

**HERITAGE VALUE-BASED CARE CONFERENCE SERIES**

# Virtual Third National Primary Care Transformation Summit

Virtual Online Video Live and Archived

**DECEMBER 3 – 6, 2024**

Agenda current as of October 8 • All times are EDT

[www.PrimaryCareTransformationSummit.com](http://www.PrimaryCareTransformationSummit.com)

## **A Sister Conference to the Virtual First National Specialty Care Transformation Summit**

The Leading Forum on Strategies to Enhance the Role, Coordination and Compensation of Specialty Care Providers, Including CMMI's Support of Person-Centered, Value-Based Specialty Care Initiatives

Media Partners: *Harvard Health Policy Review, Health Affairs and Inside Health Policy*

**October 8 – 11, 2024**



**SUPPORTED BY GRANTS FROM**

**The Heritage Group, including Heritage Provider Network and  
Heritage Medical Systems**

**Patient-Centered Outcomes Research Institute (PCORI)**

**TUESDAY, DECEMBER 4, 2024**

## DAY I OPENING PLENARY SESSION: BACKGROUND AND PUBLIC POLICY SETTING

10:30 pm

### Co-chair Introductions and Keynote Address:



**Ann Greiner, MCP**, President and Chief Executive Officer, Primary Care Collaborative; Former Vice President, Public Affairs, National Quality Forum; Former Vice President, Public Affairs, American Board of Medical Specialties Washington, DC (Co-chair)

11:15 am

### Keynote: Out of Balance: Fixing our Health System's Neglect of Primary Care



**Christopher F. Koller, MPPM, MAR**, President, Milbank Memorial Fund; Former Health Insurance Commissioner, State of Rhode Island; Former CEO, Neighborhood Health Plan of Rhode Island; Founding Chair, Association of Community Affiliated Plans, New York, NY

11:45 am

### A Fireside Chat Update on CMS Primary Care Initiatives



**Douglas B. Jacobs, MD, MPH**, Chief Transformation Officer, Center for Medicare, Centers for Medicare & Medicaid Services; Former Chief Medical Officer and Chief Innovation Officer, Pennsylvania Department of Human Services, Washington, DC



#### Interviewed by:

**Valinda Rutledge, MBA, EVP**, Advocacy & Education, America's Physician Groups; Former Group Director, Patient Care Model Group and BPCI Lead, CMS, Washington, DC

12:15 pm

### Luncheon Break

1:00 pm

### The CMS Innovation Center's Primary Care Initiatives



**Elizabeth Fowler, PhD, JD**, Deputy Administrator and Director, CMS Center for Medicare and Medicaid Innovation; Former EVP of Programs, The Commonwealth Fund; Former VP, Global Health Policy, Johnson & Johnson; Former Special Assistant to President Obama; Former Chief Health Counsel, Senate Finance Committee, Washington, DC

1:30 pm



### State Leadership in Advancing Primary Care

**Howard M. Haft, MD, MMM, CPE, FACPE**, Former Senior Medical Advisor, Maryland Department of Health Former Executive Director, Maryland Primary Care Program, Baltimore, MD

2:00 pm



### Primary Care Provider Risk Arrangements for Medicaid... Are They Worth It?

**Hugh Lytle, MBA**, Founder, Chairman, and CEO, Equality Health; Co-Founder, Univita Health and Axia Health Management/Silver-Sneakers, Phoenix, AZ (Moderator)

2:45 pm



### Can Primary Care be Fixed via Changes in the Medicare Fee Schedule

**Robert A. Berenson, MD**, Senior Fellow, Urban Institute; Former Assistant Director, White House Domestic Policy Staff, Washington, DC

3:15 pm



### Strengthening Primary Care Reimbursement Models to Improve Medicare's Outcome and Efficiency

**Ann Greiner, MCP**, President and Chief Executive Officer, Primary Care Collaborative; Former Vice President, Public Affairs, National Quality Forum; Former Vice President, Public Affairs, American Board of Medical Specialties, Washington, DC

