

# HERITAGE VALUE-BASED CARE CONFERENCE SERIES

Virtual First National

# Specialty Care Transformation Summit

**October 8 – 11, 2024**

[www.specialtycaresummit.com](http://www.specialtycaresummit.com)

Virtual Online Video Live and Archived

Agenda current as of September 5, 2024

All times are EDT



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Thanks to the generous support of PCORI and Heritage, the Summit now offers complimentary registration to full-time practicing physicians, nurses and allied health professionals.

## CO-CHAIRLED BY



**Helen Burstin, MD, MPH, MACP**, Chief Executive Officer, Council of Medical Specialty Societies; Former Chief Scientific Officer, National Quality Forum; Former Director, Center for Primary Care, Prevention, and Clinical Partnerships, Agency for Healthcare Research and Quality, Washington, DC



**Susan Dentzer, MS**, President & CEO, America's Physician Groups; Former Editor in Chief, Health Affairs; Former Health Correspondent, PBS NewsHour, Washington, DC



**Lee Fleisher, MD**, Principal, Rubrum Advising; Emeritus Professor, Anesthesiology and Critical Care, Perelman School of Medicine, University of Pennsylvania; Former Chief Medical Officer and Director, Center for Clinical Standards and Quality, CMS, Philadelphia, PA



**Jerry Penso, MD, MBA**, President & CEO, American Medical Group Association; Former Medical Director, Continuum of Care, Sharp Rees-Stealy Medical Group, Alexandria, VA

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## Virtual Third National Primary Care Transformation Summit

Virtual Online Video Live and Archived • Part of the Heritage Value-based Care Conference Series

**The Leading Forum on Strategies to Enhance the Role, Compensation and Supply of Primary Care Providers**

**MEDIA PARTNERS:** Harvard Health Policy Review, Health Affairs and Inside Health Policy

**December 3 – 6, 2024 • [www.PrimaryCareTransformationSummit.com](http://www.PrimaryCareTransformationSummit.com)**

## AGENDA AT A GLANCE

### DAY I: TUESDAY, OCTOBER 8, 2024

#### MORNING CONCURRENT MINI SUMMITS

##### MINI SUMMITS GROUP I

MS 1: Strategies for the Integration of Primary Care and Behavioral Health

MS 2: Hospital Acquisitions of/or Employment of Oncology Practices

MS 3: Making Specialty Fee-for-Service Practices Great Again

##### MINI SUMMITS GROUP II

MS 4: Implications of Prior Authorization to Specialty Practices

MS 5: Case Study of a Private Equity Acquisition and Operation of Specialty Practices

MS 6: A Fireside Chat on The New Frontier in VBC: The Transformation of Specialty Care

##### MINI SUMMITS GROUP III

MS 7: Strategies for the Integration of Primary Care and Nephrology Services

MS 8: Establishing Levels of Distinction in Surgical Episodes of Care

MS 9: The Medical Specialty Exposure Pipeline (MSEP) at Yale

#### OPENING PLENARY SESSION

Co-chair Introductions and Keynote Address: 2024 Priority Concerns of the 55 Specialty Society Members of the Council of Medical Specialty Societies

Demographic Overview of Specialty Practice in the United States

The CMS Innovation Center's Strategy to Support Person-centered, Value-based Specialty Care

How New Treatments will Impact the Future of Specialty Care

The Road to Value Can't Be Paved with a Broken Medicare Physician Fee Schedule: Implications for Specialists

Day I Adjournment

### DAY II: WEDNESDAY, OCTOBER 9, 2024

#### MORNING CONCURRENT MINI SUMMITS

##### MINI SUMMITS GROUP IV

MS 10: Strategies for the Integration of Primary Care and Cardiovascular Services

MS 11: The Potential Role of Physician Unions in the Future of Specialty Practice in the United States

MS 12: Representing Specialty Practices in Acquisitions by Third Parties, including Private Equity or Health Systems

##### MINI SUMMITS GROUP V

MS 13: Using A Value-Based Enterprise to Integrate Specialists and Primary Care: Taking Value-Based Care to the Next Level

MS 14: Clinically Integrated Networks (CIN) Initiatives to Engage Specialists

MS 15: Developing Chronic Condition Bundles Co-managed by PCPs and Specialists

##### MINI SUMMITS GROUP VI

MS 16: A Fireside Chat on CMMI's Specialty Care Initiatives

MS 17: Transforming Value-Based Musculoskeletal Care with Clinical-Grade Digital Health Solutions

MS 18: The Role of Direct Specialty Care

#### DAY II PLENARY SESSION

Co-chair Welcome and Introductions

A Fireside Chat with Amir Dan Rubin, MBA, MHS on the Future of Specialty care and Related Venture Capital Investments

The Role of Private Equity in Acquiring and Managing Specialty Practices

Equity Investment in Physician Practices: What is all the Brouhaha?

