

# HPIR Pulse

Insights from the  
Health Plan  
Innovation Roundtable

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SPRING 2020 Sessions



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# HPIR Overview



**ABOUT HPIR** The Health Plan Innovation Roundtable (HPIR) is a collaborative group of regional health plans and an innovation accelerator. Leveraging observations and learning from the Employer Health Innovation Roundtable (EHIR), and the strategic insights of its investment banking and principal investing partners at TripleTree and TT Capital Partners, HPIR creates a catalyst to streamline innovation efforts into a sustainable and proactive process. A hallmark of HPIR is the ability to identify and prioritize emerging solutions and companies that advance the strategic priorities of its health plan members. HPIR is laser focused on innovation, with a mission to drive impact through the adoption of transformative healthcare solutions.

## MEMBER VALUE

- » Intimate and collaborative forum to network and share challenges/ideas with a nimble group of progressive peers
- » Leverage the HPIR innovation model to streamline innovation efforts and numerous one-off vendor requests and interactions into a centralized and repeatable process
- » Opportunity to proactively address emerging trends and engage with the innovative solutions gaining the most interest from leading employers
- » Opportunity for regional health plans to differentiate their value proposition in their local markets

## MEMBER COMMITMENT: ENGAGEMENT, ACTION, SHARING

- » Exec-level decision-maker engagement in our innovation process and participation in our Spring and Fall meetings
- » Commitment to explore pilot implementations with one or more new solutions each year
- » Willingness to share results and learnings from recent implementations with the group

In this third edition of *HPIR Pulse*, we summarize the key observations, opportunities, and outcomes surfaced during the April 2020 HPIR member meetings and provide insight to help entrepreneurs and innovative companies engage with health plans in the future and consider HPIR as a resource to advance their growth agenda.

2020 certainly has been an unprecedented year for everyone, HPIR included. The impact of COVID-19 has underscored the critical need for innovative solutions in all facets of healthcare. Now more than ever, HPIR members are relying on us to accelerate the identification of high-impact solutions to address the needs exacerbated by the unique implications of COVID-19.

# HPIR Members

## Cohort 1



## Cohort 2















# SPRING 2020 HIGHLIGHTS

# Health Plan Priorities

HPIR health plan members are focused on a number of important topics that support their respective strategic priorities. Common macro themes focus on the healthcare consumer, enable new approaches to care delivery and address a more holistic approach to healthcare.

