DARWIN RESEARCH GROUP

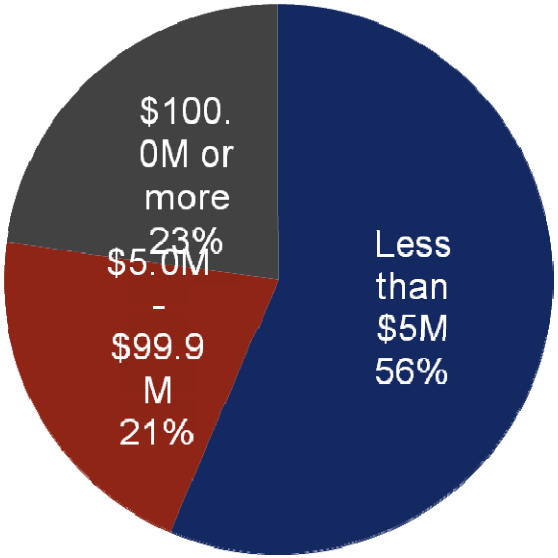
Home Care Panel Research Fall 2015

Highlights for Panel Discussion

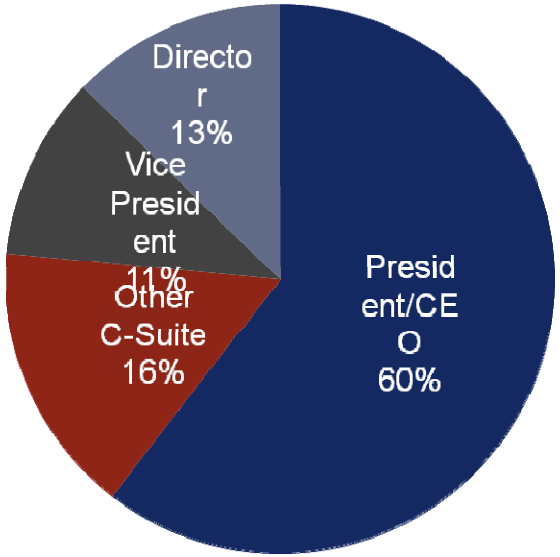
John Marchica

HOME CARE PANEL COMPOSITION

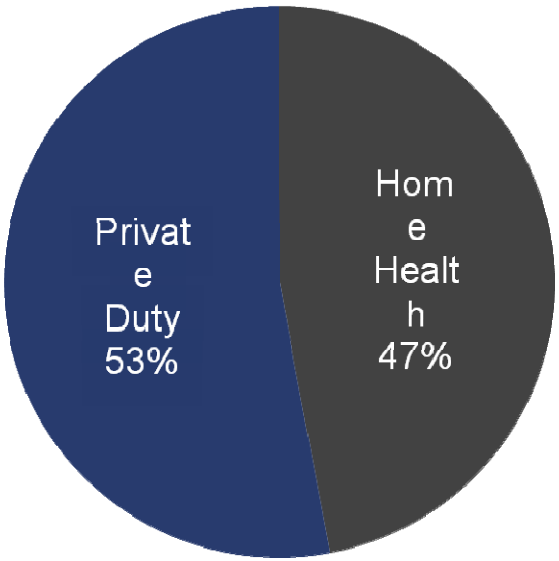
ANNUAL REVENUE



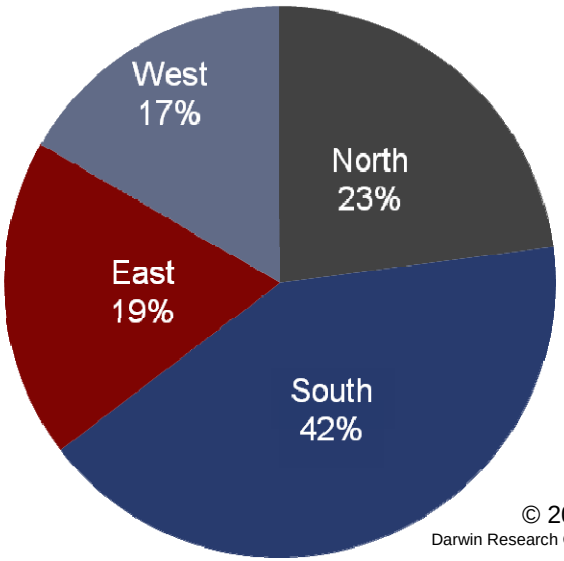
TITLE



PRIMARY BUSINESS



