

**UPCOMING REGIONAL
ROUNDTABLE**

June 12-13, 2012

Ritz-Carlton, Chicago

September 12-13, 2012

Ritz-Carlton, Washington, DC

November 6-7, 2012

Four Seasons Las Vegas

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OUR MISSION

Home Care 100 offers senior executives in home care resources for sharing ideas and best practices, and for discovering new ways to achieve organizational and management excellence.

Leveraging
Thought
Leadership

Executive Summary

Home Care 100 Regional Roundtables bring together thought leaders in home care and hospice for an intimate, forward-looking discussion about top-of-mind issues facing providers and suppliers.

On September 9, 2011, 10 home care C-level executives from seven states (AZ, CA, CO, FL, NY, TX, WA), met in San Francisco to discuss the many challenges and opportunities facing the home care and hospice segment in light of changes taking hold across the industry. Among the core topics discussed, three areas of particularly pressing interest to the sector were explored by executives at the roundtable, including:

- a. **Strategic Partnerships**
- b. **Care Coordination**
- c. **Advocacy**

We have organized this Executive Summary to present the key discussion points and leverage the experiences and knowledge of thought leaders in the home care community.

Please note that names have not been attributed to specific quotes to protect the candor of the roundtable.

Strategic Partnerships

As a foundation for developing strategic partnerships, attendees believe that you must start with the proper mindset. Executives suggested we need to “get away from the mindset that we’re home care. We are the solution.” It will be important to stretch thinking in terms of partnerships and the types of service you can provide. Health systems are looking at different models of care, and home care can be in the position to help by becoming trusted post-acute advisors.

Roundtable participants pointed to population management as a case in point. With the requirement to bring together many parts of the continuum, home care providers have an opportunity to become the community case management solution. But to be effective, home care providers will need to become: well-versed in risk management; better integrated with other healthcare providers throughout the spectrum; and adept at collecting and sharing more and new data.

This need to capture data was identified by participants as one of the key hurdles in becoming a central player in the evolving health care continuum. Trade associations can be a repository for industry data, and are in the perfect position to author standards, and track data and outcomes. A challenge will be the significant investment required both at a national level and with individual providers. The other challenge is the issue of standards – or the lack thereof.

It was noted that there is some help available. Grants are available to develop programs and track results. Also, some of the providers are part of a RHIO (Regional Health Information Organization) that captures data so that it can be shared between hospitals and post acute providers. There are limitations, but it’s a start.

Care Coordination

The second of the roundtable focal points was that care coordination presents an opportunity to reinvent home care. It's possible to redefine it with core principles that are valuable to Patient Centered Medical Home (PCMH), insurance companies and health systems. We can be a core piece of whole person care. If we want a value proposition, we need to go beyond health system patients. In essence, this would entail providing "pre-acute" care.

Home care will need to look at different models, be creative, and come up with a new model that is sustainable. And whatever model is created, it must take into account the complexity of dealing with a variety of payers and sharing patient data across the continuum.

A challenge with providing care coordination is that the system doesn't recognize this role, raising questions about how to get paid. The solution, it was suggested, is that providers need to prove the concept and demonstrate value first, then get paid. There is data on integrated care management with combined chronic care models.

Home care won't be the only player jockeying for position in care management. Businesses are already ahead of CMS in this regard. Large self-insured organizations already have care managers, for example auto manufacturers. They are also providing services in manufacturing plants. Participants pointed to CVS Minute Clinics as another example.

Executives see managed care playing an increasingly influential role in the future. They are looking into options, looking at new approaches, acquiring physicians and ultimately they want to become ACOs. By increasing the size and scope of their business, managed care organizations will be able to exercise more control.

Advocacy

In a time when healthcare providers are trying to make their case to Washington and state government, executives believe that trade associations could be more effective. One issue that was raised several times was the need for "one voice." Over the years, the number of voices has grown, and with it there has been a loss of focus. Washington has very little time, so having multiple voices with different agendas is a liability. We can have individual voices, but on core things there must be agreement. It was offered that now there might be a better opportunity to bring people together because the stakes are so high.

There was a debate over the ability for home care and hospice leaders to come together. On the one hand, executives stated that we are "asking too much of associations" and need to help them focus on a smaller number of issues; on the other hand, others have "given up on having a national voice" and believe that we can drive public policy by driving the best care for our respective communities. And generally, there was skepticism about the ability of such large and diverse trade organizations to address important strategic issues.

To be successful we will need to redefine ourselves, and that will require thought leaders to come together to do that. We need to seize this opportunity. But if we agree that one voice is really important, what is the message? And what data is necessary to show that home care is part of the solution?

Several ideas were mentioned about how to become more effective. Banding together with other trade associations (including ones outside of home care and hospice) to increase scale and influence might be a solution. Another would be to substantially narrow the areas of focus. But at the core, multiple voices and the lack of data remain critical hurdles.

ATTENDEE LIST

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Thank You

To our Regional Roundtable Partners, whose support and vision allows these thought-leading efforts to continue at Home Care 100.



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EXECUTIVE MANAGEMENT CONFERENCE

About Home Care 100 Regional Roundtables

Leveraging Thought Leadership

Home Care 100 Regional Roundtables allow small groups of CEOs to come together to discuss their most pressing business issues. These efficient thought provoking discussions will explore implications of healthcare reform, consumer demographics, technological advances, financial markets and other top-of-mind issues.

By invitation, these roundtables provide a tremendously valuable opportunity to leverage the experiences and knowledge of your peers in a compact period of time.

Please visit us online at www.homecare100.com to learn more and also register to join us for our 11th annual Home Care 100 conference on January 26 - 29, 2013. at the Park Hyatt Aviara Resort in San Diego, CA.