

Enabling Connected &
Independent Living Through
New Care Models

Connecting The Dots
To Promote Innovation

DECEMBER 2017

NEW MODELS OF CARE WORKING GROUP

 **healthxl** in partnership with 



HealthXL brings people, thinking & technology together

The HealthXL Platform brings together key market stakeholders in digital health and empowers them to collaborate and learn from each other.

HealthXL engages leading companies (see members on the right).



Background

This report is created as part of HealthXL's New Models of Care Working Group.

The aims of the report include:

- * Provide a high-level overview of care models and tech-enabled senior care solutions that promote connected and independent living.
- * Highlight venture capital / investor perspectives on the senior care market, with a focus on what makes startup solutions stand out.
- * Facilitate discussion in areas of interest to HealthXL stakeholders in order to guide deeper reviews and analyses in the senior care market.

Note: In this report, "care" is broadly defined and encompasses both medical and non-medical care (e.g., support with daily living, etc.).

- Section 1: Overview & Trends
- Section 2: Solution Landscape
- Section 3: Investment Perspective



Overview & Trends

How Should We Think About Improving Senior Living?



There is increasing awareness that seniors represent a diverse group ranging in age, ability, and needs. As a result, senior care solutions are not “one size fits all” – an important lesson as innovators aim to scale solutions.



Solutions geared towards seniors must be easy-to-use and solve a specific problem. This helps ensure technology actually improves quality of life and wellbeing, and does not become a nuisance. Ideally, developing senior care solutions should involve various stakeholders including clinicians, designers, and seniors themselves.



Mass market products aimed at improving convenience and livability (e.g., Blue Apron, Amazon’s Alexa) have the opportunity to enable independent living. However, large companies need to better market their products to seniors and their caregivers.



Venture capitalists are realizing that seniors represent a significant opportunity, but usually tend to invest in solutions that have a broader impact across more than one single population or disease state (with some exception).

Trends Driving Senior Care Innovation



TECHNOLOGICAL ADOPTION

A greater understanding in how seniors and caregivers utilize technology, and where need remains.



INDEPENDENT LIVING

An overwhelming majority of individuals want to maintain independence and age gracefully in their home.



WHOLE LIFE SOLUTIONS

Increasing realization that broadly available consumer tech, particularly those adhering to “universal design” principles, can be helpful to seniors.

Source: Aging in Place: A State Survey of Livability Policies and Practices,” (AARP 2011), Trends in Seniors’ Use of Digital Health Technology in the United States, 2011-2014 (JAMA, 2016), Tech Adoption Climbs Among Older Adults (Pew, 2017)



Ray Dorsey MD, MBA

NEUROLOGY
UNIVERSITY OF
ROCHESTER

“Medicare has done an amazing job of ensuring access to care for acute conditions (e.g., heart attacks) but has come up short in ensuring access for chronic conditions. Over 40% of Medicare beneficiaries with Parkinson disease do not see a neurologist for their condition. Telehealth solutions, including the ability for older adults to receive care directly in their home, are available, but Medicare’s reimbursement policies currently incent institution-based care and discourage patient-centered care. Political will from organizations like AARP can help change that to the benefit of soon-to-be 70 million Medicare beneficiaries and 40 million Americans who care for adults.”

