



2010 CANCER CENTER BUSINESS SUMMIT



The Impact of Health Reform on Oncology

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Palmer House Hotel • Chicago, Illinois

Annual Cancer Center Business Summit Industry Survey 2010

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Annual Cancer Center Business Summit

Industry Survey 2010

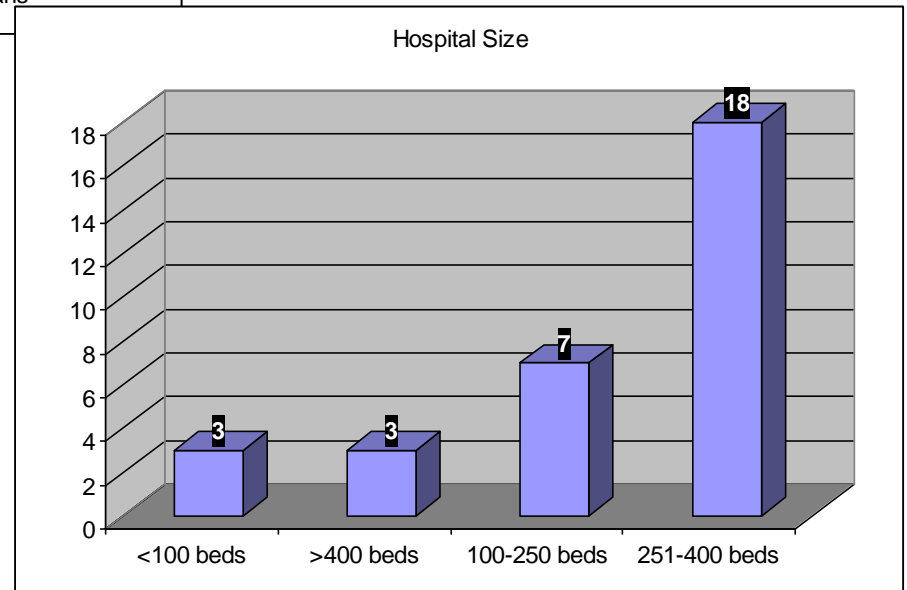
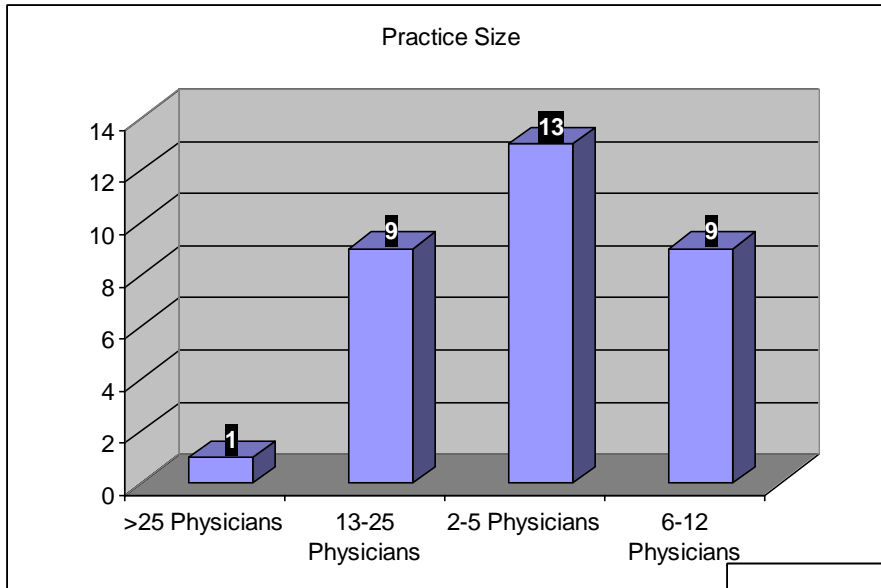
Hypothesis: health reform is leading to increased activity among cancer care providers to affiliate, consolidate, integrate. 2010 Survey explored:

- Employment and professional service contracts;
- Sites of service (physician practice or hospital-based);
- Facilities and equipment relationships;
- Staffing & management relationships;
- Information technology (IT) and EMR relationships;
- Forms of clinical integration and associated compensation.

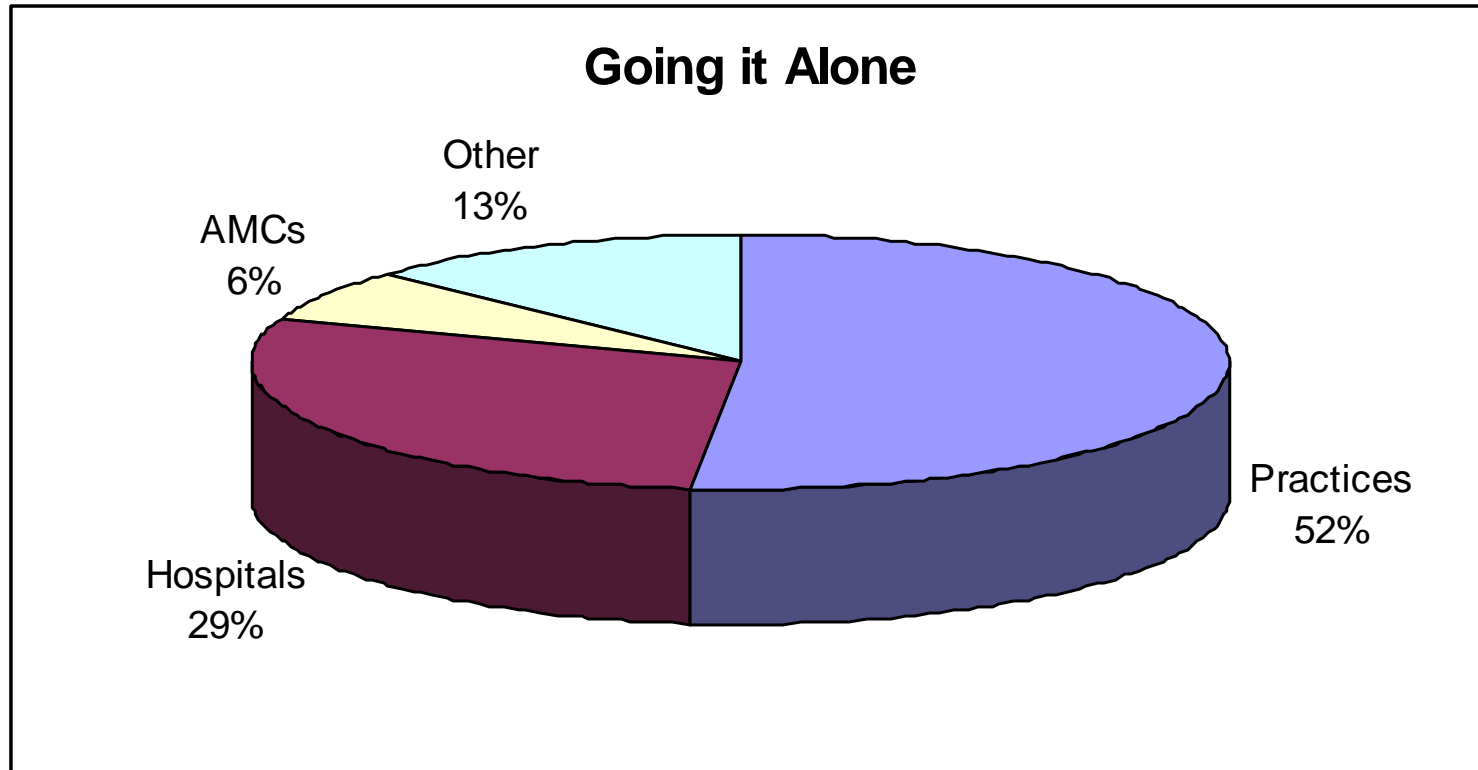
Respondent Profile

	<u>Collaborate</u>	<u>Go it Alone</u>
Practices	16	16
Community Hospitals	35	9
Academics	1	2
Other	3	4
SubTotal	<hr/> 55	<hr/> 31
Grand Total	<hr/> 86	<hr/>
	64%	36%

Does Size Matter?