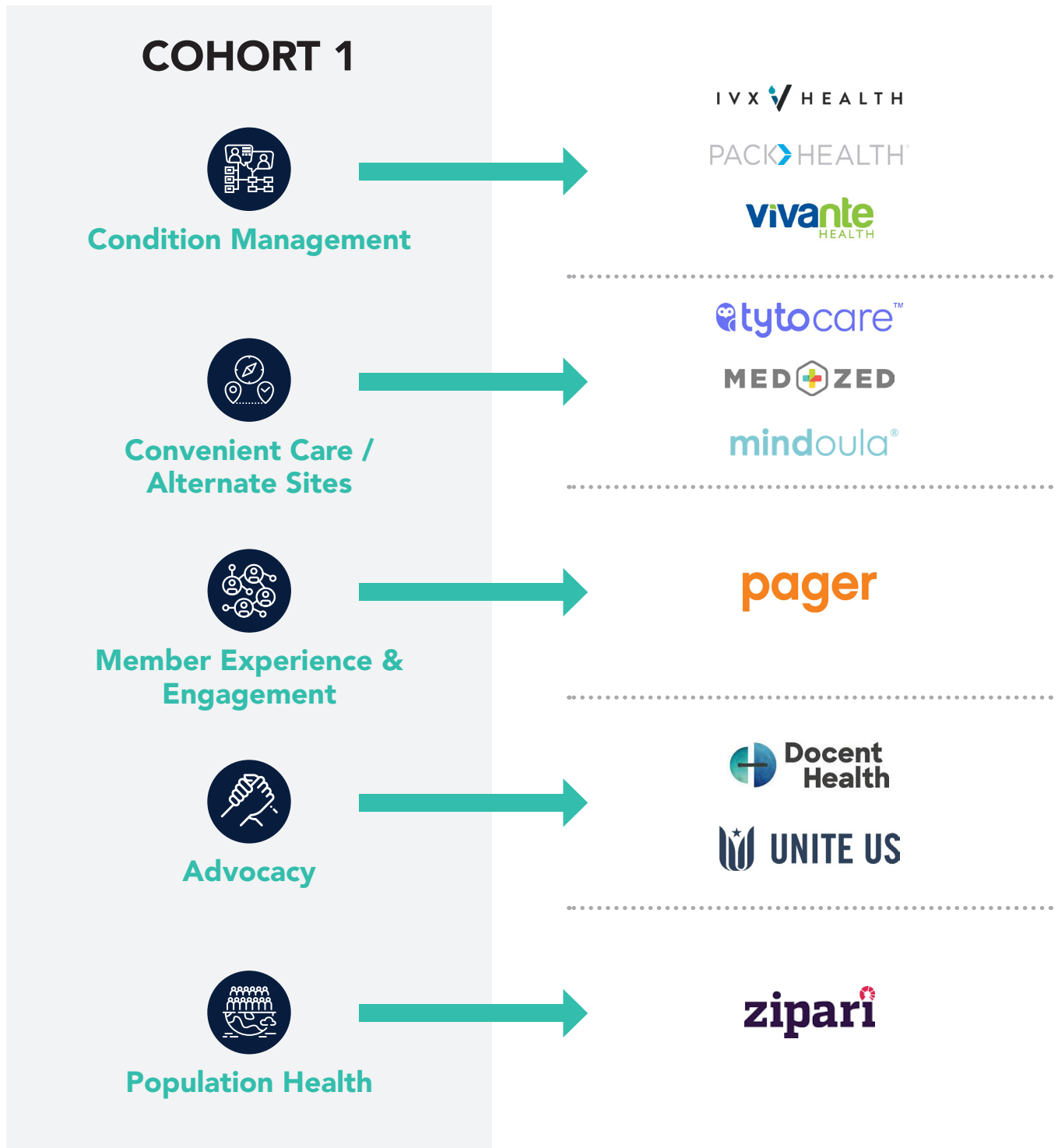
More targeted focus areas are established by HPIR members in advance of each bi-annual HPIR session and are used to identify the innovative companies invited to present to HPIR members at each meeting. The Spring 2020 priorities helped determine the fifteen companies (noted on page 5) that were invited to present at the April 2020 HPIR sessions.

COHORT 1	COHORT 2
 <b>Condition Management*</b>	 <b>Condition Management*</b>
 <b>Convenient Care / Alt. Sites*</b>	 <b>Convenient Care / Alt. Sites*</b>
 <b>Member Experience &amp; Engagement*</b>	 <b>Member Experience &amp; Engagement*</b>
 <b>Advocacy</b>	 <b>Mental Health</b>
 <b>Population Health</b>	 <b>Risk Adjustment</b>

\* indicates overlap between cohorts

Although COVID-19 has had a dramatic impact in all areas of healthcare in the first half of 2020, direct impact to member priorities for the 2020 Spring cycle may not reflect this fact. We would expect these impacts to manifest in our Fall 2020 cycle. However, many of the priorities identified above have become even more critical as our health plan members seek to manage both the near and long-term impacts of COVID-19 (i.e. mental health, SDOH, complex patient management, care model innovation, and member engagement).

# Summary of Cohort 1 Innovator Companies by Priority



# Innovators that Presented at Cohort 1 Meeting



Mindoula uses an adaptive data science approach to (a) risk stratify and target populations that programmatic interventions can help, (b) outreach and enroll targeted members in the appropriate program, and (c) deliver tech-enabled, synchronous 24/7 care extension and support that builds sustained engaged relationships.



Innovative experience algorithms combine curated member profiles, proprietary workflow pathways, modern communication integrations, and white-labeled human services to deepen member engagement.



