2019–2020
Health Care Advisory Board
National Meeting Series

Revolution or reformation?
How to preserve mission and restore margins
by meeting the affordability mandate

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The road to 2020: Revolution or reformation?

With the 2020 elections fast-approaching, the concept of Medicare for All is experiencing a remarkable surge in public and political support. While it is reasonable to be skeptical about the passage of legislation under that name, no incumbent health care organization can afford to ignore the drivers of its growing support—in particular, the mounting anger and discontentment directed at the health care industry. And while much of the political debate about Medicare for All centers on coverage, it is concerns about the cost of health care that are the most important driving force behind the public’s increasing willingness to embrace governmental intervention.

Consumers and policymakers grappling with unsustainable cost trajectory

<table>
<thead>
<tr>
<th>Consumer unaffordability</th>
<th>Government unaffordability</th>
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<tbody>
<tr>
<td>$1,350</td>
<td>2026</td>
</tr>
<tr>
<td>Average deductible among covered workers in 2018 for single coverage¹</td>
<td>Estimated date by which Medicare’s trust fund will be depleted, 3 years earlier than previously expected²</td>
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Anxiety about unaffordability is driving not only increased receptivity to Medicare for All, but disruptive solutions writ large.

This year’s research will unpack the industry’s response to the increasing pressure to deliver on the demand for affordability:

» How far will purchasers go to attain affordability?

» How will the delivery system respond to the affordability mandate?

» How can innovation help solve the affordability problem?

2. 2019 annual report of the Board of Trustees of the Federal Hospital Insurance and Federal Supplementary Medical Insurance Trust Funds,” Medicare Board of Trustees, April 22, 2019.
Capturing today’s opportunities

As concerns about affordability mount, purchasers of all stripes are actively working to shift care to lower-cost ambulatory settings.

While the outlook for ambulatory growth is strong, most hospitals and health systems are poorly positioned to seize that opportunity—and disruptive innovators are siphoning lucrative volumes with consumer-centric offerings.

How must health systems transform their asset portfolios, physician partnerships, and organizational designs to win in the rapidly growing but hyper competitive ambulatory market?

Building tomorrow’s capabilities

While leaders need ambulatory growth to restore margins today, they can’t lose sight of the need for even more dramatic transformation in the future.

Given the intensifying pressures of disruptive competition, business model evolution, and public health challenges, succeeding in the future health care economy will require health systems to develop three fundamentally new capabilities:

1. **Re-envisioning primary care**: How can we compete in an increasingly segmented and competitive marketplace?

2. **Addressing social determinants of health**: What is our unique role in addressing the non-clinical drivers of health care spending?

3. **Hardwiring innovation**: What is the right balance between speed and deliberation—and how do we scale innovations effectively across the organization?
Who should attend

» **C-suite executives**: CEOs, COOs, CFOs, CSOs, CTOs, CMOs, and CNOs

» **Strategists and planning leaders**: VPs and directors of strategy, planning, and business development

» **Frontline leaders**: Administrative and clinical leaders at the director level and above

What you will take away

» Analysis of the major market forces reshaping the industry and key implications for hospital and health system leaders

» Playbook for building a winning strategy in the growing but crowded market for ambulatory care

» Insight into the changing nature of primary care—and how to remain competitive in the long term

» Lessons on addressing social determinants of health from best-in-class organizations

» Guidance on how to effectively develop and scale innovations across the enterprise

Featured presenters

Bradford Koles, Jr.
Executive Director

Stuart Clark
Managing Director

Rob Lazerow
Managing Director
2019–2020 National meeting series

Meeting agenda

The 2019–2020 Health Care Advisory Board national meeting series will help leaders navigate continued disruption and political uncertainty to secure the growth they need today and build the competencies they will need for tomorrow. We look forward to seeing you at these sessions.

Day 1: Capturing Today’s Opportunities

12:30 p.m. Guest Arrival and Registration
Light lunch provided

1:00 p.m. State of the Union—Revolution or Reformation?

» Decoding the Medicare for All debate: How do we differentiate between policy and politics leading up to the 2020 elections—and what is driving the renewed focus on major health reform?

» Physician partnerships in flux: Are we on the brink of a major shake-up in the physician landscape as new practice options test the durability of established hospital-physician relationships?