Caring For Seniors Can Be A Costly Endeavor

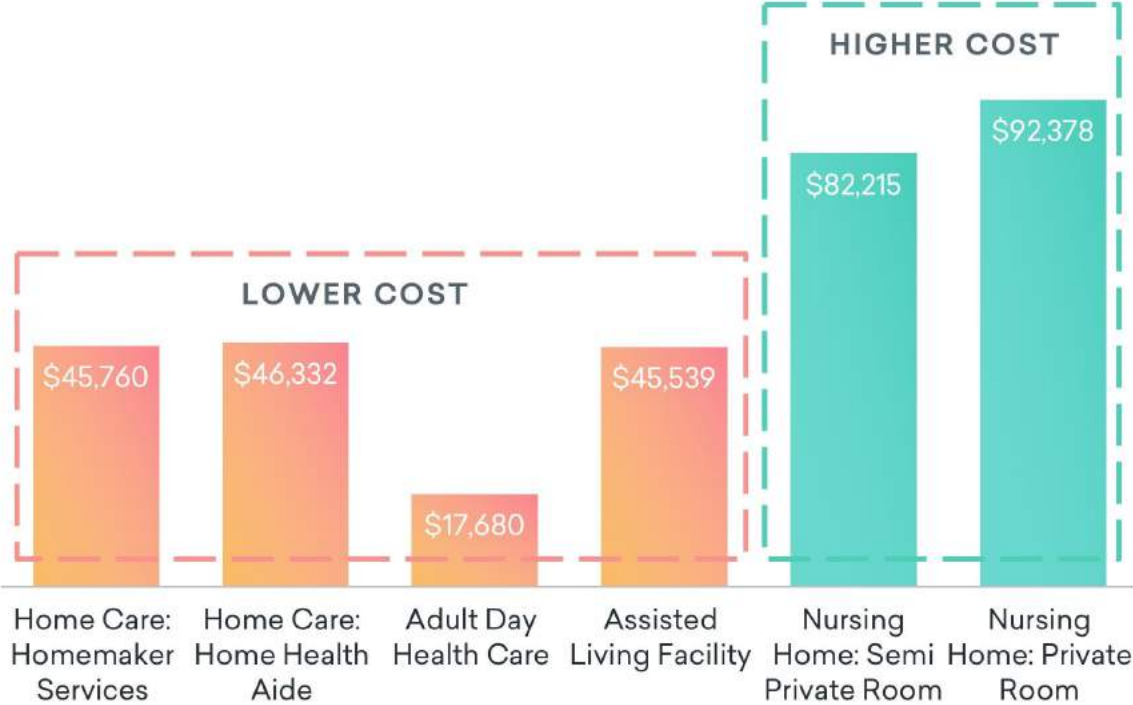
The U.S. Centers for Disease Control and Prevention defines Aging in Place (AiP) as “the ability to live in one’s own home and community safely, independently, and comfortably, regardless of age, income, or ability level.”

Enabling seniors to reside in their homes may help offset increasing long term care costs. Independent living further helps seniors maintain social ties and avoid feelings of displacement.

Medicaid continues to be a big payor of services, followed by individual out of pocket and Medicare.

Source: Genworth Financial Website (2016), CDC

Median Annual Cost (2016, USD)



More Cost Effective Models That Enable Aging In Place Will Increase, Reflected In Market Forecasts

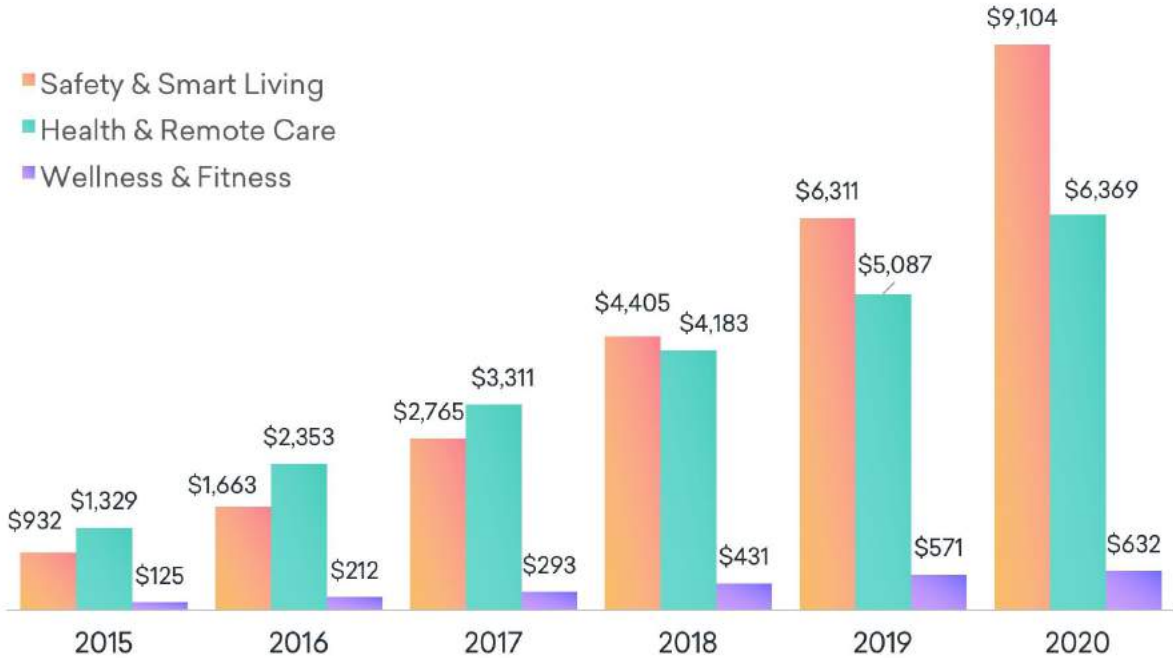
The range of products and services that seniors may derive value from is diverse.

Park & Associates has forecasted key market segments, further highlighting a shift towards enabling seniors to live independently at home.

This shift gives rise to technologies and approaches that enable more convenient living and remote monitoring for patients where medical oversight is desired.

