



HEALTH CARE

R O U N D T A B L E

The health care industry as a whole has faced an incredible array of challenges over the last few years and has rallied by making improvements, enhancements and adjustments to protocols, all while providing services that are the most essential to those in need. To explore the future of health-related issues, our Inside the Valley team has discussed insights, suggestions and best practices with health care experts and thought leaders from the region.

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THE FUTURE OF THE HEALTH CARE SYSTEM SHOULD PRIORITIZE PROACTIVE APPROACHES TO MENTAL AND PHYSICAL HEALTH.

—SYLVIA MARTIN

What is your outlook for the future of the health care system — this year and beyond?

SIMPSON: As an employee benefit broker, I feel that the need for a preventive approach with providers is critical. Methods for patients to understand how to improve their health through honest patient / doctor conversations is essential to discover the root cause of the issues. The United States is growing unhealthier with each generation. The cost of mental health and medical — from prescriptions to surgeries — and recovery, are causing huge increases for carriers, individuals and employers. Carriers are spending vast dollars on wellness. The wellness industry is valued at \$5.6 trillion and is expected to be \$8.5 trillion in 2027. Research states Americans are living longer, chronic diseases impact large populations and are costly, as well as preventable. Accountable care is a must to control cost and reward providers.

MARTIN: The future of the health care system should prioritize proactive approaches to mental and physical health. This entails focusing on preventative measures, community health education, and empowering individuals to take charge of their well-being by emphasizing proactive strategies such as promoting healthy lifestyles, early intervention, and mental health awareness as well as mental health maintenance. We can mitigate the need for reactive sick care. This shift will not only improve overall health outcomes, but also reduce health care costs

and enhance the quality of life for individuals and communities.

What can or should be done to improve health care equity and access to care?

HART: Health care equity implies that everyone has access to care and that their outcomes for illnesses and health conditions are the same. CommonSpirit Health, the parent company of Dignity Health, has taken several steps to improve health care equity and access to care. The health system offers financial assistance programs to help low-income individuals and families afford health care services. CommonSpirit collaborates with community organizations, faith-based groups, and government agencies to address social determinants of health and improve access to care. It collects and analyzes data to identify and address disparities in health care access and outcomes and it emphasizes cultural competency among its health care professionals to ensure that patients receive care that is respectful of their cultural beliefs and values. Through these initiatives, CommonSpirit Health aims to reduce health care disparities and ensure that all individuals have equal opportunities to receive high-quality health care. In addition to their initiatives, Northridge Hospital hosts a monthly produce distribution in conjunction with the American Heart Association to provide fresh produce to community members who are food insecure. To date, we have provided hundreds of thousands of pounds of fresh fruits and vegetables to members of the communities in need of healthy food options.

How does California's health care outlook differ from other parts of the country?

MARTIN: California's health care status and culture different from other parts of the country in several ways. First, California has been a pioneer in health care reform, such as early implementation of the Affordable Care Act and expanding Medicaid coverage. This has led to a higher percentage of insured residents compared to some other states. Additionally, California's diverse population and progressive attitudes often result in a

greater emphasis on holistic and alternative medicine practices. The State also has strong forces in technological innovation, with many health care startups and research institutions based in the Silicon Valley. However, challenges such as health care disparities, excessive cost of living, and access issues persist, particularly in rural and underserved areas.

SIMPSON: California has secured its position as the fourth most affordable state for health care, with the sixth lowest deductible for residents through their employers, according to Forbes. The capitated model (HMOs) is still the low-cost leader in Southern California. Medi-Cal receives \$152 billion from federal and state, with 2023-2024 expected to be \$6.6 billion (21%) higher. California is the first state to expand health insurance to undocumented immigrants, while a few states offer coverage to certain groups. Effective January 1st of this year, undocumented immigrants ages 26-49 became eligible for full medical coverage under California's Medicaid program, Medi-Cal. Medi-Cal outpaces Medicare significantly. The Legislative Analyst's Office reports at the end of 2022, 1.5 million Californian's are subsidized and approximately 163,000 are unsubsidized on Covered California. Employer Sponsored Insurance remains at approximately 50%.

How is digital innovation revolutionizing health care?

