

# HCA

## Employer and Consumer Health Services

The National Retail Clinic Summit  
*March 1, 2010*

***Brian Jones***



# Agenda

- HCA's Overview
- What Employers and Consumers Want
- Employer and Consumer Health Services
- Contact Information
- Q&A/Closing Comments

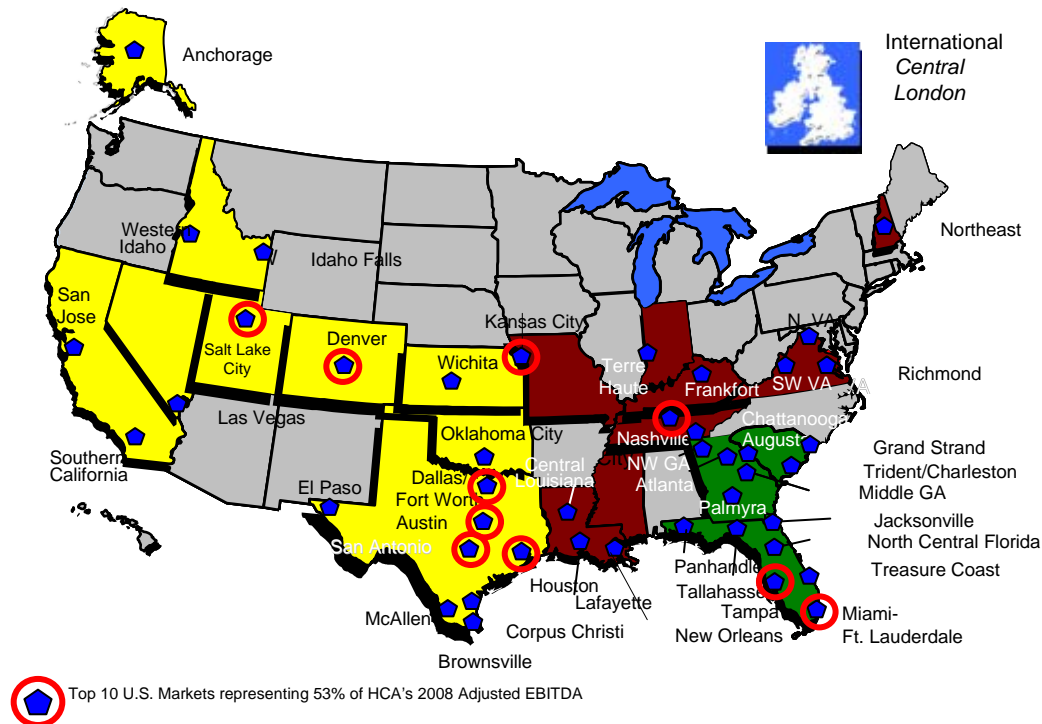
# America's Largest Private Health System

## A stable portfolio of facilities in 20 states and England<sup>2</sup>:

- 163 hospitals with 38,793 beds
- 112 freestanding surgery centers
- 48 oncology centers
- 145 freestanding imaging centers
- 14 freestanding ERs, 1 to open 4<sup>th</sup> Qtr
- 8 onsite employer clinics

## Majority of facilities located in large urban areas and operated as part of full service networks:

- Operates hospitals in 15 of the 25 fastest growing MSAs of 500,000 population or more<sup>3</sup>
- 22 markets with 20% share or greater; 11 markets with 30% share or greater
- Provides nearly 5% of all U.S. hospital services



Work force of approximately 190,000 U.S. employees, 1,200 employed physicians, and 35,000 affiliated physicians

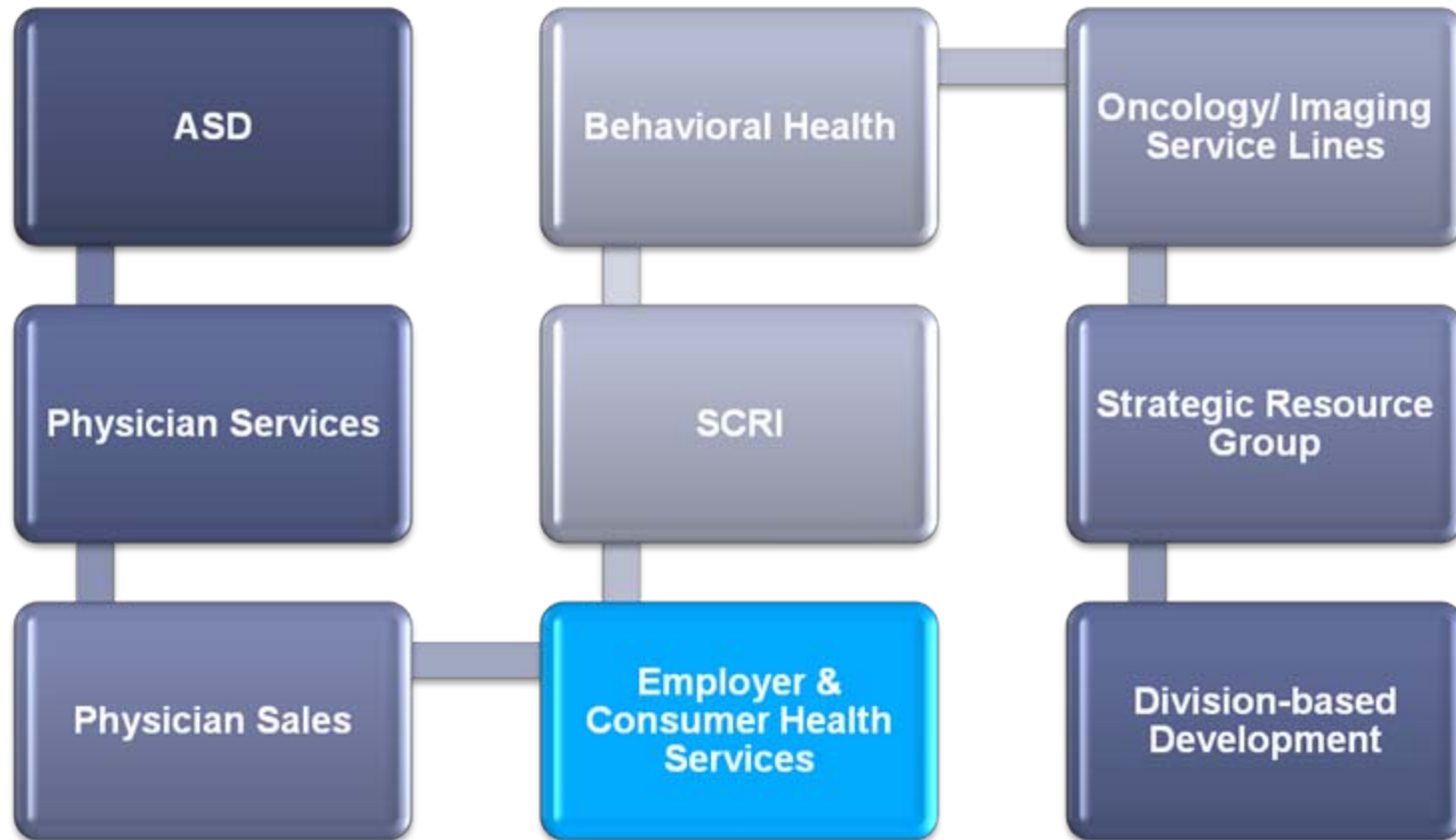
<sup>1</sup> Modern Healthcare 2008 Hospital Systems Survey. Based on revenue size.

