



HOUSTON, WE HAVE ~~A PROBLEM~~ SOLUTION

HBCH SUMMER FORUM

June 26, 2025

Unlocking the Power of Primary Care:

A Strategic Approach
to Health Benefits Design

MULTIPLY
DELIVERY
OPTION

CHRONIC
CONDITION
MANAGEMENT

SPECIALISTS
NAVIGATION

PRIMARY
CARE

BETTER
OUTCOMES

MORE TIME
WITH
PATIENTS

BEHAVIORAL
HEALTH
INTEGRATION

ENHANCED
ACCESS

REALIGNED
PAYMENT
METHODS



Our Mission



EDUCATE employers about opportunities to improve benefit plan value



EMPOWER employers with the NEW initiatives, tools, and resources to take actions that improve the value of health benefit plans



ADVOCATE for legislative reforms that improve healthcare market competition

HBCH empowers Houston employers to provide high-value health benefits

Meet Our Exceptional Board



Johnthan Markert

Director of Benefits &
Well-Being

Tokio Marine HCC



Denise Crandon

Senior Manager Benefits,
Medical Programs

HISD



Sarah Acosta

Director, Benefits &
Wellness

Harris Health System



Elaine Britt

Executive Director of HR
Operations

Rice University



Dan Burke

VP, Director, Corporate
Benefits

Turner Industries Group,
LLC



Amy Hartman

Senior Manager Human
Investments

Credit Human

Meet Our Exceptional Board



Daniel Jane

Benefits Consultant
Gallagher



**Amanda Jones-
Duncan**

Benefits & Shared
Services Manager, Health
& Welfare
Harris Health



Heidi McPherson

Project Manager &
Co-Lead Health Equity
Collective
UT Health



Karen Rakers, MD

Vice President Next Level
PRIME and Onsite Clinics
Next Level Medical



Carrie Rust

Chief Human Resource
Officer
Ellwood



Ted Barrall

Director, Compensation
& Benefits
The Friedkin Group

JOIN US

JOIN US





41 Coalitions, 90 Million Lives

Not the What, but the How

- Resources (HBCH website)
- PBM Consultant RFP
- PBM RFP
- PBM Contract
- High Cost Claims Management
- Data Warehouse



**Texas Employers
For Affordable
Health Care**

The Employers Voice at the Texas Capitol



88th Legislature

HB711

- Prohibits anti-competitive language between hospitals and health plans
- Gag Clauses
- Anti-Tiering
- Anti-Steering

89th Legislature

- SB926 – Removes barriers to quality data. Allows modified deductibles, copayments, coinsurance, or other cost-sharing provisions.
- HB2254 – Allows primary care physicians and groups to enter into capitated payment and other value-based payment arrangements.
- APCD funding of the UTSPH Center for Health Care Data. Research by the Center and others, e.g., RAND Hospital Price Transparency

Employer Health Care Data Field Guide

THANK YOU TO UNDERWRITER SPONSORS

Genentech



Johnson & Johnson



THANK YOU TO OUR PANEL SPONSORS

Aligned

amazon one medical



galileo

Kelsey-Seybold Clinic

nextlevel
MEDICAL

MEMORIAL[®]
HERMANN

Premise Health

THANK YOU TO OUR ACTIVITY SPONSORS



Texas Employers
For Affordable
Health Care



HBCH Summer Forum Agenda 2025

10:45 AM - 11:00 AM

Welcome and Opening Comments

11:00 AM - 12:15 AM

Key Tenets of a Successful Primary Care Strategy

12:15 PM - 1:15 PM

Lunch: Exhibit Hall

1:15 PM - 1:40 PM

Premise Health and Google - Advanced Primary Care:
A Model for Better Health

1:45 PM - 2:10 PM

Amazon One Medical, HTA, Lyft and Sequoia

2:15 PM - 2:40 PM

Kelsey-Seybold Clinic and Goose Creek ISD - Primary and
Specialty Care Integration

2:40 PM - 3:00 PM

Networking and Exhibits

3:05 PM - 3:30 PM

Primary Care Only Works If People Use It... Best Practices and
Mistakes to Avoid in Driving Primary Care Engagement.

