



2023

Year In Review



FELLOWS
NASHVILLE HEALTH CARE COUNCIL

Year In Review

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LETTER FROM THE COUNCIL FELLOWS CHAIR



Michael Burcham, DHA Chair, Council Fellows

I have the distinct privilege of chairing the Council Fellows, helping craft the program's curriculum and facilitate dialogue throughout the five-month program. We were thrilled to host the 2023 Council Fellows class, and we welcomed phenomenal speakers from across the healthcare industry.

Engaging with this diverse group generated fresh perspectives, innovative ideas, and valuable insights into the complexities of health care and leadership. This exchange of knowledge and experiences is incredibly powerful in participants' growth and is critical to generating actionable ideas for Council Fellows to take back to their organizations.

Our sessions address the rapidly changing healthcare landscape by identifying the challenges and opportunities facing modern healthcare leaders. Sessions focus on the cost of care, health equity, health policy, innovation, technology, marketing, and leadership. Through panel discussions, spotlight speakers, fireside chats, breakout activities and panel discussions, we foster critical conversation and honest dialogue meant to drive change.

We also provided our Fellows opportunities to immerse themselves in places where disruption is taking place. This year, we toured The Village at Glenclyff, which provides housing for unhoused individuals upon discharge from the hospital, and visited UnitedHealth Group's 701i Innovation Center in Washington D.C. Council Fellows also participate in social events where they build a strong network of colleagues they can rely on for ongoing guidance and advice.

A special thanks to Lydie Marc, the Council team, the Fellows Advisory Board, and our Council Fellow Partner Organizations, whose support ensures our work is impactful.

A handwritten signature in black ink, appearing to read 'Michael Burcham', written in a cursive style.

Michael Burcham, DHA
Chair, Council Fellows



ABOUT

The Nashville Health Care Council inspires global collaboration to improve health care by serving as a catalyst for leadership and innovation. As a premier membership association since 1995, the Council convenes the industry's top minds and has provided a foundation for collaboration in health care for more than 20 years.

The Council Fellows program connects healthcare's brightest minds, most influential leaders and top drivers of change across the U.S. Through a customized curriculum, the program breaks down silos to give Fellows a one-of-a-kind opportunity to have critical conversations at a pivotal moment for our industry. Over the course of seven sessions and two retreats, Fellows strengthen their understanding of healthcare and develop authentic relationships poised to impact the industry.

Led by a faculty of internationally-known experts and thought leaders, the program's curriculum addresses various topics such as health policy, consumerism, transparency, telehealth and rural care delivery solutions.

The Council Fellows Class of 2023 seized this opportune moment in the industry to use the power of dialogue and address innovation from inside and outside healthcare.

Learn More:
healthcarecouncil.com/Council-Fellows

Stay Connected on LinkedIn:
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Cost of Health Care

Expanding Medicaid to include residents with incomes up to 138% of the Federal Poverty Level would increase the number of insured patients at Vanderbilt and other hospitals.

That astronomical increase disproportionately affects the uninsured, people of color and those with lower incomes, forcing them to forgo or skip care. When people delay care, the cost to treat them when they arrive at the hospital or doctor's office increases substantially.

During the first session, Council Fellows learned about internal and external factors driving healthcare costs, including inflation, labor, payor contracts, pharmaceutical and supply chain pricing, payor mix, capital needs, technology upgrades and more.

Access is also suffering. The U.S. is no longer the best in class when it comes to waiting time to receive care. Waiting times are nearly as long as those in the U.K., a country with a nationalized healthcare system. In the U.S., a backlog of credentialing and licensing caused by an archaic old rule set limits the number of providers available to provide care.

Shon Dwyer, president of Vanderbilt Adult Hospital at Vanderbilt University Medical Center and a 2023 Council Fellow, said expenses have increased

by 19% due to factors such as decreased reimbursements, longer lengths of stay, staffing challenges, inflation and drug prices.

