# Navigate the workforce challenge

How to create a positive future for working in health



The health care workforce is at an extraordinary intersection of pressure, change and transformation. Even after years of pandemic upheaval, health care workers continue to experience increasing workplace hazards, long hours and the frustrations of inefficient workflows.

Organizations are coping with high levels of churn in frontline workers, quiet quitting by mid-level staff, and early retirement of their most experienced clinicians.

Aging, chronic and complex populations are expanding and expect health care to offer the same ease and convenience of other service sectors. Leaders are coping with immediate, widespread workforce upheaval as they straddle diverse financial models and navigate into the next era of digitally integrated health care.

But there is evidence of wins that can produce near-term financial and staffing stability. There are actions to calm and reconnect the workforce while mapping exactly where more significant adjustments need to happen. This white paper will look at some of the root causes of workforce upheaval and actions that leaders are taking today to methodically adjust their policies, procedures and practices for immediate stability and long-term growth.



Hybrid work flexibilities, a connection and visibility into the company's impact, as well as tools that remove administrative burden in clinical care are essential parts to a winning recruitment and retention strategy."

Kristi Henderson, DNP,
 NP-C, FAAN, FAEN
 CEO, MedExpress &
 Optum Virtual Care
 SVP, Optum Everycare





Lever One:

## Reconnect talent to purpose and performance

In health care, the workforce must be well-trained, alert and able to respond to the needs of people with a wide spectrum of physical and mental health concerns. This demands a high level of energy and engagement — enough to fuel compassionate care, ongoing learning, crisis response and an allegiance to the organization's values and mission. Without this, organizations risk not being able to meet the urgent health concerns of the people under their care.

A large percentage of the workforce is made up of women and hourly workers. These could be call center employees, coders, social workers, medical assistants, and the frontline staff who greet and guide consumers through their experience. This segment is most vulnerable to churn and shortages within this group can create a domino effect, cascading disruption across departments as everyone adjusts to compensate. Leaders can gain early momentum by tackling the concerns of this segment in key areas:

#### 1. Find ways to connect in person

A quick, low-cost action is to hold more face-to-face conversations to understand the daily realities that are robbing staff of time, energy and job fulfillment. Building on the core standards of satisfaction surveys, many leaders are seeing the value of getting on the floor and experiencing workforce challenges firsthand. Not only is it revealing, but often staff members have already thought of cost-effective solutions that can be implemented swiftly. Expanding these kinds of hands-on encounters and conversations builds a culture of trust, speeds issue resolution and gives workers more reasons to stay.



A culture of respect guided by leaders who listen and respond makes us more competitive."

Tom Albanesi, CPA, FHFMA
 Chief Financial Officer
 Excela Health

#### 2. Uncover common themes

Physically visiting each workplace location can reveal unique challenges, such as local transportation or parking challenges, food deserts, distance from family care, or specific physical safety concerns. These visits also shed light on how roles may have evolved, new ways that job responsibilities could shift to bring relief, and where technology is a help or a hindrance.

#### 3. Reinforce an inclusive, mission-driven culture

At its core, the health care workforce is inspired. They are motivated to contribute to the health and well-being of people in their community. But they also desire a sense of connection. Another quick action is to find out how attached your employees feel to your organization. Ask the right questions, such as:

✓ Are your mission, vision and values communicated in everything you do?

Can employees connect your purpose to their performance?

Have you recognized their perspectives, ideas and suggestions, and proven that they will be considered and potentially implemented?

Are their concerns met with empathy by their team members and managers regardless of their status or background?

Are people able to practice compassion in ways that bring meaning and joy back into the workplace?

#### 4. Build clarity and confidence around roles

As roles, technology and workflows evolve, health care workers at all levels have said they can feel like an anonymous cog in a desensitized system. If they are overworked, demotivated or feeling isolated, they will naturally withdraw and begin looking for alternatives.

With regular, straightforward conversations, managers can confirm that their people:

- · Know what's expected of them
- · Have the tools they need to succeed
- · Have a level of autonomy to make their own decisions
- Have work relationships they trust
- · Can see a path to professional growth

If any one of these areas is inadequate, the employee is likely already at risk. But with clarity, tools, connections and a clear path to growth, employees can feel secure. The primary investment for employers is time and conversation.

Having strong relationships at work is a leading indicator of retention. Good work relationships speed training, resolve conflict, enhance ideas, strengthen culture



When you ask people what they need, what they want, it isn't always about money."