Unite Us interconnects providers around members and integrates the social determinants of health into care delivery, tracks members across independent agencies, providing private and non-profit agencies with the ability to seamlessly integrate care delivery to improve overall health, increase efficiency and lower costs.



Zipari's CX Platform is the only suite of tools built around the member with the capabilities to serve them via self-service or facilitated-service channels, offering visibility and transparency into those touchpoints, and promoting personalized recommendations along the way.



TytoCare improves the quality and trust of telehealth visits by offering the first all-in-one home diagnostic kit that allows users to perform medical examinations and share those exam readings with existing telemedicine providers.



MedZed provides a new physician house call model that focuses on patient engagement, social determinants of health, and complex care for high-risk patients - all delivered through an intelligent, member-centric telehealth platform.



Pager is a tech-enabled virtual care platform that provides a personalized, connected care experience, like having a "doctor in the family". By connecting members with care navigators, doctors, and nurses, across a care team, Pager transforms the way people access, navigate and coordinate care.



With its national network of ambulatory infusion centers, IVX Health delivers an experience-first model for both patients and referring providers. With over 15,000 encounters in 2019, IVX Health helps payers expand site of care access, improve member experience, ensure better outcomes, and ultimately lower costs.



Addressing 25+ chronic conditions on one platform, Pack Health addresses comorbidities, solves for social determinants, and navigates members to the care they need. Pack Health's backend technology stack supports in-house Health Advisors that deliver a simple, intuitive experience.

