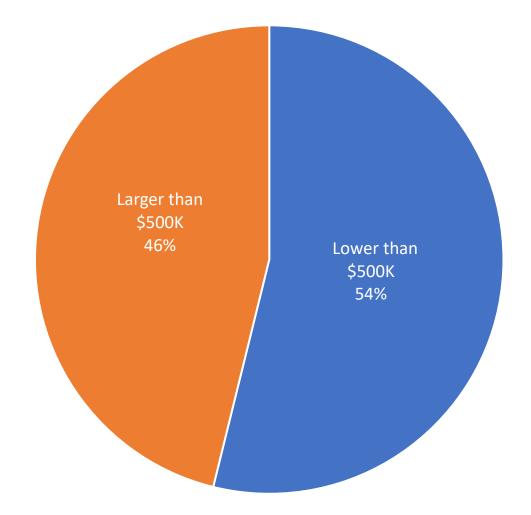
Coalition Member Survey Results May 2022



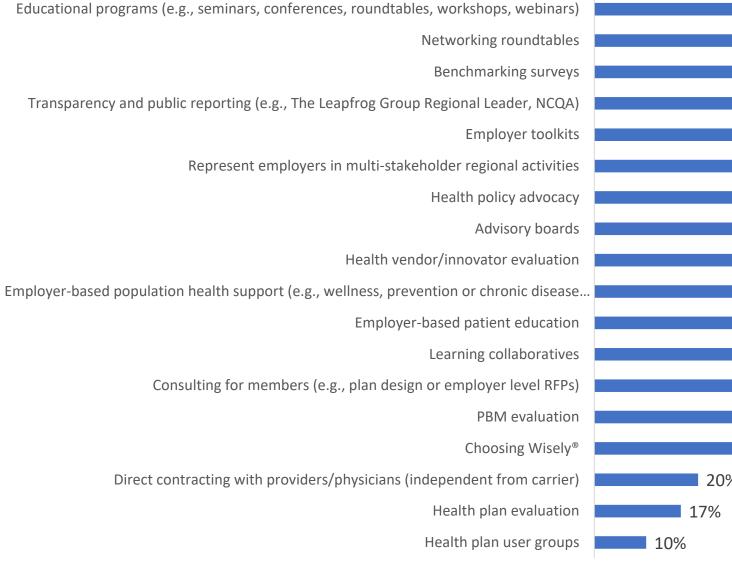
High-Level Observations

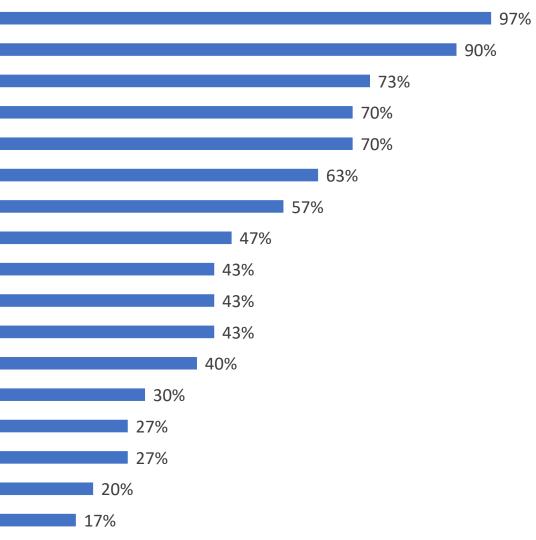
- 34 Coalitions responded 46% less than 500K and 54% over 500K
- At least 70% of Coalitions offer: educational programs, networking roundtables, benchmarking surveys, transparency and public reporting and employer toolkits
- 50% offer group purchasing services with the most common being PBM contracting
- Biggest challenges for Coalitions under \$500K/year include ability to leverage membership to influence market and insufficient staff while Coalition over \$500K/year indicate a lack of health plan and provider cooperation, coalition stability and competition from consultants as their biggest challenges
- Regional health plan largely reflect BUCAs, Kaiser and regional Blues 66% have significant relationships with regional health systems
- Prescription & medical drugs, mental health, hospital evaluation were leading areas of focus in Delivery & Payment Reform Leading areas of future focus include advanced primary care and high-cost claims
- Leading health-focused areas include mental health, diabetes, obesity, and high-value preventive care leading areas of future focus include health equity, social determinants, and musculoskeletal
- Most valuable meetings hosted by National Alliance include Delivery & Payment Reform Strategy Group, Health Policy Strategy Group and National Purchaser Leadership Council
- Most valuable reports and publications include Action Briefs, infographics, special publications, benchmarking surveys
- Most valuable events include the Annual Forum, Leadership Summits and national webinars