Kristy Duffey, MS,
 APRN - BC, FAAN
 Chief Nursing Officer,
 Optum Health

Chief Operating Officer, Optum Home & Community Care

visible – in every department –

Leadership needs to be

and offer the social interaction germane to a fulfilling human experience.

Employees are empowered when they feel they have independence to make their own decisions, have the opportunity to bring their greatest talent to light, and can see a positive and productive path forward.

#### 5. Expand the possibilities for your workforce

Being in clinical practice for every hour of a working week is tremendously challenging and health professionals simply burn out as a result. Many workers feel defeated when struggling with technology or trying to serve consumers with incomplete or erroneous information. As they go through their career, people need opportunities for growth, human connection and learning. Look for ways to expand opportunities that serve the workforce and the business. These might include ongoing education, management opportunities, entrepreneurship, or creating a new innovative practice built from existing experience. Direct conversations bring more of these ideas to light. Building flexibility and growth into a role proves you recognize how difficult the job is and have identified ways to refresh, restore, reinvigorate and retain valuable talent.

Leaders can begin to revitalize their workforce by increasing the conversations that reveal common concerns, connecting work to the company's mission and values, fostering positive relationships, and providing clear expectations and opportunities for professional development.







Lever Two:

## Find the right relationship between people and technology

Care looks entirely different today than it did even a few years ago. No one debates the value of technology or the growing capacity of digital solutions to improve health. But while many intelligent efficiencies and improvements have been achieved, it is clear that many health care employees feel technology has complicated their work life.

When the experience is siloed, redundant, cumbersome or carries incomplete information, it frustrates both the consumer and anyone who is trying to serve them.

Frustration with technology is associated with emotional exhaustion among health care workers1

Technology is achieving its potential return on investment only when it:

- Makes the health experience simpler and more convenient for everyone
- Empowers every user to make the swiftest, most informed health choices or decisions
- · Improves outcomes and reduces the overall cost of care



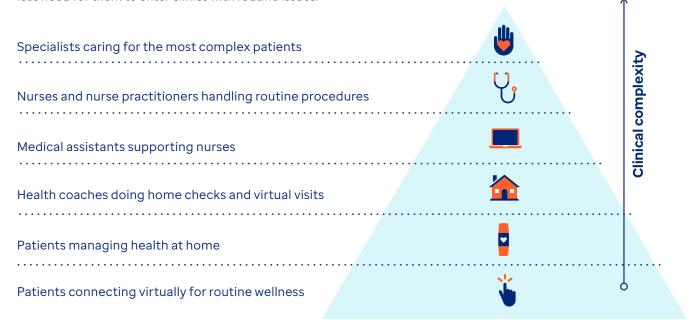
Adding a technology wrapper to an outdated operating model or process will miss the mark."

#### - Constance Thomason

Vice President, Advisory Services Optum

#### Lever Two: Find the right relationship between people and technology

Let's look into the future. Not all patients have the same need. They do not need or want to be treated in a generic manner. Technology allows them to engage in a personalized experience that matches their health concerns and preferences. As consumers embrace remote monitoring and more self-management, there will be less need for them to enter clinics with routine issues.



Technology-enabled upskilling

With smart technology at their side, nurses can take on more common surgical procedures, freeing specialists to focus on cases with severe complications or comorbidities. Technology is adding a rich layer of intelligence to the people managing care so that they can operate at their highest potential and improve health outcomes in the simplest and easiest way.

This will not happen overnight. But the right relationships between people and technology can be fine-tuned in planning, training and daily engagements. And there is strong agreement that technology innovation should be physician-led at every level. Here are actions leaders report they are taking today to make sure that technology is boosting their human capital rather than depleting it.



## 1. Bring the right perspectives to your planning process

Organizations are looking at what technology they have, determining what to keep, and deciding where to invest. Decisions that will restructure the technology infrastructure rely on leaders asking the right questions, such as:



Who are the operational, business and clinical leaders who will help us refine our priorities and our operating model?



What do our consumer and our workforce require today and how will that evolve in the next few years?



How do we plan for those needs based on who we are now and how we earn revenue?



What are the core services we need to perform and where will we perform them?



What people and supporting technology are required to be competitive and create more value for the business?



How will we adjust our recruitment and training systems to match this new model?



How can technology upskill our workforce and best engage consumers in their health?

#### 2. Make training a seamless, everyday action

While planning is ongoing, people are still using technology every day. And it is impossible to create an optimal experience if people don't know the best way to use their tools. The upheaval of the pandemic temporarily pushed training to the back burner. Now, many are experiencing the delayed ramifications for having cut corners on training. Workflows are more cumbersome, employees are more frustrated, and errors and omissions are more costly. This is compounded by having a negative impact on retention — so the attrition, recruiting, hiring, training cycle repeats.

