



National Alliance
of Healthcare Purchaser Coalitions
Driving Innovation, Health and Value

LEAD

LEVERAGE

LOCALIZE

*Building a Value-based
Market Together*

2020 UPDATE





National Alliance

MISSION

Driving innovation, health and value for organizations and communities across the country

VISION

To be a recognized force in leading constructive and collaborative change that enables higher value in the healthcare marketplace

VALUES

We will consistently act in the collective best interest of purchasers and coalition members while being candid, transparent and, at times, disruptive in our efforts to improve health and healthcare across America

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Message from President & CEO

We are living in a period like no other in our lifetime and potentially our history. Recent upheavals have galvanized our communities, nation and world. The resulting challenges and changes of our lives and culture is shaping a new reality — a “new normal.” This is not the time to pull back from our efforts, but rather to adjust our path to consider this reality and take advantage of the opportunities at hand.

The National Alliance — including all our regional coalition members, advisors and partners — has never been more important to the lives and fortunes of our people or the prosperity and sustainability of our organizations and communities. This is evidenced by our efforts to:

- ▶ Support employers and other purchasers as they navigate the challenges of the pandemic, anticipate issues before they become mainstream, and serve as a trusted source of information and insights.
- ▶ Deliver on the value agenda by standing up to and influencing a healthcare system that is increasingly calcified in its focus, sometimes at the expense of patients and purchasers.

- ▶ Tackle with a sense of urgency and leadership a perpetually and continuously deteriorating public health crisis in our mental health and substance use system.
- ▶ Give voice and lead open conversations on one of the most sensitive and critical issues of our time — systemic racism and its disparate and widespread impact on the health and equity of Black Americans.

We remain focused on our mission to drive innovation, health and value for organizations and communities across the country and are committed to collaboration to shape a “new normal” where we all thrive and the burdens and rewards of our collective efforts are more equitably realized. No other group is better positioned, nationally and regionally, to make an impact, to consistently and collectively advocate for healthcare purchasers, and to address the inter-woven complexities we face today.

Let’s act with hope, optimism and generosity of spirit as we navigate this journey together.



Michael Thompson
President & CEO

About National Alliance

The only nonprofit (501(c)6) purchaser-led organization in the country with a national and regional structure, the National Alliance and its members are a powerful force for change — representing private and public sector, nonprofit, and Taft-Hartley organizations, and more than 45 million Americans spending over \$300 billion annually on healthcare.

The National Alliance provides diverse expertise and resources, serving as a leading voice in the employer community and representing its members on the national level. Through education, community collaboration, group purchasing, quality improvement initiatives, data analytics, and direct contracting programs, the National Alliance and its members organize the buying power of purchasers to promote and support safe, efficient, high-quality care.

In this changing environment, purchasers and coalitions can no longer afford to conduct business as usual. They are repositioning and empowering themselves and uniting to change the market. The National Alliance is advancing a thoughtful, collective agenda to help guide members and purchasers down a path that leverages best practices and identifies new opportunities aimed at reducing costs, eliminating inappropriate care, and improving health outcomes.

OUR DIFFERENTIATION:

- ▶ **National/Regional Structure**
- ▶ **Distributed Change Agents**
- ▶ **Deep Knowledge of Healthcare Issues**
- ▶ **Unparalleled Collaboration**
- ▶ **Objectivity/Independence**

NATIONAL INITIATIVES



MENTAL HEALTH



EPISODES OF CARE



ADVANCED
PRIMARY CARE



OPIOIDS



ONCOLOGY



OBESITY



WELLBEING



PHARMACY &
MEDICAL DRUGS



HOSPITAL
TRANSPARENCY



STAR CAPTIVE

MARKET ASSESSMENTS

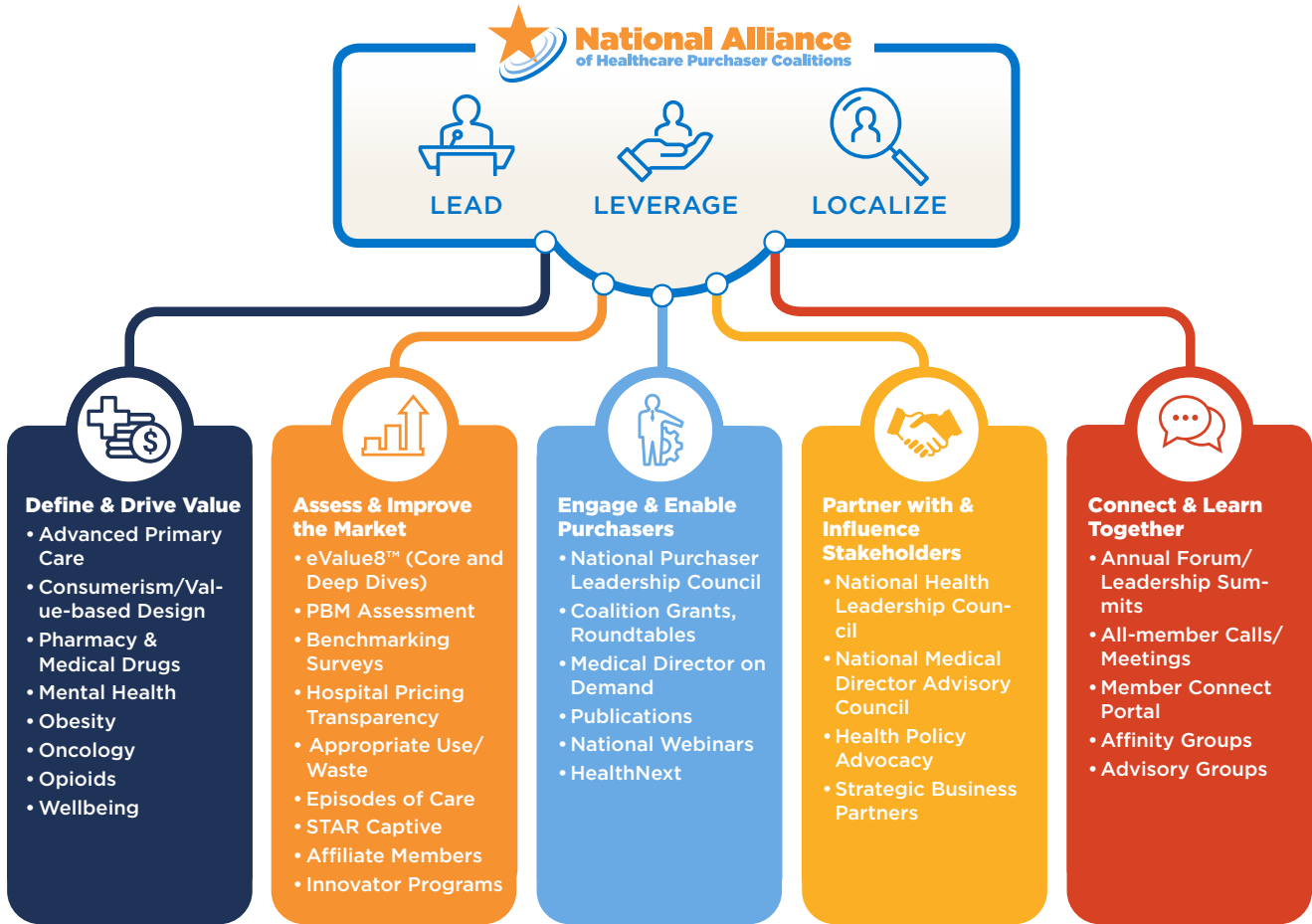


eValue8™



PBM
ASSESSMENT
TOOL

OUR STRATEGIC FRAMEWORK



NATIONAL ALLIANCE COMMUNITY



Board of Governors

The Board of Governors is comprised of regional coalition and national healthcare leaders who govern the National Alliance. They set short- and long-term goals to further the objectives and mission of the organization. Members are committed to ensuring the National Alliance is effectively and properly run and accountable to those who hold an interest or stake.