34 Coalitions Responded



Services/Programs Offered to Members





Distribution of Revenue

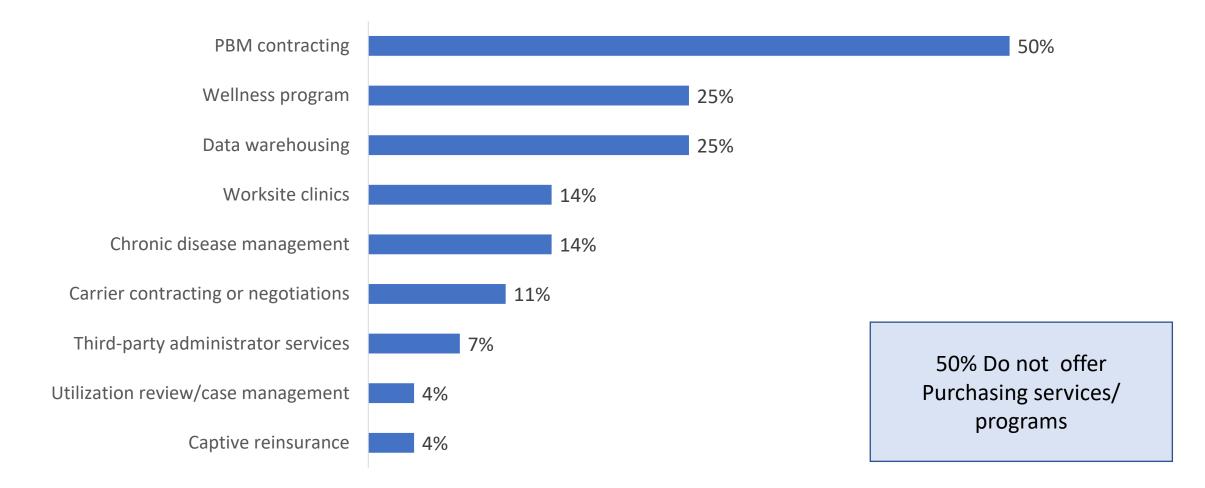
Percentage of total 2021 revenue

	Membership dues	Grants	Educational events	Group purchasing	PPP loan	Other	Total
With Significant Group Purchasing*	15	3	5.6	56.8	3	16.6	100
Without Significant Group Purchasing*	56.7	19.7	15.8	0.9	2.5	4.4	100
All Coalitions	47.9	16.5	13.5	12.5	2.4	7.2	100