3:45 pm



### Advancing Health Equity Initiatives in Primary Care Practices

**Margot L. Savoy, MD, MPH, FAAFP**, Senior Vice President, Education, Inclusiveness and Physician Well-Being, American Academy of Family Physicians; Former Chief Quality Officer, Temple Faculty Physicians' Former Chair, Department of Family and Community Medicine, Lewis Katz School of Medicine, Temple University, Washington, DC

4:15 pm

### DAY I ADJOURNMENT

## DAY II MORNING MINI SUMMITS MINI SUMMITS GROUP I 10:00 am – 10:45 am

### Mini Summit 1: Why Primary Care Practitioners Aren't Joining Value-Based Payment Models: Reasons and Potential Solutions

**10:00 am Introduction, Discussion and Q&A**

**Ann S. O'Malley, MD, MPH**, Senior Fellow, Mathematica Policy Research; Former Senior Health Researcher, Center for Studying Health System Change, Washington, DC

### Mini Summit 2: A Fireside Chat on Primary Care: Stratified Approach to Optimal Outcomes

**10:00 am Introduction, Discussion and Q&A**

**Stuart Levine, MD, MHA**, Chief Health & Transformation Officer, AltaMed; Strategic Advisor, VillageMD; Operating Partner, Chicago Pacific Founders; Co-Founder, agilon health, Los Angeles, CA

**Interviewed by:**

**Don Crane, JD**, Former President & CEO, America's Physician Groups; Co-producer Primary Care Transformation Summit, Specialty Care Transformation Summit, and Medicare Advantage Summit, Los Angeles, CA

### Mini Summit 3: Keeping our Finger on the Pulse of Primary Care: A 360 Degree Holistic View of How to Improve the Delivery of Care

**10:00 am Introduction, Discussion and Q&A**

**Bill Lane**, Executive Vice President of Network Development, illumed; Former Payment Innovation Lead, Humana, Hillsboro Beach, FL

**10:45 am Transition Break**

## MINI SUMMIT GROUP II 10:50 am – 11:35 am

### Mini Summit 4: Primary Care Development Corporation (PCDC), a National Nonprofit that Provides Capital Financing, Expertise, and Advocacy to Expand Primary Care Access and Advance Health Equity in Underserved Communities

**10:50 am Introductions, Discussion and Q&A**

**Louise Cohen, MPH**, Chief Executive Officer, Primary Care Development Corporation (PCDC); Former Director of the Park Slope Family Health Center; Former Vice President, Public Health Programs, Public Health Solutions in New York City; Former Deputy Commissioner, New York Division of Health Care Access and Improvement, New York, NY

### Mini Summit 5: Primary Care Case Study: agelon health

**10:50 am Introductions, Discussion and Q&A**

**Steven Sell, MBA**, Chief Executive Officer and Board Member, agilon health; Former President and Chief Executive Officer, Health Net Inc., San Francisco, CA

**Interviewed by:**

**Don Crane, JD**, Former President & CEO, America's Physician Groups; Co-producer Primary Care Transformation Summit, Specialty Care Transformation Summit, and Medicare Advantage Summit, Los Angeles, CA

### Mini Summit 6: Innovations in Street Medicine: Bringing Primary Care to the Homeless

**10:50 am Introductions, Discussion and Q&A**

**Indu Subaiya MD, MBA, MFA**, Interim CEO, Healthcare in Action; District E Rep and Homelessness Co-Chair, Los Feliz Neighborhood Council; Former President & Co-founder, Catalyst at Health 2.0, San Francisco, CA

**11:35 am Transition Break**

## MINI SUMMIT GROUP III 11:40 am – 12:25 pm

### Mini Summit 7: Case Study: Providing Direct Primary Care in Rural America: Leeton Medical, a Direct Physician Care Practice

**11:40 am Introductions, Discussion and Q&A**

**Lara Briseno Kenney, MD**, Internal Medicine Physician with Sub-specialty Board Certifications in Hematology, Oncology, Hospice and Palliative Care; Founder Leeton Medical DPC; Co-founder, Direct Specialty Care Alliance, Leeton, MO