3:35 PM - 4:00 PM

Next Level Medical, Humble ISD and City of Manvel

4:05 PM - 4:30 PM

Beyond Assumptions: 3 Realities and Actions to Transform
Health Engagement, Outcomes, and Cost

4:30 PM - 5:00 PM

Audience Discussion and Closing Remarks

5:00 PM - 7:00 PM

Post-Conference Reception, Networking, and Exhibits

Key Tenets of a Successful Primary Care Strategy



Tiffany Albritton, MD

VP, Chief Medical
Officer
Memorial Hermann



Juliet Breeze, MD

CEO
Next Level Medical



Jason Chirichigno, DM

Clinical System Lead
Galileo



Tony Lin, MD

Retired - Chairman &
CEO
Kelsey-Seybold Clinic



Patrick Nelli

CEO & Founder
Aligned Marketplace



Sarah Pollard

VP of Clinical Operations
& Performance

apree Health

Employer cost pressures persist as traditional primary care declines

PCPs are leaving networks and quicker to make referrals, leading to access issues and less preventative care

5-9%

Commercial plan
expected pricing inflation*

>30k

PCP shortage in 2025, up
from 20k in 2021**

4x+

Increase in referrals from
PCPs between 1999 and
2018***

75%

Of PCPs listed as
available by payers aren't
available****

*internal analysis based on Baumol's cost theorem and employers being price takers from providers

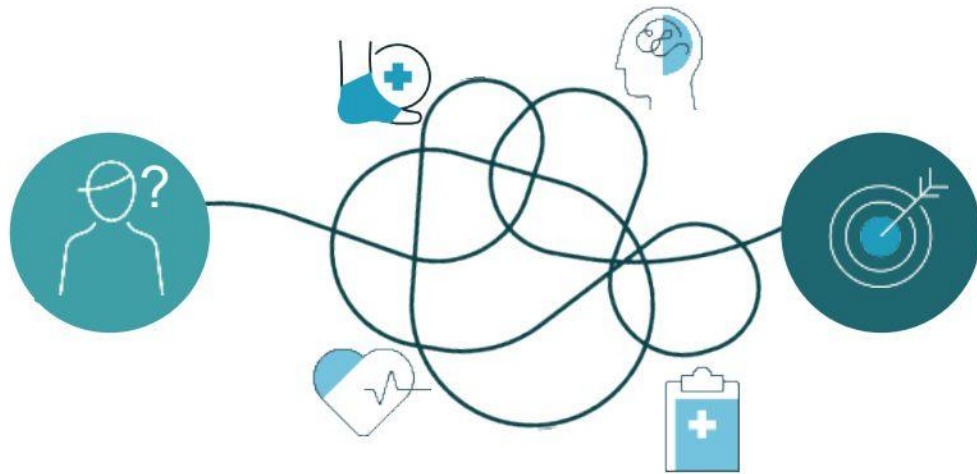
**<https://www.aamc.org/media/75231/download?attachment>

***<https://www.ajmc.com/view/outpatient-referral-rates-in-family-medicine> and <https://www.jabfm.org/content/jabfp/34/6/1183.full.pdf>

****Aligned Marketplace internal study based on 2,000 primary care providers that were listed as having availability on multiple health plan provider directories

Traditional Primary Care

See as many patients as possible



Benefit Leader at Fortune 100 company

"I've had the same primary care doctor for 10 years, but recently the care isn't the same. **It takes months to get an appointment**, and when I do, they're often running late. My time with the doctor is shorter, the discussions are shallow, and they always seem to be rushing. Recently, I've left with a prescription or referral and little guidance on what to do next."

Nearly every problem in the system can be traced back to declining primary care

Primary Care is only

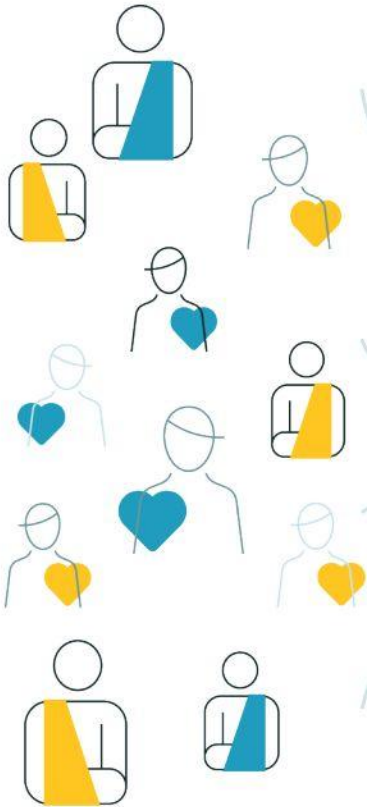


But influences up to



Employees of self-insured employers

Advanced Primary Care companies*



Aligned
One simple-to-administer contract
to access a national network of the best
advanced primary care groups