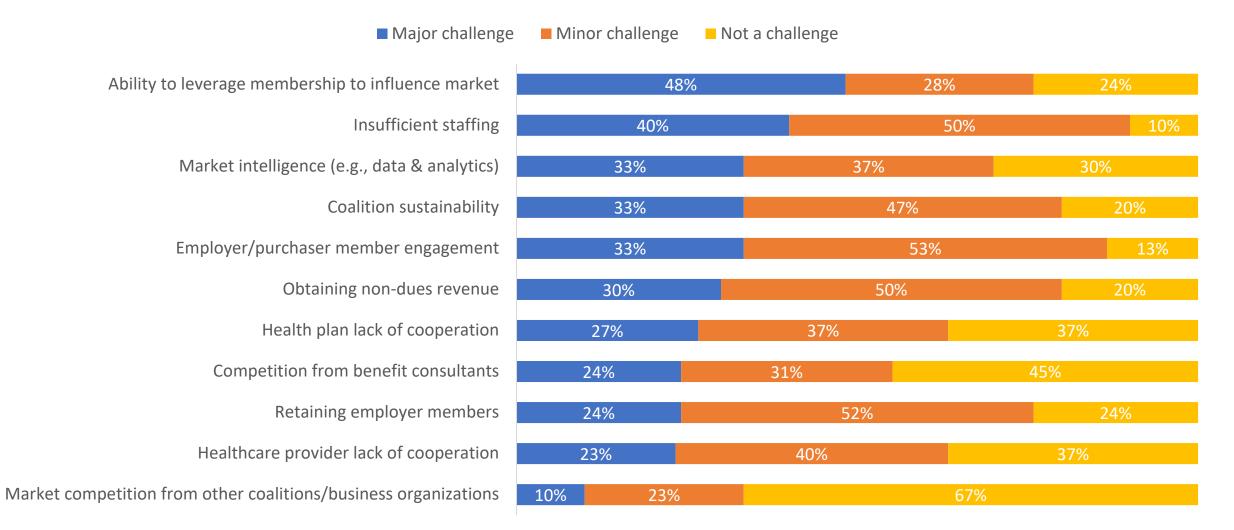


* Significant Group Purchasing defined as over 10% Revenue from Group Purchasing

Group Purchasing Services/Programs



Areas of Major or Minor Challenge

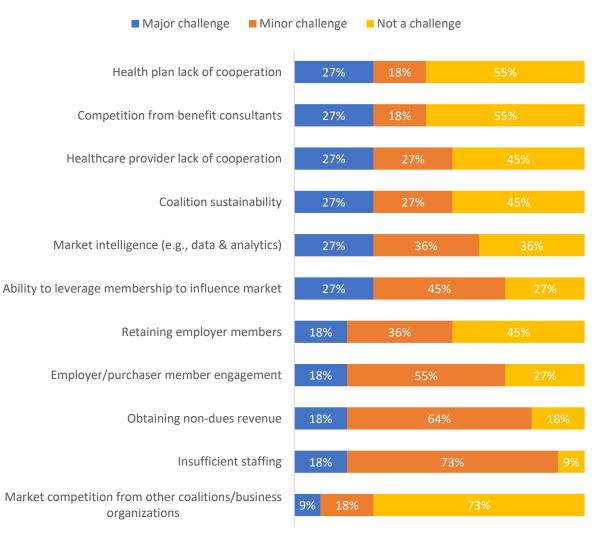


Areas of Major or Minor Challenge

Major challenge Minor challenge Not a challenge Ability to leverage membership to influence market 63% Insufficient staffing 56% Market intelligence (e.g., data & analytics) 50% Obtaining non-dues revenue 44% Employer/purchaser member engagement 44% Coalition sustainability 44% Retaining employer members 27% Competition from benefit consultants Healthcare provider lack of cooperation Health plan lack of cooperation 19% Market competition from other coalitions/business 13% organizations

(Lower than 500K)

(Greater than 500K)



What are Biggest Challenges (open comment)

Membership

- Recruiting new members
- Retaining members or expanding membership base
- Members in different markets/industries lots of effort to keep engaged
- Engaging members so we can make changes
- Employers who are fully-insured some could benefit to move to self-insured
- Continued programming for member attraction/retention

Internal Issues

- Need high level staff who can lead complex projects
- Revenue generation
- Limited staff time due to low budget

External issues

- Convincing employers that disruption is not a negative in healthcare transformation.
 Most seem content to continue to be part of the problem Vs drive action
- Leverage combined voices across US and regionally to drive change
- Purchaser voice is weak due to feeling loss of local control
- Strong reliance on brokers
- Challenge to directly involve business representatives in policy/cost discussions

Financial

- Revenue generation
- Funding is a challenge

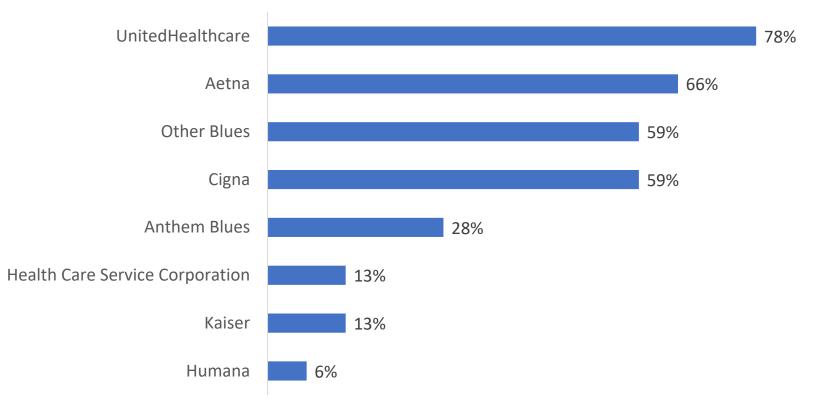
Type of Support Most Healthful

- Support with the new transparency tools
- Continue to disseminate Action Briefs and webinars