Thank you to the outgoing board members for their leadership and time.

Cristie Upshaw Travis

CEO, Memphis Business Group on Health, outgoing Board Chair

Chris Syverson

CEO, Nevada Business Group on Health

Christopher Goff

CEO and General Counsel, Employers Health

Diane Hess

Executive Director, Central Penn Business Group on Health

Paul Fronstin

Director of the Health Research and Education Program, Employee Benefit Research Institute, outgoing External Member



Members of the 2019 Executive Committee. Left to right: Chris Syverson, Neil Goldfarb, Cristie Upshaw Travis, Randa Deaton, and Gaye Fortner

▶ EXECUTIVE COMMITTEE AND BOARD REPRESENTATIVES



CHAIR
Gaye Fortner
President & CEO HealthCare 21 Business Coalition



VICE CHAIR
Randa Deaton
President and CEO Kentuckiana Health Collaborative



**SECRETARY/
TREASURER**
Robert Smith
Executive Director Colorado Business Group on Health



Neil Goldfarb
President and CEO Greater Philadelphia Business Coalition on Health



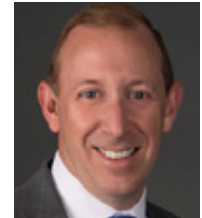
Cheryl Larson
President and CEO, Midwest Business Group on Health



Nancy Giunto
Executive Director, Washington Health Alliance



Peter Hayes
President and CEO, Healthcare Purchaser Alliance of Maine



Bret Jackson
President, The Economic Alliance for Michigan



Karen van Caulil
President and CEO, Florida Alliance for Healthcare Value



Jessica Brooks
CEO and Executive Director, Pittsburgh Business Group on Health



Gloria Sachdev
Executive Director, Employers' Forum of Indiana



Chris Skisak
Executive Director, Houston Business Coalition on Health

▶ EXTERNAL BOARD MEMBERS



Lauren Block
Program Director, National Governors Association



Leah Binder
President and CEO, The Leapfrog Group



Lynn Quincy
Director, Healthcare Value Hub, Altarum



Christa-Marie Singleton
Senior Medical Advisor, Centers for Disease Control and Prevention



National Alliance Staff and Key Advisors



Michael Thompson
President & CEO



Margaret Rehayem
Vice President



Maria Cornejo
*Director of
Operations*



Karlene Lucas
*Director of
Development
& Program
Management*



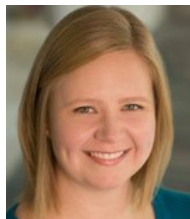
Alyssa Barilotti
*Project, Technology
& Member Relations
Manager*



Juan Hidalgo
*Project, Technology
& Member Relations
Manager*



Larry Boress
Membership Advisor



Colleen Bruce
Policy Advisor



Joe Checkley
*Wellbeing Initiative
Leader*



Scott Conard, MD
Medical Director



Cary Conway
*Public Relations &
Communications
Advisor*



Susan Frank
Project Consultant

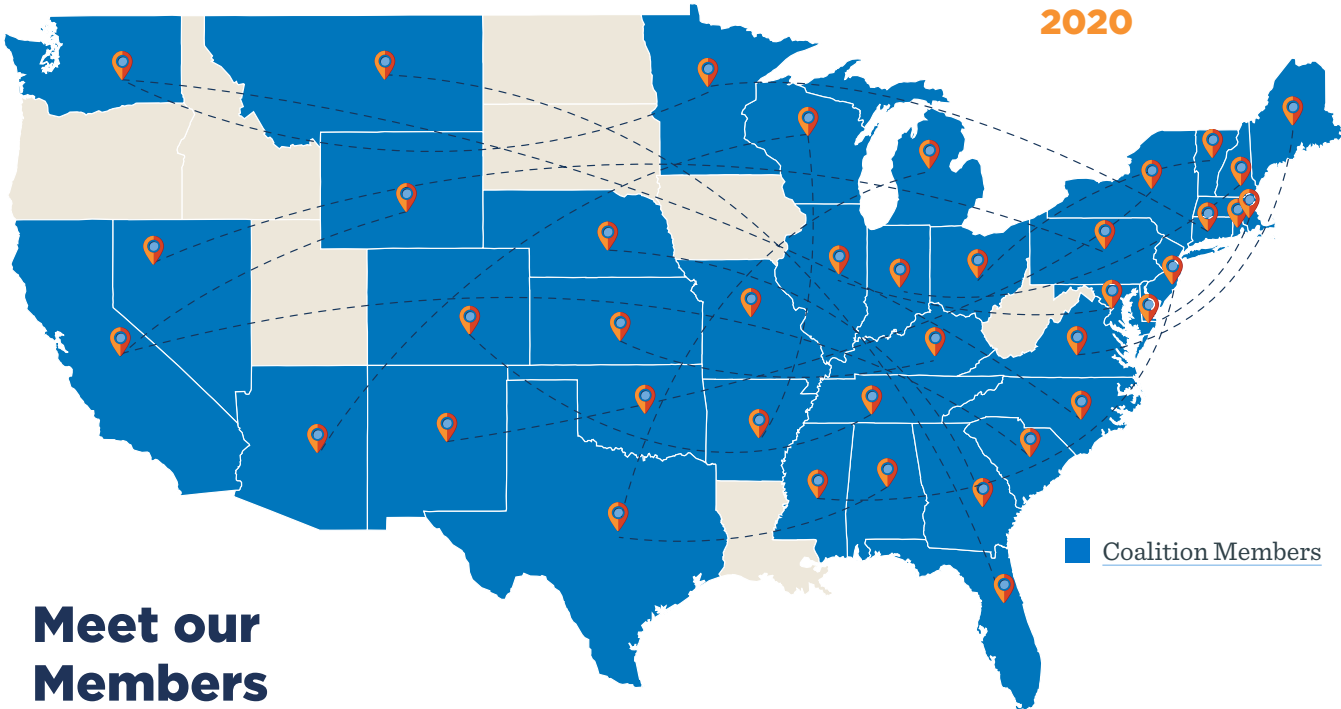


Jean Hanvik
*Marketing
Communications
Advisor*



Foong-Khwan Siew
Director of eValue8™

2020



Meet our Members

National Alliance coalition members serve as leaders in their cities, counties, states and regions and are involved in education and networking, community collaboration, quality improvement, and public reporting efforts.