**Interviewed by:**

**Don Crane, JD**, Former President & CEO, America's Physician Groups; Co-producer Primary Care Transformation Summit, Specialty Care Transformation Summit, and Medicare Advantage Summit, Los Angeles, CA

### Mini Summit 8: How Optum is Using AI/ML Tools to Increase the Quality and Efficiency of Primary Care

**11:40 am Introductions, Discussion and Q&A**

**Ken Cohen, MD**, Executive Director of Translational Research, Optum Care; Former Chief Medical Officer, New West Physicians, Golden, CO

### Mini Summit 9: Equity Investment in Physician Practices: What's aal the Brouhaha

**11:40 am Introductions, Discussion and Q&A**

**Lawton R. Burns, PhD, MBA**, James Joo-Jin Kim Professor, Professor of Health Care Management, Director, Wharton Center for Health Management & Economics, and Professor of Management, Wharton School, University of Pennsylvania, Philadelphia, PA

**Mark V. Pauly, PhD**, Bendheim Professor Emeritus, Health Care Management, Wharton School, Professor, Economics, School of Arts and Sciences, University of Pennsylvania; Former Member Physician Payment Review Commission, Consultant, Congressional Budget Office, and Member, Medicare Technical Advisory Panel, Philadelphia, PA

**12:25 pm Luncheon Break**

## DAY II PLENARY SESSION: THE ROLE OF PRIMARY CARE IN VALUE-BASED CARE

1:00 pm

### Co-chair Welcome and Introductions



**R. Shawn Martin, MHCDS**, Executive Vice President & CEO, American Academy of Family Physicians; Former Director of Government Relations, American Osteopathic Association, Washington, DC (Co-chair)

1:30 pm

### Keynote: The Role of Primary Care in Value-based Care



**Farzad Mostashari, MD**, Chief Executive Officer, Alidade, Inc.; Former National Coordinator for Health Information Technology, Washington, DC

2:00 pm

### Enhancing Primary Care's Role in Accountable Care



**Susan Dentzer**, President and Chief Executive Officer, America's Physician Groups; Former Editor in Chief, Health Affairs; Former Health Correspondent, PBS NewsHour, Washington, DC (Moderator)

2:45 pm

### Humana's CenterWell Expands into Senior-Focused Primary Care



**Sanjay Shetty, MD**, President, CenterWell, Humana; Advisory Board, Wharton AI & Analytics Initiative; Former President, Steward Health Care System, McLean, VA



#### Interviewed by:

**Kate Goodrich, MD**, Chief Medical Officer, Humana; Former Chief Medical Officer, Centers for Medicare and Medicaid Services, Potomac, MD

3:15 pm

### Driving Value in Medicare Advantage Through Advanced-Risk Primary Care



**Angelica Jewett, CPA**, Vice President, Value-Based Solutions, Elevance Health; Former Director of Enterprise Strategy, Enterprise Consulting and Alliances, Blue Cross NC, Indianapolis, IN



**Kevin P. Spencer, MD**, Chief Clinical Officer, agilon health; Former Chair, Premier Family Physicians, Austin, TX



**Jeff Micklos, JD**, Executive Director, Health Care Transformation Task Force; Former EVP, Management, Compliance & General Counsel, Federation of American Hospitals, Washington, DC (Moderator)

4:00 pm

### Day II Adjournment

## THURSDAY, DECEMBER 5, 2024

## DAY III MORNING MINI SUMMITS

### MINI SUMMITS GROUP IV 10:00 am – 10:45 am

#### Mini Summit 10: What Have We Learned from Primary Care Innovation & Where do We go Next

10:00 am

##### Introduction, Discussion and Q&A

**Soujanya (Chinni) Pulluru, MD**, Co-Founder, My Precious Genes; Co-Chair, PTAC (Physician-Focused Payment Model Technical Advisory Committee), US Department of Health and Human Services, Sarasota, FL

**Tom Yackel, MD, MPH, MS, MBA**, Chief Clinical Excellence Officer, CenterWell Senior Primary Care; President, VCU Health, Richmond, VA