Source: Park & Associates (2016)

U.S. Active Aging Market Forecasts – Connected Solutions (USD, Millions)



Innovators Focused On Senior Care Must Be Thoughtful About Their Revenue Model

Medicare & Medicaid face cost pressures and places limitations on coverage of newer digital health solutions, an issue compounded by a lack of strong cost saving evidence by digital health players.

Costly solutions, such as remote monitoring approaches, may be untenable for a direct-to-consumer model due to high cost of monitoring technology and associated services. As a result, innovators often experiment with at-risk revenue models to promote adoption.

Startups building senior care solutions often have to be resourceful and implement a mixed business model combining several payment models to optimize operations.

Source: Company Websites

SELECT PAYMENT APPROACHES



Medicare & Medicaid



Private Insurance



Government Assistance



At-Risk Models



Self Pay / Caregivers or Family Pays



Lee Shapiro

MANAGING PARTNER
7WIRE VENTURES

“Health tech start-ups do not fully appreciate the purchasing power of the senior market and their disposable income. This market is more tech savvy than is commonly perceived. Further, start-ups may not appreciate that while individuals 65+ years of age have Medicare, they also buy supplemental coverage. We see the Medicare Advantage market as very attractive – and a place where the interests of consumer, provider and plan can be highly aligned.”

Payment Reform Impacts A Broad Range Of Services

[SELECT EXAMPLES / MODELS BELOW]

PRIMARY CARE & RISK BEARING



Primary care clinics designed for adults with Medicare.
Founded: 2012 / Raised: Undisclosed



Primary care for Medicare and Wellcare Medicare, team based, and incorporates wellness classes.
Founded: 2011 / Raised: \$123.25M



Focused on senior patients who are chronically ill and frail in partnership with other healthcare stakeholders.
Founded: 2013 / Raised: \$240M

Source: HealthXL Database, Company Websites, Crunchbase (November, 2017)

TELEMEDICINE



Telehealth platform serving broad US population.
Founded: 2002 / IPO: 2015

ON DEMAND / HOME CARE



In-home senior care to enable independent living.
Founded: 2014 / Raised: \$62M

MEDICAL GROUP & HEALTH SYSTEMS



Medical Group and Medicare health plans (subsidiary of Anthem).
Founded: 1993



A non profit community-based health system with a long history of Medicaid care.
Founded: 1999

NEXT GEN INSURANCE



Preferred Provider Organization with a Medicare Contract.
Founded: 2013 / Raised: \$425M

GOVERNMENTAL



DIGITAL THERAPEUTICS



Disease prevention through digital therapeutics (with data on Medicare population).
Founded: 2011 / Raised: \$126.52M



Respiratory management through sensor platform (with data on Medicare population).
Founded: 2007 / Raised: \$49.86M

The Range Of Transportation Needs For Seniors Highlights The Importance Of Thinking Holistically About Patient Needs



Emergency Transport

Medicare may cover depending on situation and location/type of facility (e.g., Critical Access Hospital, Skilled Nursing Facility, etc.)

VALUE

Critical care management and potentially life saving.



Non-Emergency Medical Transport



VALUE

Optimal disease management and improved outcomes.



General & Leisure Transport



VALUE

Social connectedness and reduction of isolation.

Source: Company Websites



Solution Landscape

Connected & Independent Living By Seniors Is Increasingly Achievable Given Diverse Solutions

TELEHEALTH & REMOTE PATIENT MONITORING



SHARED CARE PLANNING & COORDINATION



SMART LIVING & HOME CARE



MEDICATION MANAGEMENT



HEALTH ASSESSMENTS



Source: HealthXL Platform (Note: The companies listed above are meant to be representative, not exhaustive. Visit HealthXL.co for more detailed company information including partners, funding, and publications).

Multiple Stakeholders Have A Role To Play In Helping Seniors Thrive



- 1 Focused on convenience, safety monitoring, and family coordination; requires more of an "evidence" mindset.
- 2 Senior care programs may be created within systems or adopted from national level programs such as PACE; scaling is challenging due to "high touch" nature of programs.
- 3 Broadly available technologies with mass market appeal; strategic marketing towards senior population can increase mindshare.
- 4 Multi-stakeholder initiatives to enable better catering to seniors in everyday environments; requires significant forethought and planning.

Source: HealthXL Analysis

Not All Senior Care Solutions Require Reimbursement To Be Valuable



NOVEL CARE MODELS & SOLUTIONS

New models of care including smart home appliances (e.g. Nest) that have not yet proved their ROI in a traditional sense, or solutions that do not neatly fit into established care models (e.g., voice technologies, circadian rhythm optimization).



COST SAVINGS DEMONSTRATED

A wide range of solutions that have through pilots or otherwise, shown some sort of cost savings ... whether it be around medication adherence or hospital readmissions.