Recently, we have welcomed returning members



and new members



Primary Coalition Activities

SERVICES AND PROGRAMS

- ▶ Educational programs
- ▶ Transparency & public reporting
- ▶ Benchmarking
- ▶ Represent purchasers in multi-stakeholder forums
- ▶ Regional activities

GROUP PURCHASING

- ▶ PBM contracting
- ▶ Data warehousing
- ▶ Carrier contracting or negotiations
- ▶ Chronic disease management
- ▶ Wellness programs

LIST OF MEMBER ORGANIZATIONS



Alabama Employer Health Consortium

Michael Howard
President & CEO
Vestavia, AL
alemloyerhealth.org



Central Penn Business Group on Health

Diane N. Hess
Executive Director
Lancaster, PA
cpbgh.org



The Alliance

Cheryl DeMars
President & CEO
Madison, WI
the-alliance.org



Colorado Business Group on Health

Robert Smith
Executive Director
Lakewood, CO
cbghealth.org



Business Health Care Group

Jeffrey Kluever
Executive Director
Waukesha, WI
bhcgwi.org



Connecticut Business Group on Health

Nancy Martone
President
Hartford, CT
ctbgh.com



California Health Care Coalition/San Diego Purchaser's Cooperative

Ken Stuart
Chairman of the Board
San Diego, CA
calhcc.org



DFW Business Group on Health

Marianne Fazen
Executive Director
Dallas, TX
dfwbgh.org



The Central Penn Business Group on Health hosts educational events to fit the needs of today's employers and address the issues surrounding healthcare benefits offered to employees.



The Economic Alliance for Michigan

Bret J Jackson
President
Novi, MI
eamonline.org



Employers Health

Christopher Goff
CEO and General Counsel
Canton, OH
employershealthco.com



EdHEALTH

Tracy Hassett
President and CEO
Northbridge, MA
educatorshealth.org



Employers Like Me

Jamie Benton
Atlanta, GA



Employers' Advanced Cooperative on Healthcare

Bob McCollins
Managing Director
Fort Smith, AR
eachmember.org



Florida Alliance for Healthcare Value

Karen van Caulil
President and CEO
Orlando, FL
flhealthvalue.org



Employers' Forum of Indiana

Gloria Sachdev
CEO
Indianapolis, IN
employersforumindiana.org



FrontPath Health Coalition

Patricia Beham
President and CEO
Perrysburg, OH
frontpathcoalition.com



Employers Health member organizations learned from benefits professionals and their peers at more than 40 virtual and in person events in 2019.



The Florida Alliance for Healthcare Value hosted its 26th Annual National Conference, "Extraordinary Challenges: Extraordinary Leaders" in Orlando.



**Greater Philadelphia
Business Coalition
On Health**
"Building Bridges to Better Healthcare"

**Greater
Philadelphia
Business Coalition
on Health**

Neil Goldfarb
President and CEO
Philadelphia, PA
gpbch.org



**Kentuckiana
Health Collaborative**

Building a Bridge to Better Health, Better Care and Better Value

**Kentuckiana
Health
Collaborative**

Randa Deaton
President and CEO
Louisville, KY
KHCollaborative.org



**Health Services
Coalition**

Stacie Sasso
Executive Director
Las Vegas, NV
lvhsc.org



**Lehigh Valley
Business Coalition
on Healthcare**

Carl Seitz
President
Bethlehem, PA
lvbch.com



HealthCare 21 Business Coalition

**HealthCare 21
Business Coalition**

Gaye Fortner
President & CEO
Knoxville, TN
hc21.org



memphis business group on health

**Memphis Business
Group on Health**

Cristie Upshaw Travis
CEO
Memphis, TN
memphisbusinessgroup.org



HEALTHCARE
PURCHASER
ALLIANCE
OF MAINE

**Healthcare
Purchaser Alliance
of Maine**

Peter Hayes
CEO/President
Topsham, ME
purchaseralliance.org



**Mid-America
Coalition on
Health Care**

**Mid-America
Coalition of Health
Care**

Troy Ross
President & CEO
Overland Park, KS
machc.org



Houston Business Coalition on Health

**Houston
Business Coalition
on Health**

Chris Skisak
Executive Director
Houston, TX
houstonbch.org



MidAtlantic
BUSINESS GROUP
ON HEALTH

**MidAtlantic
Business Group on
Health**

John Miller
Executive Director
Greenbelt, MD
mabgh.org



Kansas Business Group
on Health

**Kansas
Business Group on
Health**

Shelley Duncan
Executive Director
Wichita, KS
ksbgh.org



Midwest Business Group on Health
The Source for Leading Health Benefits Professionals

**Midwest Business
Group on Health**

Cheryl Larson
President & CEO
Chicago, IL
mbgh.org



Minnesota Health Action Group

Mamie Segall
President & CEO
Bloomington, MN
mnhealthactiongroup.org



North Carolina Business Group on Health

Jon Rankin
President
Charlotte, NC
ncbgh.org



Montana Association of Healthcare Purchasers

Don Creveling
Executive Director
Missoula, MT
mahcp.org



Northeast Business Group on Health

Candice Sherman
CEO
New York, NY
nebgh.org



Nevada Business Group on Health

Chris Syverson
CEO
Reno, NV
nvbgh.org



Pacific Business Group on Health

Elizabeth Mitchell
President & CEO
San Francisco, CA
pbgh.org



New Mexico Coalition for Healthcare Value

Susan Wilson
Executive Director
Albuquerque, NM
nmhealthcarevalue.org



Pittsburgh Business Group on Health

Jessica Brooks
CEO/Executive Director
Pittsburgh, PA
pbghpa.org



New Hampshire Purchasers Group on Health

Lucy Hodder
Dir. of Health Law & Policy
University of New Hampshire
Concord, NH
nhpgh.org



Rhode Island Business Group on Health

Al Charbonneau
Executive Director
Narragansett, RI
ribgh.org



New Mexico Coalition for Healthcare Value

Susan Wilson
Executive Director
Albuquerque, NM
nmhealthcarevalue.org



Savannah Business Group

Angela Wood
Executive Director
Savannah, GA
savannahbusinessgroup.com



Silicon Valley Employers Forum

Lisa Yee
Executive Director
San Francisco, CA
svforum.org



Washington Health Alliance

Nancy Guinto
Executive Director
Seattle, WA
wahealthalliance.org



South Carolina Business Coalition on Health

Lisa Morgan
Executive Director
Greenville, SC
scbch.org



Well OK Northeastern Oklahoma Business Coalition on Health

Stan Schwartz, CEO
Tulsa, OK
wellok.org



St. Louis Area Business Health Coalition

Louise Probst
Executive Director
St. Louis, MO
stlbhc.org



Wyoming Business Coalition on Health

Ryan Jackson
CEO
Casper, WY
wyohealth.org



Virginia Business Coalition on Health

Kelly Cannon
Acting CEO
Richmond, VA
myvbch.org



The Rhode Island Business Group on Health hosted an employer roundtable event on pharmacy cost control at the University of Rhode Island to identify current employer perspectives and attitudes on drug pricing, formulary decisions to help employers define overall value in developing their own pharmaceutical strategy.