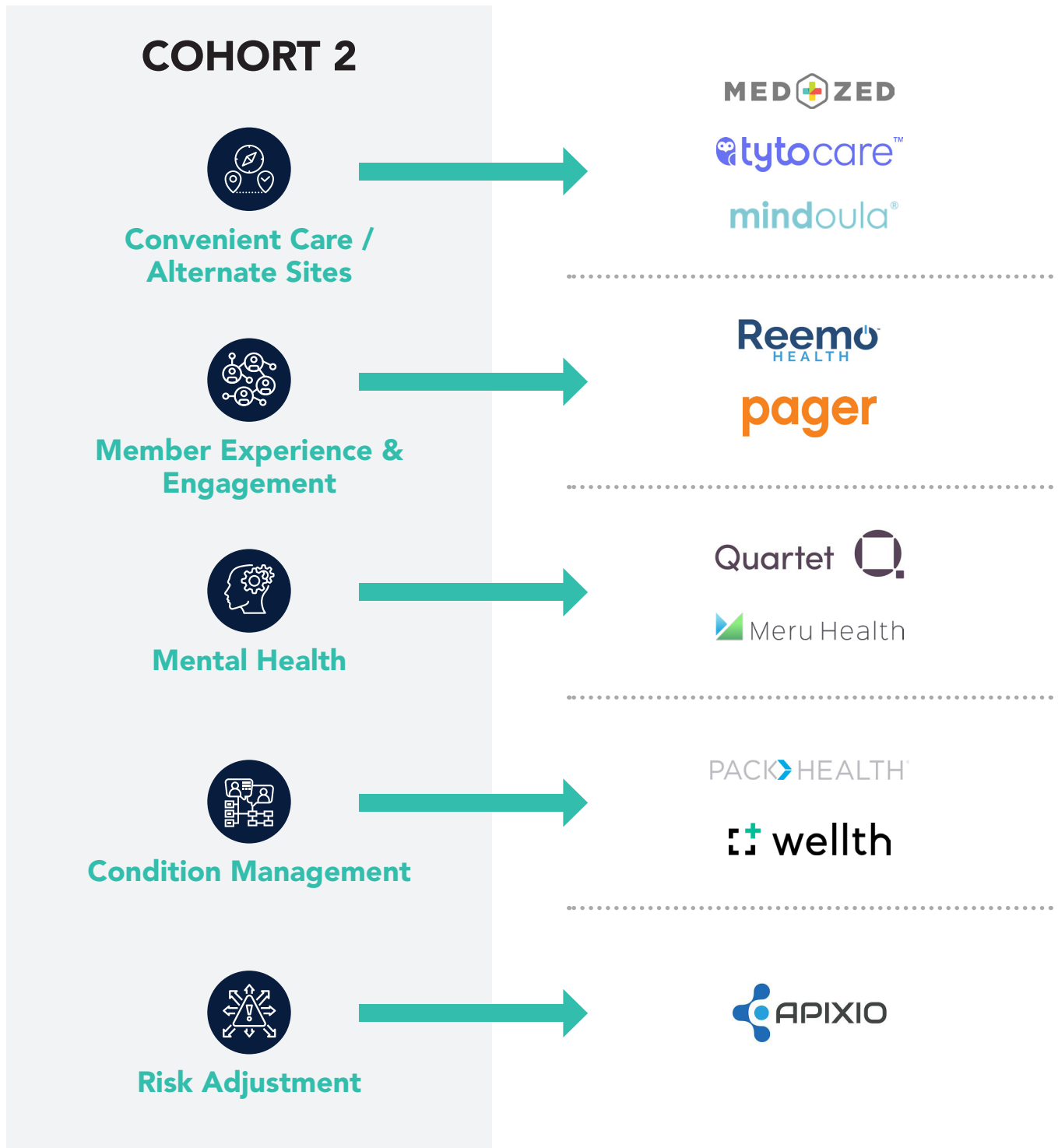


Vivante Health simplifies and personalizes the way people live with chronic inflammatory conditions, beginning with the gut. GIThrive is the only multidisciplinary digital program for GI health and disease. The platform combines digital medicine, biometric devices, therapeutic nutrition, medication optimization and predictive analytics.





# Summary of Cohort 2 Innovator Companies by Priority



# Innovators that Presented at Cohort 2 Meeting



Mindoula uses an adaptive data science approach to (a) risk stratify and target populations that programmatic interventions can help, (b) outreach and enroll targeted members in the appropriate program, and (c) deliver tech-enabled, synchronous 24/7 care extension and support that builds sustained engaged relationships.



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TytoCare improves the quality and trust of telehealth visits by offering the first all-in-one home diagnostic kit that allows users to perform medical examinations and share those exam readings with existing telemedicine providers.



Reemo provides on-demand concierge support, seamlessly connects the user with resources and services, collects remote health data, captures self-reported measures, and delivers protocol or reminders all through an intuitive, standalone smartwatch interface.



Pager is a tech-enabled virtual care platform that provides a personalized, connected care experience, like having a "doctor in the family". By connecting members with care navigators, doctors, and nurses, across a care team, Pager transforms the way people access, navigate and coordinate care.



Quartet's tech-enabled, HIPAA-compliant, integrated mental health platform connects health plan's members to the most medically appropriate mental health provider / resources at scale, which reduces avoidable IP/ER utilization and improves health outcomes.



Meru's 12-week remote solution is powered by a combination of tech-enabled digital content, a network of high-quality behavioral health providers, a smartphone-based treatment interface, and a Biofeedback wearable device. Meru tracks and reports on clinical effectiveness.



Addressing 25+ chronic conditions on one platform, Pack Health addresses comorbidities, solves for social determinants, and navigates members to the care they need. Pack Health's backend technology stack supports in-house Health Advisors that deliver a simple, intuitive experience.



Wellth guarantees long-lasting behavior change in your least adherent populations. Their platform improves healthcare using mobile technology, artificial intelligence, and behavioral economics to increase adherence among patients with chronic diseases.



Apixio's proven AI technology allows reviewers to code and audit charts more efficiently, accurately, and affording greater scalability than manual review workflows or basic Natural Language Processing (NLP) solutions.

# Innovator Case Study



A cornerstone of HPIR membership includes a commitment by health plan members to implement new pilots and develop a feedback loop that helps both innovative companies and other HPIR members learn from new commercial partnerships. Tim Lightner, Vice President of Product Strategy & Portfolio Development, shares insights from Highmark's recent collaboration with Contessa.