Employer Initiatives to Improve Quality Measurement of Specialty Services and Use Informed Referrals to Specialty Care from Primary Care using Quality Information

How Optum Uses Granular Data on Quality and Efficiency at the of the Individual Specialty to Assign all of Specialists Nationwide into 4 Tiers Urging Primary Care to Refer to Tier 1 Specialists

How Leading Medical Groups Manage Specialty Referrals and Compensate Specialists

Day II Adjournment

# AGENDA AT A GLANCE, CONTINUED

## DAY III: THURSDAY, OCTOBER 10, 2024

### MORNING CONCURRENT MINI SUMMITS

MINI SUMMITS GROUP VII	MS 19: In-house vs Outside Specialty Care: The Advantages and Disadvantages of Bringing Specialty Care Inside the Tent vs Using an External Network	MS 20: Trends in Managed Care Contracting Strategies for Specialty Practices	MS 21: A Fireside Chat on the Future of Oncology
MINI SUMMITS GROUP VIII	MS 22: How Patient-personalized Specialty Referrals Create Value	MS 23: A Fireside Chat on Enhancing Ambulatory Referral Order Workflow	MS 24: A Fireside Chat on 4 Ways to Improve Specialty Health Care in the US
MINI SUMMITS GROUP IX	MS 25: Accelerating Value Based Care to Benefit Specialists and the Health-care Industry	MS 26: Five Commonly Overlooked Cybersecurity Practices in Fast-growth Specialty Groups	MS 27: Cancer Care of the Future: Study of Virtual Cancer Center

### DAY III PLENARY SESSION

- Co-chair Introductions and an Overview of Opportunities in Value-based care for Specialty Practices
- A Fireside Chat: How to Engage all Specialists in Value Based Care
- A Fireside Chat on Accountable Care Organization Initiatives to Improve the Cost and Outcomes of Specialty Care
- Can ACOs Flex While Supporting Specialty Care?
- Advancing Collaborative Care: New Developments in Primary-Specialty Care Models
- Value Based Specialty Care at Henry Ford Health
- Day III Adjournment

## DAY IV: FRIDAY, OCTOBER 11, 2024

### CLOSING PLENARY SESSION: POLITICS, POLICY AND THE FUTURE

- Co-chair Introductions & The Role of AI and Clinical Decision Support
- MedPAC Chair Fireside Chat
- How Value-based Specialty Care at Permanente Medical Groups Rewards Quality Over Quantity
- TEFCA's Impact on Primary Care-Specialist and Specialist-Specialist Communications, Referrals and Coordination
- The Implications of AI to the Future of Specialty Practice
- Improving Primary Care-Specialty Communications, Referrals and Coordination
- The Future of Specialty Practice in the United States
- Summit Adjournment

**TUESDAY, OCTOBER 8, 2024**

## DAY I MINI SUMMITS

### MINI SUMMITS GROUP I 10:00 am – 10:45 am

#### Mini Summit 1: Strategies for the Integration of Primary Care and Behavioral Health

##### 10:00 am Introduction, Discussion and Q&A

**Tristan Gorrindo, MD**, Chief Medical Officer, Optum Behavioral Care; Former Chief, Division of Education, American Psychiatric Association, Washington, DC

**Anitha Iyer, PhD, MPH**, Director, Behavioral Health Population Management, Mount Sinai Health System; Associate Professor of Psychiatry, Icahn School of Medicine at Mount Sinai, New York, NY

**Maria Koshy, MD**, Chair, Chiefs of Psychiatry & Addiction and Director, Regional Mental Health Administration, Permanente Medicine, Sacramento, CA

**Taft Parsons, III, MD**, Chief Psychiatric Officer, CVS Health; Former Enterprise Medical Director for Behavioral Health, Humana, Birmingham, MI

**Jennifer Podulka, MPA**, Senior Vice President of Federal Policy, America's Physician Groups; Former Senior Policy Analyst, Medicare Payment Advisory Commission, Washington, DC (Moderator)

#### Mini Summit 2: Hospital Acquisitions of/or Employment of Oncology Practices

##### 10:00 am Introductions, Discussion and Q&A

**John E. Hennessy, MBA**, Principal, Valuate Health Consultancy; Former Executive Director, Kansas City Cancer Centers, a US Oncology Network Practice Affiliate, and Executive Director, Community Cancer Program, University of Kansas Medical Center, Kansas City, KS

**Michael Kolodziej, MD, FACP**, Head of Medical Oncology, Canopy; Former Chair, Pharmacy & Therapeutics Committee, US Oncology Network, New York, NY

**Erich Mounce, MSHA**, Chief Executive Officer, Oncology Care Partners; Former COO, OneOncology; Former CEO, West Clinic/West Cancer Center, La Grange, TN

#### Mini Summit 3: Making Specialty Fee-for-Service Practices Great Again

##### 10:00 am Introduction, Discussion and Q&A

**Owen Dahl, FACHE, CHBC, LSSMBB**, Founder, Owen Dahl Consulting; Member, MGMA Consulting; Author, "Think Business! Medical Practice Quality, Efficiency, Profits and Lean Six Sigma for the Medical Practice: Improving Profitability by Improving Processes," Spring, TX

**Doral Davis-Jacobsen, MBA, FACMPE**, Partner, Prosper Beyond LLC; Member, MGMA Consulting, Asheville, NC

**Shawntea "Taya" Gordon, MBA, FACMPE, CMOM**, Chief Revenue Cycle Officer, H4 Technology, LLC; Member, MGMA Consulting, Omaha, NB