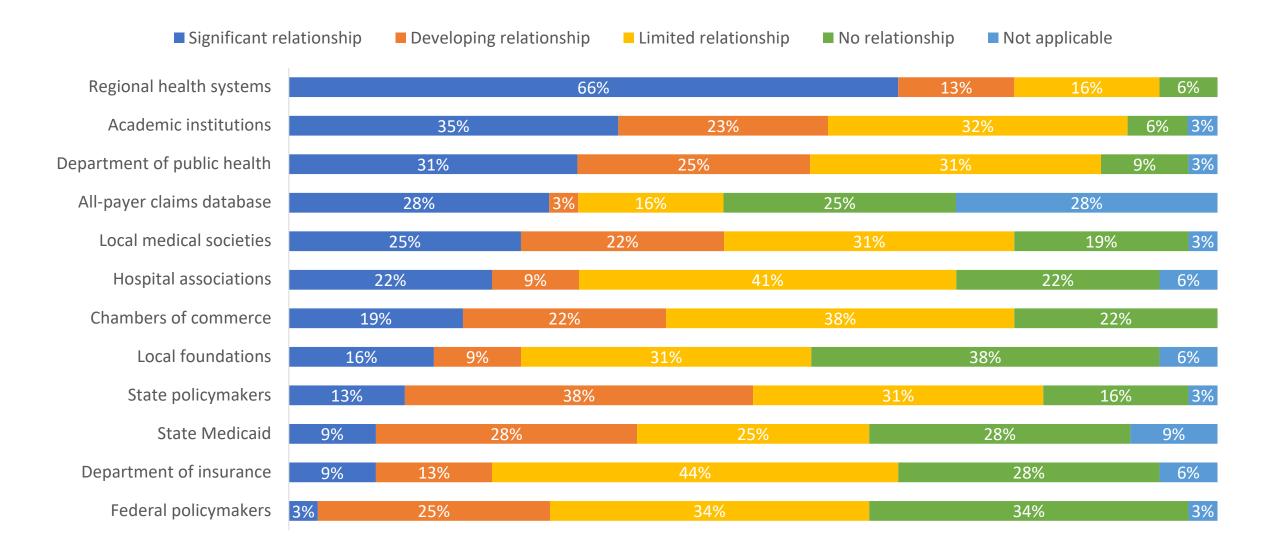
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 Continue to educate on importance and benefits of self-funding and have resources available to assist staff in transition