REGION



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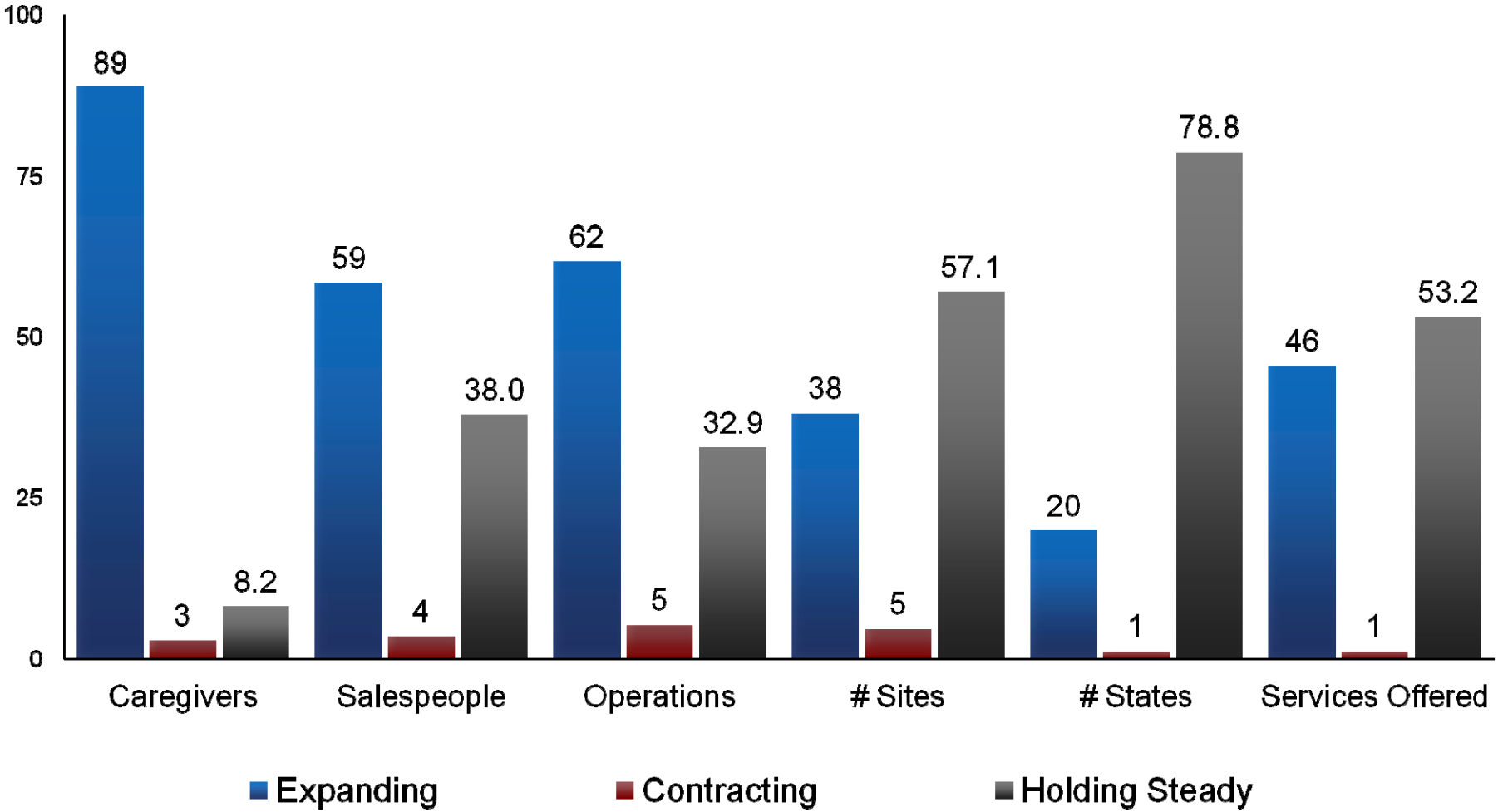
STATE OF HOME CARE: KPIs

"In the next 12 months, will your company be Expanding, Contracting, or Holding Steady for the following:"



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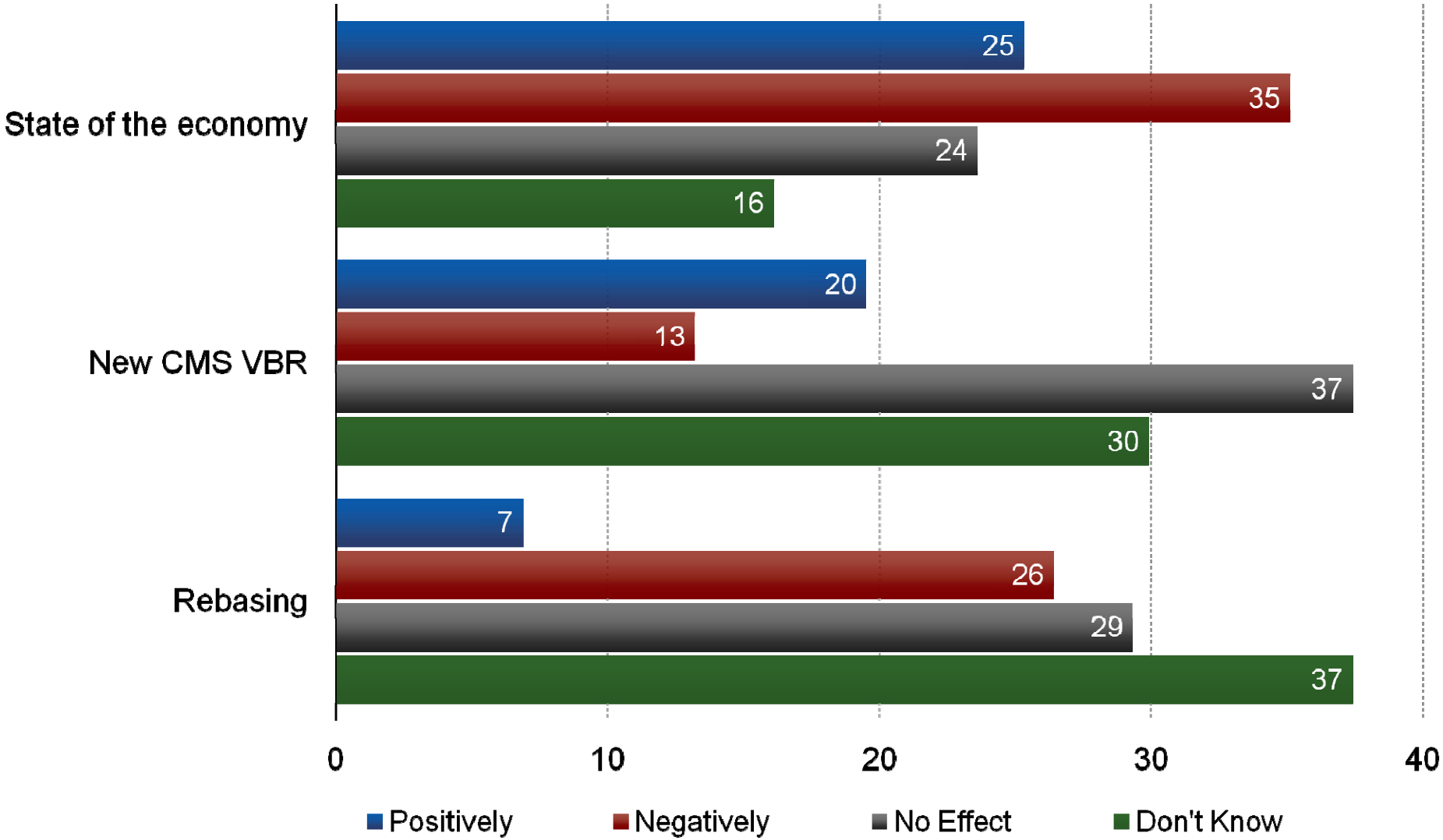
STATE OF HOME CARE