## **HPIR: Why was this a focus area for Highmark?**

**Tim:** Home as the future site of care is a core component of our Healing at Home and Virtual Health Strategies, and we are committed to creating a value-based experience that enables patients and families to heal in the home as a priority for Highmark Health. We understand that the majority of condition management already occurs outside of the hospital and physician office setting, and we believed that was extensible to low acuity, historically "inpatient" episodes. Caring for patients in a home setting has been shown to improve patient care and reduce healthcare spending. Additionally, at-home visits allow our clinical teams to treat patients where they are most comfortable and assess their living situations, thus addressing potential social determinants barriers that contribute to suboptimal care plan adherence and health outcomes.

## **HPIR: What specific opportunities and/or challenges were you seeking to address?**

**Tim:** We are laser focused on achieving the quadruple aim — to transform healthcare through proactively improving clinical outcomes and driving better patient and clinician experiences, thereby lowering total cost of care. The Home Recovery Care capability we built with our JV Partner, Contessa Health, offers a clinically effective, differentiated option to our patients/members who require inpatient level care, but would prefer to receive in the comfort of their own environment.

## **HPIR: What is the launch plan and timing?**

**Tim:** We launched "Allegheny Health Network Home Recovery Care (HRC)" (how our JV is branded in Western Pennsylvania) in November 2019, for a limited commercial membership, including Highmark & Allegheny Health Network employees. HRC was expanded to Highmark Medicare Advantage members in January 2020. Currently, HRC is operational in three hospitals within the Allegheny Health Network and we have plans to scale throughout the network and into additional markets, beyond Western PA in 2021.

# Community Health Panel

Over the last few years, it seems you couldn't have a conversation in healthcare without hearing the words "Social Determinants of Health" or the acronym SDOH. As payers, providers, and employers started focusing on the overall health and well-being of the people they serve, collaborating with community-based organizations (CBOs) became essential. Then came COVID-19, which amplified the important role of CBOs as people wrestled with anxiety, financial stress, food disparity, substance abuse, and other aspects of living a healthy lifestyle. SDOH now matters more than ever! On this panel, industry leaders discussed the important role of effective community strategies, the realities of SDOH in the era of COVID-19, and the best practices to developing social determinants of health strategies that work.

## PANELISTS



**Maya Mcdoom-Echebiri PhD MPH**

CareFirst  
Evaluation Specialist



**Abner Mason**

ConsejoSano  
Founder & CEO



**Elizabeth Colyer**

Sharecare  
SVP Community Wellbeing

## MODERATOR



**Michael Carroll**

TripleTree  
Chief Marketing Officer

## KEY TAKEAWAYS

- ◇ Success at the local level requires culturally relevant partnerships with community-based organizations (CBOs).
- ◇ COVID-19 is not the great equalizer when it comes to effective community health — it is the great revealer that continues to expose the health disparities that need to be addressed in social determinants of health strategies.
- ◇ COVID-19 was an innovation kickstart — accelerating the pace of tech-enabled and digital solutions.
- ◇ Effective community health strategies require actionable data — data about the member, data that connects CBOs, local data that facilitates collaboration.

# The Future of Platforms

## (in a COVID-19 World)

The speed of change has never been faster. If we've learned anything in the last 90 days it's that agility and flexibility are paramount. The needs of health consumers have certainly evolved and the capabilities needed to meet those must rapidly evolve as well. The need for consolidated, high-impact, multi-capability platforms has never been higher. The required table-stakes of a platform remain simple integration, seamless experience, member engagement, and clinical validation. What's new is the emphasis on extensibility — health plans are increasingly frustrated by having to try to integrate multiple point solutions themselves. Omada's recent acquisition of Physera is an example of an innovator building capabilities across multiple disease states, as are Livongo's numerous recent acquisitions, including myStrength last year.