Major Commercial Carriers in Your Region



Relationships with Other Healthcare Stakeholder Organizations



Delivery & Payment Reform Areas

Current and Next Two Years

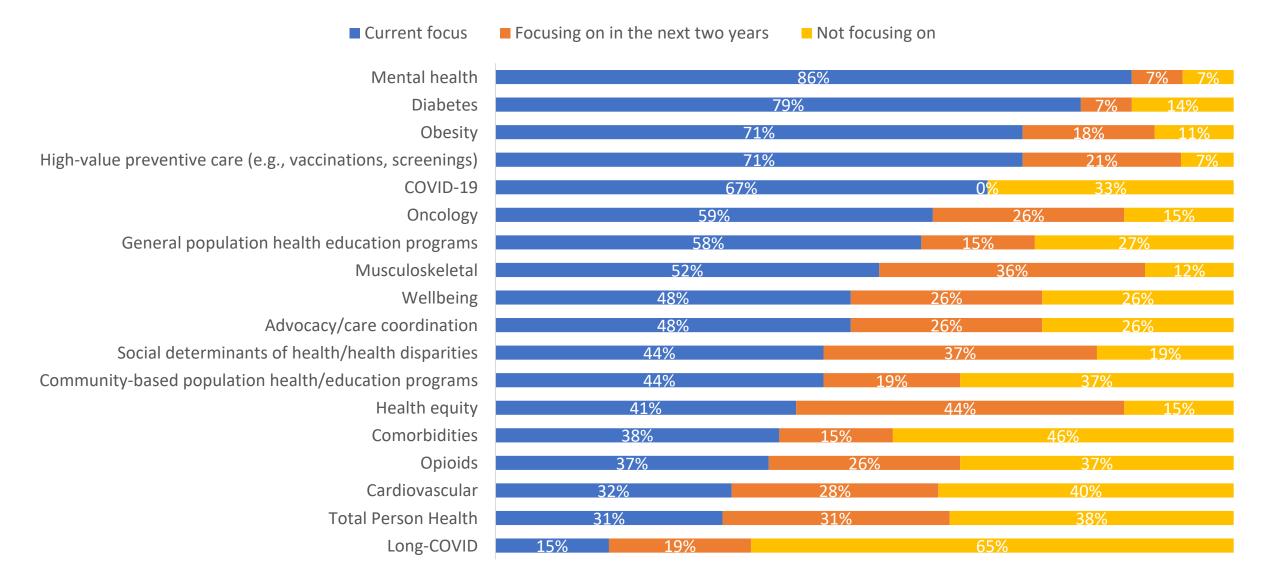
Current Focus	ocusing on in the next two years	Not focusing			
Pharmacy and medical drugs		80%		10%	10%
Specialty drug management	79%			11%	11%
Mental health access and quality reform (e.g., The Path Forward)	79%			7%	14%
PBM management	73%			10%	17%
Value-based purchasing	71%			21%	7%
Hospital patient safety (e.g., The Leapfrog Group)	68%		14	4%	18%
Hospital pricing evaluation (e.g., RAND, NASHP)	68%			25%	7%
Waste or inappropriate use	67%			22%	11%
Hospital quality evaluation (e.g., Healthcare Bluebook)	56%		26%		19%
Advanced primary care	48%		41%		10%
Centers of excellence	39%	29%		32%	
Bundled payments	37%	26%		37%	
High-cost claims	34%	38%		289	%
Accountable care organizations	11% 22%		67%		

Sources of Data Used to Evaluate Quality & Performance of Medical Providers

The Leapfrog Group	67%			
CMS data	47%			
Health plan data	37%			
All-payer claims database	33%			
Hospital compare	30%	Other		
NCQA	23%	other		
Coalition data warehouse	23%			
Centers of excellence criteria	20%	Medicare Cost Report		
Other (please specify)	17%	NAIC data		
State licensure agencies	17%	Community Reports		
Our coalition does not evaluate quality and performance data for	17%	• PHC4		
JCAHO (Joint Commission)	13%	Florida Health Finder		
Data vendors (e.g., IBM Watson)	13%	CareChex Rating		
We do not use any data sources to evaluate the quality and	13%	Ũ		
SurgeonCheck	7%	System (Quantros)		
Healthgrades	7%			
Health plan high performing networks	3%			
Vitals	0%			
US News & World Report	0%			
Imagine Health	0%			

Health-Focused Areas

Current or Next Two Years



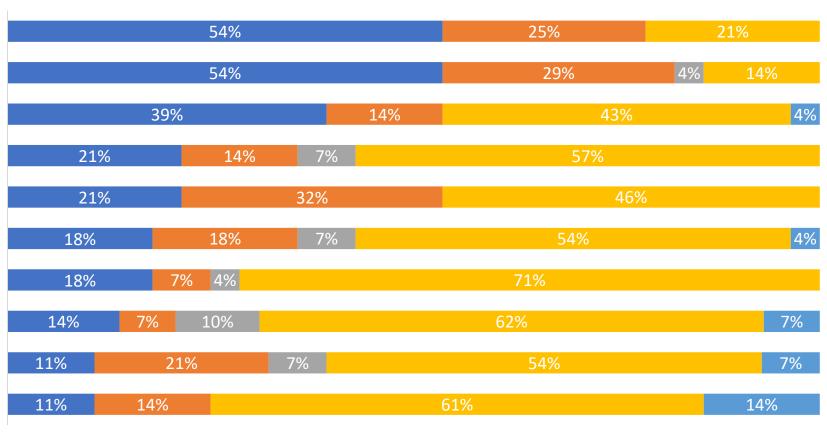
Virtual Meetings Hosting by National Alliance