The Washington Health Alliance's September meeting focused on primary care payment initiatives intended to increase payment for primary care services and increase primary care spending as a percentage of total health care spending.

Councils and Collaborators

National Health Leadership Council

Thought Leadership and Strategic Partnerships that Shape Future Directions

Membership in the National Health Leadership Council (NHLC) offers a unique forum to enable cooperation and exchange of ideas between key stakeholders to promote market change. Members include health plans, pharmaceutical and provider organizations, health and wellness suppliers, employer-focused groups, and accreditation and advocacy organizations.

NHLC membership offers an exclusive opportunity to:

- ▶ Engage with leaders of purchaser-led coalitions in high-level discussions of issues important to purchasers of healthcare services and products
- ▶ Network with large private and public purchasers that play a central role in both innovating and driving the supply chain to improve health and value
- ▶ Inform the National Alliance and its members of perspectives and insights of stakeholders on current industry trends, challenges and innovations in the marketplace
- ▶ Work with the National Alliance and its members to shape purchasing strategy and delivery system innovations, agendas and programs for national initiatives and structured roll-out across regional coalitions
- ▶ Participate in strategic partnerships with the National Alliance and its coalition members through activities including: eValue8™; research and education; *Clinical Briefs* and *Action Briefs*; national initiatives; webcasts; and Leadership Summits and Annual Forum on emerging issues and opportunities

NHLC MEMBERSHIP



National Purchaser Leadership Council

The National Purchaser Leadership Council (NPLC) is a group of influential employers/purchasers who convene throughout the year to define healthcare priorities; identify issues and opportunities for managing supply chain challenges and value-based approaches; and support the direction and execution of national initiatives.

Comprised of organizations representing diverse private and public sector industries, NPLC has a history of active engagement and leadership with the National Alliance and its members and supports the growth of the coalition movement regionally and nationally.

NPLC MEMBERS



Mike Adams
*VP, Benefits & HR
Systems, Dean Foods*



Lisa Evans
*Senior Director
of Living Well,
Southwire*



Larry Fagerhaug
*VP & Chief Human
Resource Officer,
Carson Tahoe Health*



Tom Ferraro
*Assistant VP,
MetLife*



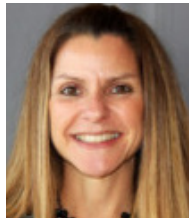
Laurie Lee
*Executive Director,
Division of Benefits
Administration, State
of Tennessee*



Demmy McBride
*Manager, Health &
Welfare Benefits,
Ford Motor
Company*



Janet McNichol
*Human Resource
Director, American
Speech Language-
Hearing Association*



Ginger Miller
*Health Promotion
Manager, Utz
Quality Foods*



Rosa Novo
*Employee Benefits
Director, Miami-
Dade County Public
Schools*



Mary Romero-Hart
*Senior Manager
Health, Benefits, &
Employee Services,
Sandia National
Laboratories*



**Sherri Samuels-
Fuerst**
*VP Total Rewards,
Sargento Foods*

Medical Director Advisory Council

The Medical Director Advisory Council is comprised of clinicians who are medical directors from member coalitions and chief medical officers for leading purchasers. The Council supports the efforts of coalitions and other key stakeholders to address the latest science and discuss clinically related and timely topics relevant to healthcare benefits to help employers improve health and healthcare value.

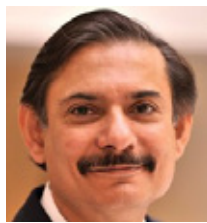
The Council creates a channel for information dissemination to coalitions and their members around selected topics for collective investigation. Members can engage in collaborative research to enhance the value employers can derive from their investments in workforce health and wellbeing.

These clinicians also organize, lead and participate in the monthly Medical Director on Demand discussion forums.

COUNCIL MEMBERS



Jan Berger, MD, CEO
Health Intelligence Partners, Medical Director, Midwest Business Group on Health



Faiyaz Bhojani, MD
Global Health Lead & Regional Health Manager, Shell



Scott Conard, MD, DABFP, FFAFM
CEO, Converging Health, supporting CBGH, DFWBGH, and HPA of Maine (Council Chair)



Mark Cunningham-Hill, MB ChB (MD), FFOM, FACOEM
Medical Director, Northeast Business Group on Health



Charles Cutler, MD
President, Cutler Healthcare



Ray Fabius, MD
Co-founder and President, HealthNeXT



Ryan Jackson, MD, CEO
Wyoming Business Coalition on Health



Ron Kline, MD
Chief Medical Officer, US Office of Personnel Management



Mohannad (Ned) Kusti
MD, MPH, MRO, CPS/A Medical Director, Pittsburgh Business Group on Health, Pivot Onsite Innovations



Justin Moore, MD, FACP
Medical Director, Kansas Business Group on Health



Suresh K Mukherji, MD, MBA, FACP
Medical Director, The Economic Alliance of Michigan



Stan Schwartz, MD, FACP
CEO, WellOK, The Northeastern Oklahoma Business Coalition on Health



Bruce Sherman, MD
Consultant, National Alliance



Christa-Marie Singleton, MD
Senior Medical Advisor, Centers for Disease Control and Prevention

Affiliate Members

Established in 2018, the National Alliance Affiliate Member Program enables participation of for-profit health and wellbeing vendors to increase their visibility to purchasers across the country.

The proliferation of employee health and benefit solutions has led to employer vendor fatigue. The National Alliance helps ease the pressure by featuring the healthcare products and services of trusted vendors whose solutions are featured on the website, in a monthly newsletter, and an online [directory](#). The

resource includes summaries, videos and other ways to get to know a variety of vendors in one convenient spot.



In 2019, the National Alliance began hosting one-on-one podcasts with executive leaders from Affiliate Member organizations. These interviews are available on the [National Alliance website](#) and new conversations are added regularly.



Initiatives and Affinity Groups

National Alliance Initiatives

BRINGING ABOUT A VALUE-BASED MARKETPLACE

The National Alliance and its member coalitions play a major role in defining and helping bring about a value-based marketplace. Initiatives include programs and tools that promote greater transparency on cost and quality, educate and support employers, engage consumers, and promote alternative payment methodologies that reward and recognize value not volume.

As these efforts take hold, we're engaging, challenging and influencing coalitions, purchasers and stakeholder partners to advance our value-based marketplace programs and strategies to drive better health, outcomes and value across the system.