To date, the state of Tennessee has not expanded Medicaid. During this session, Deputy Commissioner and Director of TennCare, Stephen Smith, shared how the TennCare III waiver allows the state to retain Medicaid cost savings instead of returning the money to the federal government. In its first year, the state realized \$300 million in cost savings and reinvested the difference in TennCare programming to include comprehensive dental coverage, lactation supports, broader waiver programs for developmentally disabled adults and expanded postpartum care.



"If you only look at cost, you forget the whole reason why we're here. And that is really to provide value,"

SHON DWYER

Vanderbilt University Hospital



Healthcare spending grew 2.7% to \$4.3 trillion in 2021, or \$12,914 per person, accounting for 18.3% of GDP.

CENTERS FOR MEDICARE & MEDICAID SERVICES



Health Equity

During session two, Council Fellows learned about obstacles to health equity, including poverty, unsafe housing and lack of access to nutritious food, healthcare, transportation, quality education, jobs with fair pay and childcare.

Mark Yancy, CEO of NashvilleHealth, discussed the group's work to address the city's poor health profile. NashvilleHealth builds partnerships to focus attention on one area, one demographic and one disparity at a time, such as hypertension in a North Nashville zip code where rates of high blood pressure are double in surrounding areas. "We call ourselves the healthcare mecca, but that's a misnomer. Our health profile says otherwise," he said.

Leslie Meehan, deputy commissioner for the Tennessee Department of Health and a 2023 Council Fellow, echoed Yancy's sentiments, saying Tennessee's urban communities continue to suffer from redlining policies introduced in the 1930s.

Meehan said people living in rural areas with sparse broadband access and fewer provider practice also need help accessing care. Meehan identified the state's Uninsured Adult Safety Net program and \$94 million investment in dental care as steps to

address gaps in care. The department has also granted counties \$17 million for recreation opportunities.

Dr. James Hildreth, president and CEO of Meharry Medical College, shared his experiences with racism in healthcare and academia. Hildreth said racism is a common thread among six social determinants of health: access to healthcare, social construct, geography, educational attainment, economic stability and access to technology.

"The one thing that runs across all of those that cannot be ignored is racism. People don't want to talk about it, but in every aspect of these things, racism plays a factor," he said.

During the session, Council Fellows toured the Village at Glenclyff, a micro-home community that provides medical respite for people experiencing homelessness. Council Fellows brainstormed ideas to make the program sustainable and replicable in other communities.



Half of Black adults in Nashville say they have hypertension compared to only 27% of white adults surveyed.

NASHVILLEHEALTH



"The best we can hope for is each of us in our own organizations and environments do what we can to change things."

DR. JAMES E.K. HILDRETH
Meharry Medical College

Health Policy

Public health policy includes laws, regulations, actions, and decisions that promote societal wellness and meet health goals.

During the third session, Council Fellows heard from those responsible for making health policies and brainstormed ways to affect them.

Elizabeth Fowler, deputy administration and director of the Center for Medicare and Medicaid Innovation, discussed her agency's work encouraging the creation of Accountable Care Organizations (ACOs).

Council Fellows also heard from Sen. William H. Frist, MD, co-founder and partner, Frist Cressey Ventures and Chair Emeritus of the Council Fellows program, and Nancy-Ann DeParle, managing partner, Consonance Capital Partners, about moving the needle in Washington D.C.

Both encouraged Council Fellows to use data to support claims during conversations with elected officials. "It is so important for those of you who collect the data to establish metrics on quality, not just value but on quality," Frist said.

When trying to find consensus on contentious issues such as Medicaid expansion, Sen. Frist told Council

Fellows to "start with common ground and build out."

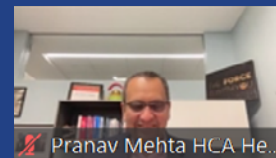
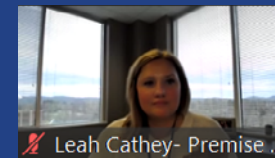
"Don't give up. It's so easy to just shake your head and say it can't be done. Speak genuinely, know your stuff and think expansively. Remember to frame things appropriately, find things people can agree upon and build out from there," he said.