Clinic/in-home DPCs**



Virtual-first DPCs

CIRRUS MD galileo

Population-specific DPCs



Hybrid FFS/value-based clinics



*Select list of hundreds of market participants

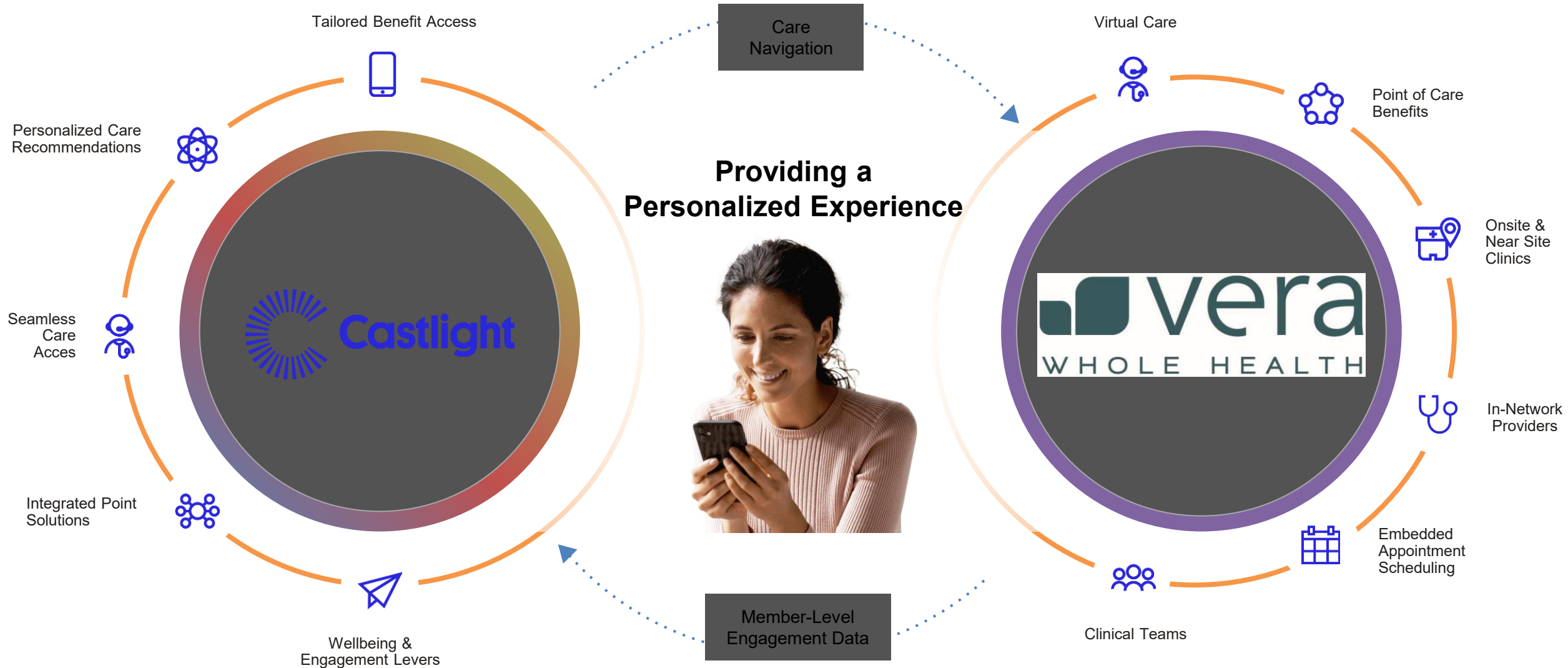
**DPC = Direct primary care. These groups don't bill FFS and are not currently available in health plan networks