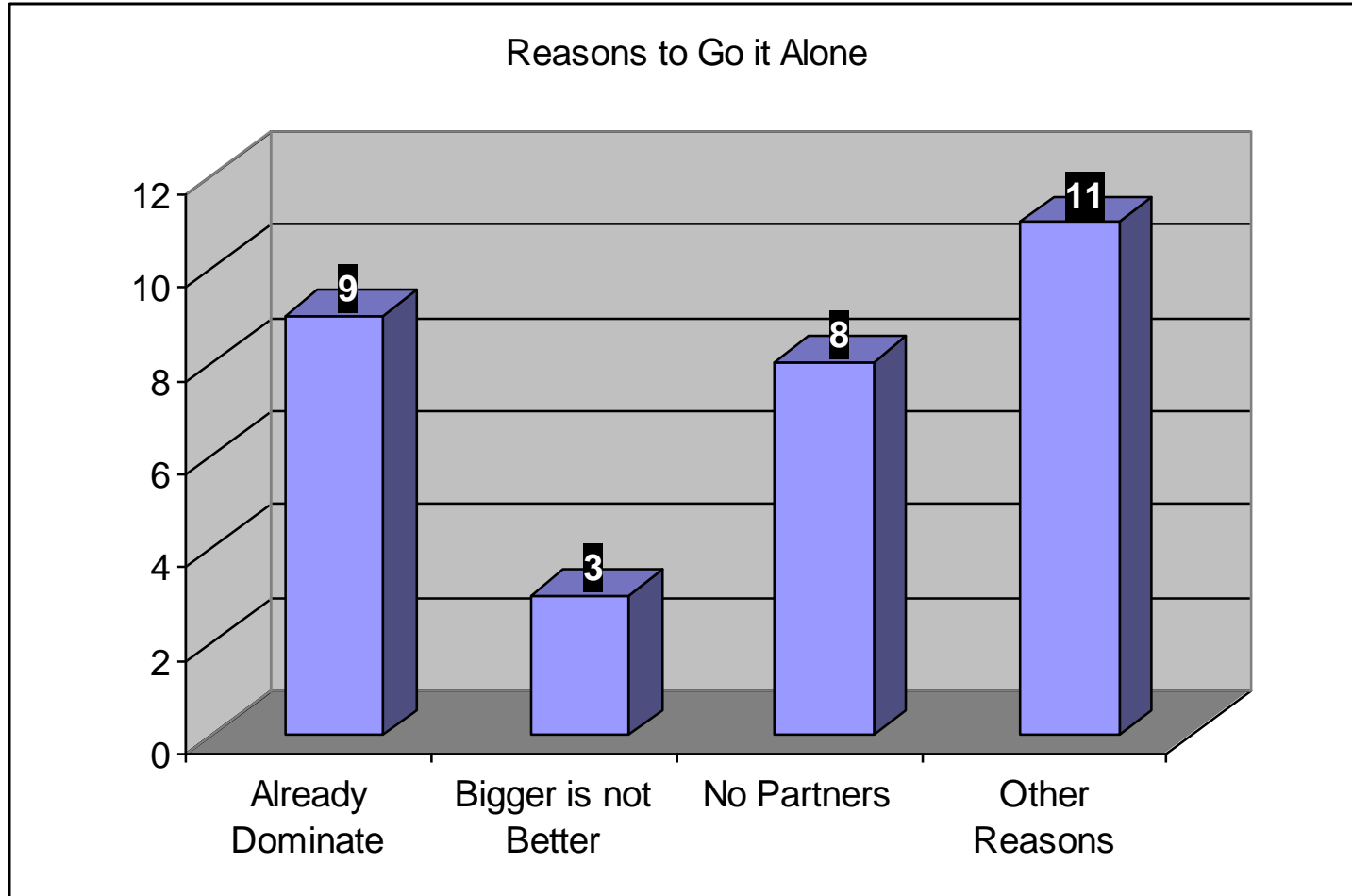


Going it Alone

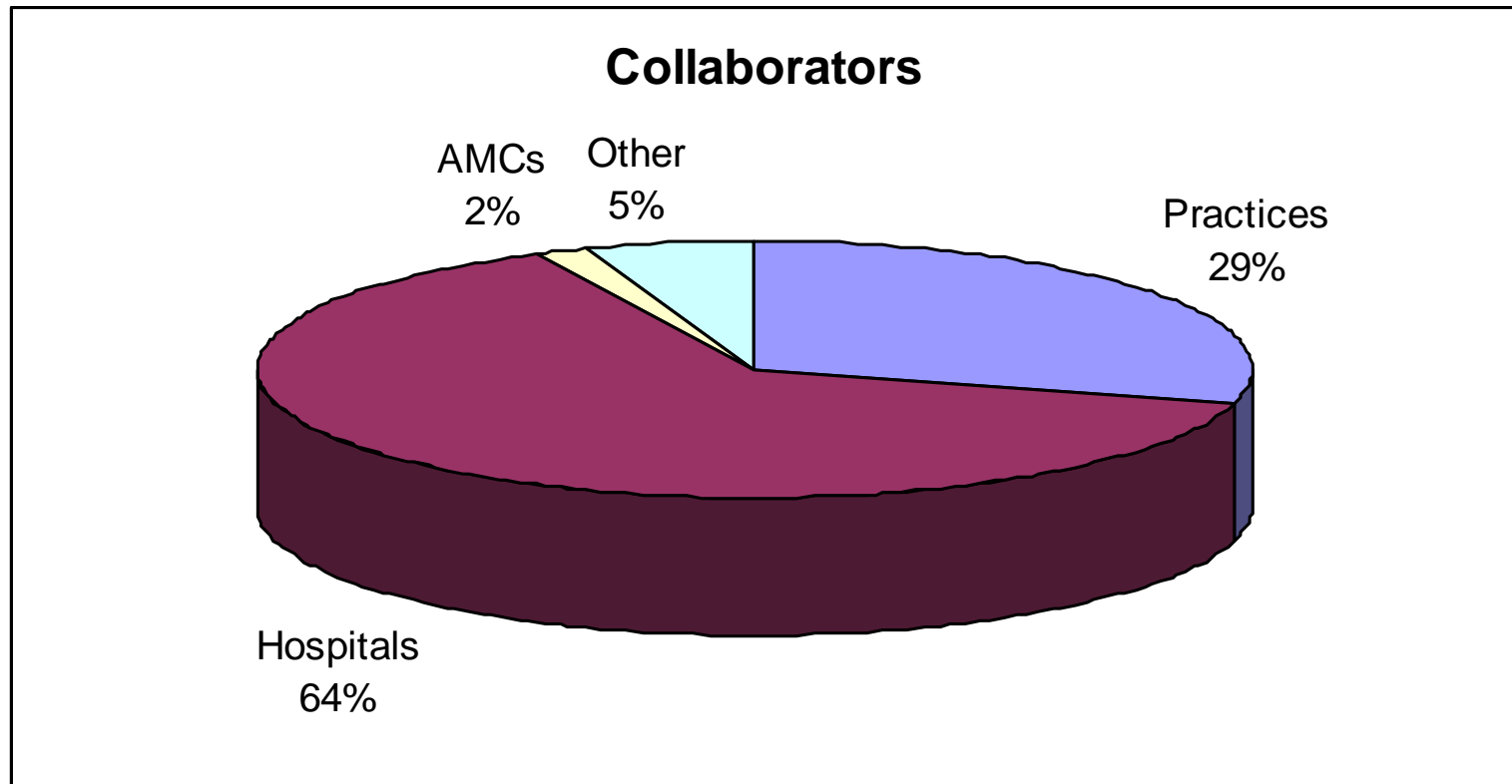


- A substantially larger proportion of practices intend to “go it alone”