**Kem Tolliver, FACMPE, CPC, CMOM**, President, Medical Revenue Cycle Specialists Member, MGMA Consulting; Co-author, "Revenue Cycle Management: Don't Get Lost in the Financial Maze," Washington, DC

##### 10:45 am Transition Break

### MINI SUMMITS GROUP II 10:50 am – 11:35 am

#### Mini Summit 4: Implications of Prior Authorization for Specialty Practices

##### 11:40 am Introductions, Discussion and Q&A

**Robert M. Tennant, MA**, Vice President, Federal Affairs, Workgroup for Electronic Data Interchange (WEDI); Former Director, HIT Policy, Medical Group Management Association, Washington, DC

#### Mini Summit 5: Case Study of a Private Equity Acquisition and Operation of Specialty Practices

##### 10:50 am Introductions, Discussion and Q&A

**Aytan Dahukey, JD**, Partner and Private Equity Team Leader, Sheppard Mullin, Los Angeles, CA (Moderator)

#### Mini Summit 6: A Fireside Chat on The New Frontier in VBC: The Transformation of Specialty Care

##### 10:50 am Introductions, Discussion and Q&A

**Stuart Levine, MD, MHA**, Chief Health & Transformation Officer, AltaMed; Strategic Advisor, VillageMD; Operating Partner, Chicago Pacific Founders; Co-Founder, agilon health; Director, Payer and Provider Partnerships, Google; Assistant Clinical Professor, Internal Medicine/Psychiatry UCLA & Stanford Schools of Medicine, Los Angeles, CA

**Interviewed by: Don Crane, JD**, Former President & CEO, America's Physician Groups; Co-producer Primary Care Transformation Summit and Medicare Advantage Summit, Los Angeles, CA

##### 11:35 am Transition Break

## MINI SUMMITS GROUP III 11:40 am – 12:25 pm

### Mini Summit 7: Strategies for the Integration of Primary Care and Nephrology Services

#### 11:40 am Introductions, Discussion and Q&A

**Adam Boehler**, Founder and Managing Director, Rubicon Founders; Former CEO, International Development Finance Corp; Former Senior Advisor, Value-Based Transformation, HHS; Former Deputy Administrator CMS & Director, CMML, Nashville, TN

**Alex Portet, MBA**, Co-Chief Operating Officer, US Renal Care; Former SVP, Operations and Growth, Optum, Dallas, TX

**Martin Serota, MD**, Chief Executive Officer, RheoMed MSO; Advisory Board, Nephrology Specialty IPA; Chief Medical Officer, Conversio Health, Commerce, CA

**Samual A. Skootsky, MD**, Chief Medical Officer, UCLA Faculty Practice Group and Medical Group; Professor of Medicine, David Geffen School of Medicine at UCLA, Los Angeles, CA

**Valinda Rutledge, MBA**, Executive Vice President, Advocacy and Education, America's Physician Groups; Former Group Director, Patient Care Model Group and BPCI Lead, CMS, Washington, DC (Moderator)

### Mini Summit 8: Establishing Levels of Distinction in Surgical Episodes of Care

#### 11:40 am Introductions, Discussion and Q&A

**Frank Opelka, MD**, Former Medical Director, American College of Surgeons; Former Vice Chancellor for Clinical Affairs, LSU Health Science Center; Former President and CEO, LSU Healthcare Network, Orange Beach, AL

### Mini Summit 9: The Medical Specialty Exposure Pipeline (MSEP) at Yale

#### 11:40 am Introductions, Discussion and Q&A

**Kristen Obiakor, MD, MS**, Yale-trained Pediatrician; National Clinician Scholar at UCLA; Founder, Medical Specialty Exposure Pipeline (MSEP) at Yale, Los Angeles, CA

#### 12:25 pm Luncheon Break and Visit Exhibit Hall

## OPENING PLENARY SESSION: BACKGROUND AND POLICY SETTING

#### 1:00 pm

#### Sponsor Welcome Fireside Chat



**Richard Merkin, MD**, Founder, President and Chief Executive Officer, Heritage Group; Board, California Institute of Technology and USC Keck School of Medicine; Founder Richard Merkin Foundation for Stem Cell Research, Broad Institute, Harvard and MIT, Los Angeles, CA



**Interviewed by: Don Crane, JD**, Former President & CEO, America's Physician Groups; Co-producer Primary Care Transformation Summit and Medicare Advantage Summit, Los Angeles, CA

#### 1:15 pm

#### Co-chair Introductions and Keynote Address: 2024 Priority Concerns of the 55 Specialty Society Members of the Council of Medical Specialty Societies



**Helen Burstin, MD, MPH, MACP**, Chief Executive Officer, Council of Medical Specialty Societies; Former Chief Scientific Officer, National Quality Forum; Former Director, Center for Primary Care, Prevention, and Clinical Partnerships, Agency for Healthcare Research and Quality, Washington, DC (Co-chair)