next level

High-Quality, Affordable
Care Across Texas

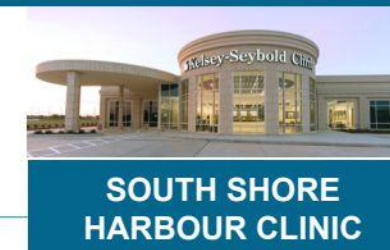
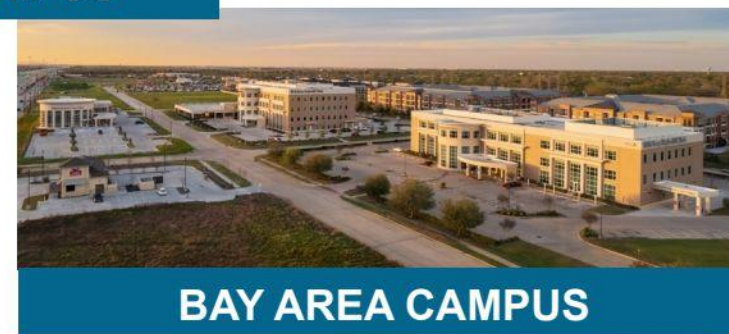
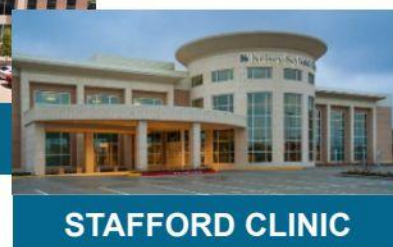
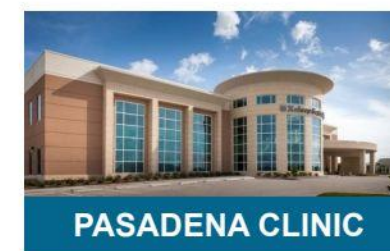
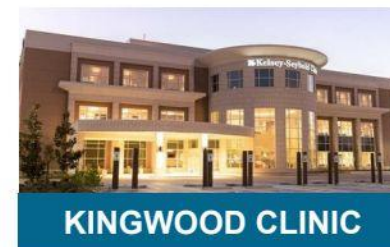
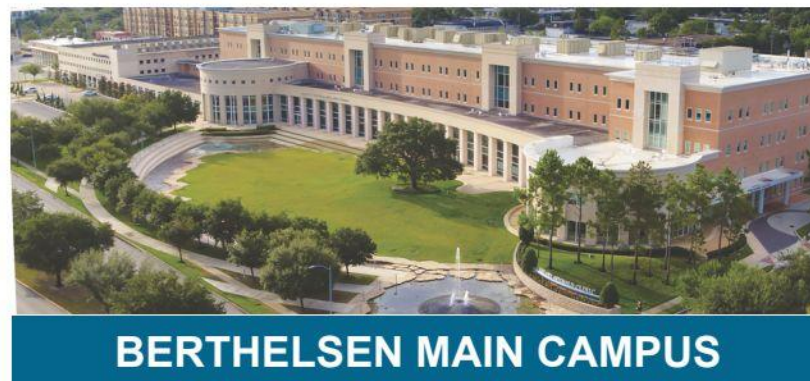
[www.Next LevelUrgentCare.com](http://www.NextLevelUrgentCare.com)

Curated Benefits. Personalized Care.

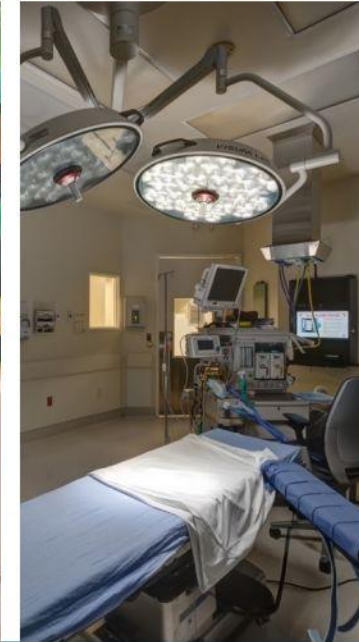




Tiffany Albritton, MD
MHMD Chief Medical Officer



- 43 Locations
- 6 Campuses
- 37 Clinics



galileo

What do you think is the biggest issue with primary care today?