<sup>2</sup> As of June 30, 2009. Total hospitals includes 8 nonconsolidating hospitals and 9 nonconsolidating surgery centers managed under joint ventures. Oncology centers including 9 freestanding and 39 provider based. Imaging centers include 52 free-standing and 93 provider-based centers.

<sup>3</sup> U.S. Census Bureau. Compound annual growth rates for 2000-2008 population estimates.

## The Outpatient Services Group

Employer & Consumer Health Services is one of several OSG entities supporting HCA's growth agenda.

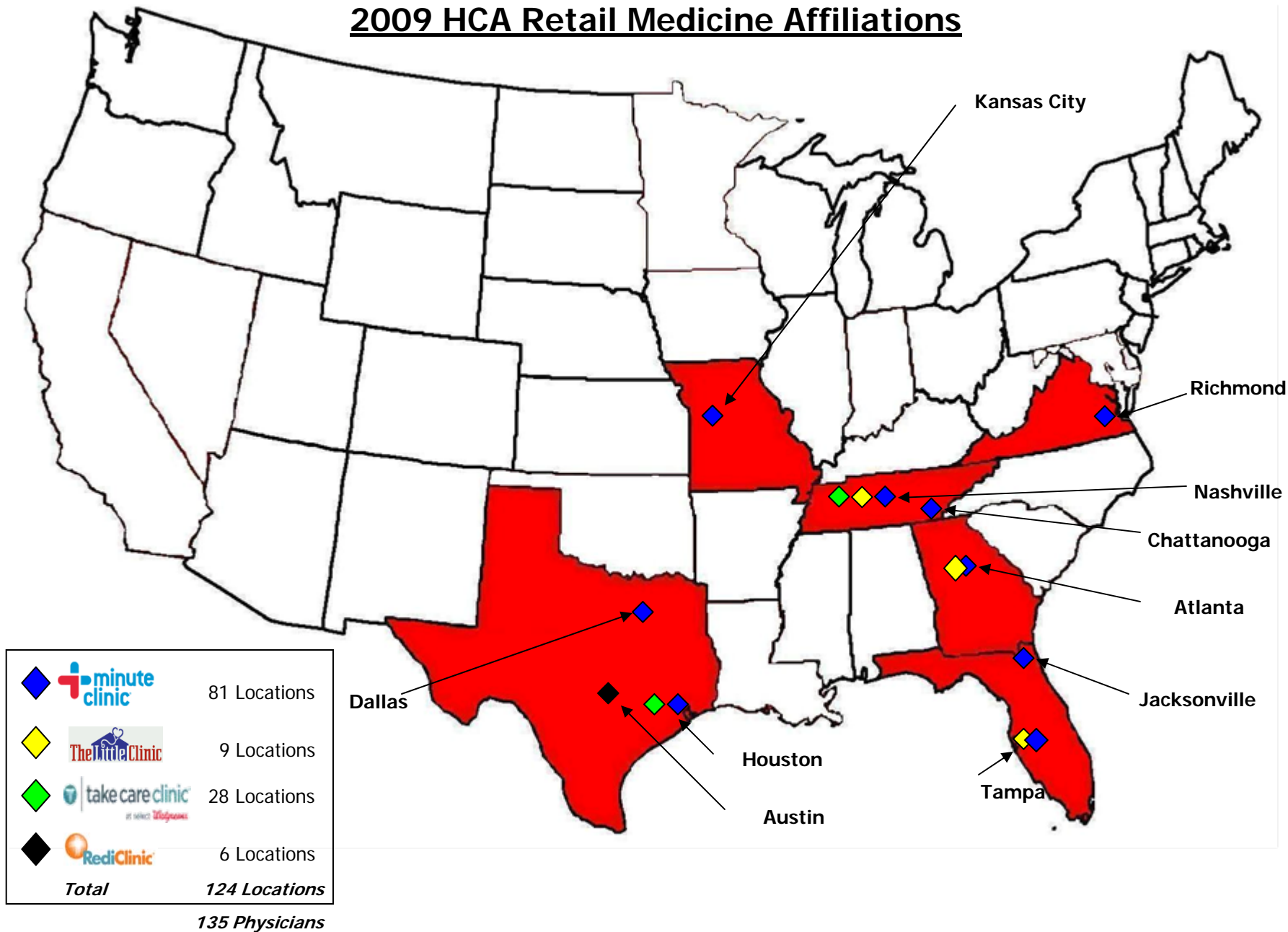


# Employer and Consumer Health Services

In 2010 HCA combined existing initiatives under one umbrella.



