

Thought Leaders' Summit UCAOA Spring Convention May 2, 2017



Thank you for participating in the inaugural Thought Leaders' Summit during the 2017 UCAOA Annual Convention & Expo. Your participation, insights and expertise were invaluable and we thank you for your contributions in this discussion about the future of our industry. UCAOA and AMB will continue to evaluate opportunities to support the delivery of on demand medicine and ensure that urgent care is an essential component of the healthcare continuum and population health, now and in the future.

Some of the important goals discussed during the three-hour session included:

- 1. Identify what consumer needs the urgent care industry needs to meet over the next decade to ensure its value proposition extends beyond access as new on-demand services enter the market.*
- 2. Provide guidance and thought leadership on how UCAOA can best support the industry to ensure its ongoing success.*
- 3. Identify unmet needs or barriers to industry success.*

Following the meeting, we analyzed each objective and assessed your collective responses on future industry challenges and opportunities. Your candid and thoughtful insight was valued and appreciated. We synthesized some of the key discussion points covered during the meeting. The key ideas that emerged during the Summit include:

1. Develop a strategic plan to influence optimal outcomes with public and private payors.
2. Expand legislative impact and outreach by continuing to manage relationships with policymakers and exploring the creation of a Political Action Committee.
3. Prioritize partnerships with Telemedicine.
4. Improve existing resources with data collection and analytics.
5. Convene additional meetings/summits with industry leaders to plan future strategies.

During the next 6 months, we will begin devoting resources to these issues, building partnerships, holding research and strategy symposia and developing strategic plans for each issue. UCAOA will continue to address issues that were discussed during the Summit but were not identified as key priorities. These topics will be addressed through other means, including membership communications, publications and educational sessions.

Key Discussion Points During Summit

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In this section, we highlighted some of the key discussion points around each issue. While some of the comments are direct quotes, to ensure confidentiality we have not attributed these comments to specific attendees. If there are additional key discussion points that you believe are important and warrant further discussion, please reach out to Kim Youngblood at KYoungblood@ucaoa.org.

Questions:

1. Ensuring the relevancy of urgent care in 5-10+ years as an integral component of the healthcare continuum:

- a. Today's environment is already witnessing the trend towards providing primary care, telemedicine and urgent care under the same roof; will this stay and what's next?
- b. Is technology changing the service offerings?
- c. There is a tremendous opportunity for ER diversion strategies, reinforced by a recent study published in the Annals of Emergency Medicine. How can we leverage this as an urgent care opportunity?
- d. Should urgent care's traditional value proposition of access change and, if so, what do we need to do as an industry to prepare (which will drive UCAOA's agenda)?
- e. How do we overcome the market objections heard today (e.g., urgent care is disruptive to the medical home)?

Thought Leader Responses:

- The definition of urgent care is changing and the industry will need to monitor future trends in health care and quickly respond to changes; If we don't adapt and develop strategies for continuous improvement, the industry will be extinct within 5 years; On-demand health care is the future and patients will dictate the type of treatment and coverage they would like to receive.
- Patients no longer want the primary care "experience"; Primary care delivery in its traditional form is more expensive; Younger adults (under 45) are moving to urgent care versus the traditional primary care model; Key demographic audiences that will broaden the base of business include younger adults and baby boomers seeking treatment for chronic diseases; Gaining access and developing legislative strategies to provide care to veterans, and seeking Medicaid/Medicare parity is crucial.
- Telemedicine is the future but UCAOA must collect additional data and develop resources for best practices; Telehealth should merge with UCAOA since we are the gateway association; There are positive and negative outcomes associated with the proliferation of health care apps and the industry should proceed with caution in advancing this new technology.
- Assess the market share of urgent care dollars over the previous 10 years; All strategies and best practices should be data driven and UCAOA should broaden Benchmarking Survey Questionnaire; Questionnaire is cumbersome for data entry and data collection should be simplified.

Questions:

2. How can UCAOA, as an organization serving its diverse membership, best assist in a time of transformation and industry challenges?

- a. Corporate operators financed for growth continue to increase market share; How can UCAOA better serve this group?
- b. Policy challenges: Where are their opportunities and potential pitfalls in the present market. What should be the priorities of UCAOA's advocacy agenda?
- c. Payer challenges (e.g., narrow networks, new payment models, contracting restrictions): How can we collaborate in a changing market to ensure not only viability of the centers, but growth?
- d. Industry response to competitive challenges: members have expressed concerns about retail clinics, telemedicine, well-branded hospital-affiliated urgent care centers, expanded primary care access and onsite employer clinics. Urgent care has had tremendous success and the market took notice.
- e. Challenges related to acquiring and retaining 'talent'.

Thought Leader Responses:

- Competition is hurting the industry and retail clinics are the biggest competitors; Smaller operators are at a disadvantage and UCAOA should provide additional resources to educate startups on the risk factors of establishing new UCs.
- Leverage resources, best practices and success stories with state and federal legislative policies impacting the industry; UCAOA should “think bigger” with its priorities.
- Ninety percent of all barriers are payor related; UCAOA must develop a comprehensive strategic plan around public and private payors; Certification and accreditation helps to keep standards high and may improve outcomes when negotiating with payors; Industry should “make the case” for saving public dollars, reducing emergency room visits and improving outcomes with Medicaid and Medicare populations.

Questions:

3. Bold thinking.

- a. Brainstorming: One key item that UCAOA is not doing today to better serve the industry and its members at large
- b. One or two metrics by which UCAOA should judge its performance and, if not achieved, would tell us (UCAOA) that we have failed.

Thought Leader Responses:

- Broaden urgent care industry and be more strategic about the definition of urgent care;
 - Explore all partnership options including: Merging with Telehealth; Assess pros and cons of health care apps and future trends in this area;
 - Expand opportunities with public payors (specifically Medicaid block grants);
 - Explore pros and cons of expanding “retail” and “urgent care” classifications;
 - Work with large companies to steer them in the direction of urgent care;
 - Develop more refined research projects to benefit the industry.
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Final Comments

Moving forward, UCAOA will continue to seek your guidance, feedback and participation. Based upon your feedback and recommendations, in the next few months, we will finalize key strategies and develop a timeline to execute these exciting new initiatives. Thank you again for your participation in the Thought Leaders’ Summit. We are hopeful we can continue to count on you as an advisory group to UCAOA and the Urgent Care Foundation. If you have any questions or additional comments, please do not hesitate to contact us as we would like this to be an ongoing exchange of ideas.

We would also like to extend our gratitude to AMB Investment Banking for their grant to the Foundation so we might convene this summit of industry leadership.

We are proud to serve urgent care centers across the country and consider it a privilege to be stewards to an industry that provides such an essential service to our communities.

With gratitude,

Gordon Maner, Head of Investment Banking, AMB

Laurel Stoimenoff, CEO, UCAOA

Kim Youngblood, Chief Development Officer, UCAOA & the Urgent Care Foundation

David Wood, Chair, the Urgent Care Foundation