Over the past decade, inadequate care for mental health and substance use has grown into a nationwide crisis, with rates of suicide and drug-related deaths at record levels. To address this, the National Alliance, alongside the American Psychiatric Association (APA), APA Foundation Center for Workplace Mental Health, The Bowman Family Foundation, and Meadows Mental Health Policy Institute developed a comprehensive initiative to address major

RESET REGIONS AND COALITIONS LEADING THESE EFFORTS:

- ▶ **CALIFORNIA**
Pacific Business Group on Health and Silicon Valley Employers Forum
- ▶ **FLORIDA**
Florida Alliance for Healthcare Value
- ▶ **KANSAS**
Kansas Business Group on Health
- ▶ **MARYLAND, DISTRICT OF COLUMBIA AND NORTHERN VIRGINIA**
MidAtlantic Business Group on Health
- ▶ **MINNESOTA**
Minnesota Health Action Group
- ▶ **NEW YORK CITY METRO AREA, NORTHERN NEW JERSEY, SOUTHERN CONNECTICUT**
Northeast Business Group on Health
- ▶ **TENNESSEE**
Memphis Business Group on Health and HealthCare 21 Business Coalition
- ▶ **TEXAS**
DFW Business Group on Health and Houston Business Coalition on Health

challenges and barriers in mental health and substance use disorder access and outcomes.



The Path Forward for Mental Health and Substance Use includes the implementation of Five Priority Strategies over five years. This approach constitutes our nation's best opportunity to positively transform behavioral healthcare at a population level to move us forward in improving access to effective detection and treatment.

THE FIVE PRIORITY STRATEGIES:

- ▶ **IMPROVED NETWORK** adequacy for behavioral health specialists
- ▶ **EXPANSION** of the Collaborative Care Model for delivering effective behavioral healthcare in primary care settings
- ▶ **IMPLEMENTATION** of measurement-based care to hold both behavioral health and primary care systems accountable for a more disciplined approach to effective care
- ▶ **SCALING** of tele-behavioral health and digital health innovations to broaden cost-effective access
- ▶ **EFFECTIVE COMPLIANCE** with mental health parity laws and regulations

COVID-19 continues to take an emotional and cognitive toll on Americans. The National Alliance is partnering with Total Brain, One Mind at Work, and the American Health Policy Institute to bring a standardized national mental health benchmark to business leaders nationwide.

Learn more about the [Mental Health Initiative](#).



EPISODES OF CARE

As a key value-based care strategy, bundled payments are an alternative payment model that offers incentives to providers to increase coordination and efficiency of care while improving quality and outcomes at lower costs. The National Alliance is collaborating with multiple partners to help accelerate employer adoption of bundled payments across the country.

Member coalitions are working with purchasers to develop, implement and administrate episodes of care programs with multiple employers. Coalitions active in this effort include Connecticut Business Group on Health, Florida Alliance for Healthcare Value, and Houston Business Coalition on Health with other states such as Colorado, Pennsylvania and Tennessee also moving forward. To support these efforts, a toolkit is being developed that will provide materials to support the implementation

process and educate on standards and carrier assessments.

VALUE AGENDA

- ▶ **Common episodes definitions** to align and focus care management and improvement efforts
- ▶ **Quality & appropriateness of care** to ensure and promote the right care at the right place for the right patient
- ▶ **Double-sided risk** alignment to incentivize a shared commitment to success and patient-centered value
- ▶ **Warrantied performance** to provide accountability for high performance and outcomes
- ▶ **Relevance for purchasers, patients & providers** to enable substantive and sustainable benefits for all stakeholders

Learn more about the [Episodes of Care Initiative](#).



ADVANCED PRIMARY CARE

Over the last few decades primary care has suffered due to misalignment in how primary care practices are paid, lack of care coordination, and access issues. Essential to helping people stay healthy and manage chronic conditions, this has compromised the ability of the provider to treat the whole person rather than just the presenting condition.

To better understand which practices and strategies drive superior value to improve outcomes and mitigate costs within a primary care practice, the National Alliance released a [comprehensive eValue8™ assessment for employers and other plan sponsors](#).

To further assist employers in understanding advanced primary care so as to optimize and improve the delivery of care to their employees, an [advanced primary care companion infographic](#) was developed.

When properly structured and reimbursed, advanced primary care is critical to lowering healthcare costs and improving health. The National Alliance has identified seven attributes of advanced primary care:

- ▶ Enhanced access for patients
- ▶ More time with patients
- ▶ Realigned payment methods
- ▶ Organizational & infrastructure backbone
- ▶ Behavioral health integration
- ▶ Disciplined focus on health improvement
- ▶ Referral management

In July, the National Alliance announced a [partnership with the American Academy of Family Physicians \(AAFP\)](#) to work with coalitions and employers to address sustainability and effectiveness of primary care.



OPIOIDS

The National Alliance continues efforts to bring together coalition members and healthcare stakeholders to address the opioid epidemic issues and challenges employers face. This initiative helps demonstrate the impact of opioid use on employers and employees and includes interventions — including healthcare and community partnerships — to prevent and treat opioid misuse.

A number of coalitions have focused efforts underway. Kentuckiana Health Collaborative (KHC) expanded their “[Opioids and the Workplace: An Employer Toolkit for Supporting Prevention, Treatment, and Recovery.](#)” KHC hosts a series of virtual events that explore evidence-based treatment, role of key stakeholders, context of pain reliever misuse in the workforce, employer-sponsored insurance

benchmarking, and resources for employers. The Midwest Business Group on Health recently added resources to its [employer toolkit](#) to encourage opioid alternatives for postoperative pain management, and Business Health Care Group in Waukesha, WI created a toolkit to help employers raise awareness of the risks of opioids in the workplace.

Learn more about the [Opioids Initiative.](#)



ONCOLOGY

The Oncology Initiative was developed to support the needs of coalitions and employers seeking strategies to support the patient journey continuum. A framework and recommendations have been developed for purchasers, health plans, and providers to collaborate on the delivery of high-value, patient-centered care.

As supporting material to the report, an [infographic](#) was developed to help employers/purchasers facilitate thoughtful conversations with plans and providers.

This fall the National Alliance is developing a series of educational modules to support employers in assessing and evaluating their current cancer care strategy through the lens of the patient journey. The modules are focused on: (1) prevention and preliminary diagnosis; (2) treatment, planning and care; and (3) survivorship, surveillance and back to work. Learnings will occur through employer roundtables and *Action Briefs* that highlight employer strategies and best practices.

Learn more about the [Oncology Initiative.](#)





OBESITY

The National Alliance is implementing a multi-faceted approach to engage healthcare stakeholders to address obesity as a serious condition with significant health and economic consequences. This is all done with a longer-term focus of producing meaningful impact in the health of our populations through education, policy, community health, and treatment.

The initiative is expanding to work with industry stakeholders to develop a comprehensive strategy to promote evidence-based practices to address obesity and its downstream impacts. And these efforts have taken on an even greater sense of urgency given the current pandemic. According to the World Obesity Federation, “obesity-related conditions seem to worsen the effect of COVID-19.”

Learn more about the [Obesity Initiative](#).



WELLBEING

Due to COVID-19, disparities in social determinants of health have been exacerbated by widespread disruptions to the health and economic conditions across US communities. Health equity issues and disparities magnified by the pandemic are a frequent area of discussion in public discourse.

The National Alliance recently announced a [partnership](#) with Sharecare to help employers develop data-driven strategies to positively impact the wellbeing of their employees and

families and the broader communities in which they live, work and play. Sharecare’s blueprint for individual and community transformation is available to coalitions and employers to drive positive change at the local level.