## 2009 HCA Retail Medicine Affiliations

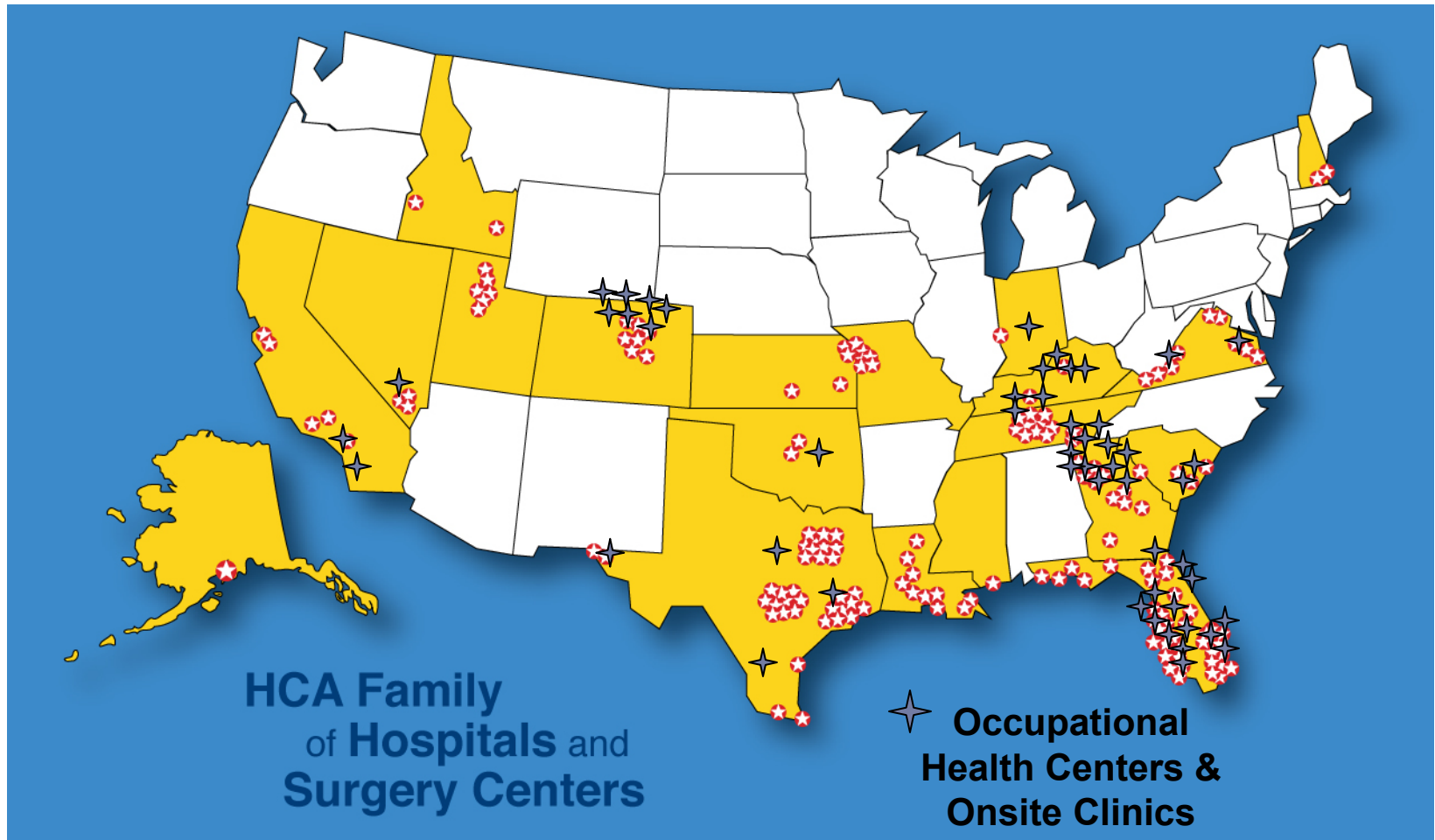


# Consumer Programs

## HCA | facilities map

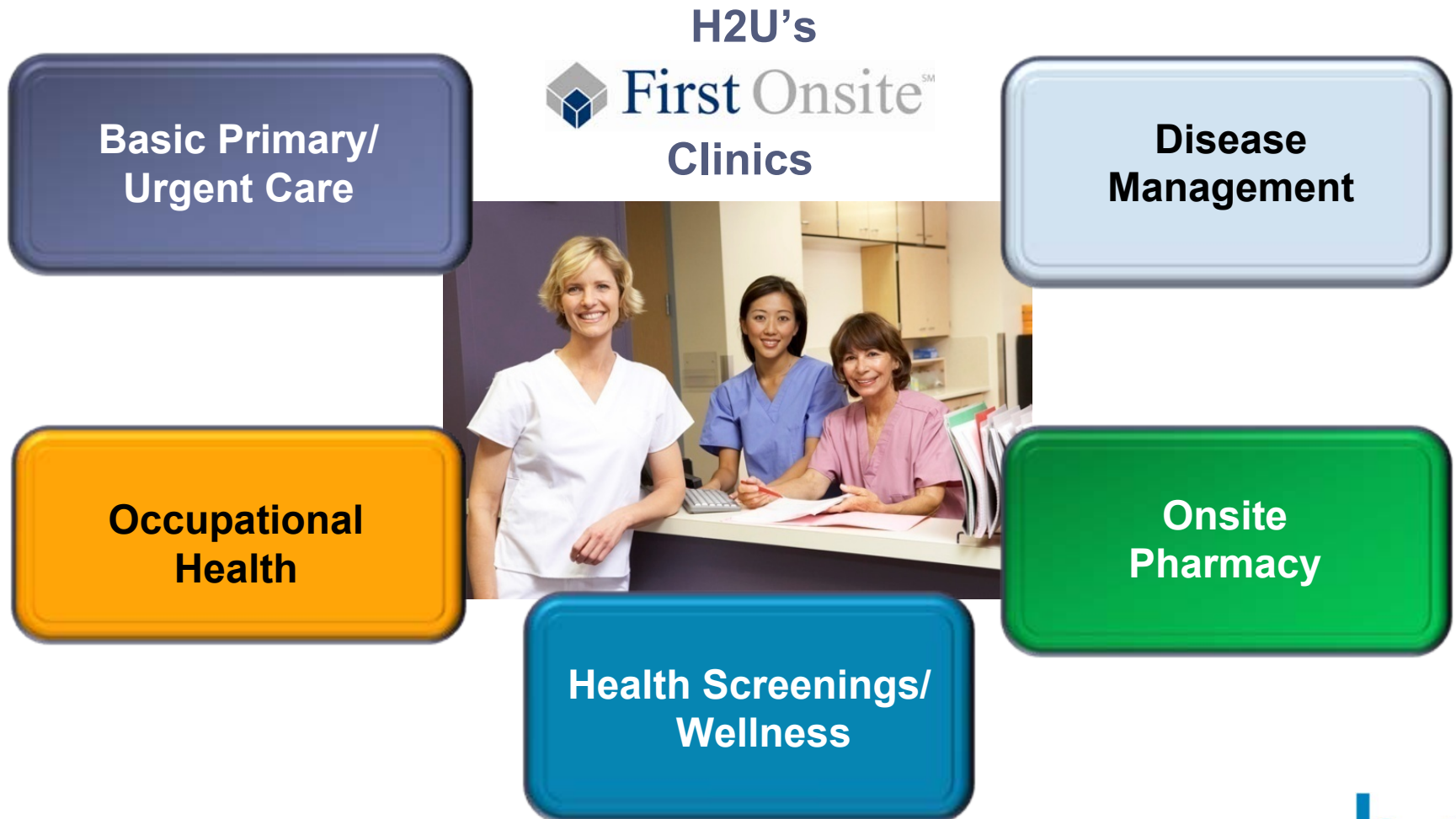


# Employer Clinic Locations in the U.S



# Convenience

Retail and Onsite clinics allow for convenient access to healthcare.