HART: Digital innovation has certainly proved to be revolutionary by improving



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—BETSY HART

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—SYLVIA MARTIN

efficiency, while allowing for greater transparency with patients, consumers and integrated health care delivery across the continuum. With such a wide variety of technologies at our disposal, from telemedicine and electronic health records to artificial intelligence, we're part of an exciting and transformative time in health care. Quality measures have been enhanced due to digital technology, which in turn improves the well-being and clinical outcomes of patients, as well as reducing the cost of services. As health care professionals, the challenges we face are numerous and complex, yet the opportunities rendered by digitalization seem limitless.

MARTIN: Digital innovation is revolutionizing health care by introducing virtual experiences, personalized monitoring devices, and advanced imaging technology. Artificial intelligence plays a role that is pivotal in interpreting data and generating smart alerts, facilitating early intervention and personalized care. Moving toward predictive algorithms enhances health care outcomes and closes gaps in addressing health care disparities by emphasizing preventative measures. Maintaining community health allows digital innovations to transform the health care landscape, shifting the focus from reactive treatment to proactive wellness management. This approach has the potential to significantly improve outcomes, reduce cost, and promote quality in health care delivery.

When you look at all the innovation happening within the health care industry today, what trends are you most optimistic about?

SIMPSON: Innovation in digital technology is creating massive changes in management of health records and improvements in care coordination in the health care industry and these come along with challenges. Cybercrime and the protection of PHI are causing serious concerns. Digital innovation is changing how health care is delivered in patient care which is expected to prolong life and save in costs overall. Telemedicine continues to rise in usage and proves to help patients save in cost and lost time at work. Insurance carriers are spending billions of dollars on technology and are still behind other industries. Those who have invested in human-centric digital transformation are beginning to see value in member satisfaction and trust. Cybercrime has put the brakes on the most needed interfacing with human resources information systems employers are all using today to collect enrollment data.

MARTIN: I am most optimistic about the health care industries trend towards innovation, particularly in providing more personalized convenience care. The shift towards offering health care services outside of traditional settings such as airports and retail stores highlight the industries adaptability and responsiveness to consumer needs. Remote monitoring and telemedicine are revolutionizing how care is delivered, allowing for more accessible and efficient interactions between patients and providers. Moreover, leveraging technology for remote consultations, home-based care and hospital services enhances convenience and reduces barriers to accessing health care. These trends not only improve health care outcomes, but also empower individuals to take proactive steps toward better health while engaging the overall health care service industry.

Telehealth is transforming care delivery. Are there specific practices, protocols or

innovations developing that can eliminate barriers to care?

SIMPSON: On December 31, 2024, many temporary provisions of telehealth are set to expire on the federal level, such as HSA safe harbor, controlled substance prescribing, in person follow up for mental health, and some Medicare waivers. The health care industry is hopeful that these policies put into place, due to COVID, will be replaced with permanent rules and guidelines, as more than 40 states have permanently updated their telehealth laws after the pandemic. Telehealth providers are limited in their delivery of care across state lines due to the way regulations for licensing are set up state by state throughout the United States. Among the questions health care facilities may ask are, "How can we use our internal staff rather than external virtual staff, AI or other technologies?" With clinics providing telehealth services this may take away from primary care doctors. What we do know is that telehealth services are a successful way to gain access to care without leaving your home or office.

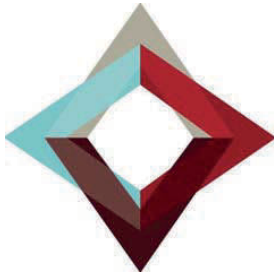
Will outpatient care continue to trend upwards?

HART: Outpatient care will absolutely continue to trend upwards. As we look to the future, patients treated in the acute care setting will likely be sicker and require more intensive care. We continue to see trends of the less acute moving towards same-day surgeries and outpatient settings. It's all about the right care in the right setting. Promoting primary care



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—DANONE SIMPSON



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WELLNESS PROGRAMS ARE DEFINITELY WORTHWHILE INVESTMENTS AND CRITICAL FOR ALL EMPLOYERS TO CONSIDER.

—BETSY HART

and preventive care is critical to ensuring this shift is successful and helping patients and communities focus on the measures they can take to optimize their health.

MARTIN: Outpatient care is poised to continue trending upward in health care, with a focus on preventative measures in early intervention outpatient settings, allowing for patient education and proactive lifestyle management, preventing the development of chronic illnesses. Additionally, advances in minimally invasive treatments enable more procedures to be performed in outpatient ambulatory settings, reducing the need for inpatient hospital stays. Health care systems are also investing in technology and processes to support recovery in ambulatory and at home settings. This shift towards outpatient care reflects a broader emphasis on promoting wellness and imaging health care needs outside traditional hospital setting, leading to more efficient and patient centered care delivery.