### PANELISTS



**Inder Singh**

Kinsa  
Founder & CEO



**Renya Spak**

Grand Rounds  
VP Strategic Alliances



**Michael Sturmer**

Livongo  
SVP Health Services

### MODERATOR



**Brad Fluegel**

HPIR  
Brad Fluegel

### KEY TAKEAWAYS

- ◇ Both Livongo and Grand Rounds expanded beyond their original area of focus (i.e., diabetes management and expert medical opinion, respectively) to build more capabilities to meet a broader set of client needs, while still allowing customers to unbundle their services. They acknowledge the need to be the platform for a customer, as well as be part of someone else's platform.
- ◇ While differing somewhat in what defines a platform, all three agreed on some common elements, such as communication, the ability to empower whole person care, personalization, and navigation.

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# The Future of Platforms

## (in a COVID-19 World)

### KEY TAKEAWAYS CONTINUED

- ◇ All three organizations have seen dramatic changes and growth as a result of COVID-19.
- ◇ Grand Rounds - accelerated telemedicine launch due to COVID-19 with unique access to specialists. It also launched an Urgent Response program for COVID-19 support
  - » Kinsa is seeing seeing 40x surge in demand due to COVID-19, and rolling out at scale with 5 states.
  - » Livongo has seen unprecedented growth and a corresponding tripling of its stock price, and increased utilization across its platform.
  - » Kinsa's unique approach to illness tracking gives it the ability to predict what will happen weeks out to help with surge planning and care management, especially with vulnerable populations that are most affected by a pandemic.
- ◇ The goal of all the organizations is to go further upstream to impact health outcomes before they result large costs and poor outcomes, and to help ensure that point solutions do not fragment a total cost of care approach.
- ◇ All panelists felt that accelerated rates of telehealth and remote monitoring will continue — we are not going back to the old world.

# Insights and Observations: The Future of Virtual

COVID-19 and the resulting shelter-in-place orders of Spring 2020 was a watershed moment for the adoption of virtual care and telemedicine. Driven largely by the forced need, the rapid adoption of all virtual care delivery modalities by consumers and providers has all but proven its effectiveness, efficacy, and convenience and solidified its place in the care delivery spectrum.

## COMMENTARY



- » **Reimbursement changes drove uptake**
- » **Telemedicine is a silver lining of the pandemic — we likely won't ever go back**
- » **Accelerated 3 years of planning in a week for telemedicine**
- » **This will change care delivery and there is concern around displacement with new solutions**
- » **Tipping point for building future virtual capabilities, e.g. remote monitoring, predictive analytics, etc. This situation is accelerating decisions and forcing some experimenting**
- » **The adoption of all things virtual isn't slowing; the need to accommodate virtual capabilities is becoming critical. The primary challenge will be the combination of traditional in-person with virtual**

## HEADWINDS & OPPORTUNITIES



**Reimbursement parity**



**Continued adoption by care providers**



**Integration into or evolution of care protocol**



**Sustained adoption by consumers**

# Member Sharing

As an intimate gathering of progressive health plans, HPIR creates a unique opportunity for members to share perspectives and insights with each other. In the Spring sessions, HPIR members shared learnings about pilots and recent implementations with innovative companies met at previous HPIR meetings, while dedicating time for real-time discussion and feedback about business priorities and opportunities. These candid sessions create a powerful catalyst to advancing innovation through the adoption of innovative and new solutions.

Member Sharing topics from this spring included common themes around COVID-19 response & capabilities, SDOH, and member engagement.

## COHORT 1



**COVID-19 Response  
& Capabilities**



**Social Determinants  
of Health**  
*ConsejoSano*



**Wellness Chatbot**



**Social Determinants  
of Health**  
*Aunt Bertha*



**COVID-19 Response  
& Capabilities**



**Substance  
Use Disorder**  
*BoulderCare*

## COHORT 2



South Carolina

**Data Analytics**



CareFirst

**Social Determinants  
of Health**  
*Socially Determined*



Allina Health



**High-Touch Care  
for Seniors**



HCSC  
Health Care Service Corporation

**Diabetes  
Management**  
*Livongo*



# Traction Award Winners



**The Traction Award** is a semi-annual award (Spring / Fall) recognizing the innovator, among those selected by our members to present, with the most member interest through our match-making process.

