

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 15 • All times are EDT

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)

10:45 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

11:15 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

11:45 am 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

12:15 pm Luncheon Break

1:00 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

1:30 pm



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

Don Langer, Chief Executive Officer, UHC Community Plan of Texas and Oklahoma, Houston, TX



Rajiv Parikh, MD, Family Medicine Physician, Arizona Network Provider, Tempe, AZ



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

2:15 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

2:45 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

3:15 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

3:45 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: agilon 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: A Fireside Chat on 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

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 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

The Role of Primary Care-Centric ACOs in Achieving Shared Savings



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 (Moderator)

4:45 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 andVP 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

All times are EST

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: A Fireside Chat on Retail Health at CVS Health

11:40 am Introductions, Discussion and Q&A

Creagh Milford, DO, MPH (Invited), President, Retail Health at CVS Health; Former Cofounder & Chief Executive Officer, HighCare Health, Denver, CO

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

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



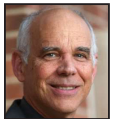
Adam Boehler, *Founder and Managing Director, Rubicon Founders; Former CEO, International Development Finance Corp; Former Senior Advisor, Value-Based Transformation, HHS; Former Deputy Administrator CMS & Director, CMMI, Nashville, TN*



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, FFAFP, *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*

2:45 pm

SUMMIT ADJOURNMENT