As more organizations from other industries move into the health care space, what can “traditional” health systems do to make sure they don’t get left behind?

SIMPSON: Labs came popping up and soaring to the Top 100 list in Forbes during COVID, earning billions of dollars. Carriers are partnering with Pharmacies to control costs. Clinics have become a great place to go in the evening or on weekends, using telehealth to assist in patient care. IPA groups, UCLA, Cedars,

and many providers are all using telehealth and new technologies in a race to be the one the patient calls. Technologies that assist doctors in patient care and management show successful results, saving cost and time. Doctors that do not keep up may lose younger patients that prefer technology. I am certain the arguments of seeing patients face to face is extremely important to older generations. However, the future is here, and it is evolving rapidly. I spoke to a few carrier reps, and they are hearing excitement around these smart technologies and systems that provide better care, which is what we all strive for.

Southern California has a critical shortage of inpatient psychiatric and behavioral health care, and a rising need. How do we move forward to meet that mental health demand?

MARTIN: Meeting the rising demand for mental health services in Southern California requires a multifaceted approach. I suggest considering early intervention with mental wellness education, starting from ages as early as kindergarten, to instill resilience in coping skills and individuals giving them the tools for coping and resilience to prevent mental health challenges from escalating. Also, there needs to be an investment in technology-enabled care delivery methods that can enhance access to critical mental health services for communities. There also needs to be an increased education on risk factors and lifestyles impacting mental health, alongside cultural shifts that prioritize mental health resources and investments by treating mental health as we do physical illnesses like cancer or diabetes. By addressing it comprehensively from education to care delivery, we can better meet the mental health needs of our Southern California communities.

As health care evolves from fee-for-service to value-based care, how do you maintain quality and accessibility?

SIMPSON: In Southern California, HMO capitated models have proven cost savings, as California leads with the lowest

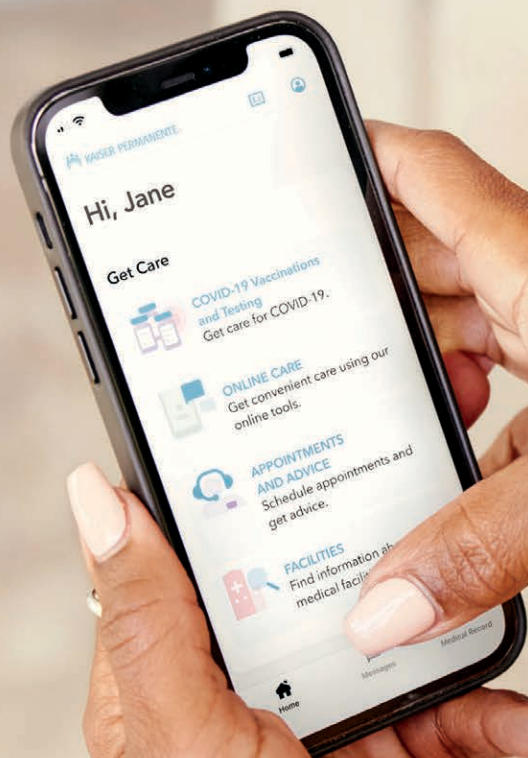
rates in the country. However, providers have been impacted in recent years and are pushing for more in payouts. Accountable Care Organizations came out years ago and I still believe in the philosophy, allowing patients to rate their care providers and then care providers are rewarded for excellence. There is financial risk, yet the goal is to care for the patient's total health rather than quickly turning to pen and knife, RX and surgeries. HMOs forced providers to see more patients, seemingly reducing the quality of care. I take time to explain the ACOs to employees whose employer has elected this plan design, so all understand the concept.

What should patients take into consideration when selecting their care providers?

HART: Selecting your care provider is such an important decision to make, as it goes beyond the quality of care received. You need to have a trusting relationship with your provider, one based on compassion, comfortability and open dialogue. Communication style is also key, as you need to be able to connect with your provider in a way that allows you to speak freely while feeling listened to.

For many years we’ve been hearing how data and analytics can improve the quality of patient care. In your view, how is data being used to improve and prevent people from getting seriously ill?