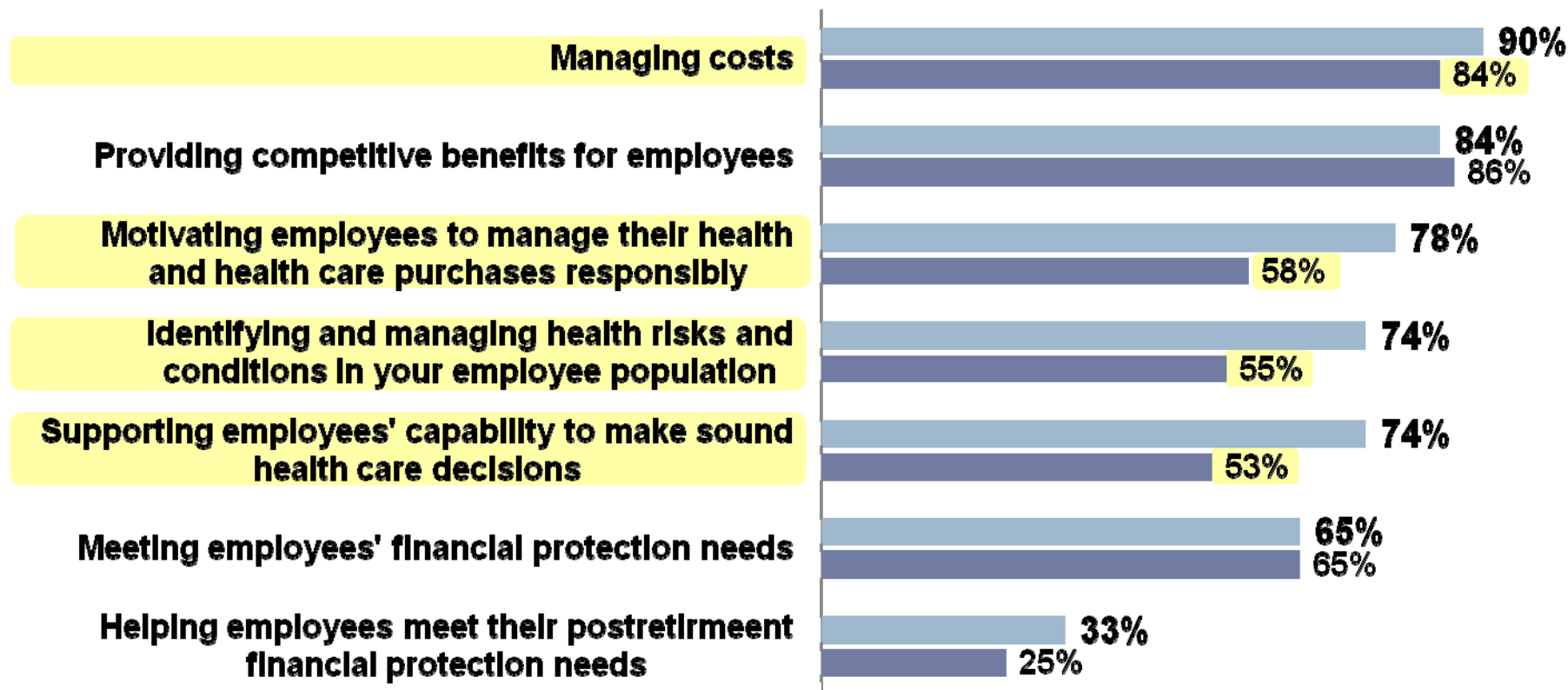
# What Employers and Consumers Want

- Lower healthcare costs
- Enhanced access to care
- Clinical excellence/quality healthcare
- Integrated health services, wellness and disease management
- Health information systems integration
- Healthier and more productive workers
- Employee satisfaction, retention and engagement
- Employer of choice recognition