Currently participating and highly valuable

Not participating

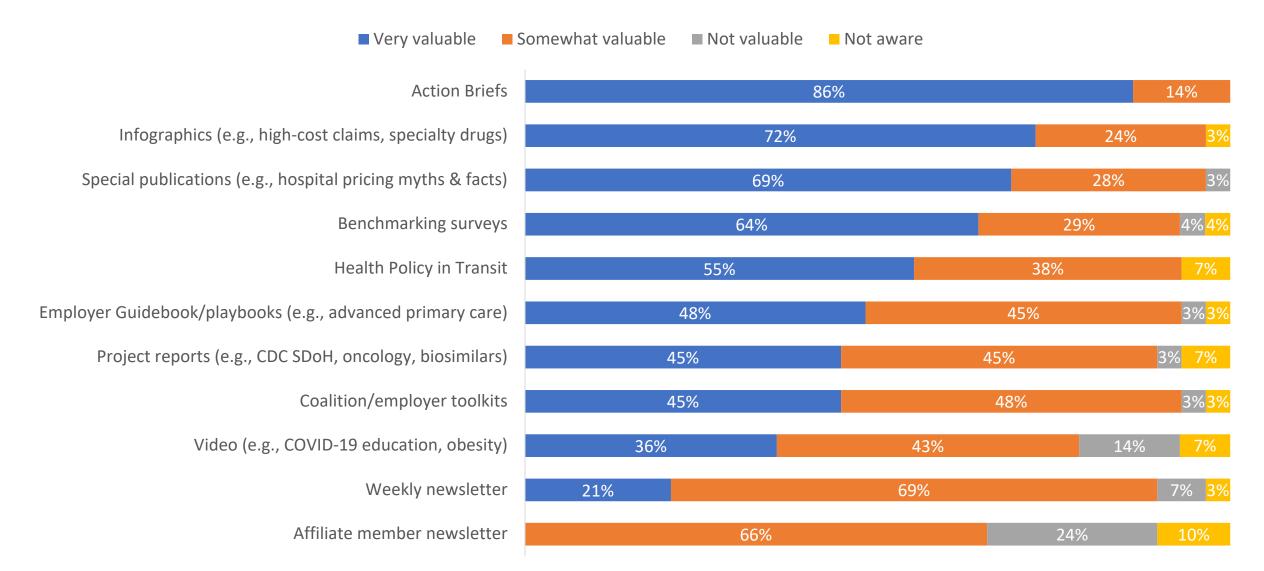
Interested in learning more

Health Policy Strategy Group **Delivery & Payment Reform Strategy Group** NPLC (National Purchaser Leadership Council) **Total Person Health Strategy Group** Medical Director Advisory Council The Path Forward RESET Meetings **COVID** Advisory Council Race, Health and Equity Advisory Council High-cost Claims Advisory Group Group Purchasing Sharing Call



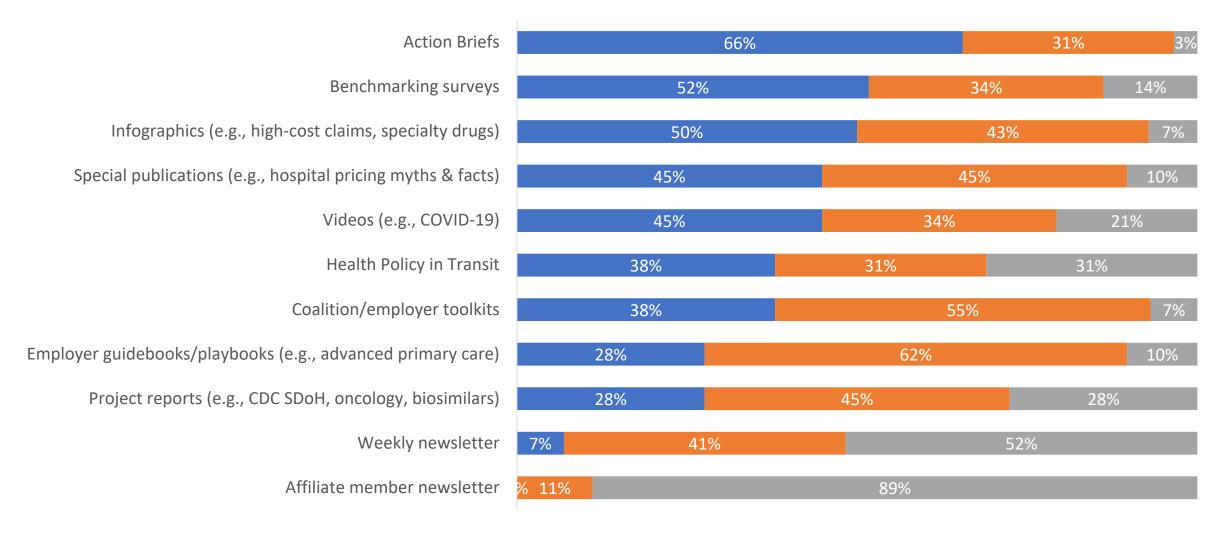
Currently participating and somewhat valuable Have participated, but is not valuable