These issues are also being addressed as part of the [Employer Town Hall](#) series to assist coalitions and purchasers in navigating the health of their organizations during the pandemic.

Learn more about the [Wellbeing Initiative](#).

“The need has never been greater for all stakeholders to work together to address the root cause issues impacting health and wellbeing at the community level.”

—Michael Thompson, President and CEO, National Alliance

PHARMACY & MEDICAL DRUGS



To drive collaboration to obtain better value and expand purchaser engagement in best practice strategies, the National Alliance is focused on a number of areas impacting the cost of drugs and the delivery of high-quality care. The key priorities for this initiative have been focused on drug efficacy and safety; formulary management and reduction of waste; the impact of hospital pricing practices; value-based contracting to align performance and adherence; sites of care; personalized medicine; and evaluation of conflicting practices across the system.

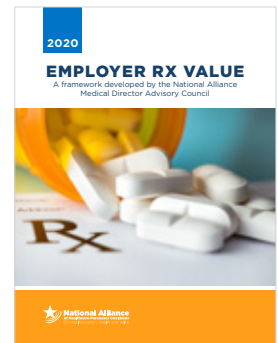
At the policy level, National Alliance is working with ERISA Industry Committee (ERIC), Pacific Business Group on Health, and Silicon Valley Employers Forum through the entity Employers' Prescription for Affordable Drugs (EmployersRx) to focus on policy and legislation to support affordable prescription drug costs.

In April, the National Alliance released the report *Employer Rx Value* that reviewed existing models/frameworks for value and provided

recommendations for employers along with areas ripe for industry change. An [infographic](#) is available on our website.

Over the last several months, the National Alliance has focused on its next eValue8™ Deep Dive Module focused on the medical side of drug benefits which will highlight knowledge gaps and employer strategies that can drive improvements in formulary management and quality. Areas of focus include transparency in business arrangements; contracting; reducing waste; use of biosimilars and comprehensive utilization strategies; sites of care; data and benchmarking; and improving a patient's experience. An infographic on preliminary findings is anticipated this fall and a full report will be released later this year.

Learn more about the [Pharmacy & Medical Drugs Initiative](#).



HOSPITAL TRANSPARENCY



Large employers enroll roughly half of the US population into sponsored health plans and are in a strong position to demand increased value from the healthcare system. This is hampered by lack of the right cost information to know what is really being paid for healthcare services.

In 2019, the [National Hospital Price Transparency Study](#) conducted by the RAND Corporation offered an unprecedented look into hospital prices relative to Medicare in 25 states. The analysis found what many already suspected – the prices we pay for healthcare vary tremendously and do not correlate to value.

As a result of this analysis, National Alliance member coalitions have continued efforts to drive employer participation and an expanded study is underway with results to be released later this year.

A Hospital Payment Strategies *Action Brief* was released earlier this year to assist employers

in setting price and quality expectations. Additional education and resources are being disseminated at conferences and webinars across the country throughout 2020.

Action steps for employers:

- ▶ Understand price relative to the local market and benchmarked against Medicare
- ▶ Learn what “paying for value” means
- ▶ Pool purchasing power
- ▶ Demand reasonable pricing and alternative payment models
- ▶ Educate and involve employees.

Learn more about the [Hospital Transparency Initiative](#).





STAR CAPTIVE

Officially launched in July 2019, STAR Captive Solutions helps small to mid-sized businesses take ownership of their healthcare supply chain, offering the same opportunities of alternate financing that large employers have with less risk to their business.

As the initiative gains traction in 2020, we remain focused on:

- ▶ Developing value-based programs including direct contracting, reference-based pricing, and concierge services for patients
- ▶ Establishing stop-loss carrier relationships that value our cost saving programs and result in more competitive pricing
- ▶ Expanding our portfolio to include a level-funded program that is more accepting to employers with 5-100 employee lives
- ▶ Finding the right committed, supportive, innovative healthcare advisors who desire to break the status quo and deliver disruptive solutions to employers

- ▶ Growing the number of participating coalitions to expand to other markets

Led by the Employers' Advanced Cooperative on Healthcare, STAR Captive Solutions is also supported by the Pittsburgh Business Group on Health, The Healthcare Purchaser Alliance of Maine, and the Kansas Business Group on Health.

S Stability in being a part of a larger risk group

T Transparency in data and costs to better manage their plan

A Accountability to other aligned employers to maximize value-based programs and maximize risk mitigation strategies

R Results of a well-managed group of employers include better benefits and lower costs

Learn more about [STAR Captive](#).

STAR Captive Solutions helps small to mid-sized businesses take ownership of their healthcare supply chain with less risk to their business, offering the same opportunities of alternate financing that large employers have with less risk to their business.

Affinity Groups

Comprised of National Alliance staff and leaders from member coalitions, newly redefined Affinity Groups cover key areas affecting the current healthcare marketplace. These groups provide peer-to-peer learning opportunities through topic-specific forums, allowing members to gain up-to-date information and respond quickly to the ever-changing healthcare landscape.



Choosing Wisely®/Appropriate Use

Neil Goldfarb

Educates coalitions and employers and their employees on the *Choosing Wisely* Campaign and provides recommended actions to advance conversations between providers and consumers and the resulting care processes and outcomes.



Coalition Capacity Building

Larry Boress

Enables new coalition members to learn and share information on key topics and discovers key priorities for the coalitions along with best practice approaches.



Community Health

Shelley Duncan and Lauren Remspecher

Enables members to share information and lessons learned that influence health and culture in diverse communities.



Data Driven Strategy

Chris Skisak and Stephanie Clouser

Informs National Alliance members about data integration capabilities of peer members and shares technical and non-technical challenges and opportunities to support improved value-based population health management and/or to collectively influence other data management stakeholders (e.g., health plans, consultants).



eValue8™

John Miller and Foong-Khwan Siew

Provides a forum for National Alliance members who use eValue8 to discuss issues, opportunities and lessons learned to influence improved health plan performance.

Four types of assessments are supported by the tool: core, mental health, oncology and pharmacy benefits management. A new assessment is being developed for advanced primary care.



Health Policy

Bret Jackson and Colleen Bruce

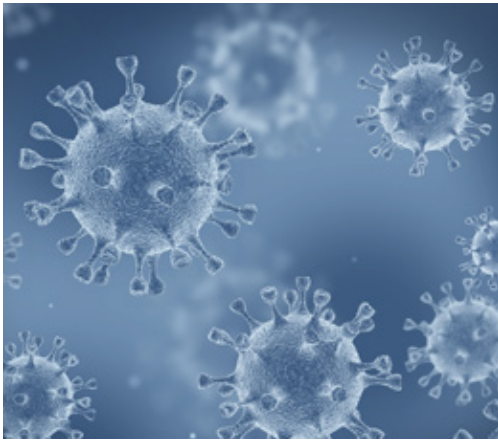
Maintains a member-oriented federal healthcare policy agenda that supports, monitors and reports federal legislation and initiatives to advance value-based purchasing, improve general population health, and protect and strengthen the employer-based healthcare infrastructure.