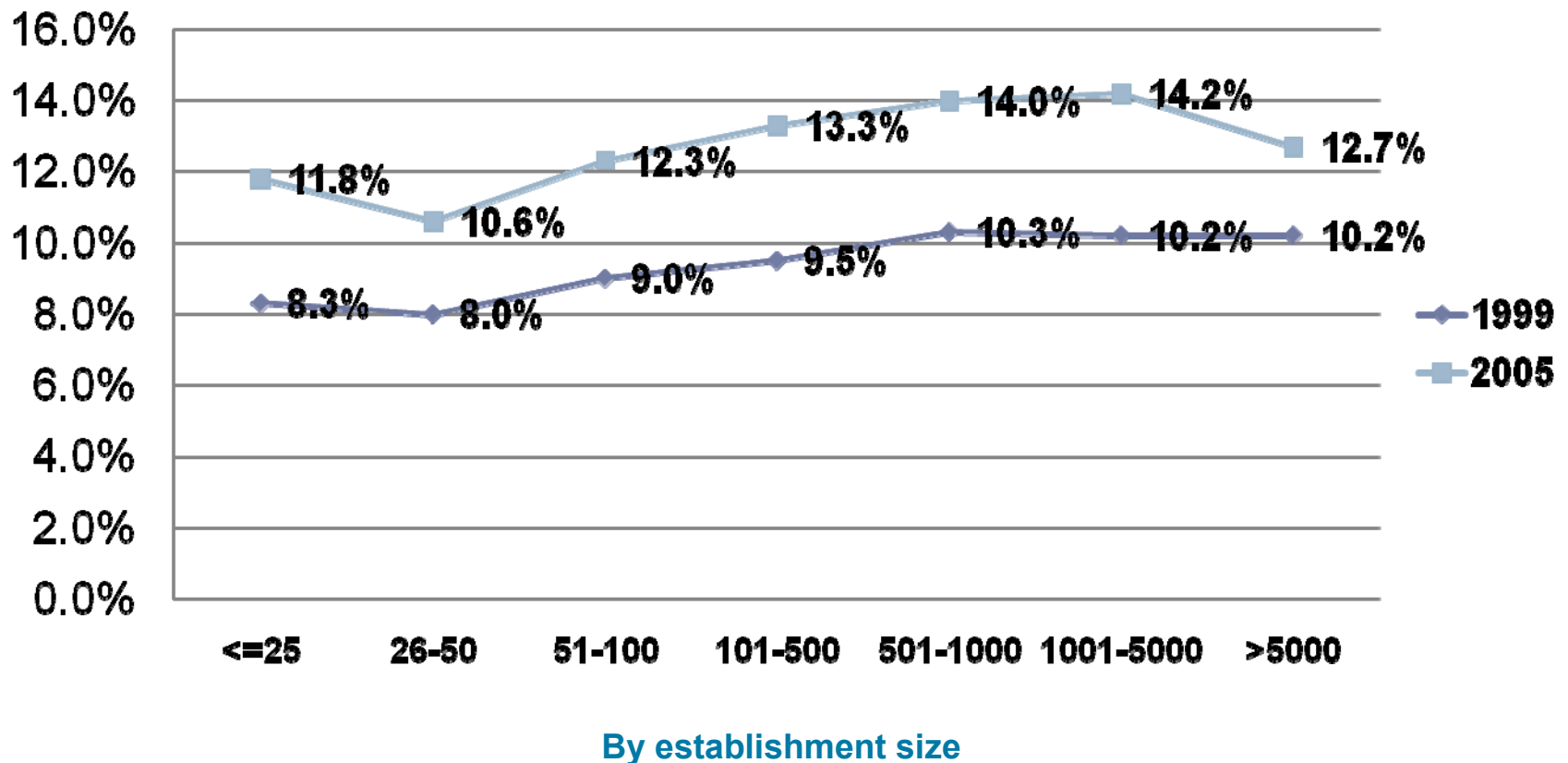
# The Evolving Role of the Employer

■ Primary/large role in 2011

■ Primary/large role today



# Employer Health Insurance Costs as a percent of payroll

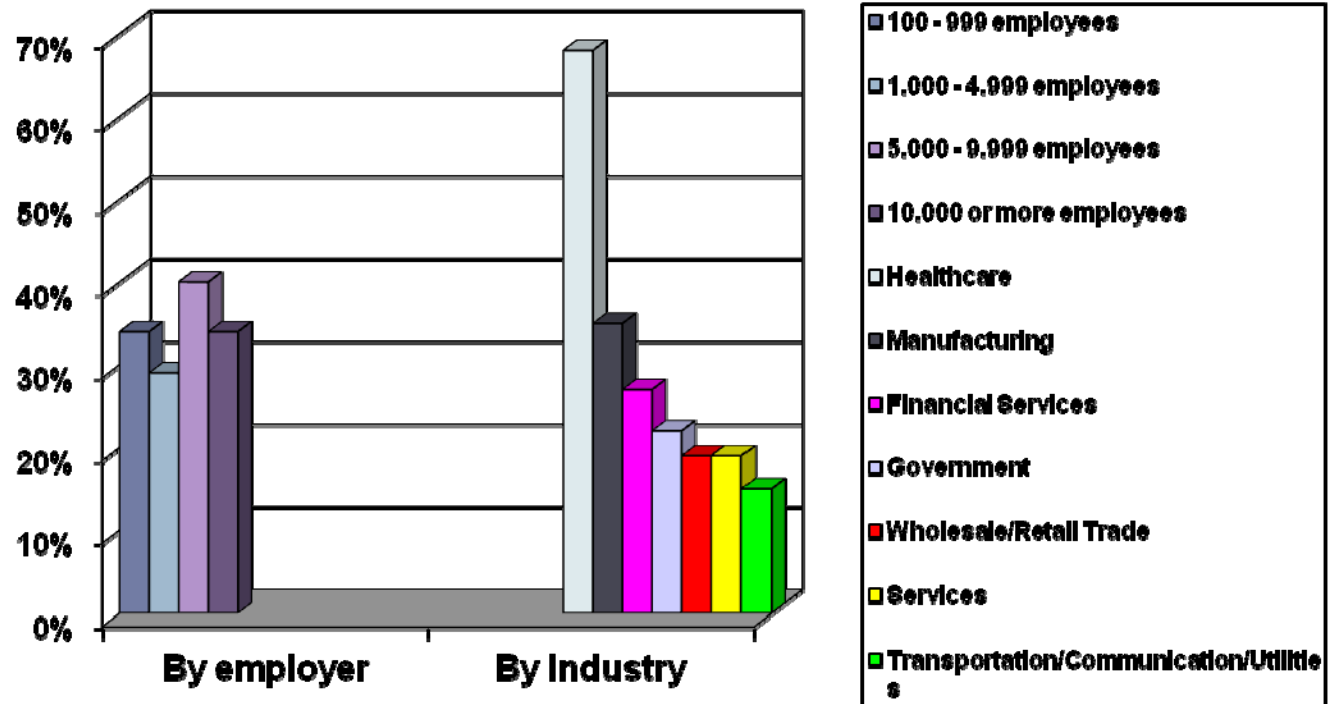


Source: Employer Health Insurance Costs and Worker Compensation, March 2008, Kaiser Family Foundation

# Worksite Clinic Trends

One in three employers with 500 or more employees now offers worksite or near-site medical clinics

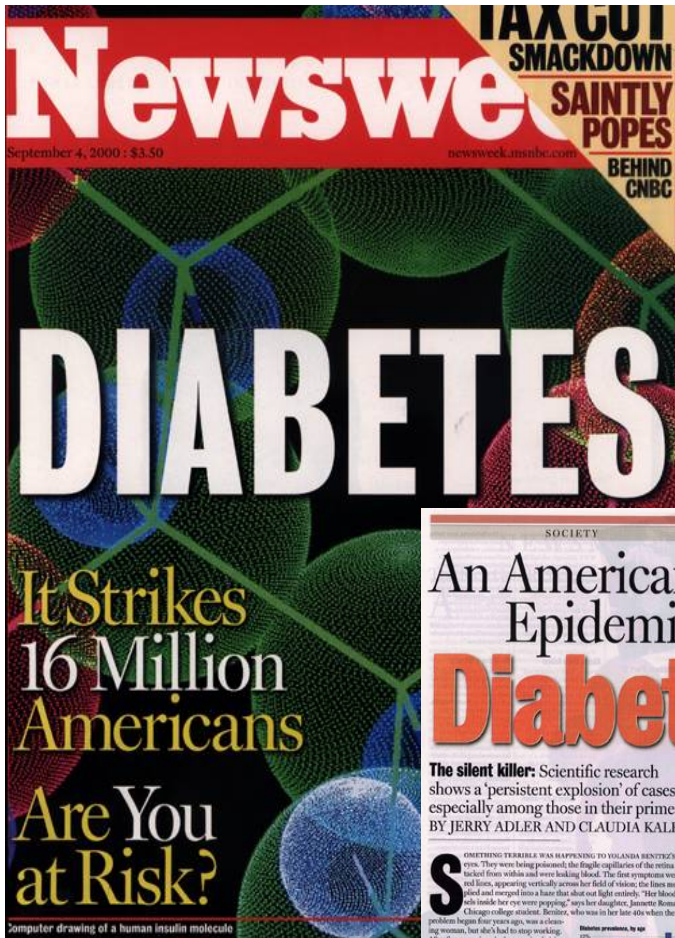
Source: 2008 Mercer National Survey of Employer-Sponsored Health Plans



Worksite wellness clinics could swell from about 2,200 today to 7,000 by 2015, and they would serve about 10 percent of the U.S. population under age 65

Source: "The Growth of On-Site Health Clinics," by Fuld & Co.

# An American Epidemic: DIABETES



The Atlanta Journal-Constitution / Sunday, June 15, 2003

## CDC: Diabetes to afflict 1 in 3 born in 2000

Scientist says kids must eat healthier, exercise more

by 2050, to 29 million, an earlier CDC study by Narayan and others found.

"These estimates I am giving you now are probably quite conservative," Narayan said in an interview before the diabetes association's annual scientific meeting here.

Narayan said it would be difficult to say whether undiagnosed cases would rise at the same rate.

If they did, that could push the 2050 figure to 40 million or more.

Doctors had known for some time that Type 2 diabetes — what used to be called adult-onset diabetes because it typically showed up in middle-aged people — is on the rise, and that patients are getting younger.

Nobody else had crunched the numbers to look at current odds of getting the disease, Narayan said.

Overall, he said, 39 percent of the girls who now are healthy 2½- to 5-year-olds and 33 percent of the boys are likely to develop diabetes, he said.

For Latino children, the odds are closer to one in two: 53 percent of the girls and 45 percent of the boys. The numbers are about 49 percent and 40 percent for African-American girls

By JANET McCONAUGHEY  
Associated Press

**New Orleans** — One in three U.S. children born in 2000 will become diabetic unless many more people start eating less and exercising more, a scientist with the Centers for Disease Control and Prevention warned Saturday.