#### 1:45 pm

#### Demographic Overview of Specialty Practice in the United States



**Atul Grover, MD, PhD**, Executive Director, Research and Action Institute, Association of American Medical Colleges; Former Chief Medical Officer, National Center for Health Workforce Analysis, Health Resources and Services Administration, Chevy Chase, MD

#### 2:15 pm

#### The CMS Innovation Center's Strategy to Support Person-centered, Value-based Specialty Care



**Elizabeth Fowler, PhD, JD**, Deputy Administrator and Director, CMS Center for Medicare and Medicaid Innovation; Former EVP of Programs, The Commonwealth Fund; Former VP, Global Health Policy, Johnson & Johnson; Former Special Assistant to President Obama; Former Chief Health Counsel, Senate Finance Committee, Washington, DC

#### 2:45 pm

#### How new Treatments will Impact the Future of Specialty Care



**Peter Marks, MD, PhD**, Director, Center for Biologics Evaluation and Research, US Food and Drug Administration; Former Chief Clinical Officer, Yale New Haven Hospital Cancer Center, Baltimore, MD

#### 3:15 pm

#### The Politics of Medicare Physician Payment Reform



**Sarah Egge, MPP**, Principal, SplitOak Strategies; Former Deputy Staff Director, Joint Select Committee on Deficit Reduction, US Senate; Former Legislative Assistant, US Senator Bob Kerrey, Washington, DC

#### 3:45 pm

#### The Road to Value Can't Be Paved with a Broken Medicare Physician Fee Schedule: Implications for Specialists



**Robert A. Berenson, MD**, Senior Fellow, Urban Institute; Former Assistant Director, White House Domestic Policy Staff, Washington, DC

#### 4:15 pm

#### DAY I ADJOURNMENT



**WEDNESDAY, OCTOBER 9, 2024**

## DAY II MORNING MINI SUMMITS

### MINI SUMMITS GROUP IV 10:00 am – 10:45 am

#### Mini Summit 10: Strategies for the Integration of Primary Care and Cardiovascular Services

##### 10:00 am Introduction, Discussion and Q&A

**Jana M. Goldberg, MD, FACC**, Chief Medical Officer, Heartbeat Health; Former Director of the Cardiac Care Unit US Department of Veterans Affairs, Philadelphia, PA

**Casey Henritz, DO**, Senior Medical Director, VBC Education and Performance, Medicare Population Health Programs, One Medical Senior, Amazon, Atlanta, GA

**Jennifer Jackman, MHCE**, Chief Operating Officer, America's Physician Groups; Former CEO, Edinger Medical Group; Former COO, MemorialCare Medical Foundation, Claremont, CA (Moderator)

#### Mini Summit 11: The Potential Role of Physician Unions in the Future of Specialty Practice in the United States

##### 10:00 am Introduction, Discussion and Q&A

**Barak Richman, JD, PhD**, Alexander Hamilton Professor of Business Law, George Washington University School of Law; Edgar P. and Elizabeth C. Bartlett Professor of Law and Business Administration, Duke University School of Law; Co-author, "Hospital Consolidation and Physician Unionization," New England Journal of Medicine, Washington, DC

**Kevin Schulman, MD**, Interim Division Co-Chief, Division of Hospital Medicine at Stanford; Professor of Medicine and Professor of Operations, Information and Technology, Stanford Graduate School of Business; Co-author, "Hospital Consolidation and Physician Unionization," New England Journal of Medicine, Palo Alto, CA

**Susan Dentzer**, President and Chief Executive Officer, America's Physician Groups; Former Editor in Chief, Health Affairs; Former Health Correspondent, PBS NewsHour, Washington, DC (Moderator)

#### Mini Summit 12: Representing Specialty Practices in Acquisitions by Third Parties, including Private Equity or Health Systems

##### 10:00 am Introduction, Discussion and Q&A 10:45 am

**Brent Hill, JD**, Partner, Healthcare & Life Sciences Section Leader, Holland & Knight LLP, Nashville, TN

**Lawrence W. Vernaglia, JD, MPH**, Partner, Chair, Industry Teams Department & Co-chair, Health Care & Life Sciences Sector's Providers of Health Care Services Area, Foley & Lardner LLP, Boston, MA

##### Transition Break

### MINI SUMMIT GROUP V 10:50 am – 11:35 am

#### Mini Summit 13: Using A Value-Based Enterprise to Integrate Specialists and Primary Care: Taking Value-Based Care to the Next Level

##### 10:50 am Introductions, Discussion and Q&A

**Mike Segal, JD, LLM**, Partner and Chair, Value-Based Care Group, Nelson Mullins Miami, FL Edward K. White, JD, LLM, Partner and Co-chair, Value-Based Care Group, Nelson Mullins, Immo, SC

**Edward K. White, JD, LLM**, Partner and Co-chair, Value-Based Care Group, Nelson Mullins, Immo, SC

#### Mini Summit 14: Clinically Integrated Networks (CIN) Initiatives to Engage Specialists

##### 10:50 am Introductions, Discussion and Q&A

**Molly Johnson, MHSA**, Consultant, Veralon; Managed Clinical Research Studies, Oregon Health & Science University, New York, NY