» New era of innovation: Which technological innovations have the potential to enable true clinical economies of scale?

3:00 p.m. Winning Ambulatory Growth

» Modernizing network strategy: Overcome the internal barriers, leadership disconnects, and counterproductive incentives that inhibit growth

» Maximizing consumer access: Improve accessibility, availability, and convenience to successfully attract ambulatory volumes

» Securing preference despite new competition: Differentiate your organization with a clear and compelling value proposition in an increasingly crowded market

5:00 p.m. Adjournment
Day 2: Building Tomorrow’s Capabilities

7:30 a.m.  Continental Breakfast

8:00 a.m.  The Future of Primary Care

» Exploring the segmentation of primary care: Navigate the tension between specialization and scale in the new primary care landscape

» Redesigning the care team: Reconfigure roles and responsibilities to expand capacity, improve outcomes, and reduce burnout

» Unlocking the promise of technology: Assess how artificial intelligence, digital health, and other innovations could transform primary care

9:45 a.m.  The New Mandate for Social Determinants of Health

» Clarifying the ambition: Scope what objectives providers should strive to achieve—and in what time frames

» Defining providers’ role: Examine the different ways hospitals and health systems can inflect the non-clinical factors that influence health outcomes

» Learning from exemplars: Distill the keys to success—and pitfalls to avoid—from the experiences of leaders addressing social determinants of health today

11:00 a.m.  The Right (and Wrong) Ways to Innovate

» Crystallizing innovation strategy: Connect diverse innovation goals into a coherent, practical strategy that supports organizations’ overarching mission

» Establishing the innovation platform: Deploy the investment, experimentation, and operationalization capabilities needed to identify, incubate, and scale initiatives

» Driving innovation across the enterprise: Infuse the highest-impact innovations across complex delivery systems to realize innovations’ promises of higher quality, greater efficiency, and other forms of ROI

12:00 p.m.  Adjournment
<table>
<thead>
<tr>
<th>Date Range</th>
<th>Location Details</th>
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| October 17–18, 2019 | Advisory Board*  
Washington, DC                        |
| November 7–8, 2019  | Advisory Board*  
Washington, DC                        |
| November 18–19, 2019| The University of Chicago  
Gleacher Center  
Chicago, IL                      |
| November 21–22, 2019| The Ritz-Carlton, St. Louis  
St. Louis, MO                      |
| December 5–6, 2019  | The Ritz-Carlton, Laguna Niguel  
Dana Point, CA                      |
| December 9–10, 2019 | The Adolphus Hotel  
Dallas, TX                          |
| December 18–19, 2019| The Fairmont Copley Plaza  
Boston, MA                           |
| January 9–10, 2020  | The Ritz-Carlton, San Francisco  
San Francisco, CA                   |
| January 23–24, 2020 | The Bellevue Hotel  
Philadelphia, PA                    |
| January 27–28, 2020 | The Henry, Autograph Collection  
Dearborn, MI                         |
| February 3–4, 2020  | The Ritz-Carlton, Westchester  
White Plains, NY                     |
| February 6–7, 2020  | Advisory Board*  
Washington, DC                        |
| February 10–11, 2020| The St. Regis, Houston  
Houston, TX                           |
| February 20–21, 2020| Four Seasons Hotel Seattle  
Seattle, WA                            |
| February 27–28, 2020| The Ritz-Carlton, Cleveland  
Cleveland, OH                         |
| March 9–10, 2020    | The Ritz-Carlton, Atlanta  
Atlanta, GA                           |
| March 12–13, 2020   | Loews Vanderbilt Hotel  
Nashville, TN                        |
| March 16–17, 2020   | The University of Chicago  
Gleacher Center  
Chicago, IL                      |
| March 26–27, 2020   | The Westin Edina Galleria  
Edina, MN                             |
| April 6–7, 2020     | The Ritz-Carlton, Denver  
Denver, CO                            |
| April 16–17, 2020   | The Fairmont Copley Plaza  
Boston, MA                            |
| April 20–21, 2020   | Advisory Board*  
Washington, DC                        |

* Advisory Board has moved! Our new address is 655 New York Avenue NW, Washington, DC 20001

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