Reports & Publications offer by National Alliance

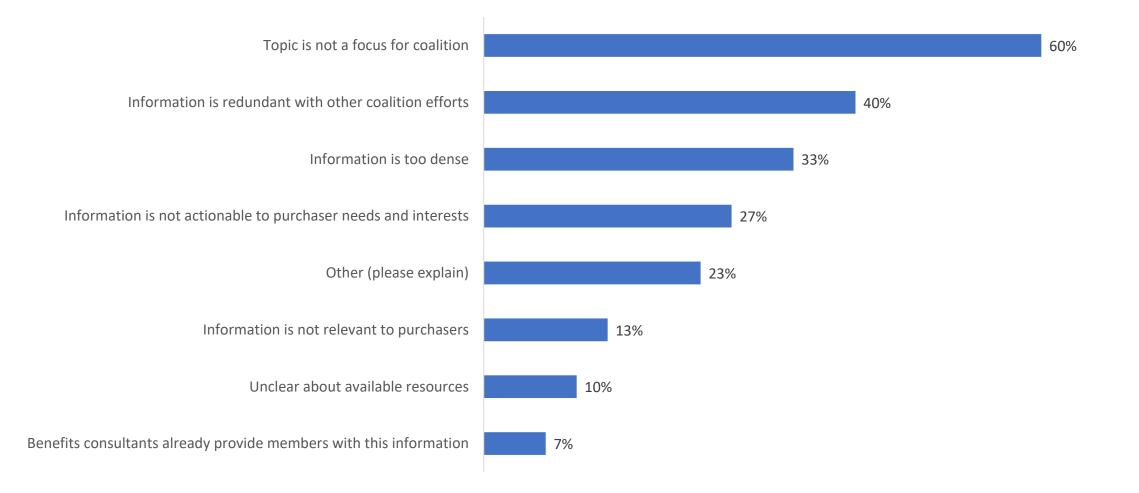


Publications & Resources Shared with Members

Generally share with our employer members Sometimes share with our employer members Do not share with our employer members



Top Factors that Contribute to Not Disseminating



National Alliance Activities & Member Benefits

Very valuable Somewhat valuable Not valuable Not aware Annual Forum 77% 3%<mark>3%</mark> 17% Leadership Summits 67% 30% 3% National webinars 66% 31% 3% National Alliance support for our coalition 59% 31% 3% 7% All-member virtual meetings – in person 52% 34% 3% Coalition member sharing virtual meetings - monthly 52% 38% 10% Coalition grant opportunities 50% 27% 3% All-member virtual meetings - monthly 48% 52% Virtual Town halls (e.g., COVID-19, race, health and equity) 46% 46% 7% Continuing webinar series (e.g., mental health index, fiduciary check-in) 43% 57% NHLC meetings 38% 45% 7% Member library - online tools and resources 31% 59% 3% 7% Member Connect discussion forum 28% 59% 10% 3% Member Connect Coalition directory 21% 61% 14%

National Alliance Testimonials

"The National Alliance is a remarkable organization that brings together like minded individuals from across the nation to drive industry change and promote high quality, affordable care."

"The National Alliance is an invaluable partner helping regional coalitions to meet or exceed the expectations of their members"

"One of the most important benefits of our membership in the National A is information exchange with fellow coalition directors."

"As a member of the National Alliance, our Coalition is positioned to drive innovation, health, and value for our purchasing members. "National Alliance provides national resources, expertise, and networking to accomplish local missions."

"Membership provides a wealth of information that would otherwise take a great deal of time to find. The Alliance is engaged in myriad of very relevant issues important to members."

"The National Alliance is a great resource to keep focused and informed on hot healthcare topics, a great source for networking with peers, and trusted resource for employer best practices."

"The National Alliance helps our members stay aware of national trends in healthcare benefits. The National Alliance gives them access to best practices."