#### Mini Summit 15: Developing Chronic Condition Bundles Co-managed by PCPs and Specialists

##### 10:50 am Introductions, Discussion and Q&A

**Robert E. Mechanic, MBA**, Executive Director, Institute for Accountable Care; Senior Fellow and Executive Director, Health Industry Forum, Heller School of Social Policy and Management, Brandeis University, Newton Centre, MA

**Jennifer Perloff, MPA**, Director of Research, Institute for Accountable Care, Director, Institute for Healthcare Systems, Heller School, Brandeis University, Framingham, MA

##### 11:35 am Transition Break

### MINI SUMMIT GROUP VI 11:40 am – 12:25 pm

#### Mini Summit 16: A Fireside Chat on CMMI's Specialty Care Initiatives

##### 10:50 am Introductions, Discussion and Q&A

**Sarah Fogler, PhD**, Director, Patient Care Models Group, CMS Innovation Center; Former Deputy Director of Performance-Based Payment Policy Group, Center for Medicare, Centers for Medicare & Medicaid Services, Baltimore, MD

**Interviewed by: Valinda Rutledge, MBA**, Executive Vice President, Advocacy and Education, America's Physician Groups; Former Group Director, Patient Care Model Group and BPCI Lead, CMS, Washington, DC

#### Mini Summit 17: Transforming Value-Based Musculoskeletal Care with Clinical-Grade Digital Health Solutions

##### 11:40 am Introductions, Discussion and Q&A

**Eric C. Makhni, MD, MBA**, Associate Professor Orthopedic Surgery, Henry Ford Health System (Detroit, MI); CEO and Co-Founder, Protera Health, Detroit, MI

## Mini Summit 18: A Fireside Chat on The Role of Direct Specialty Care

11:40 am

### Introductions, Discussion and Q&A

**Diana Girnita, MD, PhD**, *Founder, Rheumatologist OnCall; Co-founder, Direct Specialty Care Alliance; Assistant Professor Rheumatology, University of Cincinnati, Irvine, CA*

**Lara Briseno Kenney, MD**, *Internal Medicine Physician with Sub-specialty Board Certifications in Hematology, Oncology, Hospice and Palliative Care; Founder Leeton Medical DPC; Co-founder, Direct Specialty Care Alliance, Leeton, MO*

**Interviewed by: Don Crane, JD**, *Former President & CEO, America's Physician Group; Co-producer Primary Care Transformation Summit and Medicare Advantage Summit, Los Angeles, CA*

12:25 pm

### Luncheon Break

## DAY II PLENARY SESSION

1:00 pm

### Co-chair Welcome and Introductions



**Jerry Penso, MD, MBA**, *President & CEO, American Medical Group Association; Former Medical Director, Continuum of Care, Sharp Rees-Stealy Medical Group, Alexandria, VA (Co-chair)*

1:30 pm

### A Fireside Chat with Amir Dan Rubin, MBA, MHS on the Future of Specialty Care and Related Venture Capital Investments



**Amir Dan Rubin, MBA, MHS**, *CEO and Founding Managing Partner, Healthier Capital; Former CEO, One Medical, an Amazon Company; Former EVP, UnitedHealth Group & Divisional CEO, Optum; Former President & CEO, Stanford Health Care; Former COO, UCLA Health, San Francisco, CA*

2:00 pm

### The Role of Private Equity in Acquiring and Managing Specialty Practices



**Wyatt Ritchie, MBA**, *Managing Director and the Head, Cain Brothers & Company, LLC; Former Advisor, Jefferies & Company, CIBC Oppenheimer and Bank of America, San Francisco, CA (Moderator)*

2:30 pm

### Equity Investment in Physician Practices: What's All This Brouhaha?



**Lawton R. Burns, PhD, MBA**, *James Joo-Jin Kim Professor, Professor of Health Care Management, Director, Wharton Center for Health Management & Economics, and Professor of Management, Wharton School, University of Pennsylvania; Philadelphia, PA*



**Mark V. Pauly, PhD**, *Bendheim Professor Emeritus, Health Care Management, Wharton School, Professor, Economics, School of Arts and Sciences, University of Pennsylvania; Former Member Physician Payment Review Commission, Consultant, Congressional Budget Office, and Member, Medicare Technical Advisory Panel, Philadelphia, PA*

3:00 pm



### Employer Initiatives to Improve Quality Measurement of Specialty Services and Use Informed Referrals to Specialty Care from Primary Care using Quality Information

**Linda Brady**, *Value-Based Care Portfolio and Network Strategy Manager, Health Care Strategy and Policy, Boeing; Principal, Health and Benefits Consultant, Mercer, Chicago, IL*



**Raymond Tsai, MD**, *Vice President of Advanced Primary Care Purchaser Business Group on Health; Assistant Clinical Professor, University of California, San Francisco, Visalia, CA*



**Elizabeth Mitchell**, *President and Chief Executive Officer, Purchaser Business Group on Health (PBGH); Former SVP, Healthcare and Community Health Transformation, Blue Shield of California, San Francisco, CA (Moderator)*