EXTERNAL FORCES

"In your opinion, how will the following factors influence your business in the next 12 months?"



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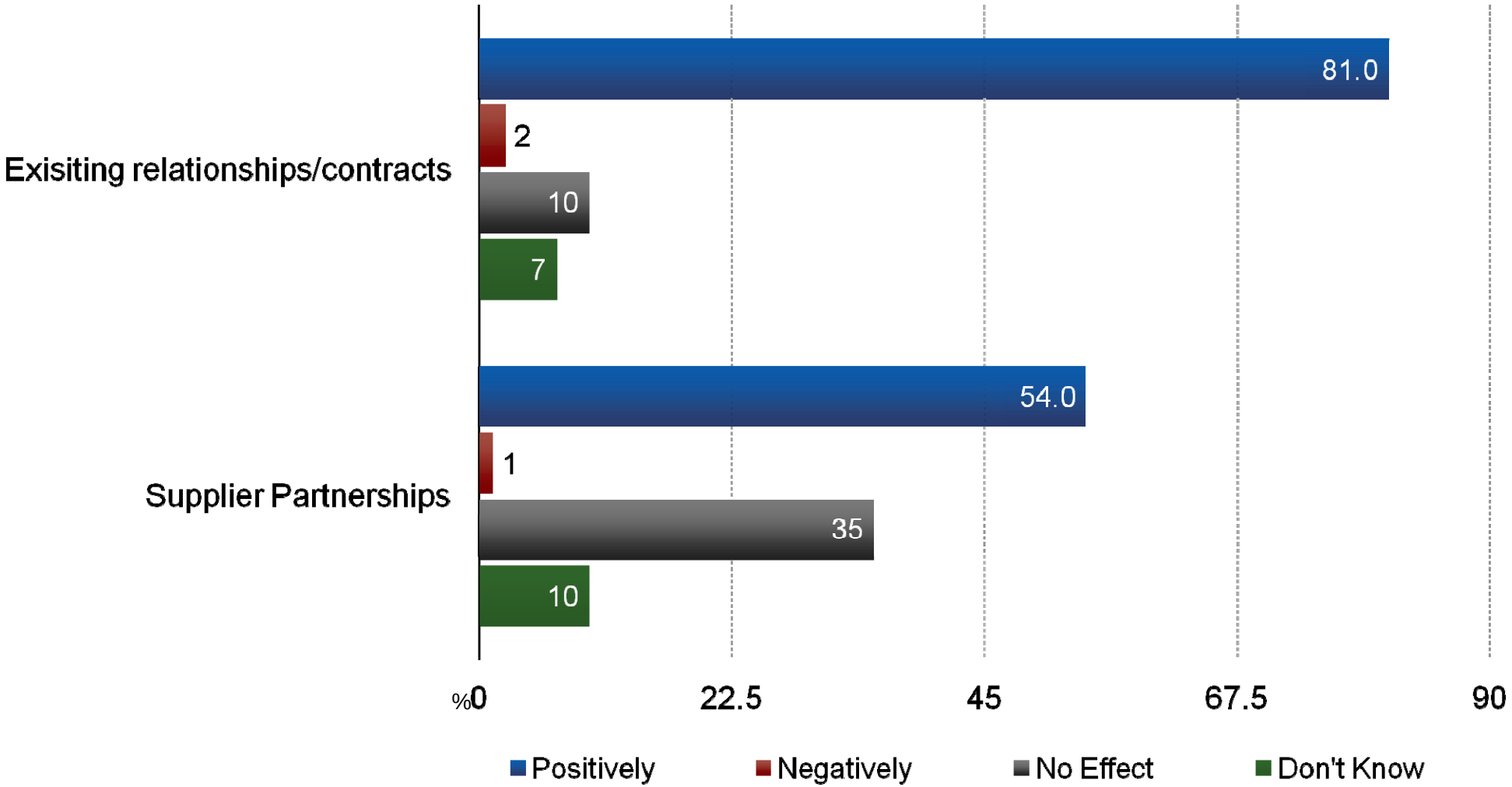
STATE OF HOME CARE

RELATIONSHIPS DRIVING CONFIDENCE

"In your opinion, how will the following factors influence your business in the next 12 months?"