Reasons to Go it Alone



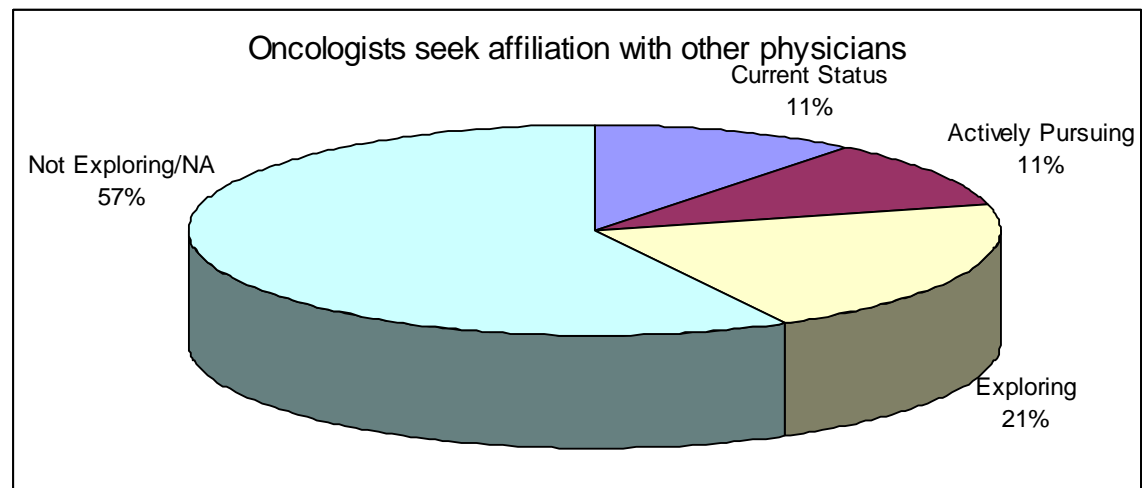
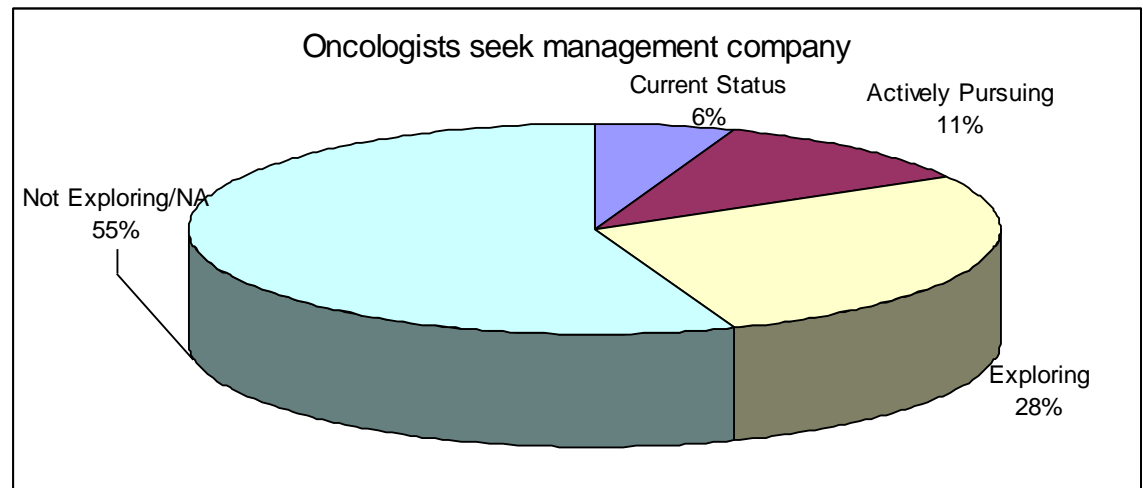
Collaborators



- A larger proportion of hospitals report seeking collaborations than practices

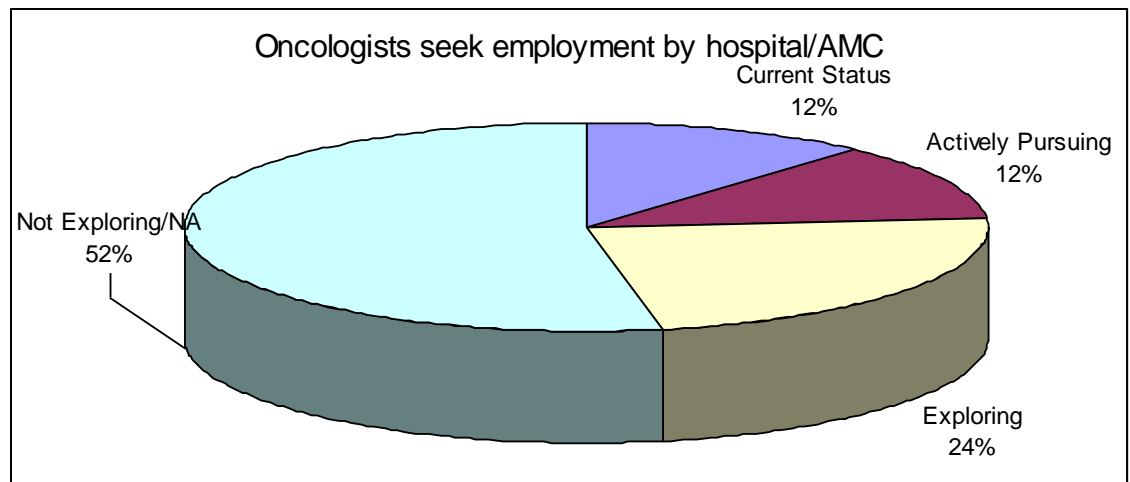
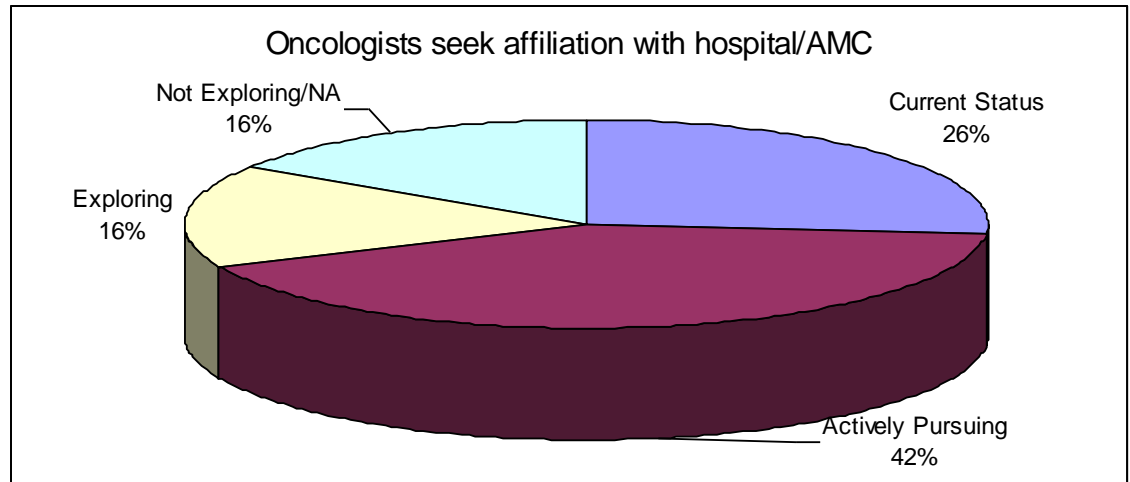
Oncologists Seeking Management and Physician Affiliations