Value-based Contracting

Emma Hoo and Kyle Monroe

Offers a discussion forum for National Alliance members who use, or are considering using, direct contracting with healthcare providers (e.g., hospitals and physicians) to promote value-based purchasing strategies and exchange information, news and ideas.



Supporting Coalitions, Employers and Employees during COVID-19

As the devastating impact to the global economy and health due to the coronavirus pandemic became evident, the National Alliance quickly developed a series of Employer Town Halls and resources for coalitions and employers. Areas of focus include the impact on mental health and wellbeing; the role social determinants of health play and the important role employers play in supporting employees where they live, work and play; understanding legislative issues such as the Families First and CARES acts; and COVID-19 testing resources. [Access the library of available resources.](#)



Race, Health & Equity

The importance of improving quality and achieving equitable care for all Americans has been heightened by the racial justice movement. In response, the National Alliance is facilitating a town hall series of listening sessions and conversations. Resources have also been compiled to aid in efforts to address racial injustice and pervasive social and structural inequities disproportionately burdening racial and ethnic minority groups. These are among efforts to examine how healthcare delivery is impacted by systemic racism and what needs to occur to improve trust, transparency and accountability. [Access the growing library of resources.](#)



Health Policy

The US healthcare system is simply not sustainable — and now more than ever due to the economic downturn — purchasers who provide coverage for more than 150 million Americans through employer-sponsored insurance must get better value for their investment.

The National Alliance collaborates with several stakeholders to leverage purchasing power of employers to influence public policies to improve health and healthcare value across the country. These efforts include letters to Congress to offer insight and recommendations around legislative issues; participating in collaborations including EmployersRx, Coalition Against Surprise Medical Billing, and The Path Forward for Mental Health and Substance Use; and the partnership with AAFP to change how advanced primary care is paid for and delivered.

Innovator Programs

The National Alliance recognizes that innovation is the lifeblood of driving health and value across the system. Through webinars, conferences and meetings, Leadership Summits, eValue8™ awards, and innovator showcases, the organization continues to identify innovators worthy of being brought to the attention of the coalitions and their employer members. Recently featured innovators include:



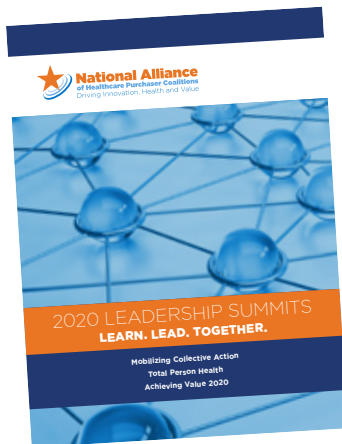
eValue8™ Innovator Awards

eValue8 was created by business coalitions and employers to measure and evaluate health plan and pharmacy benefit manager quality and performance. Health vendors are asked probing questions about how they manage critical processes that control costs; reduce and eliminate waste; ensure patient safety; close gaps in care; and improve health and healthcare. As part of the process, each year health plans are selected to receive the eValue8 Innovation Award in recognition for innovative work and measurable results. Cigna, Geisinger Health System, and Health Net, LLC were recognized for the 2019 awards.



Networking Education & News

The National Alliance helps coalitions and employers across the US find solutions to pressing employee health benefit issues. Key events make possible research and collaboration with thought leaders and subject matter experts. Resulting forums, publications and webinars offer unique insights into healthcare topics on behalf of members and employers to bring balanced, timely, actionable ideas to the forefront. The goal is to contribute to solving the challenges employers face as they balance priorities to provide high-quality, more-affordable benefits for employees.



Leadership Summits

Due to the COVID-19 pandemic, the Leadership Summits 2020 held in June pivoted from an in-person event to a virtual conference. The themes for this year's Summits centered around Mobilizing Collective Action, Total Person Health, and Achieving Value. The event set a new registration record for the Summits and the session videos are [available on demand](#).



Annual Forum

The Annual Forum is the National Alliance's flagship event and will be held November 9-10, 2020. While this meeting is usually in Washington, the event will now be virtual. The Forum covers relevant healthcare issues and strategies for employers around policy, payment and delivery reform, mental health, pharmacy value, opioids, economic recovery, and more. [Learn more and register](#).



Annual All-member and NHLC Meetings

Held twice yearly, these meetings allow for coalitions and industry stakeholders to network and discuss critical identified topics.

2019 Employer/Purchaser Excellence Award

The Walt Disney Company and Brakebush Brothers



The Walt Disney Company and Brakebush Brothers, Inc. were honored with the 2019 Employer/Purchaser Excellence Award at the National Alliance Annual Forum last fall.

These organizations were celebrated for efforts to improve quality and efficiency of the healthcare delivery system, employee engagement — and ultimately health.

Walt Disney World in Orlando is the largest single site employer in the US and a member of the Florida Alliance for Healthcare Value.

“We are very proud of the work that has been done to advance the wellbeing and healthcare offerings for our workforce and in our community as a whole. Our partners Advent Health, Orlando Health, and Premise Health have been with us every step of the way and we could not have earned this award without them.”

*— Bill Dinger, Director of Healthcare Innovation,
The Walt Disney Company*

Brakebush Brothers, Inc. is a privately owned and operated value-added processor of chicken products with processing facilities in Westfield, Wisconsin, Irving, Texas, Wells, Minnesota, and Mocksville, North Carolina. Brakebush is a member of The Alliance.

“The award shows that employers of all sizes and any location can make a positive impact in their fight against the rising costs of healthcare without government intervention or the need to pass those costs on to its employees. It is an honor to receive recognition for doing something that we felt was just the right thing to do to provide benefits that our employees need.”

— Dan Ludwig, Director of Benefits and Safety at Brakebush



Bill Dinger with The Walt Disney Company receiving the 2019 Employer/Purchaser Excellence Award



Dan Ludwig with Brakebush Brothers, Inc. receiving the 2019 Employer/Purchaser Excellence Award

2019 Member Leadership Award



The Employers' Forum of Indiana (EFI) received the 2019 Member Award. This award is presented to a member who demonstrated leadership and commitment to health and healthcare value on behalf of members and their employees and community.

A key initiative commissioned and funded by EFI, the National Hospital Price Transparency Report 2.0 by RAND Corporation, gained national attention after its release in 2019. The extensive study, which included nearly 1,600 hospitals in 25 states, found the prices paid to hospitals for privately insured patients averaged 241% of what Medicare would have paid, with wide variation in prices among states. This effort engaged many National Alliance member coalitions and catalyzed meaningful community conversations across the nation.



Gloria Sachdev with Employers' Forum of Indiana receiving the 2019 Member Award

Benchmarking

BENCHMARKING LEADS TO IMPROVED VALUE

To gain an understanding of employer directions on timely healthcare issues from a benefits and policy perspective, we regularly conduct *Pulse of the Purchaser* surveys throughout the year.

Surveys were conducted in 2019 on employer views on health reform and this year polls have been taken to gauge what employers are doing to manage the COVID-19 pandemic, return to work strategies, and changes to benefit design.



HOT HEALTHCARE TOPICS:

PUBLICATIONS FOR PURCHASERS

National Alliance publications address issues offers insights on critical topics for employers/purchasers.