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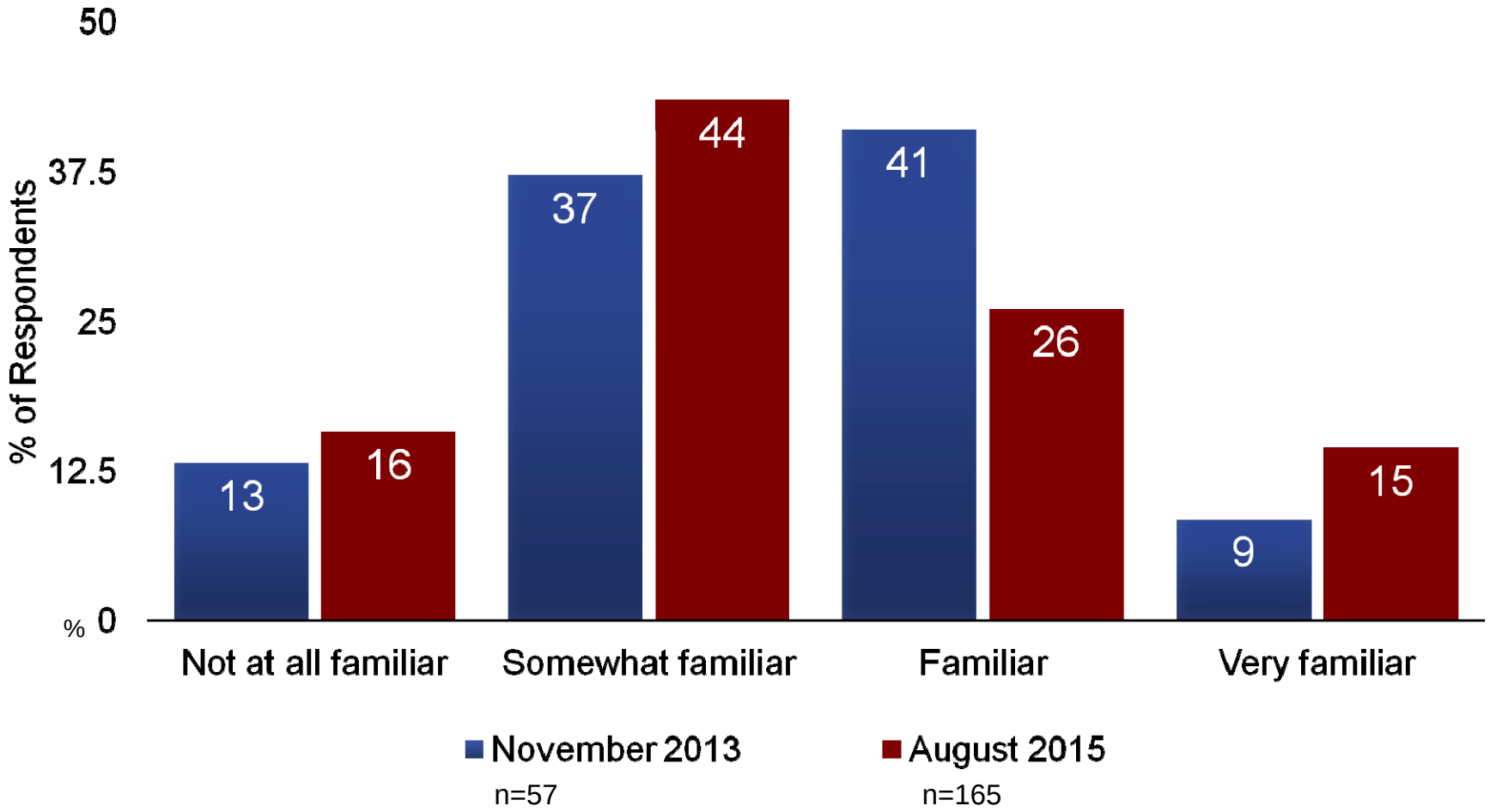
FAMILIARITY WITH ACOs

"How familiar are you with Accountable Care Organizations?"



Source: Darwin Research Group, Home Care Executive Panel, 2014, 2015

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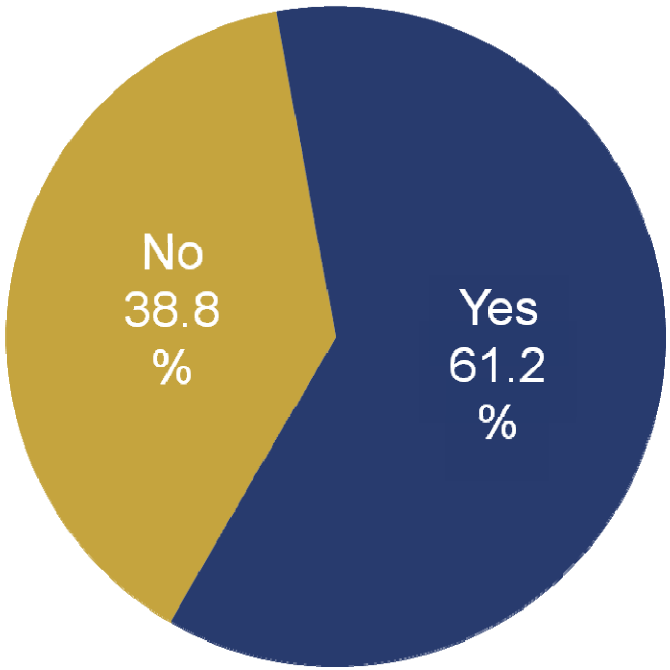
AWARENESS OF ACOs

"Are you aware of any ACOs that are in markets where you provide services?"



n=165

77% of Yes responses answered the follow-up question with a valid response.