Reclaim ground with a few simple, quick strategies:

- Authorize a percentage of work time for training so that employees are not having to cut into their personal time, fight work distractions or delay training indefinitely
- Ask people how they best learn and be ready with options such as hands-on or self-paced training
- Create a buddy system, so that every employee has a peer they can reach out to for daily support
- Assign each person a mentor within their specialty who can help them apply new use cases and offer steady, reliable reinforcement
- Recognize and reward when teams and technology are performing at optimal levels
- Identify top performers and guide them into leadership and management training



Whether it's AI, machine learning, natural language processing or a simpler user experience, technology needs to bring accuracy, joy and satisfaction to the workplace."

#### - Tim Dutton

Executive Vice President
Mission, Brand, People
Chief Human
Resources Officer
Kettering Health

#### 3. Create a culture of continual improvement

Every day can provide insight for technology expansion, improvement or overhaul. But having recognized that training is an added stressor, new workflows and processes can be an unwelcome change for tired workers who already have faced more upheaval than they can easily handle — unless they are leading the process.

#### Let employees lead the improvement process

The best ideas on how to improve technology or implement solutions with the least disruption come from the people who are using it every day. Employees have line of sight into issues and opportunities that leaders would never see. This works for technology and workflows as well as the full range of labor concerns. It's liberating and empowering to share ideas, and momentum builds as teams see their suggestions come to life. Allowing employees to directly surface ideas can keep the issue/resolution process from being lost in bureaucracy and speed resolution – and in today's labor crisis, speed is paramount.

Employees are motivated to make technology work better when it means they can work better. They may already have new ideas for guiding consumers, managing referrals and handling same-day surgeries or in-home care. They can see that with smart technology at their side, they will be equipped to uplevel their own skill sets and take on new, interesting responsibilities. In other words, they can see what's in it for them. Using technology to uplevel staff serves both the employee and the business.

#### Commit to servant leadership

Labor shortages and technology challenges are everywhere, but so are good ideas. Include managers from all departments – security, nutrition, maintenance, social services, home health – in this listening approach. This highlights more opportunities for integration, synergies and ways to reduce duplicative efforts. It also contributes more completely to the larger organizational design process.

A resilient workforce knows they have a voice and feels confident that they work with an agile organization that is willing to try new ideas and elevate their talents. Often, simple solutions can have the biggest payoff. Implement a regular check-in with employees to ensure there is organizational follow-up for proposed solutions. Measure the results and promote successes fostered by servant leaders. This is how innovation happens.

To achieve the full potential of technology investments it's crucial to involve operational, business and clinical leaders in the planning process, adopt a thorough training process and encourage employee-led improvements.

One of the most important aspects of someone's well-being at work and happiness is around their autonomy and the ability to make their own decisions."

Dominic King, MD, PhD
 SVP Clinical Technologies,
 Optum Health



Lever Three:

## Expand the use of intelligent data

Health organizations are finding new ways to collect, assess and apply data to help them better understand and manage their workforce challenges. They are gathering new insight to help them resolve training, burnout and skill-level concerns. They are also taking advantage of ways data can be used to expand workforce capabilities and capacity. And finally, they are seeing new ways to connect data from across their organizations to guide planning and investment.

In this section, we explore how leaders are finding new ways to use data from more sources to address their workforce challenges.

#### 1. Take a deeper dive into workforce analytics

Going beyond employee satisfaction surveys, leaders are gathering new data to look more specifically into the pressures and performance metrics within departments, demographics and locations. For example, in many organizations, data is revealing that while turnover is an issue, it is specifically first-year turnover that is high. This is having a domino effect because as more new people join a department to replace them, there are more workers with less than one year of experience. This creates a vicious cycle. But the data isolates an issue that can be stabilized with retention strategies specific to this demographic.

#### Lever Three: Expand the use of intelligent data

A deeper look guides a targeted approach that pinpoints root causes and focused action. Here are a few suggestions for how data can be used to assess workforce risk, prepare for shifts in demand and improve satisfaction and performance.