- Over half are not considering affiliation with management companies or with other physicians



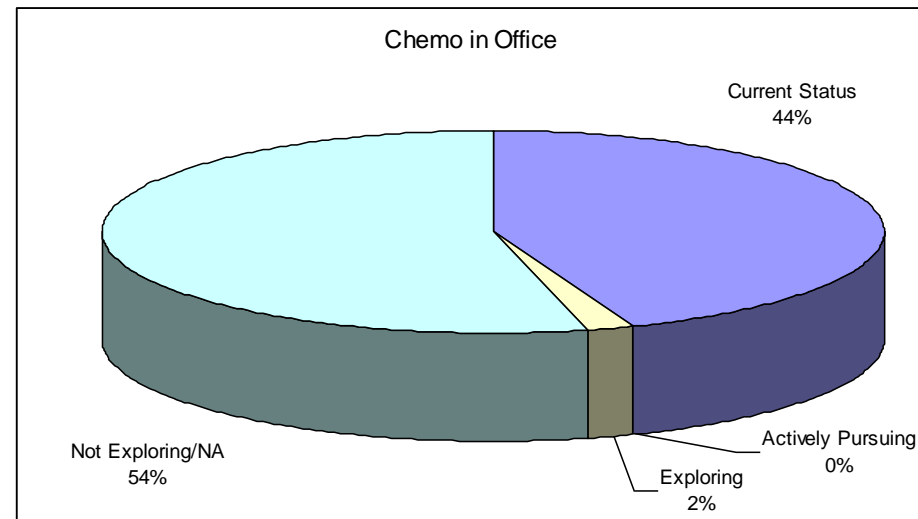
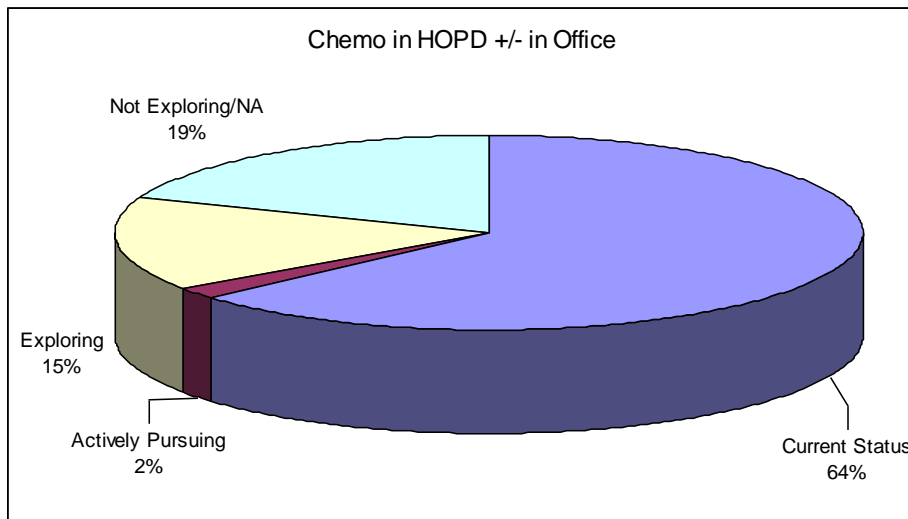
Oncologists Seeking Hospital Affiliations

- Over 70% are currently or actively pursuing affiliation but more than half are not considering employment



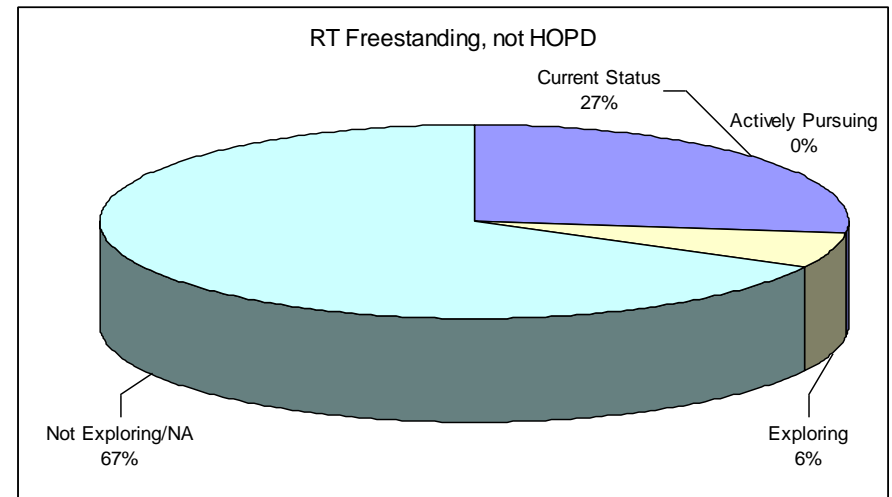
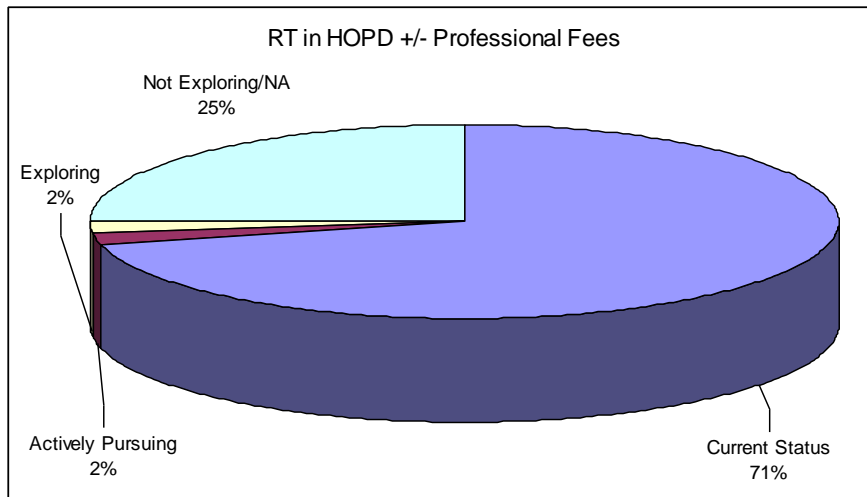
Who is Billing Infusions?

- Over 2/3 report infusion services in the hospital (with or without the Professional Services) while fewer than half now provide infusion in the office.



