

MEDICAL STAFF PLANNING CASE STUDY:

CONE HEALTH



Client Profile

Cone Health is an integrated, not-for-profit healthcare system based in Greensboro and serving the Triad region of North Carolina. One of the largest networks in its region, Cone Health is also nationally recognized for its progressive population health initiatives.



CONE HEALTH®
The Network for Exceptional Care

Situation

Cone Health's leadership engaged Ascendant to develop a provider strategy and recruitment plan at the system level and for each of the six hospitals within its system. Cone initiated this engagement as part of its routine medical staff planning, but it also grew out of previous work with Ascendant, which projected potentially dramatic shifts in demand for some specialties while simultaneously highlighting the need for greater access to primary care as Cone continues forward with its focus on population health.

Approach

Ascendant worked with Cone Health to develop an integrated, comprehensive provider needs assessment and strategy by factoring in five critical components as illustrated in Figure 1:

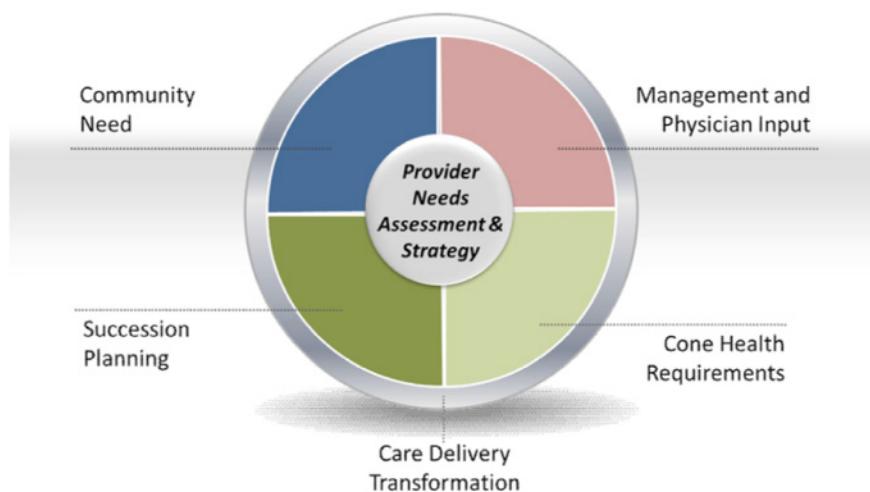


Figure 1: Comprehensive Provider Needs Assessment & Strategy Planning Components

Community Need Assessment

This component included a review of previous medical staff plans, an internal and external marketplace assessment, a review of current physician supply and practice patterns in the region, and a profile of the region's uninsured population to determine how expanded or reduced coverage would likely impact future need for primary care services.

Succession Planning

This component identified and prioritized specialties and individual providers who would be retiring in the coming years. This included analysis of affiliated and employed physicians by age, and a broader financial impact if replacement physicians were not recruited.

Care Delivery Transformation

This unique component factored in what a "transformed health system" will likely look like in the future using Ascendent's proprietary Healthytown™ statistical model. The model assumes that payment and care delivery shifts will alter the demand for provider-based care in the market. These assumptions were compared to traditional planning assumptions and methods that assumed the status quo in payment and care delivery. As Healthytown represents the expected future state, Ascendent then worked with Cone to develop a plan to transition the system from today's provider needs, over time, to those of the future.

Key findings presented to Cone Health's leadership:

- 1. Future shortages with retirements.** For several surgical specialties, Cone Health was likely facing a future shortage of providers, based on the ages of their existing physicians, many of whom are expected to retire soon.
- 2. Adequate local specialist supply:** For most medical specialties, despite anecdotal findings and the existence of lengthy wait times, the current supply of providers was found to be adequate to meet the local population's needs.
- 3. Care gaps in surrounding areas:** The assessment identified care gaps in the outer reaches of Cone's service area, with those residents traveling to Greensboro for services not available in their local community, which was artificially driving up the local demand for specialists (per #2 above).
- 4. Variation in primary care need:** Community need for primary care and Cone Health's market penetration vary considerably within the larger region, highlighting opportunities for expanding primary care service offerings.
- 5. Higher ratios of advanced practitioners to primary care doctors needed:** Based on current delivery methods, Cone's service area could support dozens more primary care physicians. However, future transformation in care delivery will eliminate this need, leaving Cone with a sufficient supply of primary care physicians. Instead, Cone Health should recruit more nurse practitioners (NPs) and physician assistants (PAs) to support its primary care needs.

Results

- ▶ Cone Health is implementing strategies to recruit more surgeons now in preparation for pending retirements in the coming years.
- ▶ Cone Health has begun more proactive efforts to recruit PAs and NPs, including partnering with PA and NP schools, to ensure that it will have the right mix of caregivers in the future. Cone Health also removed PA and NP recruitment from HR, consolidated the function under Physician Recruitment, and elevated that role.
- ▶ Cone Health's leadership use a leave-behind, interactive medical staff planning tool that Ascendent provided. Cone Health can update data inputs as needed in real time to more accurately determine current as well as projected future provider needs.

Conclusion

A changing healthcare delivery landscape will place less emphasis on inpatient care and high-cost procedures and more on keeping patients healthy within their local communities – at a lower cost. Executives should prepare not just for today's immediate needs, but also for tomorrow's, when planning for future medical staff needs.

About Ascendent

Ascendent is a top-50 healthcare consulting, strategy, planning, and feasibility firm providing future-focused research and analysis to help facilities positively transform the way they deliver care. Our specialized healthcare consulting team combines academic insights with decades of experience across multiple disciplines to help healthcare organizations thrive. We leverage our experience and depth with our proprietary research-based tools, including our Healthytown™ statistical model, to help healthcare leaders see what their local care delivery landscape will look like in the years to come. Our strategic services and insights help executives plan effectively for the future while still maintaining the bottom line today.

If you would like to explore the benefits of using a more integrated, long-term approach to strategy, planning, and feasibility, or learn more about how the Healthytown model can help you plan for a transformed healthcare delivery landscape, we encourage you to contact the Ascendent team.

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