Source: Darwin Research Group, Home Care Executive Panel, Fall 2015

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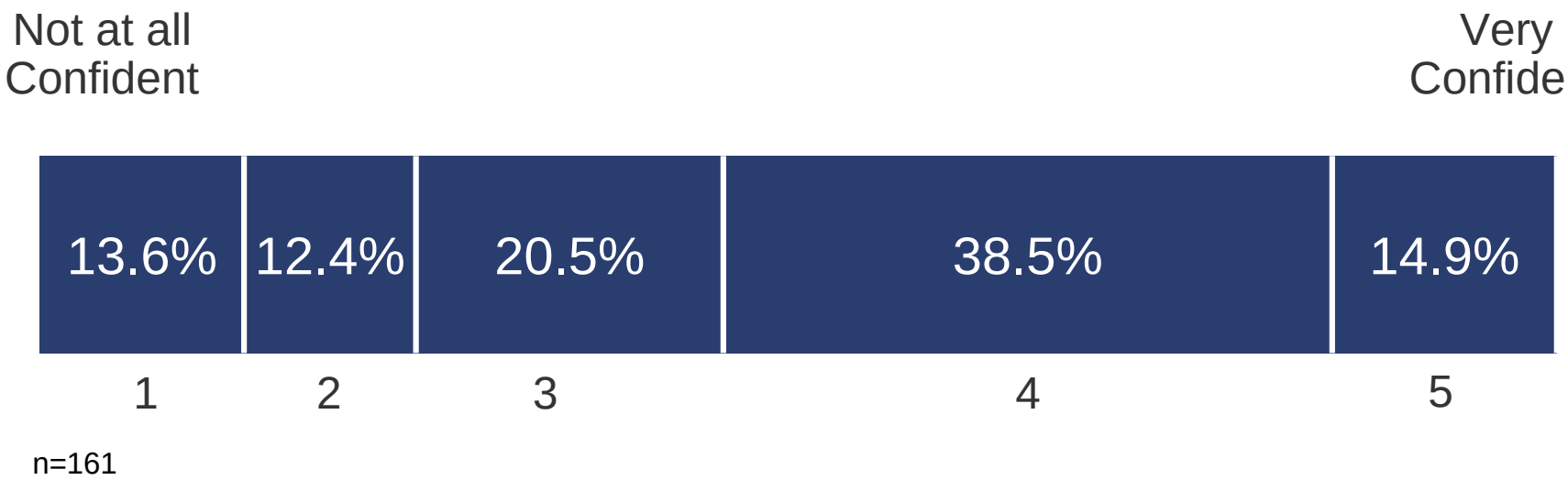
CONTRACTING WITH ACOs

If you were presented with an opportunity to enter into a service or referral agreement with an ACO, how confident are you in your ability to do so profitably?"



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VERY CONFIDENT

18% Home Health (mean=3.3)
14% Private Duty (mean=3.3)

Source: Darwin Research Group, Home Care Executive Panel, Fall 2015

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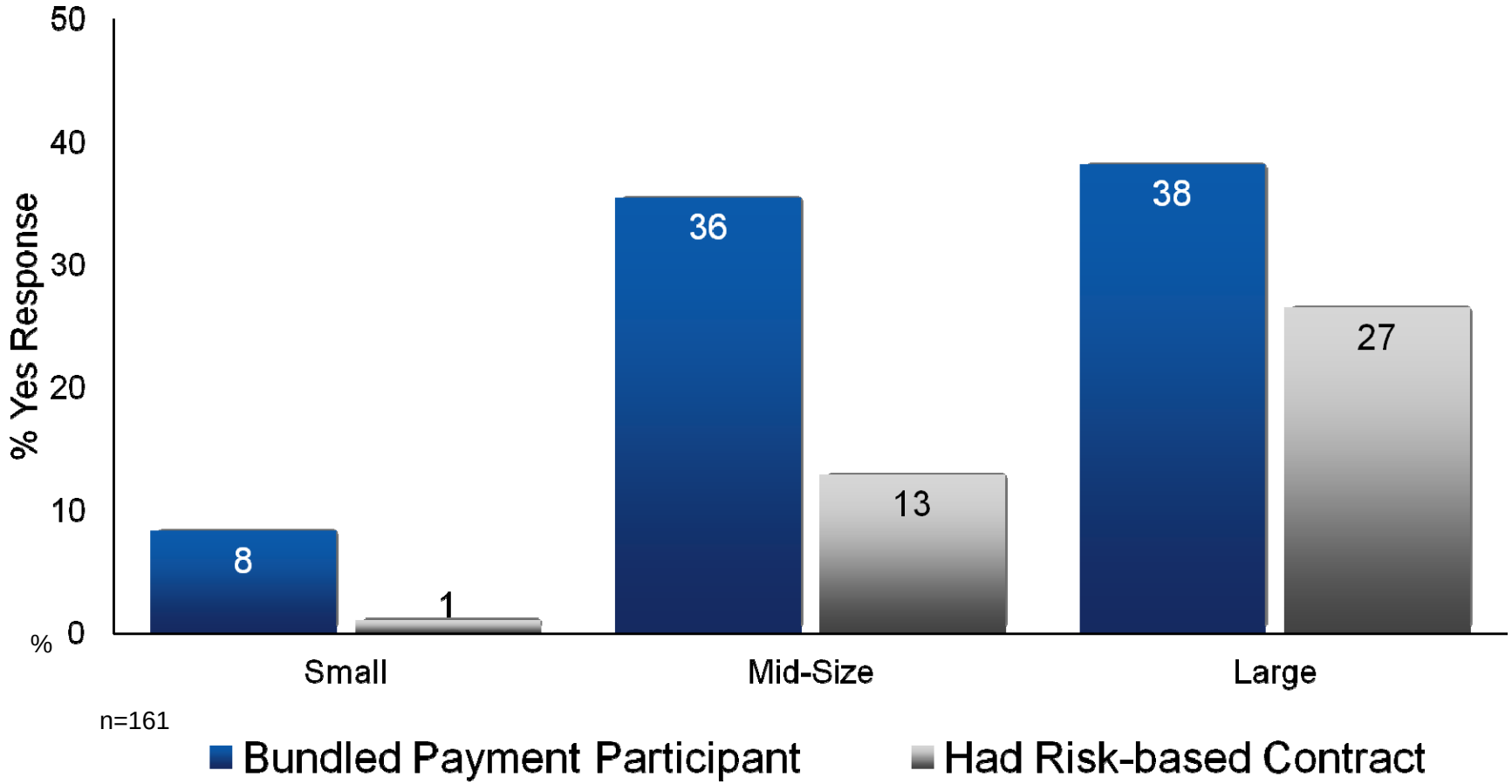
EXPERIENCE WITH RISK
by Company Size