Dr. Alex Jahangir, vice president of business development and vice chair of orthopedics at Vanderbilt University Medical Center, told Council Fellows about chairing the Metropolitan Nashville Coronavirus Taskforce at the onset of the pandemic in March 2020. Jahangir said he found relationships within healthcare and the broader community key to managing an unprecedented challenge.

Council Fellows also brainstormed ways to encourage Tennessee's elected leaders to expand Medicaid. Most said a grassroots education campaign to engage the voting public and change the narrative could move the legislature to act.

"It is so important for those of you who collect the data to establish metrics on quality, not just value, but on quality."

SEN. WILLIAM FRIST



41 states have adopted Medicaid expansion; Nine, including Tennessee, have not.

SESSION FOUR

Health Innovation

During session four, Council Fellows learned about disruptive technologies shaping the healthcare industry.

Dr. Mike Edgeworth, chief population health officer for Octave Bioscience and a 2022 Council Fellow, told Council Fellows about his company's solution for treating multiple sclerosis (M.S.). The solution tracks patients' progress, adding predictability to the existing care model and offers a decision-making solution for providers.

Aaron Gani, founder and CEO of BehaVR and a 2016 Council Fellow, discussed the rise of digital therapeutics (DTx) that offer evidence-based ways to treat mental and behavioral health conditions.

Many DTx tools have been clinically validated in randomized, double-blinded, placebo-controlled multi-center trials, and the Food and Drug Administration recognizes the technology as an effective therapy.

Tim Suther, senior vice president and general manager of data solutions at Optum and a 2023 Fellow, talked about making sense of the "amazingly fragmented" healthcare system using artificial intelligence and analytics.

Suther said A.I. can watch how patients progress through the system and assess specific interventions' impact on cost-effectiveness and health outcomes. Additionally, it can help address clinical trial diversity, research endeavors, patient safety initiatives and more.

Todd Park, chairman of the board and co-founder of Devoted Health, laid a framework for creating and sustaining innovation to improve health care. This approach allowed Devoted to grow from 1,400 members in Florida to 130,000 in 13 states in four years. In its fourth year, Devoted took 42% of the share in every market it entered.

During the session, Council Fellows also discussed methods to implement behavioral health DTx into Medicaid populations. Groups generally agreed that additional outcomes studies and national endorsement would be required to influence widespread implementation. Payors especially would be hesitant to test an experimental treatment modality.



A study of 1,300 physicians by the American Medical Association found only 3.8% of physicians use digital health tools, an increase of just 1.6% since 2015.

AMERICAN MEDICAL ASSOCIATION



"Our country spends 2X per capita on health care, and for that investment, we rank 44 in the world in life expectancy. That sucks."

TIM SUTHER
Optum



Understanding Your Market

Patients have more power than ever to make healthcare decisions so healthcare entities must better understand their consumers to reach them in the right place, at the right time.

During the fifth session, Council Fellows learned about the importance of balancing the interests of all players in the healthcare system while listening to the voice of the consumer.

Marcus Osborne, CEO of RightMove, told Council Fellows that Americans consistently report healthcare as a primary concern due to cost, accessibility and a belief the system is intentionally complex. Much of the issue stems from the balanced interest paradigm that lays a framework for healthcare solutions and technology. The paradigm weighs the interests of payors, providers, patients and product manufacturers equally.

Osborne said the model doesn't work in healthcare since the patient doesn't sit at the solution's center.

Erin Wilkins, market president of Press Ganey and a 2015 Council Fellow, told Council Fellows a sound listening strategy could glean insights into the market.

Wilkins said 84% of patients wouldn't make appointments with referred

physicians rated under four stars. "Perception is reality. It really doesn't matter whether or not (patients) are in the right position to measure competence or clinical quality because it's their perception, and that's what's going to dictate the choices that they're making in healthcare," she said.

Uttara Marti, managing director at Evercore and a 2023 Council Fellow, updated Council Fellows about market forces influencing corporate and private equity investments. Marti said investors today want to balance profitability and cash generation instead of focusing on growth and cash usage.

Council Fellows also discussed seeking ways to solicit meaningful consumer feedback during the session. Reaching patients through segmentation is difficult due to regulatory restrictions, so adding dimensionality to segmentation data may help reach the right patients.