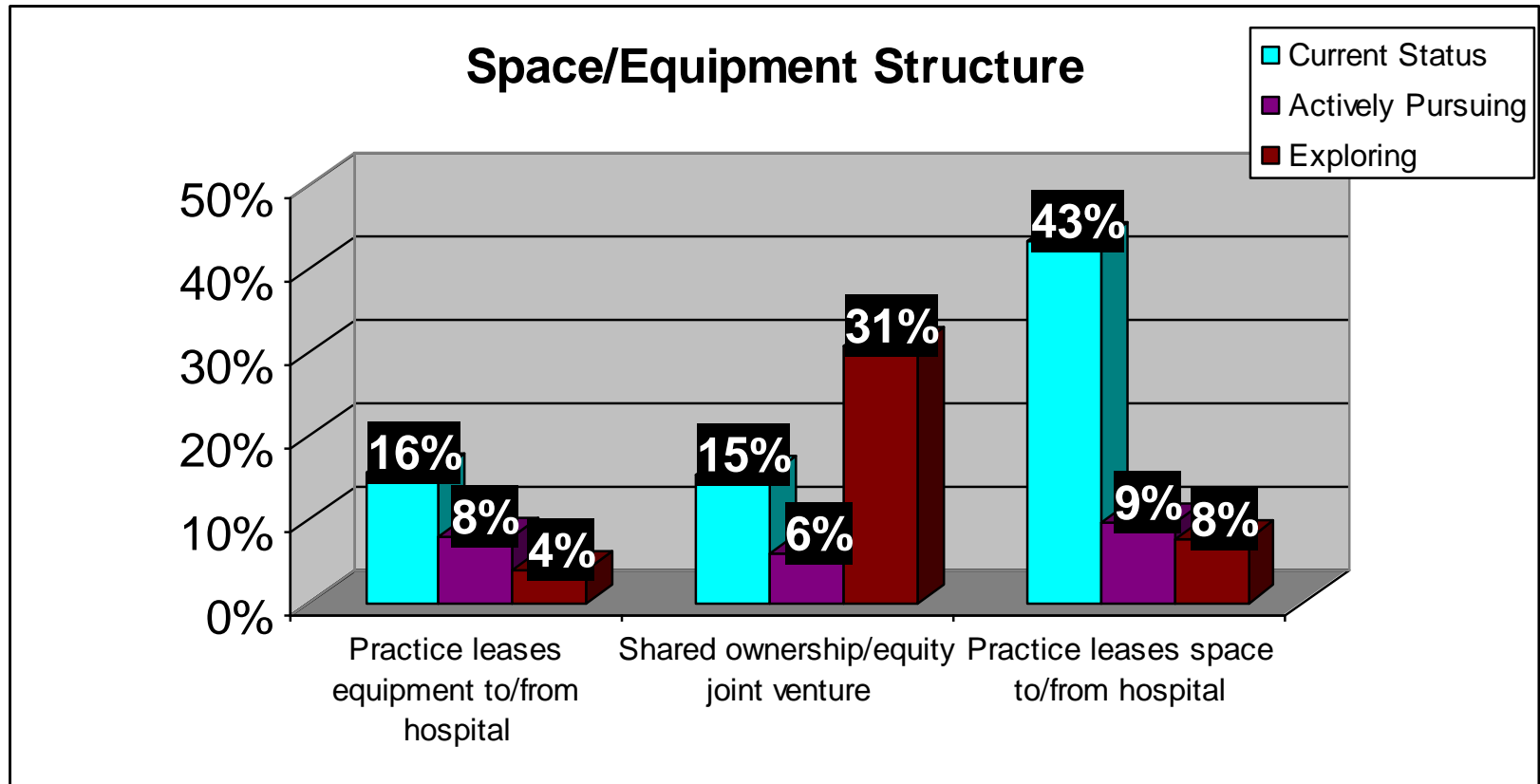
Who is Billing for Radiation?

- Radiation therapy is provided as a hospital service nearly 3 times as often as it is in a free-standing center