## COHORT 1



**Zipari's** CX Platform is the only suite of tools built around the member with the capabilities to serve them via self-service or facilitated-service channels, offering visibility and transparency into those touchpoints, and promoting personalized recommendations along the way.

## COHORT 2



**Meru's** 12-week remote solution is powered by a combination of tech-enabled digital content, a network of high-quality behavioral health providers, a smartphone-based treatment interface, and a Biofeedback wearable device. Meru tracks and reports on clinical effectiveness.

**Wellth** guarantees long-lasting behavior change in your least adherent populations. Their platform improves healthcare using mobile technology, artificial intelligence, and behavioral economics to increase adherence among patients with chronic diseases.

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# The Opportunity to Collaborate and Drive Innovation

COVID-19 was naturally a topic on everyone’s mind at the Spring 2020 HPIR meetings. With the rapid pace of industry change, the stress on the healthcare delivery system and a top-of-mind focus on their members, the participating health plans discussed their near-term and long-term strategic priorities. Several important key themes emerged from the two HPIR sessions. Here we review the themes that will impact the innovation agendas for health plans going forward:



## COVID-19 is both a catalyst and a constrainer

- ◇ The bar is higher now – solutions from innovative companies need to show results
- ◇ Innovative companies must demonstrate staying power
- ◇ Tailored COVID-19 solutions are table stakes



## Thoughtful expansion of virtual health

- ◇ How does virtual health fit into the care continuum, and the relationship with the PCP, longer term?
- ◇ The long-term reimbursement strategy needs to be normalized
- ◇ Some implications are still TBD



## Platform solutions: the opportunity and the dilemma

- ◇ Innovative companies must provide quicker access to member data
- ◇ The stability of the innovative company matters
- ◇ Proven success, referenceable clients, and configurable solutions are mandatory



## Healthcare is local, now more than ever

- ◇ Power of local community-based organizations
- ◇ Creation of mini ecosystems that rally around health plan members
- ◇ Payer and provider collaboration



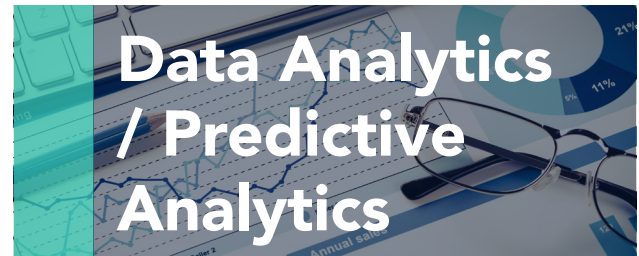
## Collaboration: the redefinition of value-based care

- ◇ The why matters: quality and outcomes
- ◇ Delayed elective surgeries amplifies the importance of value-based care
- ◇ Payer and provider collaboration, part two

# Future Areas of Focus

Healthcare is always undergoing change and that evolution requires a commitment to understanding and evaluating what's next. Coming out of the Spring 2020 HPIR sessions, our health plan members identified the following priorities to discuss at the Fall HPIR meeting.

These priorities for Fall 2020 are fairly consistent with those articulated for our Spring meetings, with no tremendous shifts. This would indicate not only a consistency of focus, but also the critical nature of these domains for our health plan members especially in light of the evolving COVID-19 situation.



# Learn More



## ABOUT HPIR

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**Are you a health plan looking to advance your innovation agenda?**

**Are you a health plan committed to exploring new solutions with innovative companies?**

**Are you a company with products and/or services making healthcare work better?**

**Are you an innovative company looking to collaborate with health plans?**

Learn more about HPIR:

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



TRIPLETREE

## ABOUT TRIPLETREE

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**TripleTree and TT Capital Partners (TTCP) are investment banking and principal investing partners whose broad horizons create opportunities that fuel growth. Our healthcare experience, reputation as a thought leader and expansive network enable us to deliver Uncommon Clarity in the changing healthcare industry.**

[www.triple-tree.com](http://www.triple-tree.com)