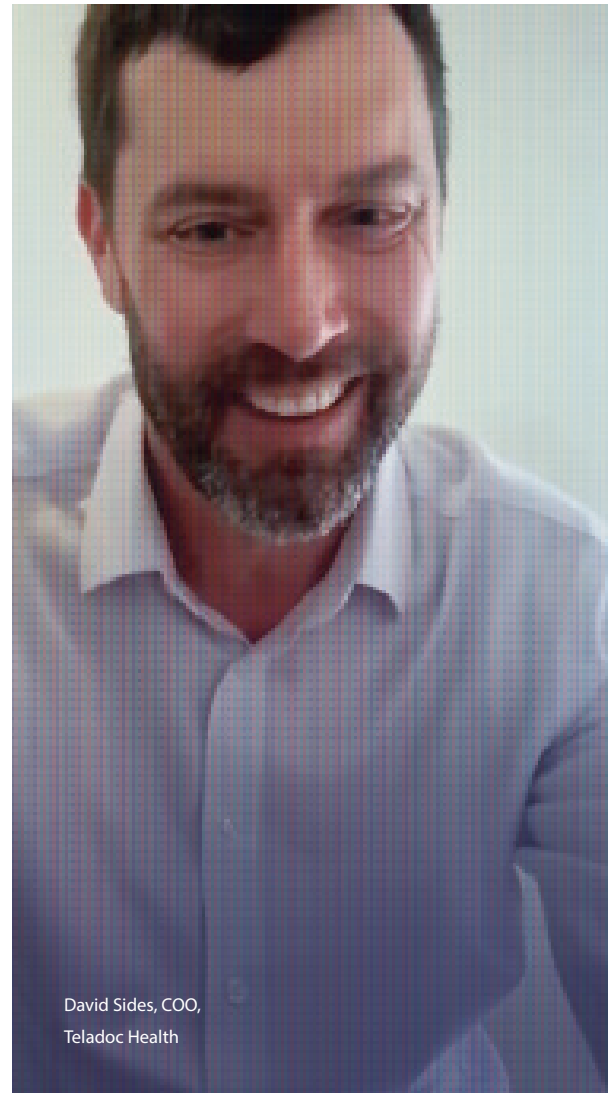
Ed Park, Founder of Devoted Health, explained the secret sauce behind his company’s successful Medicare Advantage plans: The founding motto, “Every member is Mom”; a real-time software platform that allows the plan access to members’ comprehensive moment-by-moment health information;

and customer service “guides” committed to developing meaningful, trusted relationships with members.

Fellows also connected with Susan Salka, CEO of AMN Healthcare Services, which helps health care organizations recruit and retain staff and manage their workforce. Salka emphasized the importance of diversifying companies, including at the C-suite and board levels. At AMN, women hold 62% of leadership positions and comprise half the C-suite. “It’s the right thing to do,” she said. “It also makes for better decision-making and a better culture.”

Before the session’s conclusion, Fellows took time to share their own experiences confronting COVID-19, including hospitals’ challenges with acquiring protective equipment, disrupted supply chains and declines in hospital volumes. Others highlighted bright spots, like overwhelming

community support and donations of masks and food, and leadership teams innovating and coming together in a moment of crisis.



David Sides, COO,
Teladoc Health

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“The prime directive we tell every employee at the very beginning of their orientation – whether you’re on the front lines answering a call for a member or in the back office adjudicating a claim – is that if you’re facing a difficult decision, close your eyes and imagine you’re making that decision for someone you love very deeply.”

– Ed Park, Co-Founder and CEO, Devoted Health



The Fellows experience was simply amazing. It was such an honor to be a part of this class and tap into the wealth of knowledge this group collectively shared. Thank you for allowing me to be a part of it.”

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

“I had the opportunity to collaborate with local and national health care leaders to discuss and address challenges facing patients. 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, Chief Medical Informatics Officer, Covenant Health

“[Fellows is an] excellent program and well worth the time commitment. Even during a pandemic, the Fellows program continued without missing a beat. I truly enjoyed meeting my classmates and those relationships have led to professional and personal connections outside of class. I highly recommend it.”

– Amy Casseri
Vice President, Women’s & Children’s Services, HCA Healthcare

“The diversity of the class and the dynamic speakers that accompanied each session have brought renewed depth to my acumen, energized my innovative thinking, and broadened my perspective as I work to tackle some of the biggest problems in health care during a truly unprecedented time.”