MARTIN: Data analytics and big data are transforming health care by shifting from retrospective analysis to predictive and preventative approaches. The use of apps, smartwatches, and other devices enable individuals to monitor their health behaviors such as activity levels nutrition and sleep patterns. By leveraging machine learning and AI predictive models, we can identify individuals at risk based on their unique datasets compared to population norms and past outcomes. For instance, detecting warning signs of patterns that could be leading to the need to seek treatment and adapt healthy practices that can be tailored to individuals enhancing preventative care and improving health outcomes.



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INNOVATION IN DIGITAL TECHNOLOGY

IS CREATING MASSIVE CHANGES IN MANAGEMENT OF HEALTH RECORDS.

—DANONE SIMPSON

Are wellness programs worthwhile investments for employers in 2024?

HART: Absolutely. Wellness programs are definitely worthwhile investments and critical for all employers to consider. First of all, it's the right thing to do for your team and the people you lead, as it demonstrates a concerted effort to prioritize your organization's greatest asset — their people. These programs can also help decrease sick days, help with overall productivity and provide employees a positive outlook on their own wellness, encouraging them to make lifestyle changes outside their work environment. Implementing these programs has the added benefit of bringing staff from various departments together with the common goal of promoting physical and mental well-being through camaraderie and interactive events and activities.

What do you consider to be some of the most exciting and/or game changing discoveries and innovations in the bioscience sector?

MARTIN: In the field of chemotherapy, advancements in precision medicine have revolutionized cancer treatments by enabling targeted therapies tailored to an individual's genetic makeup and tumor characteristics. This approach minimizes side effects and improves

efficacy. Precision medicine is also transforming the microbiome sector, where researchers are uncovering the intricate relationship between gut microbes and various aspects of health, including immunity metabolism and mental well-being. Personalized interventions targeting the microbiome hold promise for treating a wide range of conditions, from gastrointestinal disorders to mental health conditions. Moreover, innovative research in microbiome-targeted therapies such as fecal microbiota transplantation and microbiome modulating drugs are paving the way for novel treatment options with the potential to address antibiotic resistant infections and chronic diseases. These breakthroughs represent significant strides in the bioscience sector offering new avenues for personalized and effective health care interventions that could improve patient care outcomes and quality of life, as they will be changing the face of what health care treatment may look like in the future.

What changes are you seeing in the insurance landscape?

SIMPSON: In Southern California HMOs have created value for employers and individuals. However, due to high claims and cost of care, these pricing models are difficult to maintain as providers need and demand more. Employers are looking into self-insurance to manage costs through claim review for wellness management. Smart wearable technology has proven accuracy, impacting patient care allowing providers to monitor patients in new ways and save lives. Carriers are excited about AI technology as the world is changing rapidly for enrolling members. Medical providers care as technologies force carriers to integrate AI and new solutions to manage cost and improve member health. Digital transformation in healthcare is changing the way patients are treated, which is causing insurance carriers to rethink the expect-

ed delivery of care and payouts. As a result, the expected cost savings in 2024 will be \$1.3 billion.

What are the benefits and/or challenges to developing medical devices in 2024?

MARTIN: In 2024, developing medical devices offers the benefit of addressing unmet medical needs and enhancing patient care. However, navigating legislation and regulation poses a challenge, requiring thorough understanding and compliance to ensure safety and efficacy. Collaborating with regulatory experts and staying updated on evolving guidelines is critical to maximize connectivity transparency and communication across platforms and service pathways. Interoperability standards and data sharing protocols must be prioritized. Embracing digital health solutions and fostering collaboration among stakeholders can facilitate seamless integration and streamline patient care pathways. Prioritizing patient privacy and data security is essential to building trust and ensuring successful implementation of interconnected healthcare systems.

What should be done today to enhance the patient experience?

HART: There's no doubt that the experience of our patients is at the top of the list of goals, along with safety and high-quality care. We work in such a fast-paced environment where emergencies arise and complexities exist that require a total team effort. That's why collaboration is an indispensable element of any organization's success. It's also critical that we all take a moment to slow down and recalibrate our focus in order to operate in the optimal headspace. Connecting with our patients on a personalized level also carries a tremendous benefit. All of us have been or will be patients at some point in our lives, and nothing makes us all feel quite as comfortable as humanity and a kind touch.

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