087

Access to Primary Care Doctors



Current member experience/perception of primary care



Coordination of primary care with specialists



Member cost barriers to using primary care (i.e. HDHPs)



Improving Healthcare Value with **ADVANCED** Primary Care (APC)

FAST FACT:

US adults who have a primary care physician have **33% LOWER** healthcare costs and **19% LOWER** odds of dying than those who see only a specialist. As a nation, we would **SAVE \$67 BILLION** each year if everybody used a primary care provider as their usual source of care.

"Contribution of Primary Care to Health Systems and Health," Milbank Quarterly

Over 80%* of patients with common chronic conditions (diabetes, high blood pressure) access primary care, the most prevalent type of office visit. But misaligned incentives (i.e., fee-for-service), lack of behavioral health (BH) integration, and infrastructure and technology challenges can compromise healthcare quality and drive up costs.

*MEPS (2014) reported by Robert Graham Center (2018)

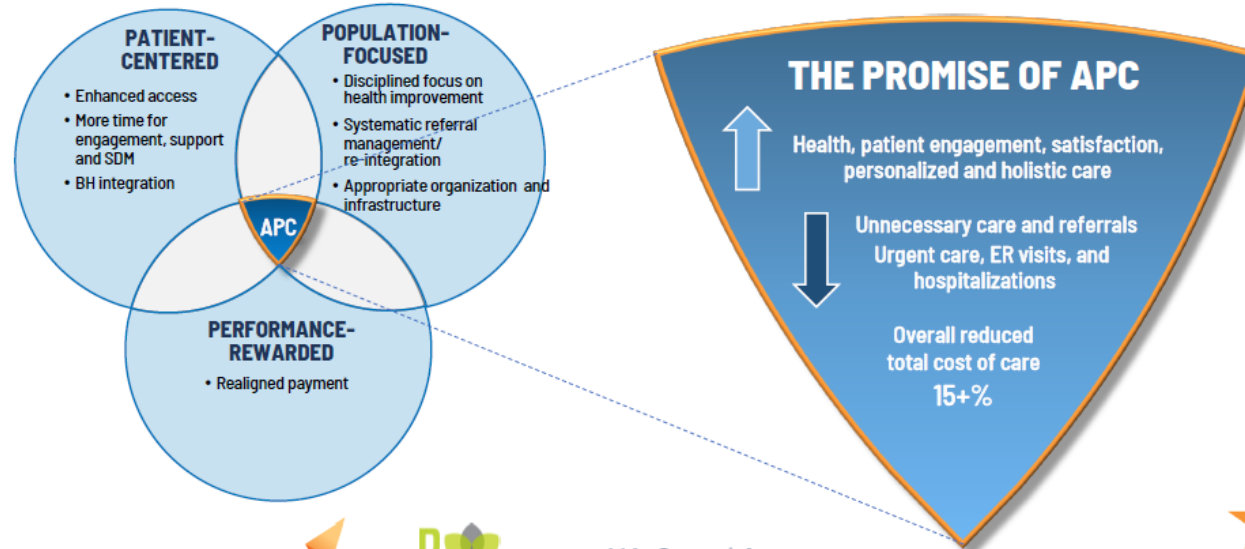


In a traditional fee-for-service (FFS) model, health care providers may be expected to see 25+ patients/day, leading to insufficient time for engagement, a tendency to refer, and high frustration levels for all.

What Makes Primary Care **ADVANCED** Primary Care? National Alliance Identified **SEVEN** Key Attributes



Most of these attributes are consistent with critical success factors identified by respondents to a National Alliance survey



What is your biggest barrier to implementing advanced primary care?