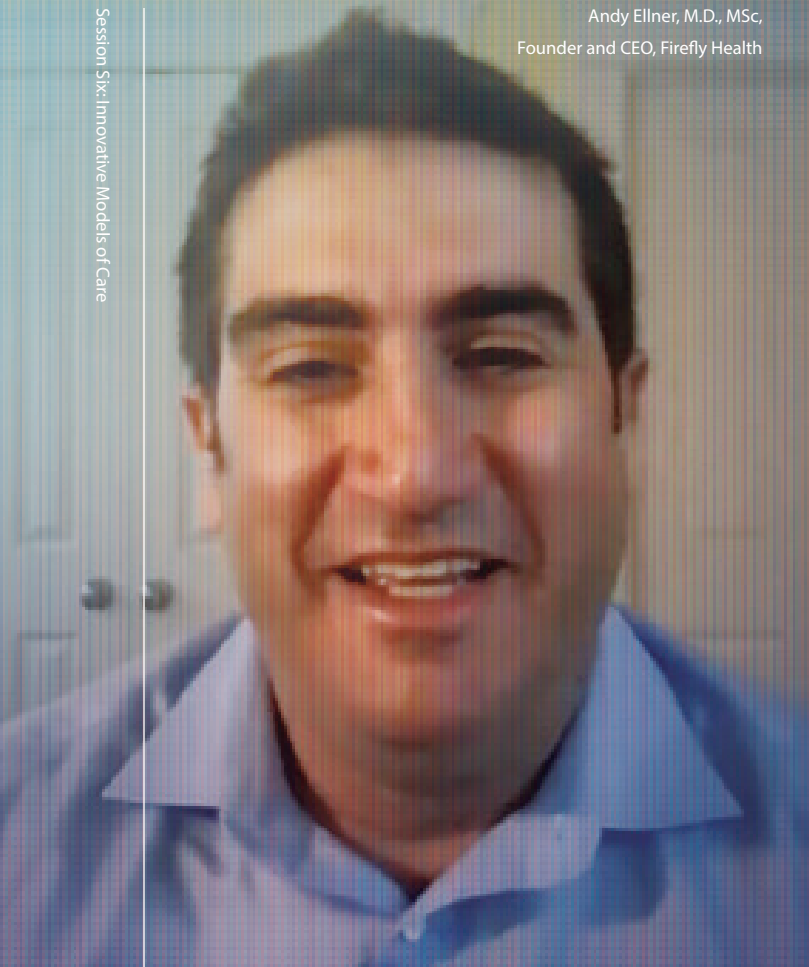
– Robert Garnett, MBA
President, Amerigroup Tennessee