**Sarah Sugar, MPH**, Senior Director, Sirona Strategies; Senior Director, Partnership to Empower Physician-Led Care; Former Public Health Analyst US Department of Health and Human Services, Chicago, IL (Moderator)

#### Mini Summit 11: PCPs and Quality: Too Much of a Measured Thing

10:00 am

##### Introduction, Discussion and Q&A

**Claire Boone, PhD**, Assistant Professor, McGill University; Coauthor, Value-Based Contracting in Clinical Care, JAMA, Montreal, Quebec, Canada

#### Mini Summit 12: Take Control of External Care Costs: Primary Care Strategies to Manage Specialty, ED And Hospital Cost and Care

10:00 am

##### Introduction, Discussion and Q&A

**Julia Jezmir, MD, MBA**, Chief Medical Officer, AristaMD; Chief Medical Officer, Sitka; Former Associate Medical Director and VP of ACO Reach & GPC Growth, ConcertoCare, Brooklyn, NY

10:45 am

##### Transition Break

### MINI SUMMITS GROUP V 10:50 am – 11:35 am

#### Mini Summit 13: Blue Zones: Incorporating the Lessons of the World's Longest Lived People into Primary Care

10:50 am

##### Introductions, Discussion and Q&A

**Wayne Dysinger, MD, MPH**, Chief Medical Officer, Blue Zones Health; Founding Board Chair, American Board of Lifestyle Medicine; Former Chair, Preventive Medicine Department, Loma Linda University Medical Center, Riverside, CA

#### Mini Summit 14: Safety Net Primary Care Capabilities after the COVID-19 Pandemic

10:50 am

##### Introductions, Discussion and Q&A

**Karen Schifferdecker, PhD, MPH**, Associate Professor of Community and Family Medicine, Geisel School of Medicine, Dartmouth College; Associate Professor, The Dartmouth Institute, Lebanon, NH

#### Mini Summit 15: Beyond the AI Buzz: How Clinicians Can Leverage AI for Value-Based Success

10:50 am

##### Introductions, Discussion and Q&A

**Edmund Billings, MD**, Co-founder, Phyx Primary Care, San Francisco, CA (Moderator)

11:35 am

##### Transition Break



## MINI SUMMIT GROUP VI 11:40 am – 12:25 pm

### Mini Summit 16: A Fireside Chat on Primary Care Incentives: CareGivers or Gate Keepers? & Variability in Specialty Referral Frequency Rates: How to Address High Variances, Educationally & Financially

#### 11:40 am Introductions, Discussion and Q&A

**Bill Gil, MBA**, Adjunct Professor, USC Price School of Public Policy; Former Vice President & Chief Executive Officer, Providence Southern California Medical Foundations; Former CEO, Facey Medical Foundation, Manhattan Beach, CA

**Interviewed by:**

**Don Crane, JD**, Former President & CEO, America's Physician Groups; Co-producer Primary Care Transformation Summit, Specialty Care Transformation Summit, and Medicare Advantage Summit, Los Angeles, CA

### Mini Summit 17: The Future of Primary Care: Lessons in Integrated Care Delivery from Cedars-Sinai

#### 11:40 am Introductions, Discussion and Q&A

**Jonathan Weiner, MD, FACP (Invited)**, Medical Director Primary Care, Cedars-Sinai Medical Care Foundation; Chair, Adult Primary Care and Acute Medicine, Cedars-Sinai Medical Group, Los Angeles, CA

### Mini Summit 18: OPEN

#### 11:40 am Introductions, Discussion and Q&A

#### 12:25 pm Luncheon Break

## DAY III PLENARY SESSION: IMPROVING PRIMARY CARE/ SPECIALIST COORDINATION AND COMMUNICATIONS

### 1:00 pm Co-chair Introductions and an Overview of Opportunities in Value-based care for Specialty Practices



**Susan Dentzer**, President and Chief Executive Officer, America's Physician Groups; Former Editor in Chief, Health Affairs; Former Health Correspondent, PBS NewsHour, Washington, DC (Co-chair)