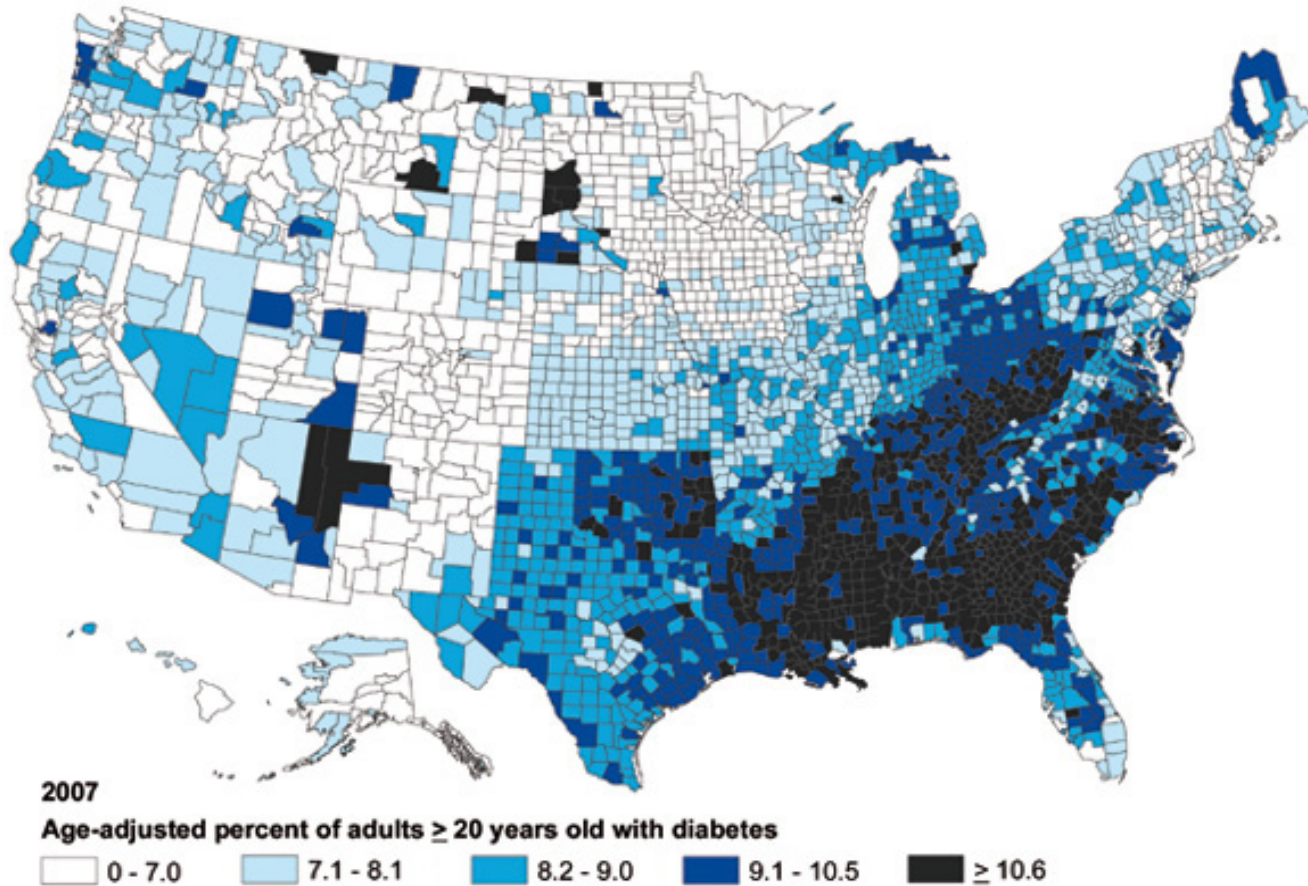
The odds are worse for African-American and Latino children: Nearly half of them are likely to develop the disease, said Dr. K.M. Venkat Narayan, a diabetes epidemiologist at the CDC.

"I think the fact that the diabetes epidemic has been raging has been well-known to us for several years. But looking at the risk in these terms was very shocking to us," Narayan said.

The 33 percent lifetime risk is about triple the American Diabetes Association's current estimate.

# Diabetes Reality

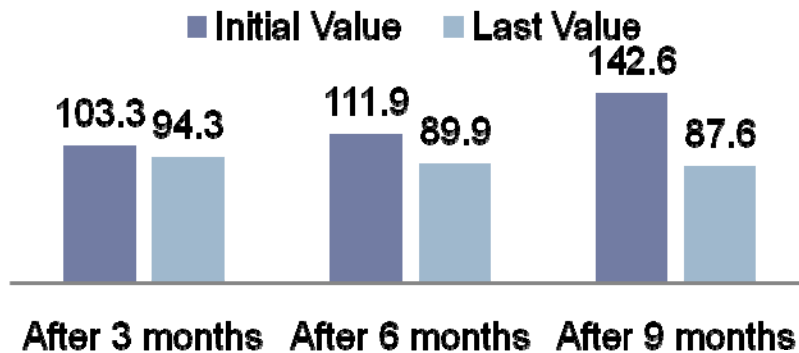
Percent of adults  $\geq 20$  years old with diabetes



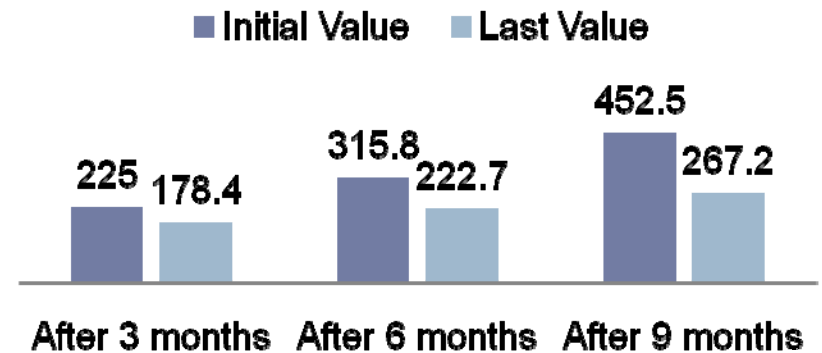
# Outpatient Diabetes Pilot

Middle TN outpatient pilot produces significant results; pilot to be expanded 3/1/10.

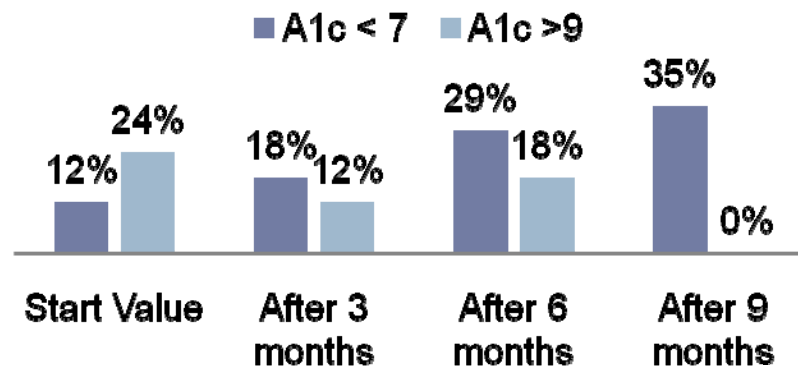
## Avg LDL results after 9 months



## Avg TRI results after 9 months



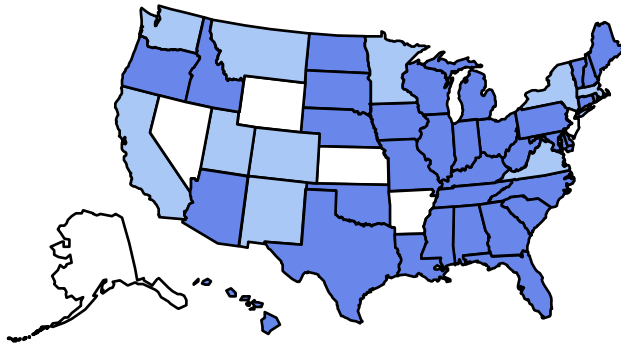
## A1c results after 9 months



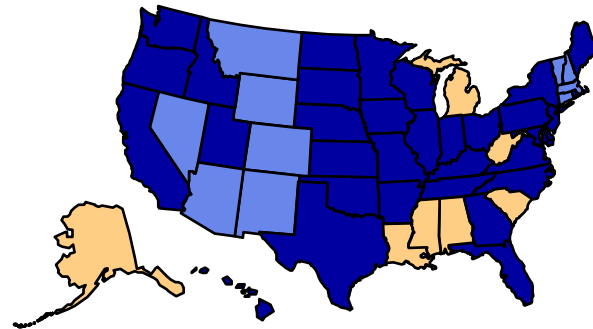
# Obesity Trends Among U.S. Adults

(\*BMI  $\geq 30$ , or about 30 lbs. overweight for 5'4" person)