#### **Assess**

- Evaluate how connected employees feel to their culture and their mission
- Track turnover by department and demographics
- · Identify root causes of exhaustion and disengagement by location and department
- Measure return on location-specific benefits such as transportation vouchers, daycare, hybrid workflows and more
- Identify how long consumer engagements take by demographic, condition, location and day/part

Employers, payers and providers who combine historical trends with real-time data can plan, schedule and manage teams with maximum operational efficiency. Leaders agree that to meaningfully forecast demand, revenue or staffing needs, the data and the insight must be accurate, accessible and shared in real time.

It's not possible to serve consumers well without timely insight. And when consumers are frustrated, so is the workforce.

#### Prepare

- Predict consumer demand for services by location, channel, day and time
- · Anticipate and prepare for surges in demand
- Recognize workforce mental health concerns

Once steps are taken to stabilize the workforce, leaders can use what they have learned to recognize, reward and sustain good action.

#### Grow

- See where workforce satisfaction and customer satisfaction data connect
- Track workforce impact on quality to steer performance bonus structures
- Measure the impact of innovative work arrangements on clinician satisfaction and consumer engagement

Performance management systems can connect data related to an individual employee or departmental team actions to metrics that are meaningful for the business. This allows organizations to offer bonuses that are directly related to improved quality and cost savings. It also improves morale, may identify training needs, reduces the quiet quitting of top performers, and helps identify employees who should move on from the organization. This also allows human resources (HR) teams to prioritize actions around upskilling, training and growth opportunities where it will have the most impact.



Analytic expertise is important to be able to pull out the right workforce insight that can guide leadership discussions on a regular basis."

Terry Cunningham, DBA, MHA
 Chief Executive Officer
 Palmetto Primary
 Care Physicians

#### 2. Use data to support and expand workforce capacity

Information is exploding across health care. Each day produces new drugs; new research; more frequent, evidence-based guidelines; and updated protocols. To benefit the workforce, it's imperative to digitize knowledge and, when possible, to include artificial intelligence (AI). Then when clinicians are seeing patients, they have a second, data-driven opinion at their fingertips. And when call centers are speaking to consumers, they can anticipate need and resolve nearly any question or concern.

But people don't want to just rely on technology, no matter how smart. To engage the workforce in these types of intelligent solutions, leaders need to promote the right balance between automation and autonomy. These tools use AI to look at highly complex data and spot patterns that the human eye cannot. On the flip side, human expertise can also identify patterns that algorithms cannot. The combination of human expertise augmented by AI for assisting in the diagnostic process is compelling. AI support can let employees bring their experience to bear but reassures them that they haven't missed any symptom or underlying issue. It speeds information to the care or service point so that the employee and the consumer can make the most thoughtful decision.

This kind of decision support can improve outcomes, increase patient ratios and help level up staff to take on specific tasks. For example, using data-driven support to augment a regularly recurring procedure, nurses can take on that capacity while allowing senior clinicians to redirect their attention to complex patients. From the call center and coding department to scheduling and surgery, intelligent data can offer every department the ability to improve quality, satisfy the consumer, and feel proud of the mission-driven work it enables them to perform.

#### Workforce enhancement checklist

- ✓ Digitize insight so that it can be shared across the system
- Ensure that clinicians are well-trained on how to use the complex databases within electronic health records
- Reinforce the balance between automation and autonomy
- ✓ Identify areas where upskilling can improve quality and worker satisfaction



### 3. Integrate human resource and financial business data

Leaders are at a challenging moment in workforce evolution. On one hand, there are not enough workers to meet demand. On the other, care and payment models are evolving to include virtual tools, remote monitoring and AI.

Managing through this level of change means leaders must be able to quickly calculate the impact of their workforce decisions on the business. The key question to ask is: "Where can we take expenses out of the system so that we can invest in areas that will get us the long-term return we want?"

To find the answer, HR teams must be able to understand how their organization maintains financial sustainability and exactly how the workforce impacts financial performance. Organizations need to evolve their HR teams and build business leaders with an expertise in human resources. These leaders must be able to recognize the correlation between financial performance, HR investment, IT investment, quality scores and consumer satisfaction levels. By looking at related data points — such as call center capacity or volume of new patient visits, impact on clinician-to-patient ratios, and customer complaints — you can connect HR data to financial data.

Leaders are correlating clinical, financial and human resources data to analyze workforce challenges, adapt to changes in market demand, and improve business performance. By analyzing data at both a macro and micro level, leaders can gain a comprehensive understanding of how specific workforce pressures impact organizational performance and consumer satisfaction. This approach enables them to make more informed decisions and effectively guides planning and investments.