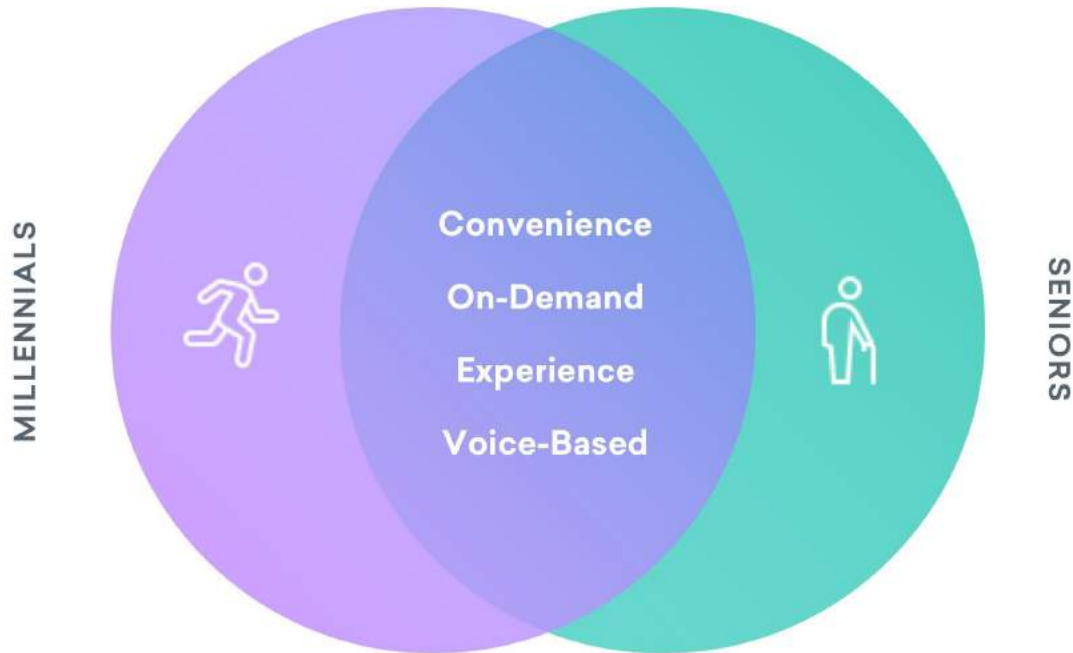


REIMBURSED BY INSURANCE

Innovators can either choose to digitize services that are already covered (e.g., transport or PACE) or build up the necessary evidence to achieve reimbursement.

Increasing levels of evidence, integration into care, and specialization in specific populations.

However, Applying Universal Design Principles Ensures Usability By All, Including Seniors



Source: HealthXL Advisors



Wen Dombrowski, MD, MBA

GERIATRICIAN, INFORMATICIST,
& CHIEF CONVERGENCE OFFICER
CATALAIZE

“The market size for startups that serve 65+ could be further expanded if they take a Universal Design approach -- i.e. design products/services that are super easy to use for all people (not just older adults, but also middle age people with disabilities, busy working moms, stressed out students, etc.).”



Peter Chai, MD

EMERGENCY MEDICINE
BRIGHAM & WOMEN'S HOSPITAL

“Successful companies will need to provide solutions that are simple to use and provide true clinical value.... We need to start picking parameters in the technology startup group that make sense, and involve physicians who care for seniors and seniors themselves early in the design.”

Telehealth & Remote Patient Monitoring



Lee Shapiro

MANAGING PARTNER
7WIRE VENTURES

What excites you about the potential of Livongo, specifically looking at engaging a senior population?

“Livongo Health fits seamlessly into the senior’s workflow – he/she tests blood sugar as they might normally do, but the process is informed with real time insights that are personalized to that senior member. The meter was designed with the senior in mind – backlit; large chicklet style icons on an interactive screen; strips that are easy to handle and insert... last but not least, Livongo is extending into assisting the senior with common co-morbidities to diabetes as well as helping them optimize their medications...”



Alignment Healthcare

Vivify Health and Alignment Healthcare utilized Samsung Galaxy tablets to provide remote care to Alignment’s population. Over 120 patients have enrolled in the program.



Chronic disease management platform that accounts for nutritional elements of various populations including seniors. Livongo applied a universal design approach to its solution to ensure seniors would be able to easily use it.



Omada Health is a CDC recognized-Diabetes Prevention Program, among others such as Noom and Canary Health, who has shown positive outcomes in a Medicare population and modeled cost-savings.

Medication Management



Peter Chai, MD

EMERGENCY MEDICINE
BRIGHAM & WOMEN'S HOSPITAL

What are the key business model implementations that makes etectRx 'senior friendly'?