3:30 pm

### How Optum Uses Granular Data on Quality and Efficiency at the of the Individual Specialty to Assign all of Specialists Nationwide into 4 Tiers Urging Primary Care to Refer to Tier 1 Specialists



**Ken Cohen, MD**, *Executive Director of Translational Research, Optum Care; Former Chief Medical Officer, New West Physicians, Golden, CO*



**Interviewed by: Don Crane, JD**, *Former President & CEO, America's Physician Groups; Co-producer, Primary Care Transformation Summit and Medicare Advantage Summit, Los Angeles, CA*

4:00 pm

### How Leading Medical Groups Manage Specialty Referrals and Compensate Specialists



**Richard Bone, MD**, *Vice President Medical Management, Advocate Health; Former Vice President of Medical Management, South Region for AMG, Chicago, IL*



**Ed Curtis, CMPE**, *Chief Executive Officer, Summit Medical Group; Former Chief Operating Officer, Hattiesburg Clinic, Knoxville, TN*



**Rick Green, MBA**, *Senior Vice President North Kansas City Hospital, Meritas Health Corp.; Former Director of Operations, BayCare Health System, Kansas City, MO*



**Mark LePage, MD, MBA**, *Senior Vice President, Medical Groups and Ambulatory Strategy, Trinity Health; Former Chief Medical Officer, Marshfield Clinic Health System, Ann Arbor, MI*



**Michael Coppola, MBA**, *Vice President and Chief Operating Officer, AMGA Consulting, Phoenix, AZ (Co-Moderator)*



**Fred Horton, MHA**, *President, American Medical Group Association (AMGA) Consulting; Former CEO, Arnett HealthSystem; President & CEO, Health Midwest Medical Group, Kansas City, MO (Co-Moderator)*

4:45 pm

### Day II Adjournment

**THURSDAY, OCTOBER 10, 2024**

## DAY III MORNING MINI SUMMITS

### MINI SUMMITS GROUP VII 10:00 am – 10:45 am

#### Mini Summit 19: In-house vs Outside Specialty Care: The Advantages and Disadvantages of Bringing Specialty Care Inside the Tent vs Using an External Network

##### 10:00 am Introduction, Discussion and Q&A

**Erik E. Davydov, MD**, Medical Director, Facey Medical Group, Mission Hills, CA

**Bart Wald, MD, MBA**, President, PA Health Leadership Consultants; Former Physician Chief Executive, Providence Health and Services California; Founding Chief Executive Officer, Physician Associates Medical Group; Former Medical Director, DaVita-HealthCare Partners Medical Group, Pasadena, CA

**Bill Gil, MBA**, Former Vice President & Chief Executive Officer, Providence Southern California Medical Foundations; Adjunct Professor, USC Price School of Public Policy; Former CEO, Facey Medical Foundation, Manhattan, CA (Moderator)

#### Mini Summit 20: Trends in Managed Care Contracting Strategies for Specialty Practices

##### 10:00 am Introduction, Discussion and Q&A

**Richelle Marting, JD, MHSA, RHIA, CPC, CEMC, CPMA**, Founder, Marting Law, LLC; Director of Managed Care, North Kansas City Hospital, Meritas Health Corporation, Olathe, KS

#### Mini Summit 21: A Fireside Chat on the Future of Oncology

##### 10:00 am Introduction, Discussion and Q&A

**Barbara L. McAneny, MD**, CEO, New Mexico Oncology Hematology Consultants, LTD; Founder and Chair, National Cancer Care Alliance; 173rd President American Medical Association, Albuquerque, NM

##### 10:45 am Transition Break

### MINI SUMMITS GROUP VIII 10:50 am – 11:35 am

#### Mini Summit 22: How Patient-personalized Specialty Referrals Create Value

##### 10:50 am Introductions, Discussion and Q&A

**Najib Jai, MD, MBA**, Co-founder & Chief Executive Officer, Conduce Health, New York, NY

**Harvard Pan, MBA**, Chief Executive Officer, Conduce Health, New York, NY

#### Mini Summit 23: A Fireside Chat on Enhancing Ambulatory Referral Order Workflow

##### 10:50 am Introductions, Discussion and Q&A

**Alyssa Scully, MHA, PMP, AVP**, Operations, Northwell Health, New York, NY

**Interviewed by: Nancy Beran, MD, MHCDS, FACP**, Vice President, Chief Quality Officer for Ambulatory, Northwell Health, Saratoga, NY

#### Mini Summit 24: A Fireside Chat on 4 Ways to Improve Specialty Health Care in the US

##### 10:50 am Introductions, Discussion and Q&A

**Spencer D. Dorn, MD, MPH, MHA**, Vice Chair & Professor, Department of Medicine, University of North Carolina School of Medicine; Author, 4 Ways to Improve Specialty Health Care in the US, Harvard Business Review, Chapel Hill, NC

**Interviewed by: Don Crane, JD**, Former President & CEO, America's Physician Groups; Co-producer, Primary Care Transformation Summit and Medicare Advantage Summit, Los Angeles, CA