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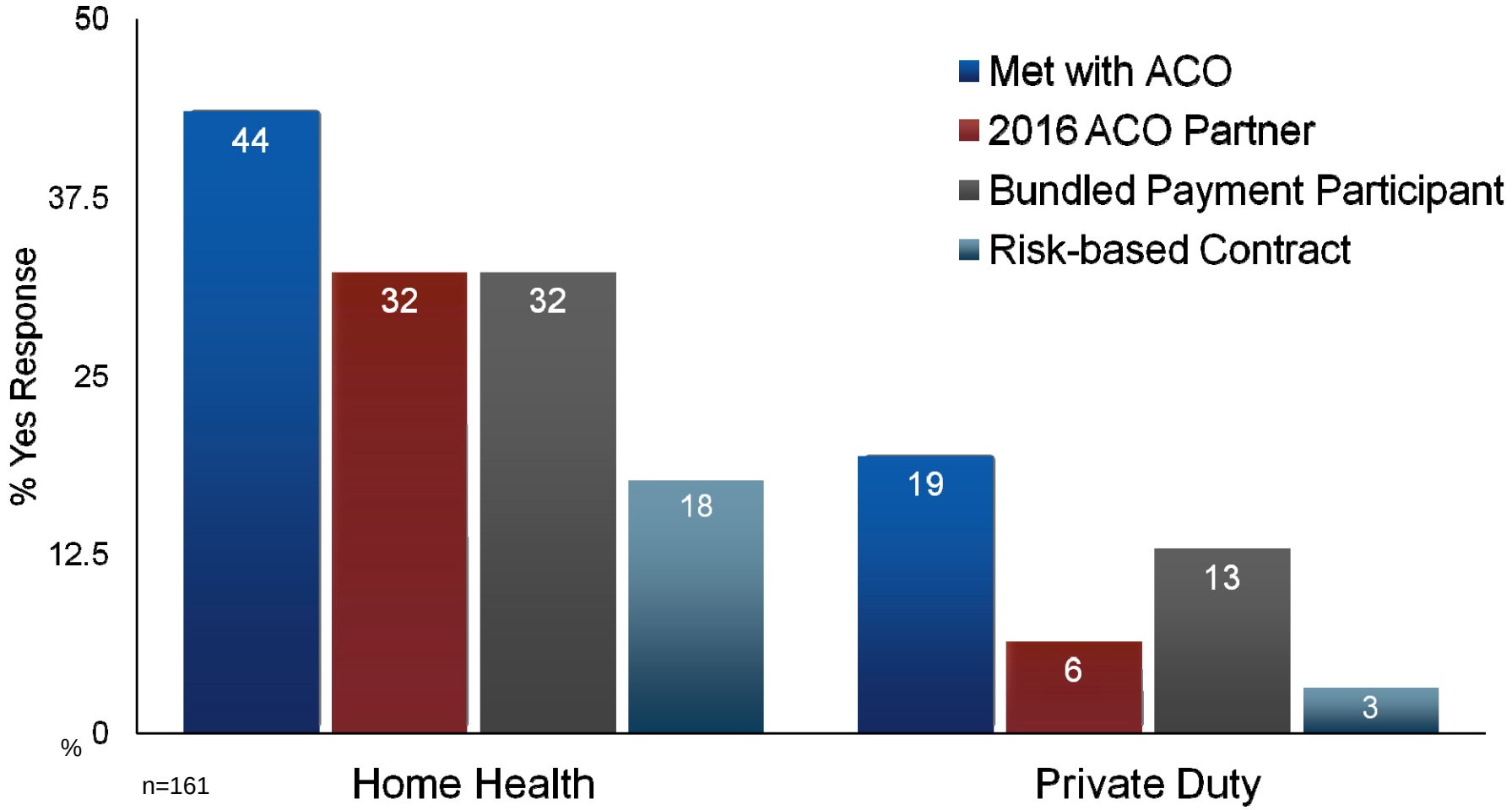
EXPERIENCE WITH ACOs

Home Health vs. Private Duty



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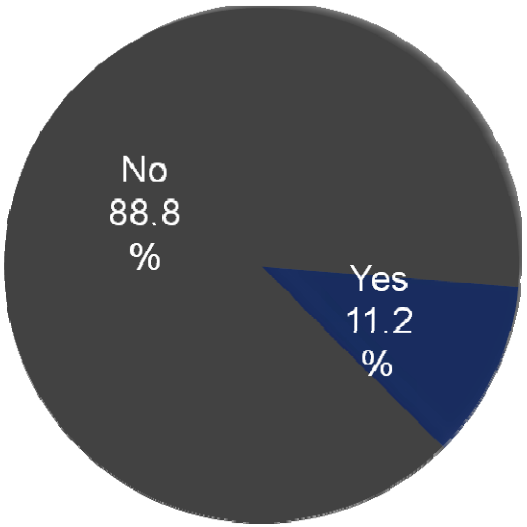
RISK-SHARING WITH ACOs

"Have you participated in a **risk-sharing** agreement?
(If yes) Financially speaking, what was the effect on your business?"