### 1:30 am Keynote: Improving Primary Care-Specialty Communications, Referrals and Coordination



**Russell S. Phillips, MD**, Director, Center for Primary Care, William Applebaum Professor of Medicine and Professor of Global Health and Social Medicine, Harvard Medical School; General Internist, Beth Israel Deaconess Medical Center, Boston, MA

#### 2:00 pm



### Advancing Collaborative Care: New Developments in Primary-Specialty Care Models

**Nina Birnbaum, MD**, Director of Value-Based Care, Blue Shield of California; Former Chief, Primary Care Department, East Bay Physicians Medical Group, San Francisco, CA



**Kevin Bozic, MD, MBA**, Chair of Surgery and Director, Musculoskeletal Institute, Dell Medical School, University of Texas at Austin; Past President, American Academy of Orthopaedic Surgeons, Austin, TX



**Paul N. Casale, MD, MPH**, Professor of Population Health Sciences and Clinical Medicine, Weill Cornell Medical College; Adjunct Professor of Medicine, Vagelos College of Physicians and Surgeons, Columbia University; Member, MedPAC, Austin, TX



**Sarah Fogler, PhD**, Director, Patient Care Models Group, CMS Innovation Center; Former Deputy Director of Performance-Based Payment Policy Group, Center for Medicare, Centers for Medicare & Medicaid Services, Baltimore, MD



**Helen Burstin, MD, MPH, MACP**, Chief Executive Officer, Council of Medical Specialty Societies; Former Chief Scientific Officer, National Quality Forum; Former Director, Center for Primary Care, Prevention, and Clinical Partnerships, Agency for Healthcare Research and Quality, Washington, DC (Co-Moderator)



**Mark McClellan, MD, PhD**, Director, Robert J Margolis Center for Health Policy and Margolis Professor of Business, Medicine and Health Policy, Duke University; Former CMS Administrator and FDA Commissioner, Washington, DC (Co-Moderator)

#### 2:45 pm



### Strategies for the Integration of Primary Care and Behavioral Health

**Tristan Gorrindo, MD**, Chief Medical Officer, Optum Behavioral Care; Former Chief, Division of Education, American Psychiatric Association, Washington, DC



**Anitha Iyer, PhD, MPH**, Director, Behavioral Health Population Management, Mount Sinai Health System; Associate Professor of Psychiatry, Icahn School of Medicine at Mount Sinai, New York, NY



**Maria Koshy, MD**, Chair, Chiefs of Psychiatry & Addiction and Director, Regional Mental Health Administration, Permanente Medicine, Sacramento, CA



**Taft Parsons, III, MD**, Chief Psychiatric Officer, CVS Health; Former Enterprise Medical Director for Behavioral Health, Humana, Birmingham, MI



**Jennifer Podulka, MPA**, Senior Vice President of Federal Policy, America's Physician Groups; Former Senior Policy Analyst, Medicare Payment Advisory Commission, Washington, DC (Moderator)

All times are EST

3:30 pm

### Strategies for the Integration of Primary Care and Nephrology Services



**Adam Boehler**, *Founder and Managing Director, Rubicon Founders; Former CEO, International Development Finance Corp; Former Senior Advisor, Value-Based Transformation, HHS; Former Deputy Administrator CMS & Director, CMMI, Nashville, TN*



**Alex Portet, MBA**, *Co-Chief Operating Officer, US Renal Care; Former SVP, Operations and Growth, Optum, Dallas, TX*



**Martin Serota, MD**, *Co-Founder, Oasis Mental Health Applications, RheoMed MSO, Indian Wells, CA*



**Samual A. Skootsky, MD**, *Chief Medical Officer, UCLA Faculty Practice Group and Medical Group; Professor of Medicine, David Geffen School of Medicine at UCLA, Los Angeles, CA*



**Valinda Rutledge, MBA**, *Executive Vice President, Advocacy and Education, America's Physician Groups; Former Group Director, Patient Care Model Group and BPCI Lead, CMS, Washington, DC (Moderator)*