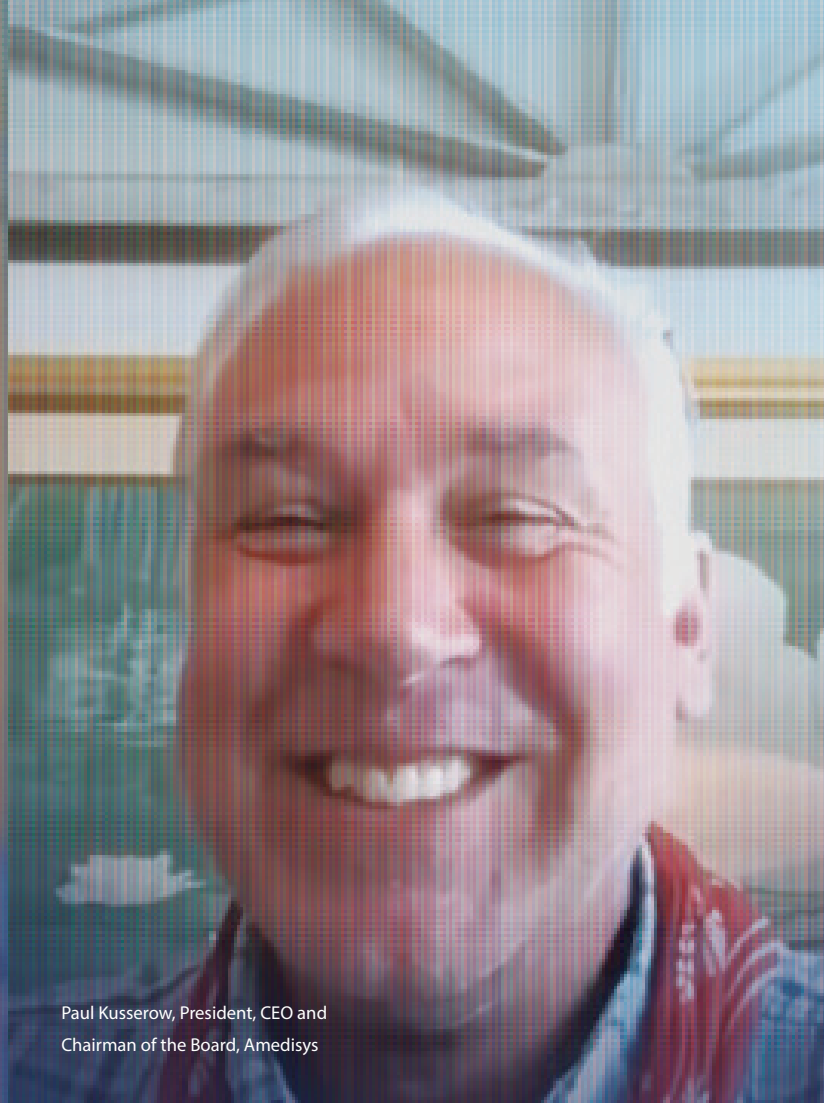
WADSWORTH
HEALTH CARE COUNCIL

FELLOWS

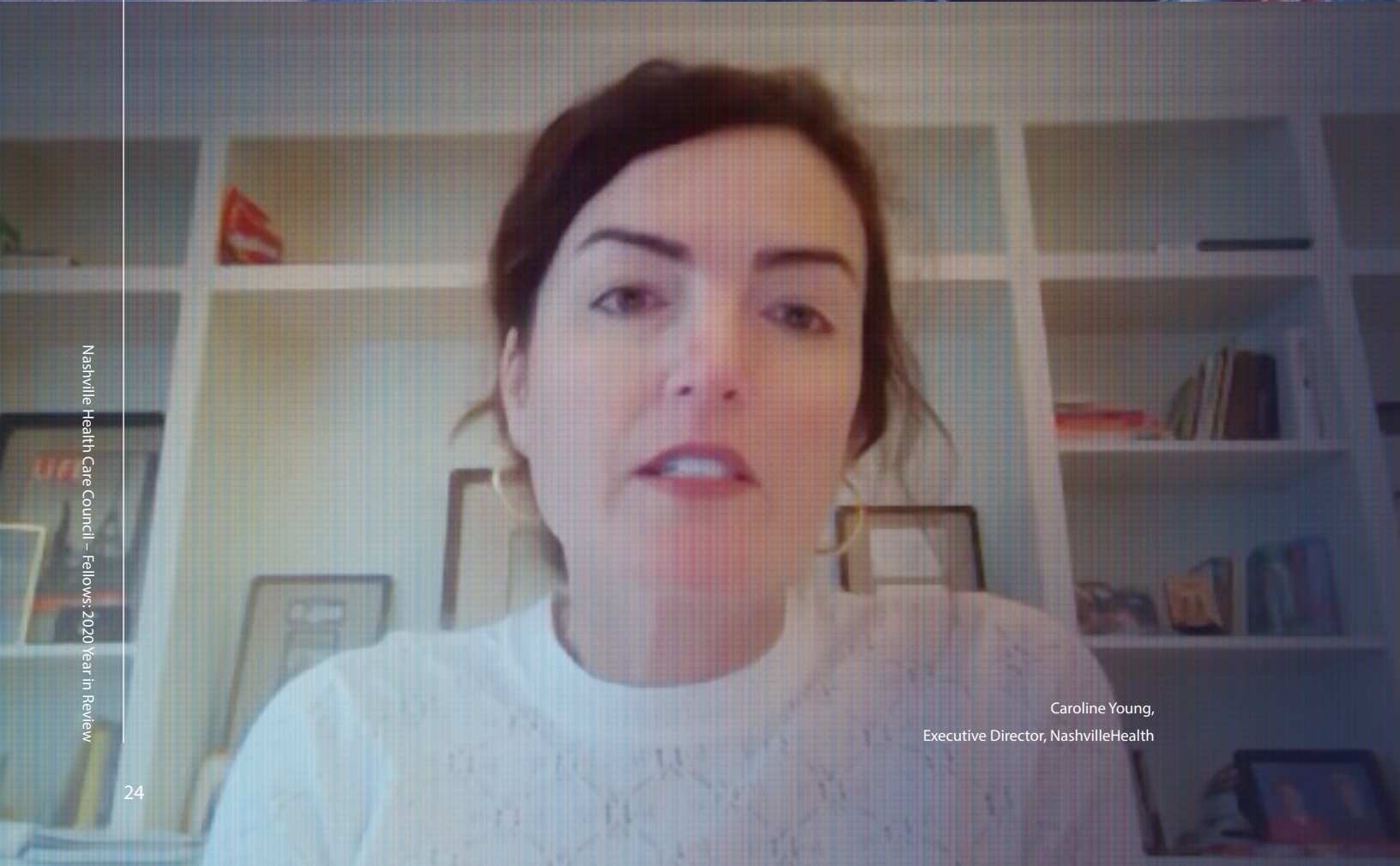
Andy Ellner, M.D., MSc,
Founder and CEO, Firefly Health