Had Risk-Sharing Contract



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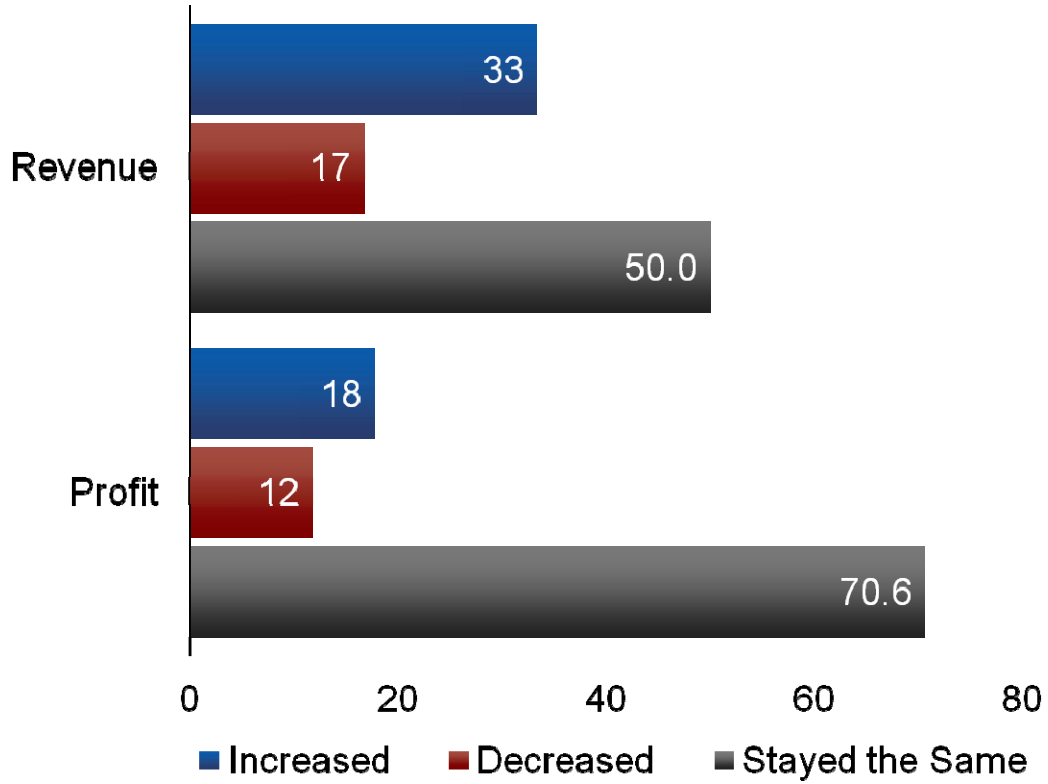
Effect on Revenues and Profit



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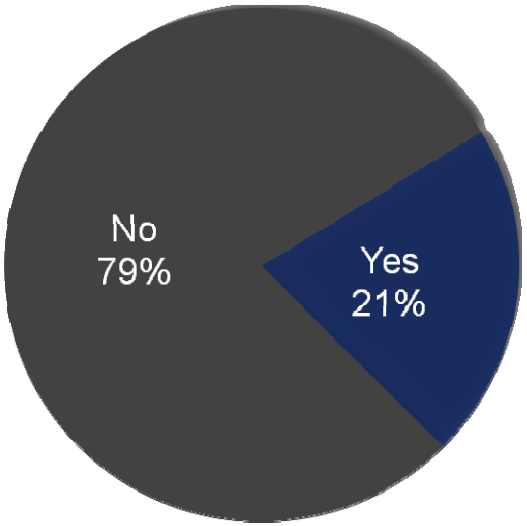
BUNDLED PAYMENTS

Have you participated in a **bundled payments** agreement?
(If yes) Financially speaking, what was the effect on your business?"