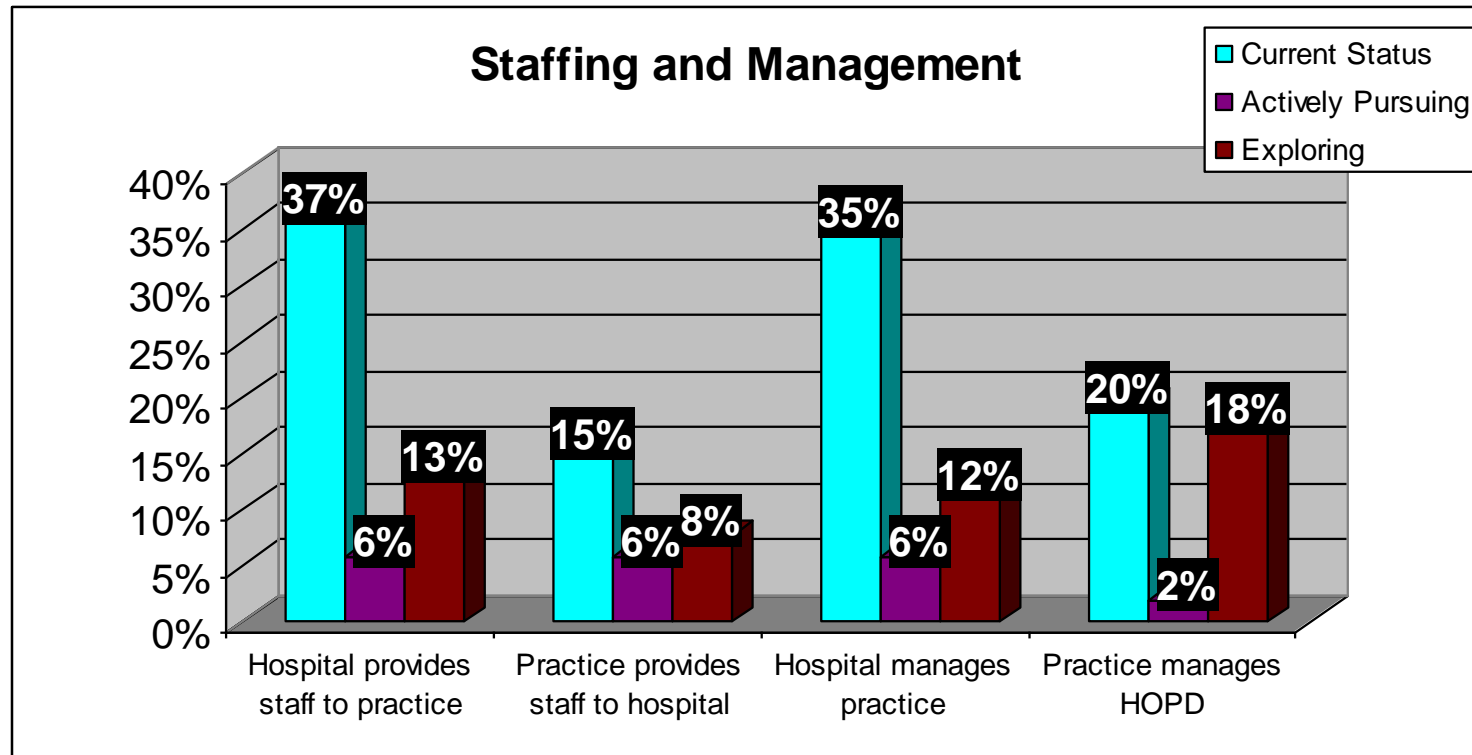


Space and Equipment

- Few joint investments yet but larger proportions lease space or equipment



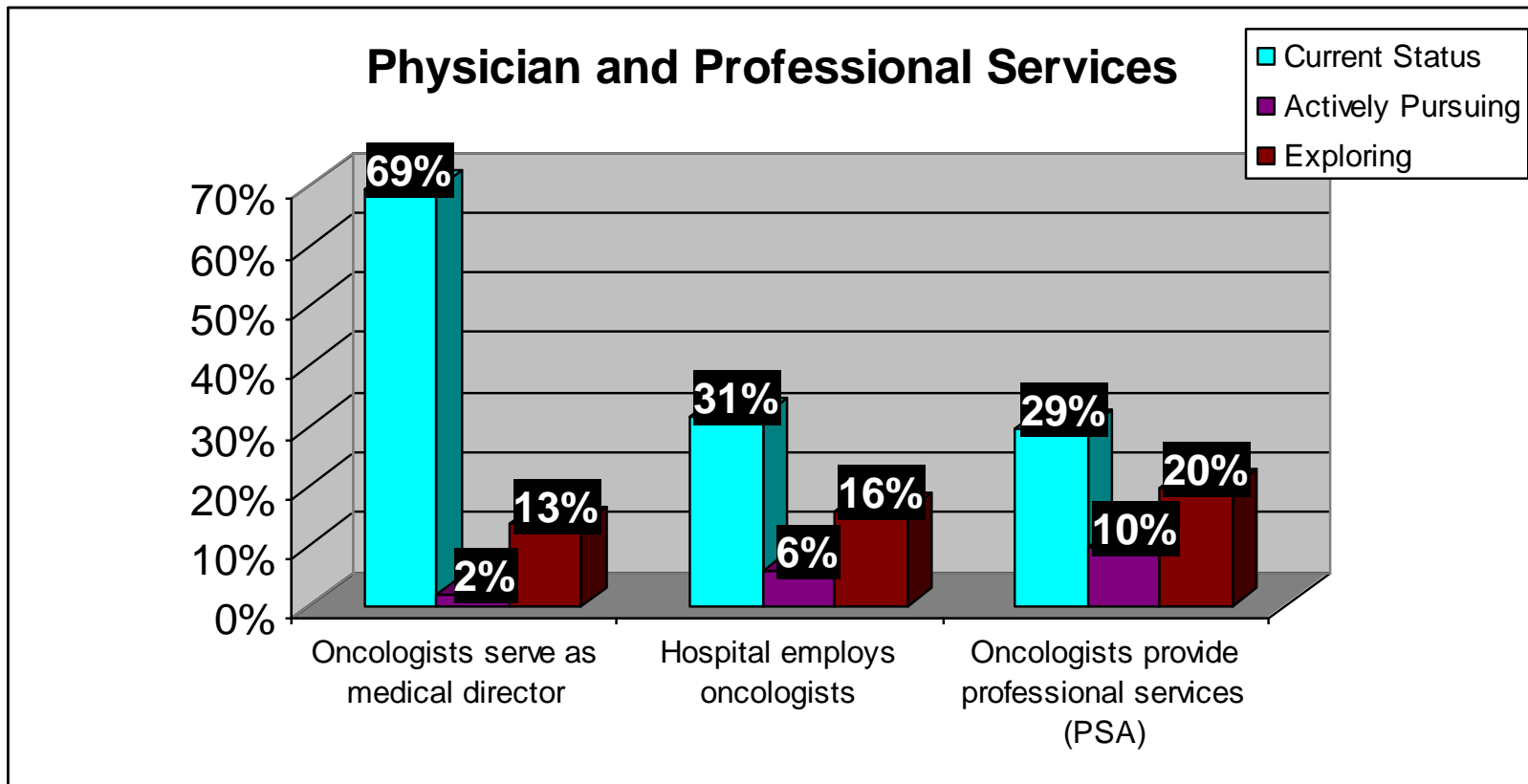
Staffing and Management



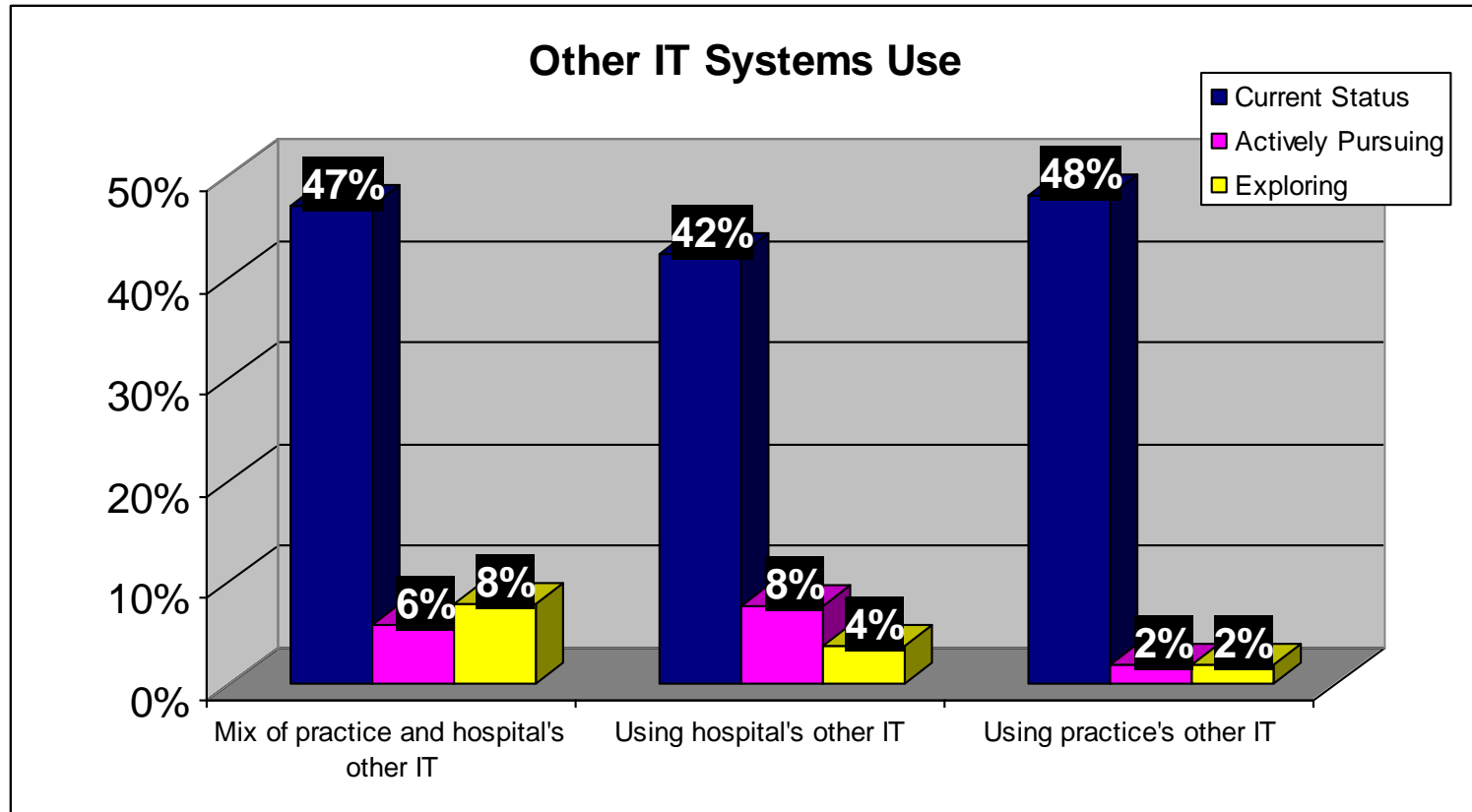
- Hospitals provide staff to or manage practices in larger proportions than the inverse

Professional Services Agreements

- Many have oncology medical directorships while employment and PSAs exist in nearly identical numbers

