

The Continued Transformation of Healthcare Delivery

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Agenda / Format

- Introductions
- Initial Polling
- What's Changed?
- What Hasn't?
- What's Next?

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Audience Polling Question 1: How prepared do you feel about your organization regarding future industry change?

- A) Very prepared: I've got this covered
- B) Moderate: I feel pretty good about my chances
- C) Not that Optimistic: At least I'm better than the other guy
- D) In Trouble: I am "the other guy"

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What do you think has changed in the sector?

- Anu
 - Pace and Direction of 'No Regret' Strategic Initiatives
 - Pace of the "Arc of Change"
 - Whole New Set of Patient and Provider Set of Concerns/ Risks
 - Acceptance and Preference for Virtual Care
 - Increased Drive of Innovation and Renewed Interest in Disruptors
- Kevin
 - Q1 versus Q2 Financial Performance
 - What will 2H2020 Show?
 - Size/Scale v/s Nimbleness
 - Leadership Decisions / Action
 - Preparedness: Past, Present and Future
 - Change versus "Basics"

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What do you think hasn't changed in the sector?

- Kevin

- Focus on Credit Fundamentals or What is Commonly Called “No Regrets” Strategies
- Clinical Excellence - But Migrating to Population Health
- Financial Expectations Must be Realistic; and Relentless
- Need to Self-Disrupt and Self Innovate

- Anu

- The Unwavering Focus on Strategic Planning & Execution
- Importance of Deployable and Flexible Resources/ Capabilities
- Benefits of Deep and Broad Intellectual Capital
- Focus on Disruption, Innovation and Other Agents of Change
- Realization that Past Success may not foretell Future Success

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Audience Polling Question 2: Are you asking your organization these questions?

- A) Absolutely: Asked and answered
- B) Mostly: We ask, but not 100% sure on the answer
- C) Sometimes: Not during global pandemics
- D) Never: What was the question again?

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Kevin: What does this mean for our forward view of financial performance, credit and enterprise risk?

- How sustainable is the existing capital structure and approach? Does it meet the needs of the organization?
- What alternative avenues, other than traditional long-term debt municipal financing, exist? Are they viable?
- Does the organization have the resources to sustain a major ‘shock’ to the system, like a pandemic?
- What qualitative considerations influence an entity’s risk profile?
- Did the coronavirus end fee-for-service?

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Anu: What questions should we be asking ourselves as healthcare leaders?

- What altitude or headroom do we have, based on our current trajectory of operations and financial performance?
- Looking ahead, how would we define our ‘Core Business’ and what can be done to improve or fortify those elements?
- Today, how should we re-approach our current and future strategic planning initiatives?
- What are the benefits of existing and the impact of potential of various collaboration and partnership opportunities?
- What is the long term play with clinicians, continuum of care providers, payors, market disruptors and other collaborators?

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Questions?

- Questions?
- Final Thoughts?