4:15 pm



### Strategies for the Integration of Primary Care and Cardiovascular Services

**Jana M. Goldberg, MD, FACC**, *Chief Medical Officer, Heartbeat Health; Former Director of the Cardiac Care Unit, US Department of Veterans Affairs, Philadelphia, PA*



**Casey Henritz, DO**, *Senior Medical Director, VBC Education and Performance, Medicare Population Health Programs, One Medical Senior, Amazon, Atlanta, GA*



**Jennifer Jackman, MHCE**, *Chief Operating Officer, America's Physician Groups; Former CEO, Edinger Medical Group; Former COO, MemorialCare Medical Foundation, Claremont, CA (Moderator)*

5:00 pm

### Day III Adjournment

## FRIDAY, DECEMBER 6, 2024

## DAY IV: CLOSING PLENARY SESSION POLITICS, POLICY AND THE FUTURE

10:30 am

### Co-chair Welcome and Introductions



**Elizabeth Mitchell**, *President and Chief Executive Officer, Purchaser Business Group on Health (PBGH); Former SVP, Healthcare and Community Health Transformation, Blue Shield of California, San Francisco, CA*

10:45 am

### Employer Primary Care Initiatives



**Raymond Tsai, MD**, *Vice President of Advanced Primary Care Purchaser Business Group on Health; Assistant Clinical Professor, University of California, San Francisco, Visalia, CA*

11:15 am

### The Implications of AI to the Future of Primary Care Practice



**Robert Pearl, MD**, *Clinical Professor of Plastic Surgery, Stanford University School of Medicine; Faculty, Stanford Graduate School of Business; Podcast Co-host, Fixing Healthcare; Former CEO, The Permanente Medical Group; Author, ChatGPT, MD: How AI-Empowered Patients & Doctors Can Take Back Control of American Medicine, New Haven, CT*

11:45 am

### Practical Uses of AI to Improve Primary Care Practices



**R. Shawn Martin, MHCDS**, *Executive Vice President & CEO, American Academy of Family Physicians; Former Director of Government Relations, American Osteopathic Association, Washington, DC (Moderator)*

12:15 pm

### Luncheon Break and Visit Exhibit Hall

## CLOSING PLENARY SESSION CONTINUED

1:00 pm

### The Role of Private Equity in Acquiring and Managing Physician Practices



**Wyatt Ritchie, MBA**, *Managing Director and the Head, Cain Brothers & Company; Former Advisor, Jefferies & Company, CIBC Oppenheimer and Bank of America, San Francisco, CA*

1:30 pm

### Status Report on National Academies of Sciences, Engineering, and Medicine Consensus Report Implementing High-Quality Primary Care: Rebuilding the Foundation of Health Care



**Lauren S. Hughes, MD, MPH, MSc, MHCDS, FAAFP**, *Co-Chair, Standing Committee on Primary Care, The National Academies of Sciences, Engineering, and Medicine; State Policy Director, Farley Health Policy Center; Associate Professor, Department of Family Medicine, University of Colorado, Denver, CO*

2:00 pm

### The Future of Primary Care Practice



**Francis J. Crosson, MD**, *Senior Lecturer, Health Systems Science, The Kaiser Permanente Bernard J. Tyson School of Medicine; Former Chairman, Medicare Payment Advisory Commission (MedPAC); Past Chair, American Medical Group Association (AMGA), Palo Alto, CA*



**Robert J. Margolis, MD**, *Founder and Chair, Advisory Board, Duke-Margolis Health Policy Center, Duke University; Former Co-chair, DaVita HealthCare Partners Inc.; Founder, California Primary Physicians Medical Group; Former Managing Partner and CEO, HealthCare Partners Rancho Palos Verdes, CA*



**Don Crane, JD**, *Former President & CEO, America's Physician Groups; Co-producer Primary Care Transformation Summit, Specialty Care Transformation Summit, and Medicare Advantage Summit, Los Angeles, CA*

3:00 pm

### SUMMIT ADJOURNMENT