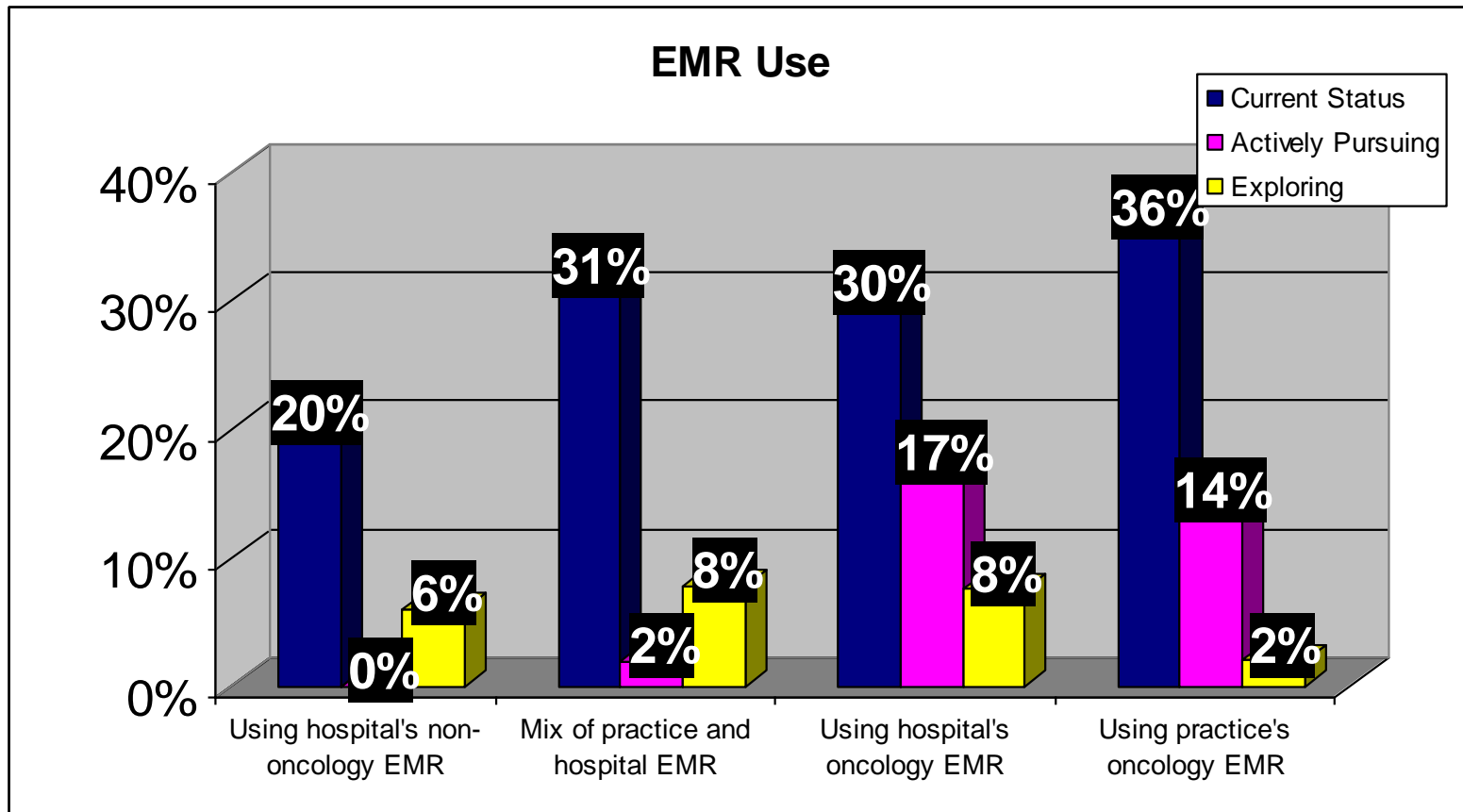


Information Technology



- Scheduling, PACS, etc.

