



All-Stakeholder Meeting

Friday November 13, 2020

Time: 11:30-2:00 pm EST

Location: Forum Members were sent an email on October 12, 2020 regarding this meeting, along with a calendar invite containing the Zoom registration link. This meeting is for Forum Members only and their guests.

*For questions or comments please contact Sara Otte at sara@employersforumindiana.org

AGENDA: Presentations can be found at <https://employersforumindiana.org/>

- I. Welcome**
- II. RAND 3.0 Study: Indiana Hospital Price Conversation Continued**
Gloria Sachdev, President and CEO of Employers' Forum of Indiana

Christopher Whaley, Policy Researcher at RAND Corporation
- III. National Academy for State Health Policy Hospital Cost Tool: How It Works**
Marilyn Bartlett, Fellow at National Academy for State Health Policy
- IV. Colorado Group Purchasing**
Bob Smith, President and CEO at Colorado Business Group on Health
- V. Hospital Cost Tool Panel Discussion**
Dave Kelleher, President of Healthcare Options Inc. (Moderator)

Panelists:
Marilyn Bartlett, Fellow at National Academy for State Health Policy

Terry Metzger, CFO at Ascension St. Vincent

Bob Smith, President and CEO at Colorado Business Group on Health
- VI. Employers' Forum of Indiana 2020 Year in Review and What's on the Horizon for 2021**



Biographies

Christopher Whaley

Christopher Whaley is an Associate Policy Researcher at the RAND Corporation and also an Assistant Adjunct Professor of Health Policy and Management at the University of California, Berkeley. His research focuses on how information and financial incentives influence patient's choice of providers, how providers respond to changes in consumer incentives, and insurance benefit design innovations. His research has been published in leading clinical, health policy, and economics journals, including Health Affairs, JAMA, the Journal of Health Economics, and the New England Journal of Medicine. A paper in JAMA examines the effects of online price transparency information and was a finalist for the 2015 National Institute for Health Care Management Foundation Annual Health Care Research Award.

Chris also received the 2015 AHRQ Director's Award for a paper published in JAMA Internal Medicine on the effect of reference pricing on consumer choice of providers for colonoscopy services. Recent work on reference pricing models has been used by the California Public Employees' Retirement System to design health insurance benefits for its 1.4 million enrollees.

He is currently the principal investigator of an R21 funded by the National Cancer Institute that uses machine-learning methods to examine the effects of the Affordable Care Act and changes in employer sponsored insurance on cancer screening.

Marilyn Bartlett

Marilyn earned a bachelor's degree in education from the University of Nevada (Reno), and taught high school for one year, an experience that sent her promptly back to school to complete the Accounting/Finance program at Montana State University (Billings). She then became a Certified Public Accountant, and followed that with the CMA, CGMA, and CFM designations.

Upon earning her CPA, Marilyn turned immediately to the business world and held financial management positions for a utility company, gold mining company and a public accounting firm. In 2001, she narrowed her focus to health care financial management, becoming Controller for Blue Cross and Blue Shield of Montana. In 2007, Marilyn became the CFO for EBMS, a regional TPA focusing on self-funded plans.

The State of Montana health plan is the state's largest self-funded plan, with over 31,000 members. In 2014, the State of Montana health plan lost \$28 million after several years of declining reserves. Actuarial projections showed health plan reserves would be -\$9 million by December 2017 if significant changes were not implemented. The 2015 legislature passed SB 418 which mandated cost-containment measures, and recommended the plan explore options such as ACO's, PCMH's, closing state-owned health centers, and value-based benefit design.

Marilyn took the helm of the Montana State Employee Group Benefit Plan in late 2014. She then jettisoned most of the legislative suggestions and led the health plan forward to implement reference-based contracting with all Montana hospitals; demanded efficiencies and quality service at the state health clinics; negotiated a



transparent pass-through pharmacy benefit; and excised vendors that weren't delivering on promises. In December 2017, Marilyn had the plan reserves at \$112 million – a \$121 million swing north from the original projections.

In July 2018, Marilyn left the state plan and took over as Special Projects Coordinator for State Insurance Commissioner, with the goal of peeling back the cloak of secrecy covering the never-ending, inexplicable costs of prescription pharmaceuticals. To date legislation and lawsuits have followed her research and data analysis with more to come.

Dave Kelleher

Mr. Kelleher was the founding CEO of the Employers' Forum in Indiana. He holds a Master of Science degree in Economics and has managed health care organizations since completing his military service in 1972. He was one of the founders of the first prepaid group practice in Indiana and served as its Executive Vice President from 1973 to 1986. He then founded HealthCare Options (HOI) and is its president. Since 1986 HOI has developed and managed health care organizations and provided consulting services to health plans, medical groups, hospitals, academic medical centers and employers in 38 states.

HealthCare Options managed the Employers Forum from 2001 until 2015 and was one of the organizers of Quality Health First of Indiana. Quality Health First was a statewide, multi-payer, quality reporting and pay-for-performance program developed and managed by the Indiana Health Information Exchange. Mr. Kelleher was also the program manager of the Central Indiana Beacon Collaborative.

Terry Metzger

Terry has been with Ascension Indiana for over five and currently serves as the System Chief Financial Officer and Interim Chief Operating Officer responsible for all financial, treasury, budget, and business analytics. Additionally, he is responsible for all system contract management, population health efforts, managed care relationships, and hospital operations. Prior to joining Ascension Terry spent seven years as a Chief Financial Officer for three different Health Insurance organizations in Wisconsin and Indiana with Commercial, Medicare, and Medicaid Health Plans. Before working in Healthcare Terry spent seven years working in mobile telephony in Africa, Asia, and Southeast Asia with the public company The e-KONG Group, first as a Chief Financial Officer of three different subsidiaries and then heading business operations and mergers and acquisitions activities in Southeast Asia and the Peoples Republic of China. Terry has a BSBA and MBA from Regis University in Denver Colorado and he and his wife Joyce live in Fishers Indiana with their two daughters Catherine and Ellen.

Bob Smith

Bob has worked with the Colorado Business Group on Health since 2010 on piloting payment reform and promoting value-based purchasing in Colorado. He became Executive Director in May, 2017 with a commitment to employer-led, market-based reform of healthcare across Colorado through direct contracting and supporting value-based purchasing and benefit designs. In January of 2020 he was elected as President



of the newly formed “The Colorado Purchasing Alliance” – a healthcare purchasing cooperative authorized under Colorado statute 10.16.1001.

Prior to joining CBGH Bob spent 38 years as a hospital/health system executive, providing leadership on strategic planning, business development, continuous quality improvement, and performance-based contracting. He facilitated various joint ventures, partnerships, and collaborative initiatives between providers and purchasers, working within the community hospital, university medical center, and managed care settings. He started and ran a hospital-owned health plan called “the most successful provider-owned plan in the country” by Modern Healthcare after his tenure as CEO and he has overseen development and management of over 20 risk-bearing physician organizations as VP of Development with McNerney Heintz.

Bob holds an MBA from Loyola University of Chicago, has co-authored a book on healthcare contracting strategies, and has published numerous healthcare articles. He taught managed care and risk-based contracting as a faculty member of the American College of Healthcare Executives for 15 years.

He served as a member of the St. Vrain Valley School District Board of Education from 2007 to 2019 including as Board President from 2013-2018. He is a Trustee of the National Coalition of Healthcare Purchasing Alliances and a member of the Colorado All Payer Claims Database Advisory Committee. He is a prior Board member of the Savannah, Georgia and Longmont, Colorado Chambers of Commerce.