Bundled Payment Participation



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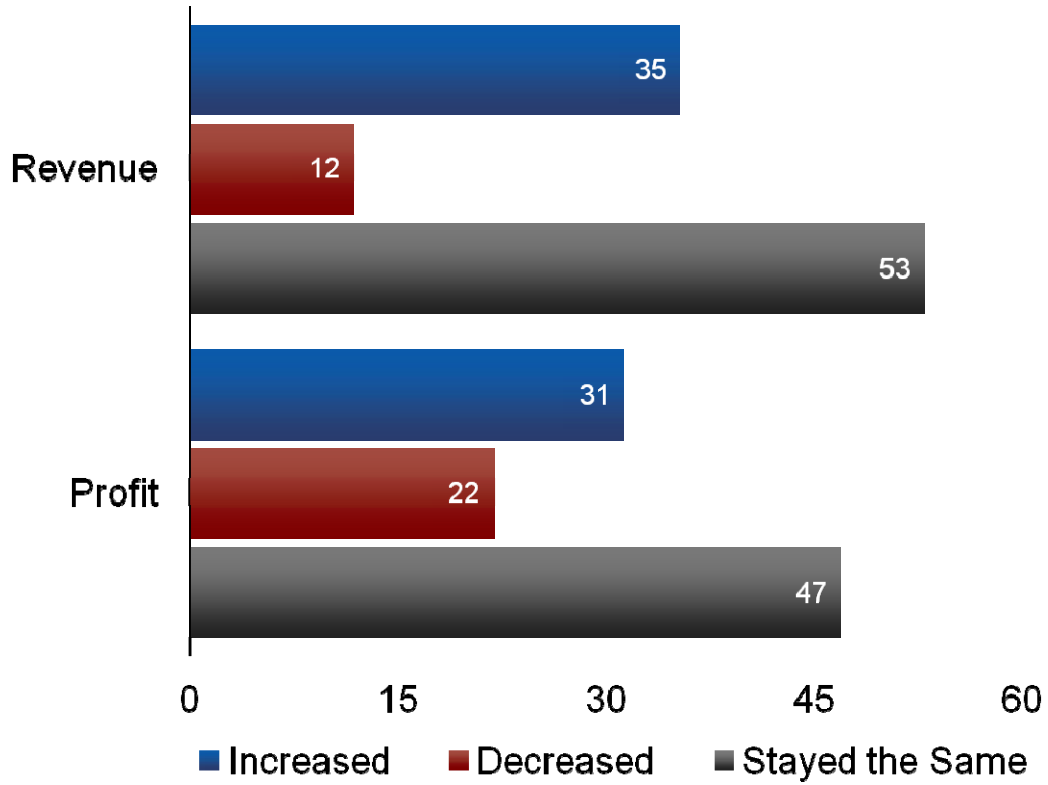
Effect on Revenues and Profit



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KEY TAKEAWAYS

- ACO familiarity & awareness should be higher by now
- Only a quarter to a third of home care companies engaged in any way with ACOs
- Lack of confidence in having a profitable relationship, despite generally positive experiences
- Larger companies more experienced with value-based agreements
- Home Health is ahead of Private Duty: more meetings, more participation, more bundled payment experience, more risk-based contracting experience

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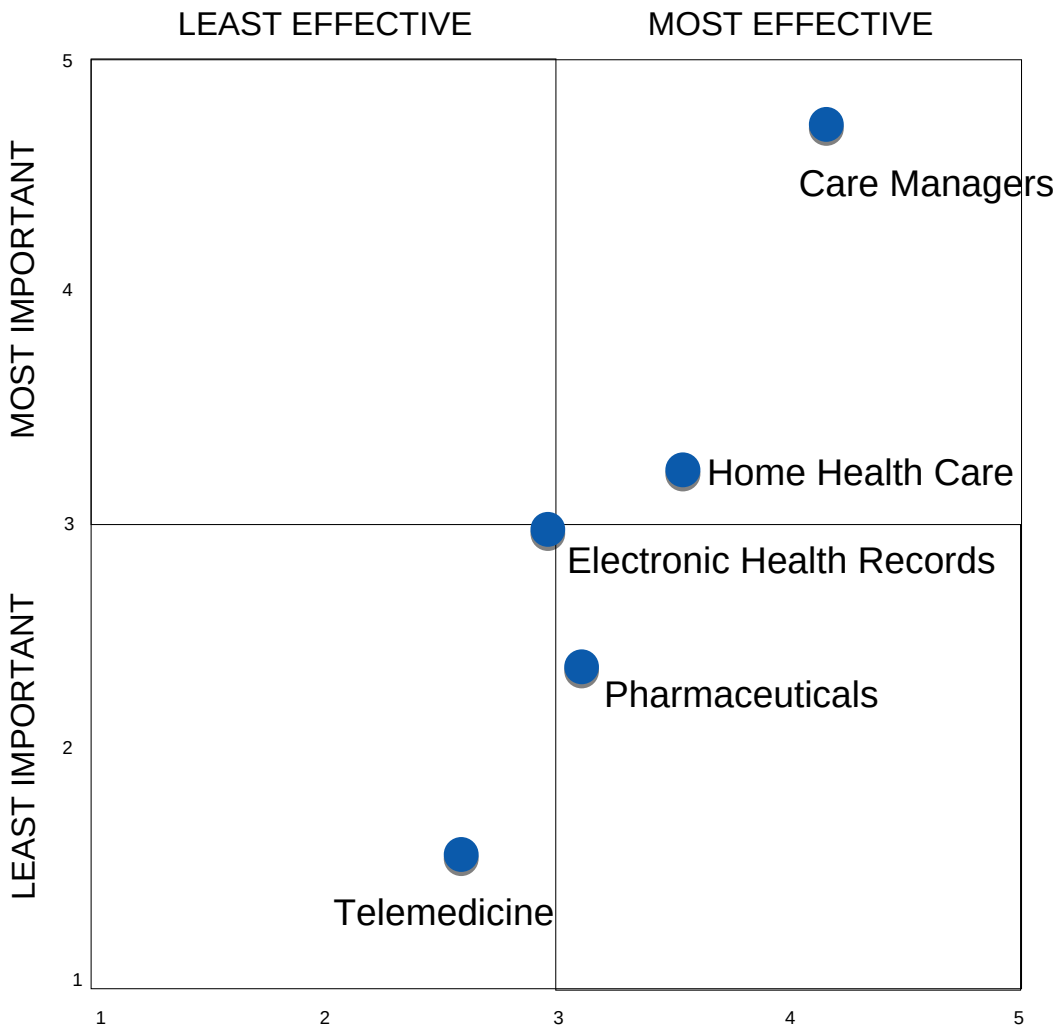
One more thing…

REDUCING READMISSION RATES

ACO EXECUTIVE PANEL, 2014



Source: Darwin Research Group, ACO Executive Panel, Fall 2014 survey

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