"In the case of the ID Cap from eTectRx, we have worked with eTectRx to build an unobtrusive and seamless product that tackles one issue (medication adherence/ingestion pattern) with a simple device (a digital pill), that doesn't require additional work from the perspective of the senior or the physician (you swallow the pill, it automatically logs the ingestion and you're done)...It's important to simplify the technology we are presenting to seniors."

Source: Company Websites, Aetna Welcomes PillPack to Preferred Medicare Pharmacy Network (February, 2017)



Pillpack is a broad adherence solution with applicability in senior care. Earlier in 2017, Aetna Medicare members can fill covered prescriptions through PillPack's full-service mail order pharmacy at preferred pharmacy co-pay levels.



etectRx is an innovative medication adherence solution. The ID-Cap is a standard hard gelatin or HPMC capsule with an embedded ingestible wireless sensor. Each time an ID-Cap is swallowed, the ID-Tag uses etectRx's proprietary technology to transmit a very low power digital message from within the patient's stomach.



Medisafe is a smartphone based medication adherence application and platform. It has shown benefit in improving adherence rates for drugs covered by CMS, and has also demonstrated how their application improves the patient-caregiver experience.

Shared Care Planning & Coordination

Evidence suggests that coordinated care models improve patient outcomes and reduce cost.

Successful solutions will also have a plan for how to best engage patients over time and carefully consider how financial savings are achieved.

Source: HealthXL Company Database, Company Websites, CareAngel: How Elite Health Achieved Engagement of 83%, 69% Readmission Reduction and \$496,000 in cost savings (2017)



Atlas of Caregiving is creating a body of research about the everyday experiences of caregiving to better understand unmet needs and lead to the development of better solutions. A recent, RWJF funded, study mapped the relationships between people and their physical space through the use of various sensors.



CareAngel helps address gaps in care between physician visits through an AI-powered virtual caregiver, leveraging basic telephone infrastructure. With Elite Health, it demonstrated positive financial savings across a 500 patient implementation, enabling Elite Health to meet the needs of their value-based contracts.



CareMore utilizes a coordinated care model that includes neighborhood care centers and care teams, case management that improves care coordination, a commitment to primary care, and a reliance on intensivists around hospitalization episodes. It recently introduced Lyft as a partner for non-emergency medical transport.

HEALTH ASSESSMENTS

A wide range of solutions exist to measure and assess the health of seniors – ranging from fitness devices to disease-specific solutions.

The level of clinical or financial evidence that exists for this class of solutions vary given the diversity of approaches.

Neurotrack has been studied more formally, while Fitbit takes a strategic marketing approach that directly targets seniors while enabling researchers to study its devices across various settings and populations.

Source: HealthXL Company Database, Company Websites



Fitbit is a direct-to-consumer company that makes a variety of fitness-related wearable devices. While its products are not specifically created for seniors, the company directly targets seniors and caregivers in various marketing campaigns and collateral.

Core & Category Growth Opportunity



- **Entry Level Price Point:** \$99.95
- **For Everyone:** Easy and Simple
- **Intended to bring new users into the category:** versatile design can look like jewelry, not technology



Neurotrack is a mobile solution that enables individuals assess and improve memory capability, a particular issue with aging individuals. Research on Mild Cognitive Impairment (MCI) have shown positive results in assessing risk of cognitive decline.

Smart Living & Home Care

Various solutions are emerging that better enable living at home.

Traditionally, this category has focused on “home care” solutions, but is now including a number of new players that may not be considered, such as:



Source: Company Websites, Honor Partners with Alzheimer’s Association for Caregiver Training (January, 2017). Medium: There’s No Magic in Venture-Backed Home Care (Feb, 2017) <http://bit.ly/2sdiWSh>



Honor provides non-medical home care through their Care Pros and focuses on helping the elderly with activities of daily living. Disease organizations like the Alzheimer’s Association have partnered with Honor and made their caregiver protocols available to Honor. Approximately 30% of Honor’s client base needs memory care.



A roommate matching service specifically aimed at baby boomers and “empty nesters”, further enabling seniors to remain in their homes and communities. The service markets itself as an alternative to “assisted living facilities” and as a means to generate additional income.



Bringing AI to dementia care and specifically helping manage and prevent falls by seniors. It uses off the shelf cameras to record falls and for a subscription fee, the falls can be analyzed by a human and appropriate action may be taken.

Companies To Watch In The Future



FUNDING AMT: UNDISCLOSED
Founded 2013

Stack is the 2016 winner of Aging 2.0's Global Startup Search, and maker of a smart lightbulbs that respond to natural light and occupancy.