070

I'm still diligencing the value of it



Member communication / worry over engaging members



Implementation/integration of APC with my benefits ecosystem



Improving Healthcare Value with **ADVANCED** Primary Care (APC)

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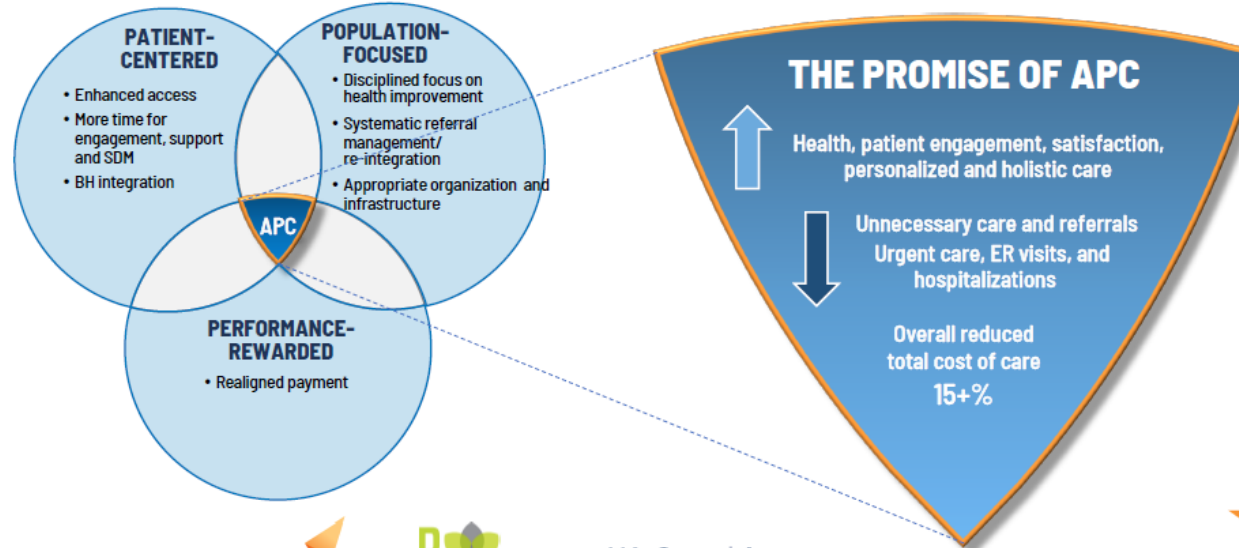


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Premise Health & Google

Advanced Primary Care: A Model for Better Health



Matt Baldwin

Benefits Program Manager

Google



Ryan Donnelly

Senior VP, Strategy and Innovation

Premise Health



Johnathan Markert

Director of Benefits & Well-Being

Tokio Marine HCC

Premise Health®



Advanced Primary Care

A Model for Better Health

How do your employees receive Primary Care?