Paul Kusserow, President, CEO and
Chairman of the Board, Amedisys



Caroline Young,
Executive Director, NashvilleHealth



Innovative Models of Care

Three companies innovating in the non-acute care space shared their wisdom with Fellows during the final class. Founder Andy Ellner, MD, introduced the class to his company Firefly Health, a virtual primary care provider offering members app-based access to a team of caregivers. A physician, nurse practitioner, health guide and behavioral health specialist are accessible, responsive and routinely follow up with patients to provide on-demand, continuous, personalized care.

Another example of decentralized care is Amedysis, a company providing home health, hospice, personal care and palliative care for patients in about 40 states. President, CEO and Chairman of the Board Paul Kusserow explained that health care is becoming institutionalized and he expects aging baby boomer consumers to increasingly demand an at-home, individualized care experience

that allows them to “age in place.” These models, he said, can be less costly than traditional care because they use data and frequent contact with caregivers to reduce readmissions.

Justin Dangel, Co-Founder and Executive Chairman of Ready Responders, shared how the in-home care startup brings urgent care into the home by sending a mobile EMT, paramedic or nurse to patients’ houses. This system is paired with a tablet for a telehealth connection to doctors, APPs and mental health specialists.

NashvilleHealth Executive Director Caroline Young discussed the nonprofit’s effort to improve health outcomes in the city, from installing additional school nurses to advocating for expanded access to smoking cessation drugs. While Nashville is a hub for health care innovation, the city’s residents are generally in poor health.

The class then shifted gears to the pervasive topic on everyone’s minds: COVID-19. Alex Jahangir, M.D., Chair of the Metro Nashville Coronavirus Task Force, discussed the city’s plans to reopen amid COVID-19, including the need for expanded testing, how to determine when it would be appropriate for various sectors to reopen and what precautions would be necessary. Ralph Schulz, President and CEO of the Nashville Chamber of Commerce and Charles Starks, President and CEO of Music City Center, also dropped in to explain the intense impacts of the crisis extending beyond the realm of public health to widespread economic upheaval.

Final Thoughts

This year's Fellows class was unlike any other. While the historic COVID-19 pandemic upended the class's format and required our first-ever virtual gatherings, and while it was a crisis no one would ever wish for, it was also the type of moment that accentuated the value of the program for participants and their organizations alike. The Fellows program is designed to provide an opportunity to collaborate and share ideas, learn from industry leaders (including both Fellows themselves and the myriad speakers) and envision the future of health care. That purpose could never be more concrete, necessary and actionable than in the midst of an overnight reshaping of the industry.



Class of 2020

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
Mandy 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

The Nashville Health Care Council Fellows is a five-month intensive program that connects health care's brightest minds, most influential leaders and top drivers of change. The Council Fellows program creates the space for the most inspiring conversations in health care with proven leaders who are poised to move the nation's healthcare industry forward.

Through a customized curriculum, the program breaks down silos to give Fellows a one-of-a-kind opportunity to have the right conversations at a pivotal moment for our industry. Over the course of six full-day sessions and two retreats, Council Fellows strengthen their network of industry peers and develop authentic relationships that are sure to impact the next stage in their career.

Launched in 2013, the Council Fellows is co-chaired by former U.S. Senate Majority Leader Bill Frist, M.D., and Larry Van Horn, Ph.D., health care management and economics professor at the Owen Graduate School of Management at Vanderbilt University. Yolanda James of the Nashville Health Care Council is the initiative's director.

More information about Council Fellows can be found at healthcarecouncilfellows.com.