It utilizes the same standards as other home technology such as Amazon Echo, Alexa-enabled devices, and Nest.



FUNDING AMT: \$3.67M
Founded 2014

Cricket Health is a platform to enable better Chronic Kidney Disease (CKD) management for patients and caregivers.

Their technology enables home dialysis, a patient community, educational materials, and personalized care experiences.



FUNDING AMT: UNDISCLOSED
Founded 2015

Care3 is a community care collaboration platform that brings together patients, caregivers, and providers/staff members.

It offers a free app for families and enterprise versions. The platform is well-suited for those offering a care program like Program for All Inclusive Care for the Elderly (PACE).



Investment Perspective

Investors Tend To Make Investments With Applicability Beyond Just “Aging” or “Senior Care”



Big tech VCs often struggle to see the value in hyper-niche solutions, while healthcare VCs understand those struggles and emphasize clarity on revenue model, distribution, and access. Investment firms tend to have a broader focus beyond simply aging, but examples do exist of niche-focused vehicles, such as the joint venture between Ziegler and Link-Age.



Progressive organizations such as AARP, Aging 2.0, and RWJF help catalyze innovation through funding and strategic partnerships, particularly helpful for solutions that hit address market needs without a clearly defined revenue path.



Strategic investment by traditional healthcare players (e.g., health systems, payors) are able to provide capital, resources to setup pilots, and actuarial know-how for proving cost-effectiveness.

Many Top Tier Investment Funds Continue To View Senior Care As Attractive

The most active funds in digital health have portfolio companies representing all major areas of health and healthcare.

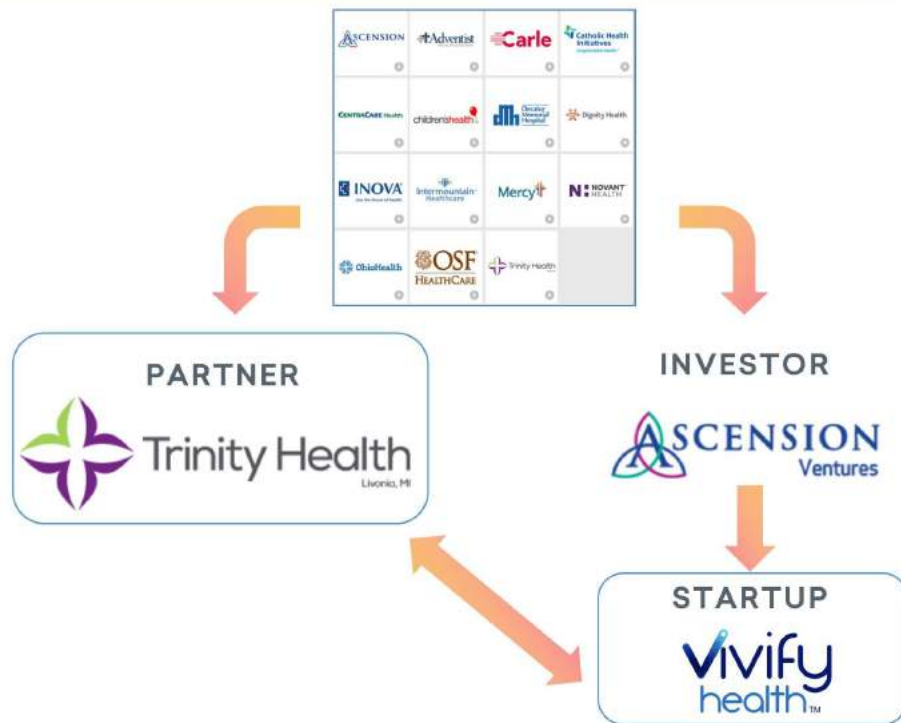
These funds are not explicitly looking for “senior care” solutions, but some of their investments have direct relevance to senior care.

Source: HealthXL Analysis, Rock Health (2016 Year End Funding Report: A Reality Check For Digital Health)

| INVESTMENT FUND | SELECT 2016 INVESTMENTS |
|---------------------|-------------------------|
| | |
| ANDREESSEN HOROWITZ | |
| | |
| khosla ventures | |
| | |

Select examples showed.

Strategic Investors Are Also Well Positioned To Capitalize On Care Platforms & Help Startups Partner With Leading Health Systems



The partnership will combine Vivify Health’s remote care platform with Trinity’s virtual care initiatives.

Vivify Health enables capture of blood pressure, weight, self-report, and the ability to involve caregivers.

The aim is to increase self-sufficiency while also reducing readmissions and ER visits. The partnership is launching in Michigan before expansion to up to seven states.

“Our goal is to provide all Trinity Health At Home patients with care that is compassionate, proactive and transforming while keeping them in their own homes.”