E. Selemon AsfawChief Financial OfficerOptum Care





Lever Four:

## Build an anywhere, anytime workforce

Several factors are changing the time and location of care delivery, administrative support and customer service. Consumer adoption of telehealth, consumer and worker demand for more flexible schedules, and workforce shortages have all accelerated the shift away from the in-person, 9-to-5 model. Expanding hours and virtual health not only gives staff more flexibility but also increases access and convenience to consumers.

Physically traveling for in-person care can be as hard on the workforce as it is on the consumer. While some scenarios certainly require in-person attention, organizations are using virtual technologies to bring expertise into the room without the need for physical travel. Here are a few examples of how location and work schedules are adjusting.

#### Retain crucial nursing experience

To retain older, more experienced nurses, providers are now offering virtual settings where nurses can work from home but still support the in-person bedside nurse. The onsite nurses find the virtual presence of a more experienced colleague to be helpful.

A flexible working arrangement is a

## top-3 motivator

for job seekers.

- The American Opportunity<sup>2</sup>

#### Offer staff and consumers more flexibility

One system heard from a majority of consumers that they prefer after-hours customer service and in-person visits. After getting crucial buy-in from their staff, they now offer scheduling flexibility in over 50 locations. This positively impacts customer satisfaction and, with the offer of flexible scheduling to the staff, employee satisfaction scores are going up.

#### **Expand chronic care**

Medicaid, Medicare and many private insurers are covering consumers with chronic conditions who take advantage of digital tools to monitor glucose levels, blood pressure, oxygen levels and weight, thus reducing the need for in-person visits. Telehealth visits and health coach texts combine to keep patients on track while the patient-to-provider ratios increase.

#### Streamline authorizations

Payers and providers are collaborating to reduce the number of prior authorizations needed based on prior performance, use of evidence-based guidelines, or eliminating outdated requirements. Understaffed physicians can have precious time wasted as they dialogue with their payer partners for authorizations. This can delay care, frustrate the patient, and tie up crucial labor that could be better deployed.

#### Bring in the specialist

Neonatal units, surgical specialties and emergency medical technicians (EMTs) are using telehealth to connect specialists to patients who are physically distant without having to add drive time to their schedules. Many communities, especially those in rural locations, find specialists in short supply. Organizations can be challenged as they strive to align their clinical expertise with the demands of the populations they serve.

#### Urgent care, Rx and customer service are now 24/7

Online pharmacies continue to enter the market, and more in-person pharmacies and walk-in clinics are staying open 24/7. Telehealth is also expanding capacity for urgent care. Consumers who may be unable or unwilling to make an in-person visit are increasingly participating in televisits. This means providers can reach more people across a geographic region with localized staff.

Building an anywhere, anytime workforce allows organizations to meet consumers where they are, lower overall costs, and attract employees with options that support their professional growth and help them achieve their work-life balance.

There are whole generations that have grown up doing everything online, 24/7. They expect health care to do the same."

George Crowley
 Chief Human Resources
 Officer, Clinical Practices
 of the University of
 Pennsylvania



Lever Five:

## Map an enterprise-wide workforce strategy

Workforce challenges are deeply intertwined with other pressing business issues. Consumerism, shifting payment models, the pandemic, the rise of mental health issues, the economy and new technologies all intersect with workforce dynamics. The only way to master this combination of concerns is with an enterprise-wide workforce strategy. That will involve clinical, business, IT and HR leaders who often have very different perspectives on what the organization needs. To succeed in gaining leadership alignment around workforce decisions, organizations need to:

#### 1. Establish a solid governance structure

Research indicates that most leaders find it challenging to gain agreement from their peers on what actions to take. A governance structure creates guidance for the healthy debate that comes from diverse perspectives. Building change management principles into this structure will ensure the decision process does not stall or allow opportunities to be missed. This kind of change governance aligns objectives, strategies, resources and organizational processes. It helps to clarify actions, set clear metrics and limit the upheaval of any change initiative. This process can help educate leaders across an organization about the implications of any change initiative and help them delineate between short-term, quick wins and the longer-term investments that need to be made.



There must be space for debate and discussion and then swift alignment – so leadership has a unified voice for the path forward."

Sasha Preble
 Vice President,
 Advisory Services
 Optum

## 2. Use business intelligence to align around the greatest challenges

Leaders will also feel more confident when they are leveraging integrated data and analytic insight. A combined view of financial, clinical and business data gives leaders the business intelligence they need to track how benefits, technology and salary investments are expected to reduce the overall cost of turnover and training. They must see how these investments increase clinician/patient ratios; if hybrid work arrangements retain staff; and how schedule, workflow and technology adjustments increase the organization's reach, capacity and capabilities. Most importantly, they must be able to draw a line from workforce strategies to culture building, quality outcomes and consumer satisfaction.