ACTION BRIEFS

Action Briefs examine topics such as cannabis products, biosimilars, hospital payment strategies, healthcare consumerism, mental health, and rheumatoid arthritis to help employers act to ensure benefits are keeping pace with the times. Access the library of Action Briefs in "[Resources](#)."

CLINICAL BRIEFS

Clinical Briefs provide coalitions and employers with clinical information on uncommonly addressed health conditions, tests and new treatments in the market. The resource highlights why it's important for employers to consider including these options as part of their overall healthcare strategy.

HEALTH POLICY IN TRANSIT: A PURCHASER VIEWPOINT

Health Policy in Transit offers viewpoints about what employers/purchasers need to know about health policy and how it affects decision making and programs. Topics recently covered include an update on mental health parity, hospital transparency insights, around hospital transparency, and the latest legislation for association health plans.

WHITE PAPERS

National Alliance white papers offer in-depth exploration and best practices on key topics such as wellbeing.

WEBINARS

Webinars provide easy access to essential learning opportunities. The timely and topical content helps coalitions and purchasers stay apprised of key healthcare issues and learn and share best practices. Speakers include coalition and healthcare thought leaders and seasoned corporate executives. Access the library of webinars in "[Resources](#)" on the website.



ACTION BRIEF 
Employer Strategies that Drive Value

HOSPITAL PAYMENT STRATEGIES

SETTING PRICE AND QUALITY EXPECTATIONS

"When you talk to people about their experiences with the healthcare system, it's clear to me that the modern-day money games of price gouging and predatory billing are driving the great public trust in the medical profession."
— Mary Mahery, MD
Chairman, Medical Professor at Johns Hopkins University

Key takeaways:

- Understand price relative to the local market and benchmarked against providers.
- Learn what "paying for value" means.
- Avoid purchasing power.
- Demand transparent pricing and alternative payment models.
- Educate and involve employees.

Key research sources:

- How prices do drive health decisions for hospital services, based on price transparency studies by the state services in two jurisdictions?
- What type of price transparency mechanisms are most successful in driving better outcomes and reducing costs of healthcare?



Clinical Brief 

Medicinal Uses of Cannabis-Derived Products

Legally available states and federal research on the potential medicinal uses of cannabis-derived products are highlighted in this report. The report also includes information on the various ways in which these products can be used, including as a dietary supplement, as a food or beverage, or as a topical product.

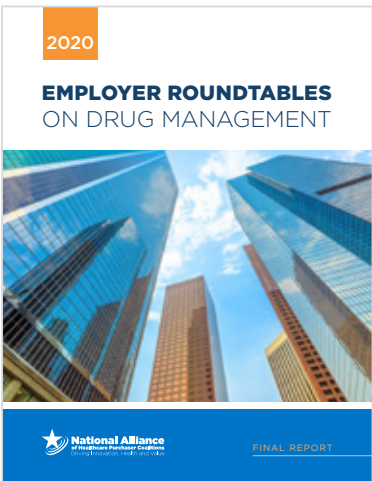
What is cannabis?

Cannabis refers to a plant with psychoactive and medicinal properties. The plant has been used for centuries for its medicinal properties. The plant contains over 100 different compounds, including tetrahydrocannabinol (THC) and cannabidiol (CBD). These compounds are responsible for the plant's effects on the human body.

What is the legal status of cannabis in the United States?


As of February 2020, 33 states and the District of Columbia have legalized cannabis for medical use. Additionally, 11 states have legalized cannabis for recreational use. The federal government has not yet legalized cannabis for any use.


The FDA has approved several pharmaceutical cannabis-based medicines for the treatment of specific medical conditions. Each formulation has been subject to rigorous review.



2020

EMPLOYER ROUNDTABLES ON DRUG MANAGEMENT



 **National Alliance of Healthcare Purchaser Coalitions**

FINAL REPORT

NATIONAL ALLIANCE IN THE NEWS

The National Alliance and its member coalitions serve as expert resources to the media to educate, offer commentary, and shine a light on the work of coalitions and the industry around efforts to improve health and healthcare in the US.

Human Resources Executive
Why employees shouldn't expect 'normal' for a while
 A recent survey found 60% of employers aren't planning to fully reopen their workplaces for at least two months.
 By **Tom Starnes** | May 22, 2020 - 3 min read

Returning to the workplace
 Article: employers are stilling or considering as employees come back to work

Category	Percentage
Full employee reopening	81%
Partial reopening	24%
Not reopening	21%
Not reopening until later	46%
Not reopening until next year	36%
Not reopening until 2021	22%
Not reopening until 2022	20%
Not reopening until 2023	18%
Not reopening until 2024	15%
Not reopening until 2025	12%
Not reopening until 2026	10%
Not reopening until 2027	8%
Not reopening until 2028	6%
Not reopening until 2029	4%
Not reopening until 2030	3%
Not reopening until 2031	2%
Not reopening until 2032	1%
Not reopening until 2033	1%
Not reopening until 2034	1%
Not reopening until 2035	1%
Not reopening until 2036	1%
Not reopening until 2037	1%
Not reopening until 2038	1%
Not reopening until 2039	1%
Not reopening until 2040	1%

TIME
Some Employers May Require Employees Get Tested for COVID-19 Before Coming Back to Work

The Washington Post
Affordable Mental Health Care Is Getting Even Tougher to Access
 Despite federal law, Americans are still struggling to find affordable, in-network mental health providers.
 By **Katie Hahn** | Nov. 20, 2019

The Washington Post
Affordable treatment for mental illness and substance abuse gets harder to find
 Tom West, a psychiatrist who serves as chief adviser to California Gov. Gavin Newsom (D) on mental health issues, says the results of the study on affordable treatment for mental illness and substance abuse "stunning."
 By **Janet Reid**
 Dec. 5, 2019 at 12:00 p.m. EST

Bloomberg Businessweek
Mental Health Is Still a 'Don't Ask, Don't Tell' Subject at Work
 Depression, anxiety, and other conditions go largely unaddressed—at a huge cost for businesses.
 By **Cynthia Koons**

ebn
National Alliance of Healthcare Purchaser Coalitions launches five-year plan on mental health
 Employee awareness of mental health options

Category	Percentage
No idea what is offered	11%
No support programs offered	42%
Support programs available	47%

The Washington Post
America can't afford billions in surprise medical bills
 The Jan. 13 editorial "Ending surprise medical billing" urged Congress to put an end to surprise medical billing. The National Alliance of Healthcare Purchaser Coalitions, of which I am president and chief executive, could not agree more.
 Without federal legislation to stop surprise medical bills, millions of patients, employers and employees face \$40 billion in unnecessary costs each year. Policymakers must fix the market loopholes that private equity firms and certain hospitals continue to exploit.

benefits4you
COVID-19 and social determinants of health: Considerations for employers
 Social determinants of health play a major role in how well employees will weather this chaotic time.
 By **Stacy Papp** | April 16, 2020 at 10:27 a.m.

Partnership for a Healthier America
There's a Lot to See in Life.
 Every day, millions of Americans are living with chronic health conditions. It's time to take control of your health and live a healthier life.



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