##### 11:35 am Transition Break

### MINI SUMMIT GROUP IX 11:40 am – 12:25 pm

#### Mini Summit 25: Accelerating Value Based Care to Benefit Specialists and the Healthcare Industry

##### 11:40 am Introductions, Discussion and Q&A

**Terrill Jordan, JD, LL.M.**, President, Chief Executive Officer, Board Member, Regional Cancer Care Associates LLC, New York, NY

**Steven A. Madreperla, MD, PhD**, Chief Executive Officer, PRISM Vision Group, New Providence, NJ

**Andrew Pecora, MD**, Chief Executive Officer and Chairman, Outcomes Matter Innovations; Senior Scientist, Institute for Biomedical Research, Hackensack University Medical Center; Professor of Medicine and Oncology, Georgetown University School of Medicine, Hackensack, NJ, (Moderator)

#### Mini Summit 26: Five Commonly Overlooked Cybersecurity Practices in Fast-growth Specialty Groups

##### 11:40 am Introductions, Discussion and Q&A

**Scott Dever**, Chief Information Officer, Gen4 Dental Partners; Former Vice President of IT and Data Analytics, Specialty Dental Brands, Nashville, TN

**Terri Ripley, MIT, PMP, CHCIO**, Chief Information Officer, OrthoVirginia; Former Assistant Vice President, Project Portfolio Management, Inova Health System, Lynchburg, VA

**Paul Shenenberger**, Chief Information Security Officer, Priva Health; Former Chief Information Officer, Summit Health Management, Kintnersville, PA

**Steve Cagle, MBA, HCISPP, CHISL**, Chief Executive Officer and Board Member, Clearwater; Former President and CEO, Moberg Pharma North America, Westfield, NJ (Moderator)

#### Mini Summit 27: Cancer Care of the Future: Study of Virtual Cancer Center

##### 11:40 am Introductions, Discussion and Q&A

**Tatjana Kolevska, MD**, Medical Director, National Cancer Excellence Program, Kaiser Permanente; Chair, Oncology and Hematology Chiefs, Kaiser Permanente Northern California, Mill Valley, CA

##### 12:25 pm Luncheon Break



## DAY III PLENARY SESSION: THE ROLE OF SPECIALTY PRACTICE IN VALUE-BASED CARE

1:00 pm

### Co-chair Introductions and an Overview of Opportunities in Value-based care for Specialty Practices



**Susan Dentzer**, *President and Chief Executive Officer, America's Physician Groups; Former Editor in Chief, Health Affairs; Former Health Correspondent, PBS NewsHour, Washington, DC (Co-chair)*

1:15 pm

### A Fireside Chat: How to Engage all Specialists in Value Based Care



**Scott D. Barlow, MBA**, *Chief Executive Officer, Central Utah Clinic; Board, American Medical Group Association, Salem, UT*



**Interviewed by: Jerry Penso, MD, MBA** (Suggested), *President & CEO, American Medical Group Association; Former Medical Director, Continuum of Care, Sharp Rees-Stealy Medical Group, Alexandria, VA*

1:45 pm

### A Fireside Chat on Accountable Care Organization Initiatives to Improve the Cost and Outcomes of Specialty Care



**Robert E. Mechanic, MBA**, *Executive Director, Institute for Accountable Care; Senior Fellow and Executive Director, Health Industry Forum, Heller School of Social Policy and Management, Brandeis University, Newton Centre, MA*



**Interviewed by: Don Crane, JD**, *Former President & CEO, America's Physician Groups; Co-producer, Primary Care Transformation Summit and Medicare Advantage Summit, Los Angeles, CA*

2:15 pm

### Can ACOs Flex While Supporting Specialty Care?



**Michael J. Alkire, MBA**, *President and Chief Executive Officer, Premier Inc., Washington, DC*



**Seth Edwards, MHA**, *Vice President, Population Health and Value-Based Care, Premier Inc.; Former Director, Federal Affairs, PACT Population Health Collaborative Washington, DC*

2:45 pm

### Advancing Collaborative Care: New Developments in Primary-Specialty Care Models



**Nina Birnbaum, MD**, *Director of Value-Based Care, Blue Shield of California; Former Chief, Primary Care Department, East Bay Physicians Medical Group, San Francisco, CA*



**Kevin Bozic, MD, MBA**, *Chair of Surgery and Director, Musculoskeletal Institute, Dell Medical School, University of Texas at Austin; Past President, American Academy of Orthopaedic Surgeons, Austin, TX*



**Paul N. Casale, MD, MPH**, *Professor of Population Health Sciences and Clinical Medicine, Weill Cornell Medical College; Adjunct Professor of Medicine, Vagelos College of Physicians and Surgeons, Columbia University; Member, MedPAC, Austin, TX*



**Sarah Fogler, PhD**, *Director, Patient Care Models Group, CMS Innovation Center; Former Deputy Director of Performance-Based Payment Policy Group, Center for Medicare, Centers for Medicare & Medicaid Services, Baltimore, MD*



**Helen Burstin, MD, MPH, MACP**, *Chief Executive Officer, Council of Medical Specialty Societies; Former Chief Scientific Officer, National Quality Forum; Former Director, Center for Primary Care, Prevention, and Clinical Partnerships, Agency for Healthcare Research and Quality, Washington, DC (Co-Moderator)*