043

Local Health System



79 %

Onsite / Near site Wellness Clinic



19 %

Other



2 %





Google

Health and Wellness Center

Powered by Premise Health



PHARMACY

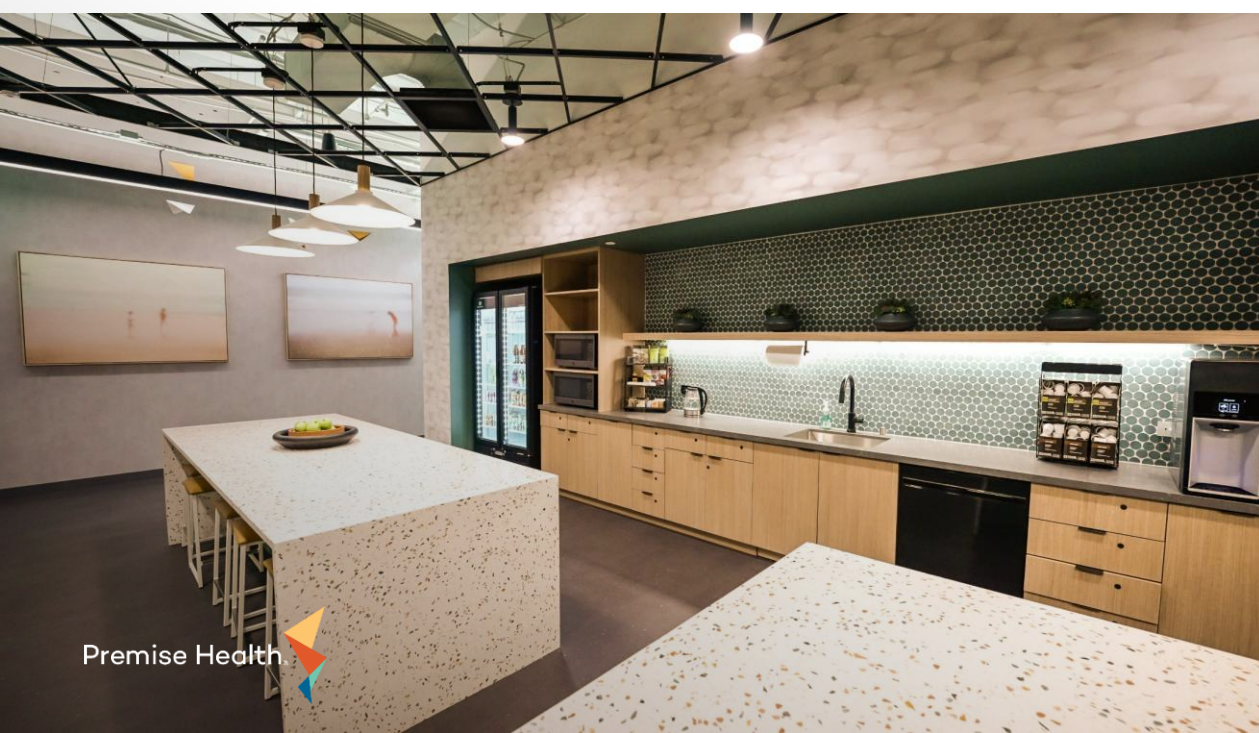


VISION











GVC BOOTH
5

Premise Health®



amazon one medical

Amazon One Medical, Health Transformation Alliance, Lyft, and Sequoia



Shannon Arens

Senior Well-Being Strategist

Sequoia



Ted Barrall

Director, Compensation &
Benefits

The Friedkin Group



Tanner Brunsdale

Sr. Manager, Benefits &
Mobility

Lyft



Lee Lewis

Chief Strategy Officer & GM
Medical

Health Transformation Alliance



Leslie O'Brien

Director of Channel
Partnerships

Amazon One Medical

Kelsey-Seybold Clinic and Goose Creek ISD

Primary and Specialty Care Integration



Ellen Akers

Director of Employee Health and Wellness
Goose Creek ISD



Daniel Janes

Benefits Consultant
Gallagher



Azam Kundi, MD

Chairman and CEO
Kelsey-Seybold Clinic



**Seamless Care
Coordination**

**1,000+
Providers**

**65
Medical
Specialties**

**High Quality
Surgical and
Cancer Care**

**Integrated
Primary and
Specialty
Care**

90
'World Class'
Net Promoter Score
(NPS)

Primary Care Only Works If People Use It... Best Practices and Mistakes to Avoid in Driving



Eric Bricker, MD

Chief Medical Officer

AHealthcareZ

If you could change out one vendor or group to improve your employee health plan, what would it be?

0 3 8

Your C-Suite



Your Carrier



Your Consultant/Broker



Primary Care Utilization

1. Acquire: Drive Awareness and Interest





1. OE, Onboarding, Email (White Collar), Text (Blue/Gray Collar), Hardcopy (Transportation Air Fresheners), Daily Standups (Retail), Champions (Utility), Persona-Persona-Driven
2. Video (5X longer, 9X recall), Faces (30-40%), Phone by PCP

2. Engage: Build Relationships

1. Availability – 24/7, Same Day/Next Day In Person Appts
2. Personable – Warm/Friendly/High Emotional Intelligence
3. Continuity – Same Doc/NP/PA In person, Virtual, Text
4. Data Driven – Claims for Dx, ER, Hospital, Meds, etc.