"Healthcare at its core is a consumer business. It's about serving individuals and trying to address their individual health needs."

MARCUS OSBORNE
RightMove



Healthcare consumers read at least 5.5 online reviews before deciding to see a doctor, and 84% read reviews of referred providers.

PRESS GANEY

The New Oil: Data and A.I

Healthcare entities use artificial intelligence to turn massive amounts of data into actionable insights.

Council Fellows spent session six exploring how to implement data and A.I. at the patient level and beyond.

During this session, Council Fellows met in Washington D.C., where they toured the 701i Innovation Center to observe how UnitedHealth Group uses data to enhance patient care. They also heard from Dr. Reed Tuckson, managing director of Tuckson Health Connections, and Bradford “Ford” Koles, vice president and national spokesperson for The Advisory Board, about the state of the healthcare industry.

Both speakers said value-based care represents the future of healthcare and will help keep costs in check. Koles said the healthcare system will require multiple value-based models, the development of which will require cooperation across the industry.

Edmund Jackson, CEO of UnityAI and a 2023 Council Fellow, explained how healthcare providers could use artificial intelligence (A.I.) to coordinate care, increase productivity and lower costs. Jackson said creating a digital frame for healthcare data is akin to the oil refining process.

“We’ve got these big barrels of data, but they’re poisonous. They’re not useful. We see we have a car we want to power with it, but all this interconnection isn’t there yet,” he said.

Caleb Gallifant, vice president of integrated health for Humana and a 2022 Council Fellow, talked about the importance of using data to exceed customer expectations.

“Data is man-made. We use data to prove a point, not to unlock the imagination or fuel what is possible or look at the world as it could be versus how you want it to be,” he said. “So much of data is really put into submission by ourselves and how we want the world to operate versus what the world is actually saying.”



“Data is man-made. We use data to prove a point, not to unlock the imagination or fuel what is possible or look at the world as it could be versus how you want it to be.”

CALEB GALLIFANT
Humana



Worldwide, the \$25.9 billion healthcare data analytics market is expected to grow 7.5% annually until 2027.

GRAND VIEW RESEARCH



The Future of the Healthcare Industry

Healthcare incumbents have fiercely protected the American healthcare system's status quo in recent years.

However, that outdated model requires changes to ensure viability and appropriate health outcomes. The industry's future requires forward-looking, customer-oriented strategies to reinvent health care from the inside out.

During the seventh session, Council Fellows heard from Paul Keckley, managing editor of *The Keckley Report*, principal of The Keckley Group and managing director of Keckley Ventures. Keckley told Council Fellows the status quo is no longer acceptable.

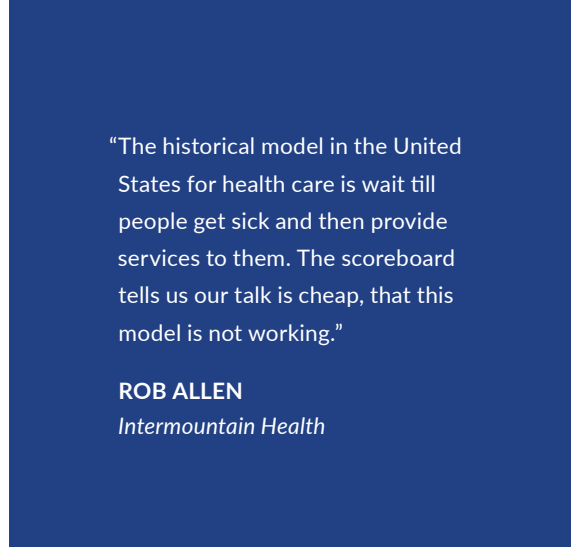
"(Systemness) requires data to be exchanged across all sectors of the system, public and private, with a common infrastructure and a common language. And that, to me, means an evolving role of generative A.I. and government guardrails. The government's role in health care will be reflected most in its rule making around access to and control of information in health care," he said.

Rob Allen, president and CEO of Intermountain Healthcare and a 2020 Council Fellow, discussed reframing how the industry thinks about current challenges.