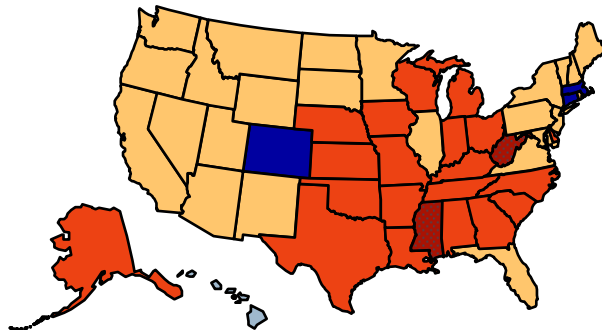
1990



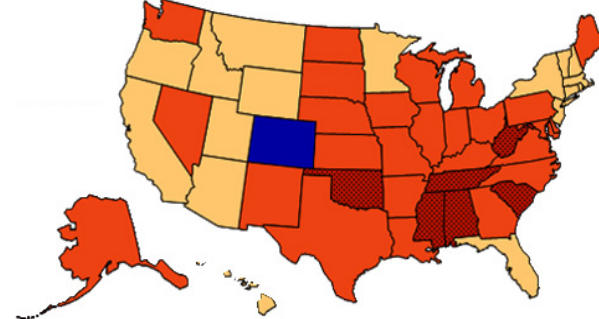
1998



2006



2008



□ No Data   □ <10%   □ 10%-14%   □ 15%-19%   □ 20%-24%   □ 25%-29%   □  $\geq 30\%$

# Overweight workers cost more in injury claims.

## Study: Fat Workers Cost Employers More

By CARLA K. JOHNSON

The Associated Press

Tuesday, April 24, 2007; 7:17 PM

CHICAGO -- Overweight workers cost their bosses more in injury claims than their lean colleagues, suggests a study that found the heaviest employees had twice the rate of workers' compensation claims as their fit co-workers.

Obesity experts said they hope the study will convince employers to invest in programs to help fight obesity. One employment attorney warned companies that treating fat workers differently could lead to discrimination complaints.

Duke University researchers also found that the fattest workers had 13 times more lost workdays due to work-related injuries, and their medical claims for those injuries were seven times higher than their fit co-workers.



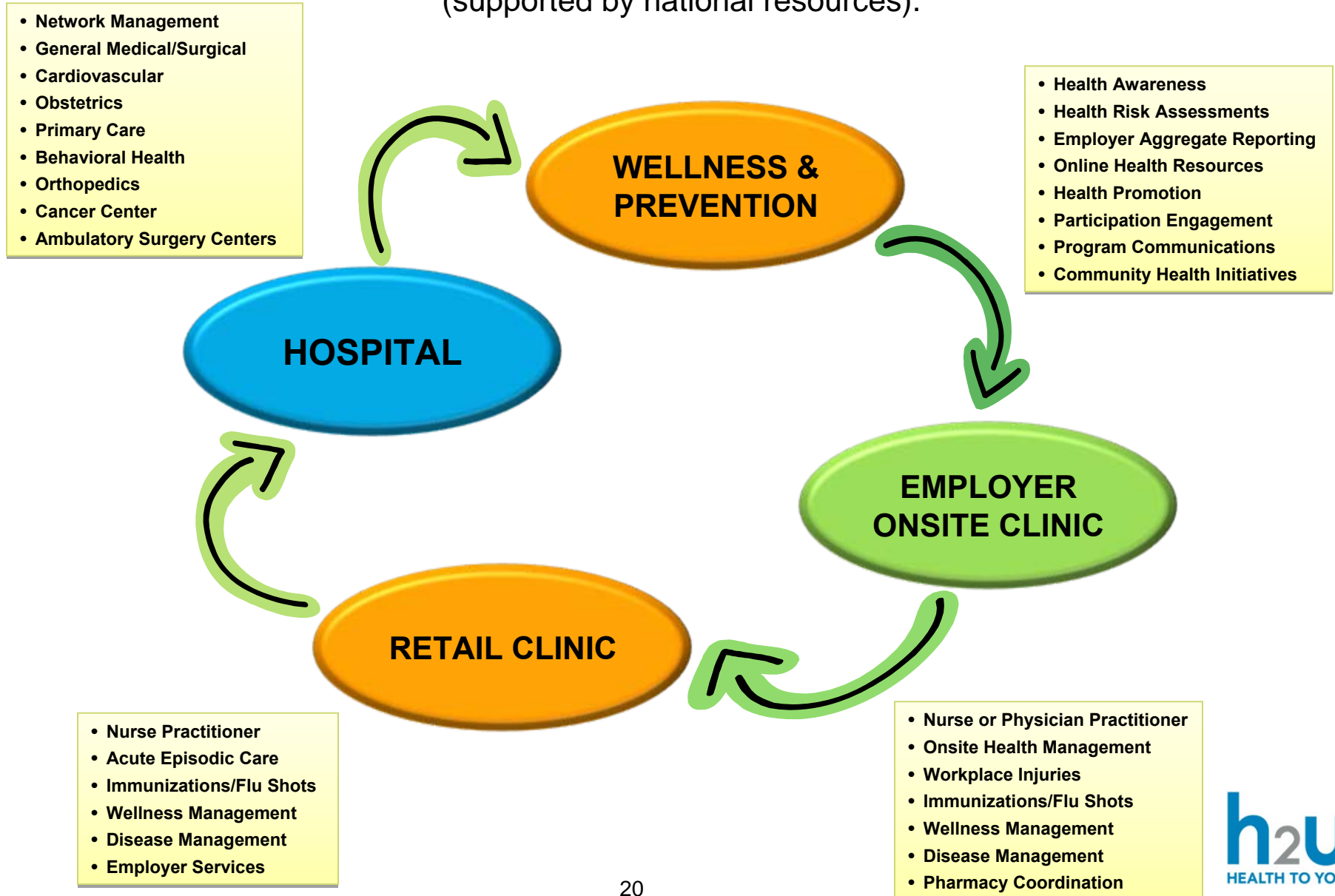
# Leading Causes of Death

*Age-adjusted death rate per 100,000 population*

1980	1990	2006
Heart Disease	Heart Disease	Heart Disease
Cancer	Cancer	Cancer
Stroke	Stroke	Stroke
Accidents	Respiratory Disease	Respiratory Disease
Flu & Pneumonia	Flu & Pneumonia	Accidents
Respiratory Disease	Accidents	Diabetes
Diabetes	Diabetes	Alzheimer's
Atherosclerosis	Suicide	Flu & Pneumonia
Cirrhosis	Cirrhosis	Kidney Disease
Suicide	HIV	Septicemia