Primary Care Utilization

1. Results: Measurement

1. Behavioral – PCP Utilization (>60%), Repeat, Age > 45 (\$8.4K/Yr vs. ½)
2. Clinical –  Newly ID Diabetes, HTN, Early-Stage Cancer Control
3. Financial – ER ( >70%), Hospital ( >50%),  HCC (>30%, >\$50K)

2. Enlist: Word-of-Mouth, Plan Members Evangelize

1. A. Wow!! Experience: Captured/Shared by Clinicians/Acct Mgr/HR
2. B. Social Butterflies, Virality, ‘Sneezers’
3. Video Testimonials

3. Special Considerations

1. Geographic Concentration – add virtual only (max 40% utilization)
2. High Turnover – HMO to use PCP first
3. HSA 1st Dollar Coverage Considerations – May Change with Fed Regs

Next Level Medical , Humble ISD, and City of Manvel



Billy Beattie

Chief Financial Officer
Humble ISD



Denise Crandon

Senior Manager Benefits & Medical
Programs
HISD



Chad Dumont

Personnel Director
City of Manvel

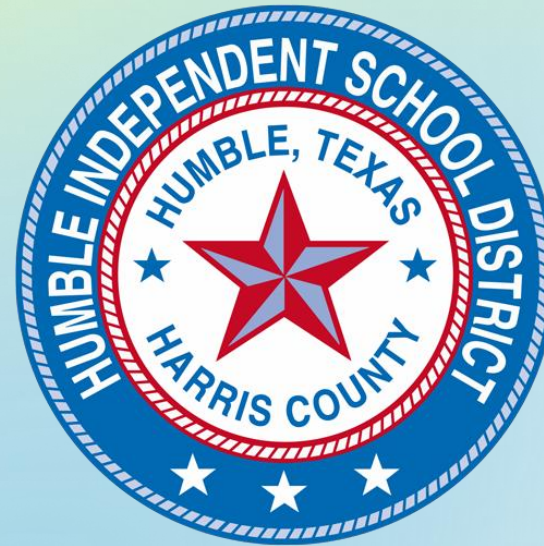


Karen Rakers, MD

Vice President, Next Level Prime and
Onsite Clinics
Next Level Medical

next level

High-Quality, Affordable Care
Across Texas



[www.Next LevelUrgentCare.com](http://www.NextLevelUrgentCare.com)

Beyond Assumptions: 3 Realities and Actions to Transform Health Engagement, Outcomes, and Cost



Matt McQuide

Chief Executive Officer

Synergy Healthcare of US

The Current State Health Engagement

- 50% of patients have inadequate Health Literacy. – Health Affairs
- Health literacy: The capacity to obtain, process, and understand basic health information and services needed to make appropriate health decisions. – Healthy People 2020
- 23% of working adults are "engaged" in their health and wellbeing (actively managing their health, making healthy choices, etc.). – Gallup

Assumption #1: People that struggle with their health, don't care about their health

Reality: Most people care about their health, they just need a little help

- Good health is hard, managing chronic conditions is hard
- Health is a long-term problem, and we all have short term issues
- If push people away, we and they may miss their moment for change
- “All progress starts with telling the truth.” – Truth starts with Trust

Assumption #2: People will want optimal health if we just inspire them

Reality: Most people don't want optimal health, they just don't want to be a large claim

- We know the outcome of limited exercise, chicken wings and beer, but...
- We are marketing all wrong
- People choose adequate over optimal, simple over complex
- People want to be successful
- Meet people in the middle, where they are today

Assumption #3: Healthcare systems are paid to manage disease

Reality: Only the employer “payor” has the incentive to support disease management

- Network providers are NOT paid to provide good disease management
- Insurance is based on short term cycles...no time for the middle way
- Most employers don't want to fix health care, but...
- Better health outcomes = improved claims, happier and more productive employees

Care navigation is a patient-centered service that helps individuals understand and manage their healthcare journey (health engagement)



Regina Gossage, RN, BSN, CCM
Nurse Advocate
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Download contact info:



Accessible

Responsive

Experienced

Trusted

“One Nurse, One Employer” Experience

- **Simplify Healthcare & Insurance** – Navigate the health care system, insurance approvals or issues, finding a PCP or a specialist, understanding provider bills, prescription issues
- **Improve Employer Risk Profile** – Claim based targeted outreach, projected top risk engagement, ER visit outreach, medication adherence, disease management, health risk assessment review, medical care follow up
- **Engage Employees in Innovation** – Increase employee participation in cost savings solutions: specialty drug programs, high-value networks, EAP, MSK, diabetes, surgery, cash pay, RBP, DPC



*Measurably improving employee satisfaction,
health and the financial integrity of the health plan*

*Matt McQuide
Chief Executive Officer
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