"The historical model in the United States for health care is to wait till people get sick and then provide services to them. The scoreboard tells us our talk is cheap, that this model is not working," he said.

Leah Cathey, executive vice president at Premise Health and 2023 Council Fellow, explained how direct health models combat increasing costs. In direct health, large, self-funded employers deliver care to employees with no third-party insurer in between. Direct health offers employers a way to control healthcare costs, streamline service delivery and align financial incentives.

During a brainstorming session, Council Fellows identified areas for future healthcare industry investments. Most groups pointed to using technology such as ambient documentation, A.I. to enhance workforce efficiency, decrease clinician fatigue and reduce the administrative burden.



"The historical model in the United States for health care is wait till people get sick and then provide services to them. The scoreboard tells us our talk is cheap, that this model is not working."

ROB ALLEN
Intermountain Health



The US spends 27% of national healthcare spending (\$730.4 billion) on preventable diseases.
LANCET PUBLIC HEALTH



2023 COUNCIL FELLOWS FACULTY

The Council Fellows program is only possible through the efforts of our distinguished speakers. We are inherently grateful to these world-class leaders who shared their time and talents with the Class of 2023. Their experience, expertise and guidance will help shape the future of health care, ensuring our system is sustainable for years to come. We were honored to hear from the top minds representing hospital management, public health, health policy, academia, health information technology as well as professional services firms with wide-ranging healthcare expertise.

Rob Allen
President and CEO,
Intermountain Healthcare

Beth Chase
Founder and CEO, c3/ consulting

Nancy-Ann DeParle
Managing Partner and Co-founder,
Consonance Capital Partner

David Dill
Chairman and CEO, Lifepoint Health

Michael Edgeworth, MD
Chief Population Health Officer,
Octave Bioscience

Elizabeth Fowler, PhD, J.D.
Deputy Administrator and Director,
Center for Medicare and Medicaid
Innovation (CMS Innovation Center)

Senator William H. Frist, MD
Chair Emeritus, Council Fellows

Caleb Gallifant
Vice President of Product and Strategic
Partnerships, Humana

Aaron Gani
Founder and CEO, BehaVR

James E. K. Hildreth, PhD, MD
President and CEO, Meharry Medical College

Alex Jahangir, MD
Vice President of Business Development
and Vice Chair of Orthopedics, Vanderbilt
University Medical Center

Paul H. Keckley, Ph.D
Managing Editor, The Keckley Report

Bradford "Ford" Koles
Vice President and National
Spokesperson, The Advisory Board

John Lowry
President, Thrivence, LLC.

Wanda Lyle
Interim President & CEO, Center for
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Kristin Neal, PA-C, MPH
SVP Optum Home and Community, Optum

Marcus Osborne
Chief Executive Officer, RightMove

Todd Park
Co-founder and Executive Chairman,
Devoted Health

Stephen Smith
Deputy Commissioner and Director, TennCare

Reed V. Tuckson, MD, FACP
Managing Director, Tuckson Health
Connections, LLC

Erin Wilkins
Market President, Press Ganey

Mark Yancy, MPH
CEO, NashvilleHealth

COUNCIL FELLOWS ADVISORY BOARD

Our Fellows Advisory Board deserves our sincere thanks for their dedicated service to our program. They are responsible for curating our cutting-edge curriculum, extending the reach of recruitment and bolstering facilitation of this unique program. These luminaries serve as representatives and spokespeople at the national level.

Michael Burcham, DHA

Nancy-Ann DeParle

David Dill

Senator William Frist, M.D.

James Hildreth, Ph. D, M.D.

Tony Iton, M.D., J.D., MPH

Todd Park

Reed Tuckson, M.D., FACP

COUNCIL FELLOWS PARTNER ORGANIZATIONS

We'd like to thank our underwriters, without whom, the Council Fellows program would not be possible.



CLASS OF 2023

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Weldon Diana, MD, MBA,
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Amy Green,
CEO/Founder, Nashville Collaborative Counseling Center

William C. Haugh, FACHE,
President, Central Division, Lifepoint Health

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