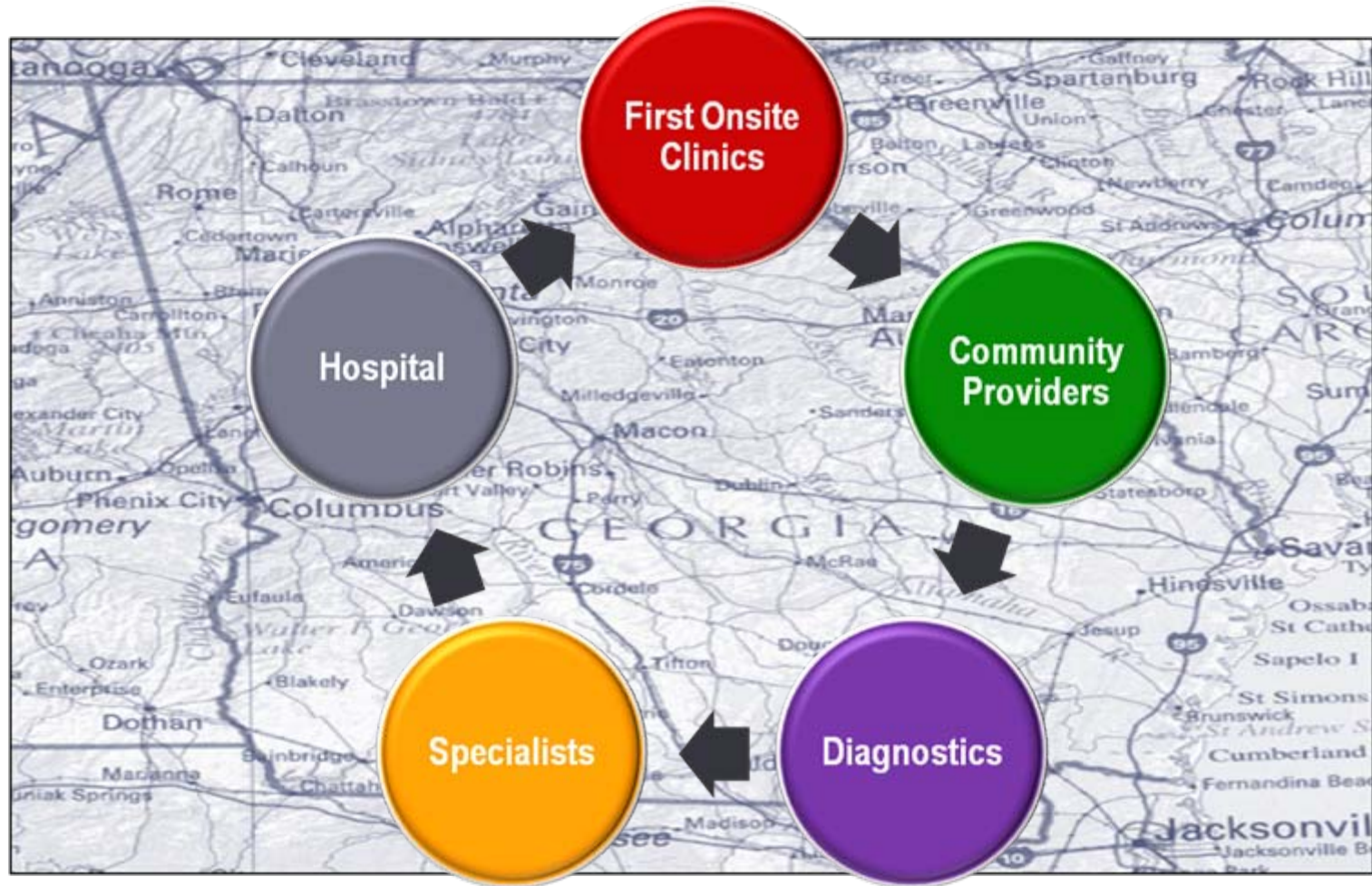
# Wellness Integration

Hospitals are able to provide an integrated approach to wellness (supported by national resources).



# Community Provider Integration

Workplace & Consumer health presents powerful integration opportunities.

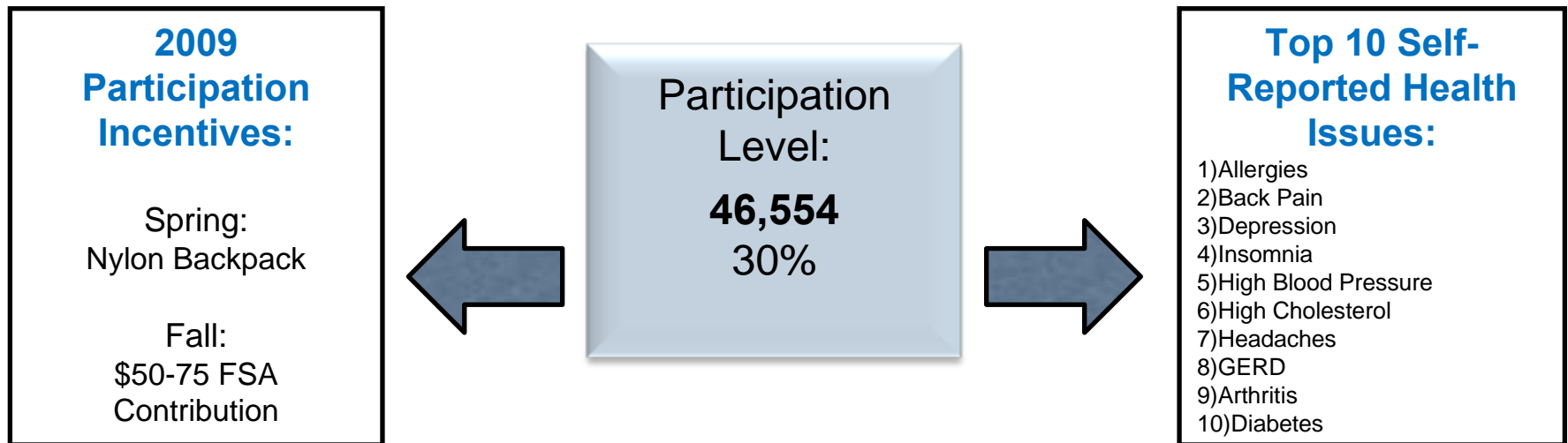


# HCA Employee Wellness Program

HCA launches an employee wellness initiative in 2009.

HCA Eligible Employee Population: **160,000**

Phase I (2009): Health risk assessment, health education and awareness



# Flexible Options

Having multiple options supplies flexibility to meet consumer/employer demands.



Consumer and Employer Products/Solutions	
✓	Health education and awareness materials
✓	Health and wellness web portal access
✓	Health risk assessments (HRA)
✓	Biometric health screenings
✓	Wellness management programs
✓	Disease management programs
✓	Retail and Onsite clinic development
✓	Onsite health seminars
✓	Worksite health promotion

# Differentiation-The Key to Success

How will you differentiate from your competitors?

1

## Distribution Channels

Does your *account management* have the capabilities to reach and support consumers and employers of all sizes ?

2

## Health Intelligence

How will you use health information to *meet and predict client and consumer needs?*

3

## Clinical Expertise

How will you leverage your *clinical experts?*

4

## Infrastructure & Systems

Do you have the *Information Technology & Services infrastructure* to support the needs of the consumers and employers?

5

## Retail Expertise

Do you have the staff that *know retail healthcare?*

# Contact Information

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# Questions/Discussion