John Capasso
Executive Vice President of Trinity Health Continuing Care

Source: Company Websites, PR Web: Trinity Health to Provide Home Care Patients with Continual, Virtual Care (February, 2017)



Blair Heavey

MANAGING PARTNER
FORTRESS INVESTMENT
GROUP

“When you look at the senior care space, specifically at home monitoring, I don’t see entrepreneurs being able to go from startup to thriving company. I see the larger companies Phillips, Amazon, Google Home crushing them before they get anywhere close to getting to that level. Amazon and Google Home have that level of distribution. But if a company was to be successful... I see the keys being some type of monitoring that converts into engagement, and then being able to show proof of well being based upon that.”



Christian Seale

GENERAL PARTNER
STARTUPBOOTCAMP
MIAMI

“Dual eligibles represent an underserved and green field opportunity when you look at the senior care space. More broadly, as average life expectancy continues to increase I believe the most successful businesses will be built at the intersection of health and other industries which affect the +65 population’s day-to-day quality of life - transport, housing, finance, travel and lifestyle/wellness. Select point solutions will undoubtedly find success but the real winners will be those that improve, extend and promote an active, healthy and fulfilled life.”



Casper de Clercq

GENERAL PARTNER
NORWEST VENTURE
PARTNERS

ACTIVE COMPANIES

NextHealth Technologies
 Omada Health
 Science Exchange

ALUMNI COMPANIES

Basis
 Crossover Health
 iRhythm
 Misfit Wearables
 Telcare

We had the pleasure of connecting with Casper to learn more about his perspective on what it takes to win in digital health. See below for a brief excerpt:

_____ (Page 1 of 2)

HealthXL Question: As an investor what are the elements you look for in a tech enabled service? What gets you excited about Omada potential and what can other entrepreneurs learn about their model ideally as applied to a senior population?

Answer: There are four issues, including:

- 1 **Do people engage over time?** Show me how many people sign up and how many are still active at 6 months. Omada has an advantage in that their program is 16 weeks not months but even then it is hard work to keep consumers engaged. I measure this as value/friction. How much value (benefit) do I get for the work I put in. Either I do no work and I get value for free (think iTunes or Spotify finding songs I like) or I put more effort in to get more value. Standing on a scale in the morning is not a big deal, charging my Fitbit is harder and I need more positive feedback.
- 2 **How much work/cost is it to keep people engaged?** For longer term benefits you need to provide short term rewards. In the case of Omada the coach and peers are essential to provide positive feedback for all the work the consumer is doing. So what is the cost of providing that service and how much revenue can I get for the solution. For example, sensors in someone's home for \$50/month is too costly for what that person gets. No one has found a scalable model yet.

_____ (Page 2 of 2)

3

What is the long term gross margin divided by the cost of getting a user?

Needs to be better than 3:1 In other words I need to get \$3 (maybe over 3 years) but it should not cost me more than \$1 to get that user. Its similar to S&M spend. I cant spend 100% of revenues on commercial efforts – maybe 30-40%. If it costs me \$1 and I plan to get \$3 over 3 years and 90% of my users are gone in one year I better get it down to \$0.30.

4

Finally. Full automation with software only is BS. You need to walk before you run.

Like manufacturing you would never set up full automation without hand assembly first. Software likewise needs to be tested in the wild in all kinds of settings. The idea of bots, automated responses and human like (AI) interactions are extremely difficult and as in #1 people are very sensitized to whether a human is on the other side. No person who cares (coach), no social validation = no persistence. So the service inherently needs to get to gross margin positive within a year or two assuming it is staffed with people and then it can be automated over time.

Even In Home Care, Aligning To Revenue Models Can Positively Impact Company Success

“The main difference between our model and their models is we’re a marketplace, whereas they are traditional agencies with their own tech staff. They basically employ all these caregivers, which is very costly and makes the unit economics hard to operate” (Sheik, CEO of CareLinx)

“[At CareLinx,] we set up families as the direct employer of record and then, similar to ADP, we manage all the payroll, taxes, W2 issuance, on behalf of the patient and the caregiver. That allows us to have a nationwide network of 200,000 caregivers on our platform versus competitors who are struggling with about 1,000 caregivers on staff. Unless you are an employer on the scale of Cisco Systems it’s hard to compete with CareLinx’s model.”

Source: MobiHealthNews

Caregiver startup CareLinx acquired by Generali Global Assistance

By **Jonah Comstock** | September 25, 2017

SHARE 0

Generali Global Assistance, the US division of Europ Assistance Group, has acquired **CareLinx**, a seven-year-old digital health startup that offers a matching service for families and caregivers. The terms of the deal were undisclosed.