**Mark McClellan, MD, PhD**, *Director, Robert J Margolis Center for Health Policy and Margolis Professor of Business, Medicine and Health Policy, Duke University; Former CMS Administrator and FDA Commissioner, Washington, DC (Co-Moderator)*

3:30 pm

### Value Based Specialty Care at Henry Ford Health



**Charles S. Day, MD, MBA**, *System Medical Director, Value Specialty Care, Vice Chair of Academics & Value Integration, Chief, Orthopedic Hand Surgery, Professor of Orthopedic Surgery, Center for Health Policy & Health Services Research Henry Ford Health, Detroit, MI*

4:00 pm

### A Fireside Chat on Capitating Specialists



**Bill Gil, MBA**, *Former Vice President & Chief Executive Officer, Providence Southern California Medical Foundations; Adjunct Professor, USC Price School of Public Policy; Former CEO, Facey Medical Foundation, Manhattan, CA*



**Interviewed by: Don Crane, JD**, *Former President & CEO, America's Physician Groups; Co-producer, Primary Care Transformation Summit and Medicare Advantage Summit, Los Angeles, CA*

4:30 pm

### Day III Adjournment

**FRIDAY, OCTOBER 11, 2024**

## DAY IV CLOSING PLENARY SESSION: POLITICS, POLICY AND THE FUTURE

### 10:00 am Co-chair Introductions: The Role of AI and Clinical Decision Support



**Lee Fleisher, MD**, Principal, Rubrum Advising; Emeritus Professor, Anesthesiology and Critical Care, Perelman School of Medicine, University of Pennsylvania; Former Chief Medical Officer and Director, Center for Clinical Standards and Quality, CMS, Philadelphia, PA

### 10:30 am MedPAC Chair Fireside Chat



**Michael Chernenow, PhD**, Chair, MedPAC; Leonard D. Schaeffer Professor of Health Care Policy, Department of Health Care Policy, and Director, Healthcare Markets and Regulation Lab, Harvard Medical School, Cambridge, MA



**Interviewed by: Susan Dentzer**, President and Chief Executive Officer, America's Physician Groups; Former Editor in Chief, Health Affairs; Former Health Correspondent, PBS NewsHour, Washington, DC

### 11:00 am How Value-based Specialty Care at Permanente Medical Groups Rewards Quality Over Quantity



**Ramin Davidoff, MD**, Co-CEO, The Permanente Federation; Executive Director & Chair, Southern California Permanente Medical Group; Chair & CEO, Hawaii Permanente Medical Group and The Southeast Permanente Medical Group, Beverly Hills, CA



**Interviewed by: Don Crane, JD**, Former President & CEO, America's Physician Groups; Co-producer, Primary Care Transformation Summit and Medicare Advantage Summit, Los Angeles, CA

### 11:30 am TEFCA's Impact on Primary Care-Specialist and Specialist-Specialist Communications, Referrals and Coordination



**Micky Tripathi, MPP, PhD**, National Coordinator for Health Information Technology; Former Chief Alliance Officer, Arcadia; Former President and CEO, Massachusetts eHealth Collaborative and Indiana Health Information Exchange, Washington, DC

### 12:00 pm Luncheon Break and Visit Exhibit Hall

## CLOSING PLENARY SESSION CONTINUED

### 1:00 pm The Implications of AI to the Future of Specialty Practice



**Robert Pearl, MD**, Clinical Professor of Plastic Surgery, Stanford University School of Medicine; Faculty, Stanford Graduate School of Business; Podcast Co-host, "Fixing Healthcare"; Former CEO, The Permanente Medical Group; Author, "ChatGPT, MD: How AI-Empowered Patients & Doctors Can Take Back Control of American Medicine," New Haven, CT

### 1:30 am Improving Primary Care-Specialty Communications, Referrals and Coordination



**Russell S. Phillips, MD**, Director, Center for Primary Care, William Applebaum Professor of Medicine and Professor of Global Health and Social Medicine, Harvard Medical School; General Internist, Beth Israel Deaconess Medical Center, Boston, MA

### 2:00 pm The Future of Specialty Practice in the United States



**Helen Burstin, MD, MPH, MACP**, Chief Executive Officer, Council of Medical Specialty Societies; Former Chief Scientific Officer, National Quality Forum; Former Director, Center for Primary Care, Prevention, and Clinical Partnerships, Agency for Healthcare Research and Quality, Washington, DC



**Lee Fleisher, MD**, Principal, Rubrum Advising; Emeritus Professor, Anesthesiology and Critical Care, Perelman School of Medicine, University of Pennsylvania; Former Chief Medical Officer and Director, Center for Clinical Standards and Quality, CMS, Philadelphia, PA



**Jerry Penso, MD, MBA**, President & CEO, American Medical Group Association; Former Medical Director, Continuum of Care, Sharp Rees-Stealy Medical Group, Alexandria, VA



**Susan Dentzer**, President and Chief Executive Officer, America's Physician Groups; Former Editor in Chief, Health Affairs; Former Health Correspondent, PBS NewsHour, Washington, DC (Moderator)

### 2:45 pm SUMMIT ADJOURNMENT