#### With a governance structure in place, and business intelligence in hand, leaders can ask the questions that define business priorities and the gaps they need to close to achieve them. For example:

What services must we deliver to meet our mission? What can we stop doing?

Do we have the right people in the roles needed?

Which performance metrics do we need to improve?

✓ What are new ways to expand recruitment strategies?

How can union relationships be reconsidered?

Are there new outsourcing opportunities?

What workforce insight is missing?

Where can training have the most impact?

What leveling-up strategies increase our capacity to deliver core services?

Where are there overlaps or redundancies?

Where are errors or gaps in quality impacting quality scores?

What are the cost/benefits of refreshed, refined or redesigned workflows?

Are the performance management systems in place to align incentives and business priorities for all employees?

What should the work be? How do we realign workflows and staffing models to meet these new aims?

#### 3. Advance on the path to value

As organizations evolve their value-based models, they are finding more ways to use these arrangements to impact workforce satisfaction. By shifting from rote, volume-based schedules to a workday that prioritizes tasks based on individual consumer needs, it not only reduces cost and risk but also creates a more satisfying experience for everyone.

Innovators are tying compensation to improvement in quality scores. Some are even starting to share gains from risk-based arrangements all the way down to their hourly workers. This directly links quality metrics, reduced costs and satisfaction levels to financial gain for every employee. It also gives employees more agency to focus on these goals. For these leaders, workforce retention and satisfaction become additional metrics associated with value-based success.

We can't let good ideas get lost in the bureaucracy. Speed is paramount."

Tom Albanesi, CPA, FHFMA
 Chief Financial Officer
 Excela Health

A successful enterprise workforce strategy requires an understanding of how workforce capacity and competencies impacts business goals and objectives, implementing a strong governance structure, utilizing data and analytic insight, and linking workforce incentives to the financial goals of the organization.

#### In conclusion

The world is changing. Changing what it means to be a physician. Changing what it means to serve consumers. Changing what it means to take care of our own health.

Much of the talent and resources leaders need to resolve workforce challenges already exists within their organization. Levers One and Two can help bring balance back into the environment, while Levers Three, Four and Five guide growth.

Consider for your organization:

- 1. Reinforcing your organization's purpose. Use every available communications channel to be sure everyone who works for you understands why your organization exists.
- 2. Defining the right relationship between people and technology. Get the most out of your human resources and technology investments by letting employee feedback be your guide.
- 3. Connecting clinical, business and financial data. Create a more complete understanding of how human resources impacts business performance.
- 4. Expanding to an anywhere, anytime workforce. Leverage digital innovation to grow your capacity and capabilities.
- 5. Establishing an enterprise-wide workforce strategy. Gaining leadership alignment is crucial to maintaining a sustainable workforce. Governance, data and financial incentives combine to guide growth.

Workforce transformation happens with a holistic mindset. This requires insight and perspective from across the organization and its ecosystem. Leaders can leverage experience and resources from their peers and their partners to help enable and accelerate their transformation. These relationships can be crucial allies that close gaps when institutional uncertainty exists.

The guiding lights are the workforce and the consumers. It's their experience that must be simplified and satisfying. And it's their voices that we must continue to listen to. They will inform us on how to redesign health care so that it works better for everyone.

#### Sources

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#### **Contributors**



**George Crowley**Chief Human Resources Officer,
Clinical Practices of the University of
Pennsylvania



**Terry Cunningham, DBA, MHA**Chief Executive Officer
Palmetto Primary
Care Physicians



**Tim Dutton**Executive Vice-President, Mission,
Brand and People
Chief Human Resources Officer
Kettering Health



**Tom Albanesi, CPA, FHFMA**Chief Financial Officer
Excela Health



**E. Selemon Asfaw**Chief Financial Officer
Optum Care



Kristy Duffey
MS, APRN - BC, FAAN
Chief Nursing Officer, Optum Health
Chief Operating Officer, Optum
Home & Community Care



**Dominic King, MD, PhD** SVP Clinical Technologies, Optum Health



**Sasha Preble**Vice President,
Advisory Services
Optum



**Kristi Henderson**DNP, NP-C, FAAN, FAEN
CEO, MedExpress & Optum Virtual Care
SVP, Optum Everycare



Constance Thomason Vice President, Advisory Services Optum



**Kathy Pennock**Vice President,
Advisory Services
Optum