“From the Generali perspective, we really believe we’re acquiring a unique asset with a competitive advantage of the nationwide caregivers as opposed to the traditional model,” Chris Carnicelli, CEO of Generali Global Assistance, said in a statement. “And all the dynamics are perfect for growing this business and helping the senior market evolve. So it’s not just that seniors want to stay at home, the dynamics and the economics are pushing the market toward the lower

External Factors Can Impact Unit Economics, Evidenced by HomeHero

In early 2017, Home Hero ceased operations after raising \$20M+ from investors including Social Capital and Cedars Sinai Medical Center. Kyle Hill, co-Founder and CEO, revealed the logic with much candor, highlighting the following:

Longstanding players in home care have deep relationships with various inpatient and outpatient facilities, which are tough to compete with.

Policy and national level wage laws can impact startups – as was the case in 2015 when US Department of Labor required all home workers to become W2s instead of 1099 contractors.

Pilots with enterprise, health systems, struggle to convert to actual contracts with a recurring revenue model.

Home care startups and others focused on senior care market should deeply understand the market dynamics of entrenched solutions.

Source: There's No Magic in Venture-Backed Home Care (Feb, 2017)

There's No Magic in Venture-Backed Home Care

HomeHero hangs up its cape, pivoting new direction.



“One thing we learned about enterprise was that our growth would be somewhat limited due to the lack of financial incentive for certain health systems across the country to pay for non-medical home care, especially if they are only at-risk for a few thousand patients.”

CASE STUDY

A Multi-Stakeholder Ecosystem Often Needs To Come Together When Generating Evidence

Journal of Medical Internet Research

JMIR Publications

Title:

Benefits of Diabetes Self-Management for Health Plan Members: A 6-Month Translation Study

Source: JMIR (2016)



A diverse set of activities and players are typically needed to implement novel programs.

How Can Digitally Enabled Solutions Position Themselves For Success?

Startups building senior care solutions require a strong value proposition that addresses a real problem.

Demonstrating effectiveness and cost savings may prove challenging, therefore strategic partnerships may be required.

Maintain strong ties with the broader healthcare ecosystem that shares similar ideology and mission to improve senior care.



WHEN THINKING ABOUT PROVIDER PARTNERSHIPS

- ✓ Partner with innovative and visionary providers.
- ✓ Identify insurance and payment models within care setting.



WHEN DESIGNING & BUILDING SOLUTIONS

- ✓ Focus on user experience requirements for seniors.
- ✓ Start thinking about how the product roadmap aligns to future needs to generate evidence.



WHEN SEEKING REIMBURSEMENT

- ✓ Learn from past studies and reimbursement approaches.
- ✓ Advocate for national level policy changes that broadly impact seniors (e.g., medical, finances, etc.).



The Future



Jody Holtzman

SVP, MARKET INNOVATION
AARP

“Aging in America must change from its focus on cost and financial burden to opportunity, in recognition of the true value older Americans contribute to innovation and the economy, to our families and communities, to society and America’s future.”

Future Thought

REDESIGNING SOCIETY FOR HEALTHY LIVING

As new models of care emerge and prove out their value, there's a real opportunity to ensure we keep implementing and enabling better senior care.

1

Our societal values need to shift in order to reframe the role seniors play, particularly important as people continue to live longer.

2

Human connections must continue to be prioritized as assistive technologies such as robotic companions, VR/AR, and others continue to take hold.

3

Our communities of the future will be designed and architected in a way that promotes health and wellbeing for all community members.

HealthXL looks forward to enabling global collaborations between leading players to create a better future.

Stay Connected & Learn About HealthXL's Working Groups



New Models of Care

Looking into how traditional care models are evolving to incorporate technology such as community based care using remote monitoring tools and telehealth, advanced analytics for patient stratification.



Precision Medicine

Precision Medicine is a customization of treatment to an individual patient, typically by using genomics, precision nutrition, and microbiome information. Looking into patient data security, regulations, policy as it applies to information repositories as well as CDS solutions, diagnostic tests, or therapy QOL trackers.



Healthcare Payments

Value pricing consists of the highest possible health gains/outcomes for patients, measured against the total cost of care. We will look into areas where value-based pricing may have the greatest impact and how risk-based contracts (including life sciences) can impact care delivery.



Big Data Analytics & AI

Best practices for gaining insights from big data, identifying application areas including healthcare, payors, and life sciences, and improving insight reproducibility. Includes analytics on vast amounts of data such as genetic, claims or EHR information to provide insights.



Consumer Empowerment

Novel solutions that empower patients to manage their own diseases and next-generation approaches leveraging data and behavior change to drive novel disease management programs. Solutions and tools include medication adherence, patient communities, information repositories and chronic disease chatbots.

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