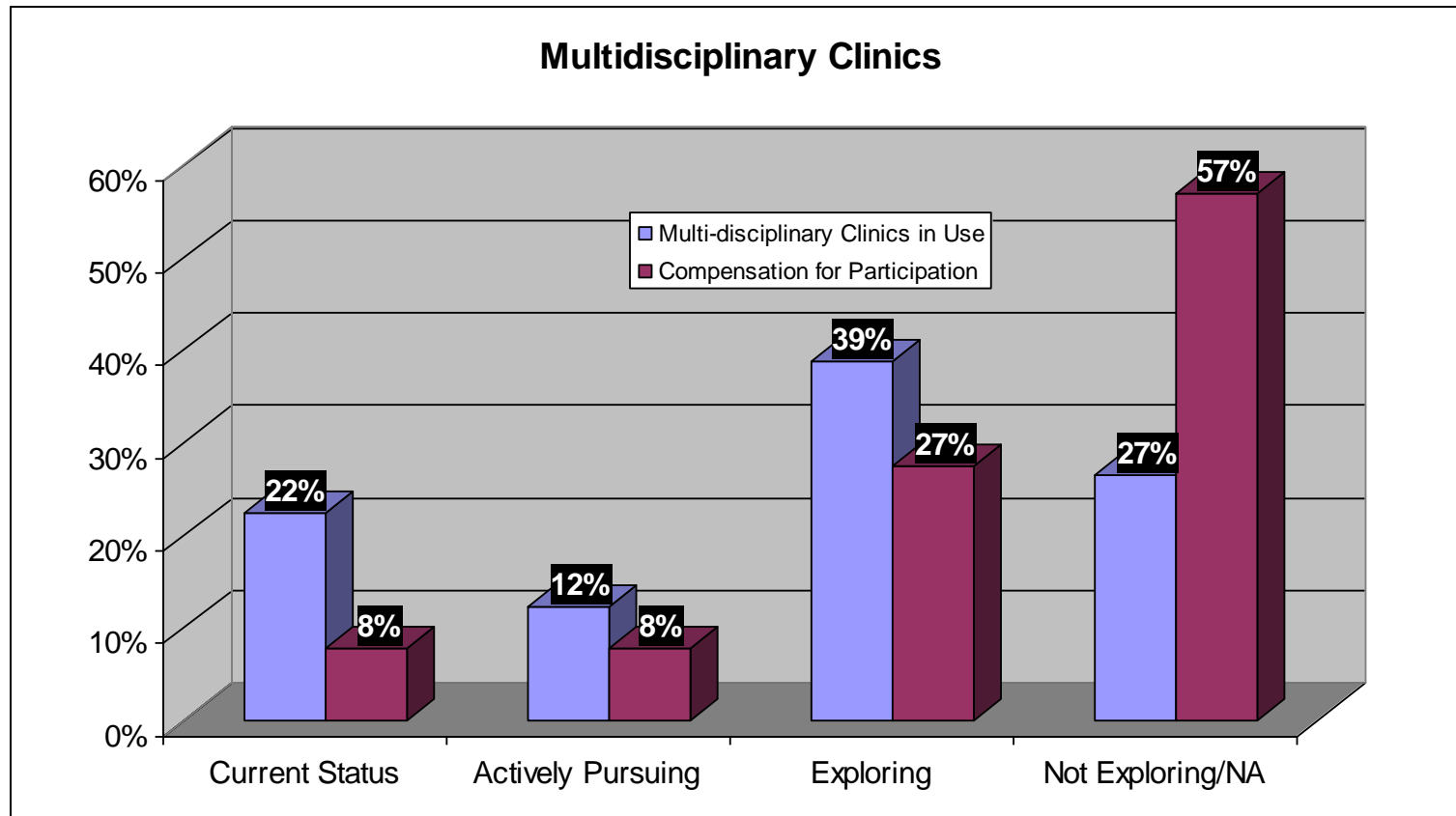
Electronic Medical Records



- Oncology-specific EMRs are clearly becoming the norm

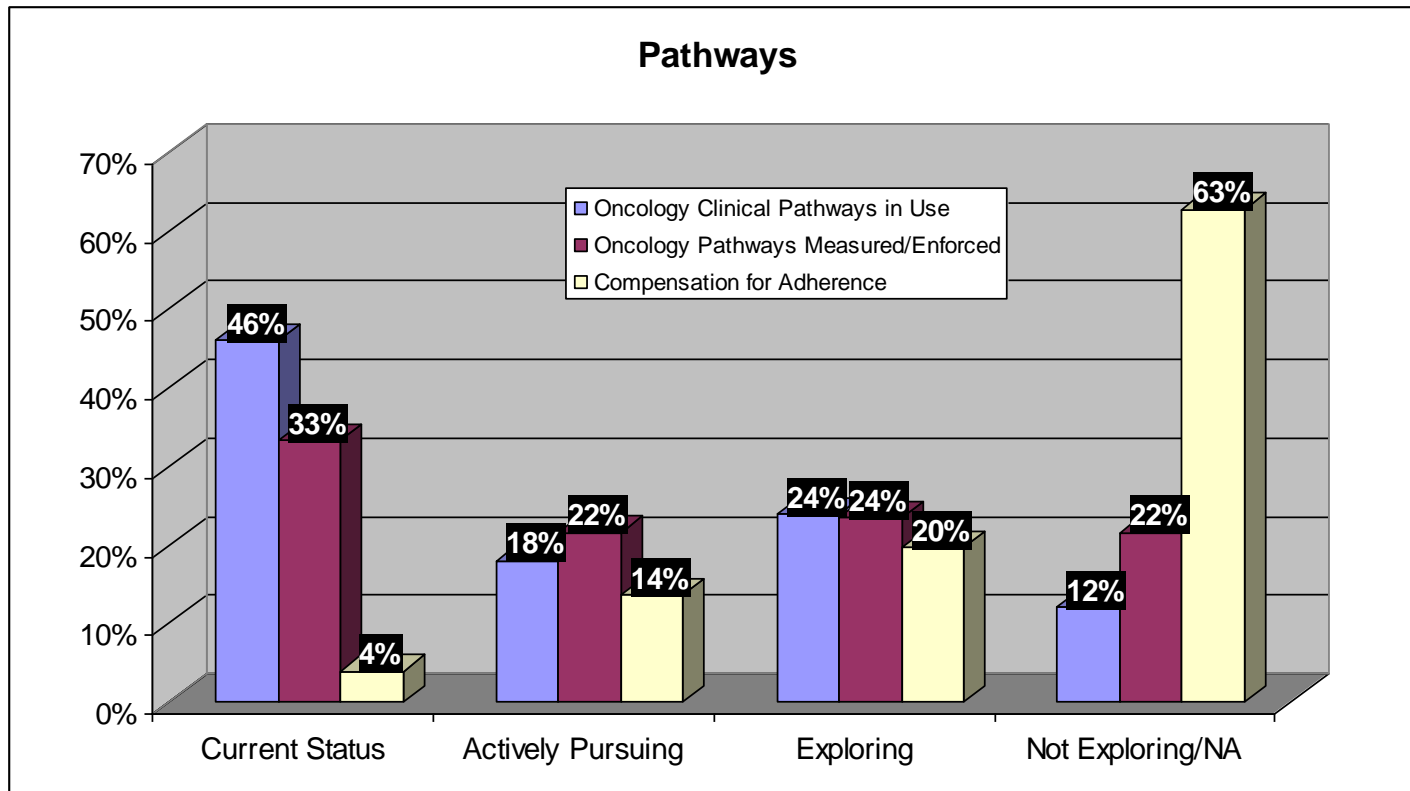
Multidisciplinary Clinics

- Over 80% have or are exploring multi-disciplinary clinics
- Only 44% compensate or are exploring compensation



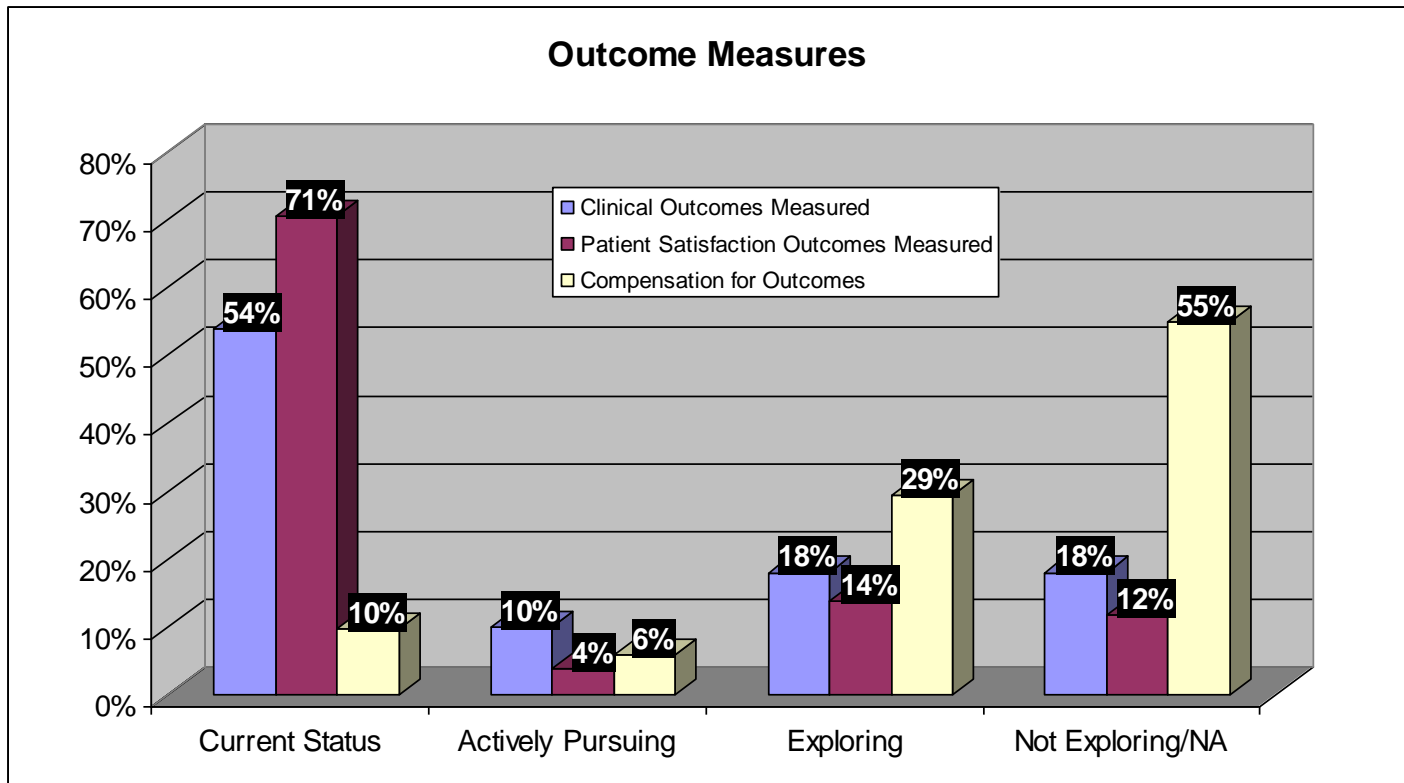
Pathways and Guidelines

- Pathways/Guidelines and measuring adherence are of high interest
- Compensation is however rarely on the radar screen



Measuring Results

- Outcomes and satisfaction measurement is high while compensation is rarely under consideration



2010 Summit Survey Observations

- 2/3 of respondents were seeking collaboration versus 1/3 intending to “go it alone;”
- Going it alone because: already dominant; bigger not better; no available partners; reason unspecified;
- Larger proportion of hospitals than physicians seeking collaboration;
- Decline in physician office as site of infusion services;
- Representative sampling of business relationships involving facilities, equipment, staff, IT/EMR;
- Clinical integration (mult-D; pathways; outcomes measures). But little in way of compensation.

Thank You



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