Musculoskeletal Institute Models across the AOC

Insights, Attributes, Financials, and Lessons Learned

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UCONN MSI Building

• Same Day Surgery
  – 5 Operating Rooms and a Procedure Room.
• Large Clinic Area
• Faculty offices
• Laboratory space
The Washington University Orthopedic Center
(opened July 2007)
UNIVERSITY OF UTAH
ORTHOPAEDIC CENTER (UOC)
#1 - “Between 2000 and 2020, the demand for orthopaedic services in this country will increase by 23% while the supply of orthopaedic surgeons will increase by only 2% during the same interval.”

# 2 - local competition with new free-standing ASCs

and

national competition at peer institutions had or were developing orthopedic centers of excellence
# 3 - service excellence will never be optimal in a highly complex environment such as an academic medical center

✓ Too many silos

✓ Too many competing interests

✓ Inability to control growth rate and capital investments

✓ Not enough “line of site” incentives

✓ Generic staff, work processes, and systems are not efficient enough for a high volume service line
#4 - most importantly were changing patient expectations

- Easy access and great service
- Quality treatment and a successful outcome
- Coordinated care and communication
- Convenience
- Reasonable cost


Lessons Learned

- Never discount the importance of physician leadership and engagement – your job is to channel this power!

- Line of site accountability and incentives work!

- Build expansion into your plans and design the facility from the inside out if possible

- A new program or facility allows you to hit the reset button – don’t miss this opportunity!

- It’s a marathon not a sprint
<table>
<thead>
<tr>
<th>Institution</th>
<th>Year Built</th>
<th>SQ FT</th>
<th>EX RM</th>
<th>ASC</th>
<th>PROC</th>
<th>IN ORs</th>
<th>PR SH</th>
<th>LAB</th>
<th>COST*</th>
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<td>100k</td>
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<td>70</td>
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<td>0</td>
<td>Direct</td>
<td>No</td>
<td>$32.1M</td>
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* IN 2019 DOLLARS
So that’s the plan????????
Fundamental Strategy (20 yrs in Making)

- **INNOVATE** - At Emory MSK, we create the play book that others try to emulate

- **DOMINATE** OUR LOCAL MARKET

- **CREATE** A TOP NOTCH TRAINING EXPERIENCE

- **CREATE** A WORLD CLASS RESEARCH PROGRAM WITH LEADERS IN BASIC RESEARCH AND CLINICIANS THAT LEAD ORGANIZATIONS AND APPEAR ON THE PODIUM
Department Strategy

Clinical

Education

Research
**Vision:** To be a leader of patient-centered musculoskeletal care by continuous innovation driven by quality and value

1 The fundamental enabling platforms of **culture/people**, **technology**, and **operational excellence** facilitate and support the focus areas. Focus in the cross-cutting platform areas will enhance MSK’s ability to achieve success in the focus areas and vision.
**Fundamental Strategy (20 yrs in Making)**

- **INNOVATE** - At Emory MSK, we create the play book
  - Fully integrated, free-standing, multi-specialty MSK Center of Excellence
  - Ortho and PMR specific “focused shops” ASC + Ortho/Spine Hospital (X 2)
  - One of a kind Sports Medicine/ Pro Team 20+ yr partnership with Sports Med Complex
  - Bundled pricing contracts direct with National and Local employers (Optum, Walmart, more to come)
  - Statewide Affiliate Network Strategy for 3º and 4º referrals
  - Use telehealth to extend reach and decrease overhead of in-person clinic visits
Fundamental Strategy (20 yrs in Making)

• **DOMINATE OUR LOCAL MARKET**
  – Excellence in Quality, Depth, Breadth of care AND Service
  – Let people know we are special “The Emory Difference” campaign
  – Leverage the TRUST of Pro Sports Teams to the benefit of Emory Ortho and all of Emory Healthcare
  – Get off the island – Create Regional Offices that provide access to Emory MSK program to more people
  – Create enough size to maintain RELEVANCE at healthcare system level (You need them to care about MSK)
MSK is a major “Front Door” to EHC

- One in every 3.7 new patients to TEC comes through MSK first
- Largest single clinical section NPSR in TEC ($60M NPSR, soon $70M)
- Hospital C.M. = $131M/yr and growing NPSR = $420M/yr
- High employee engagement
- High patient satisfaction
- Raving Fans – many of whom are introduced to EHC for first time
- We have spent the last 20 yrs transitioning Emory Ortho from a boutique training program to a clinical and financial powerhouse that is a vital engine for Emory Healthcare
- Continued success means continued change and taking risks
Sports Partnership Trajectory

- 2008: Atlanta Dream
- 2011: Atlanta Dream
- 2016: Atlanta Dream
- 2017: Atlanta Dream
- 2018: Atlanta Dream
- 2019: Atlanta Dream

Long-term relationship with Sports Complex

Atlanta Hawks

Braves

Long-term relationship with Sports Complex

Harlem Globetrotters
CRUCIAL CATCH
INTERCEPT CANCER

Tamara Mobley’s story featured at half-time on halo board, as well as promoted in social media
www.atlantafalcons.com/crucialcatch
Expanding our Geographic Footprint

Sports Medicine
Patient distribution FY12

New Patient Visits = 8,777
Zip Codes Represented = 451
Expanding our Geographic Footprint

Sports Medicine Patient distribution FY17

New Patient Visits = 17,000
Zip Codes Represented = 600+
Expanding our Geographic Footprint

1. Executive Park
2. Tucker (EUOSH)
3. Sugarloaf
4. Dunwoody+ ASC
5. EJCH (North)
6. EAH (West)
7. SS ASC (South)
8. Stonecrest (East)
Patient Visit Growth 80% (2010-2018)
Procedure Growth 62% (2010-2018)

ASC | Hospital
--- | ---
2010 | 7000 | 4000
2011 | 7500 | 6500
2012 | 8000 | 7000
2013 | 8500 | 7500
2014 | 9000 | 8000
2015 | 9500 | 8500
2016 | 10000 | 9000
2017 | 15000 | 10000
2018 | 19000 | 11000
**Fundamental Strategy (20 yrs in Making)**

- **CREATE A TOP NOTCH TRAINING EXPERIENCE**
  - Stable (top talent) faculty that are fairly compensated. We don’t accept that AMC can’t be market competitive
  - Highly efficient clinical environment (80 work week). We don’t accept that AMC can’t be efficient
  - Attract the top resident and fellow talent for those headed to both community practice AND academic careers
  - Increase diversity of faculty and trainees to better reflect our patient population
Fundamental Strategy (20 yrs in Making)

- **CREATE** A WORLD CLASS RESEARCH PROGRAM WITH LEADERS IN BASIC RESEARCH AND CLINICIANS THAT LEAD ORGANIZATIONS AND APPEAR ON THE PODIUM
  - Get the right people on the bus
  - Provide them with the infrastructure and resources and mentoring to be wildly successful
  - Find a way for everyone to participate in some way and take pride in this aspect of the mission (It’s our common glue)
  - Make sure the focus is on clinically relevant basic/translational research in addition to standard clinical research
Research Mission

• Translational Research Platform
  • Establish core research functions/personnel at VA and hopefully expand to new MSK center in Exec Park
  • Establish collaborations with basic science departments (Cell Bio, Genetics, BME) with some shared space on main campus

• Clinical Outcomes Research Platform
  • Tablet and Internet-based Patient Related Outcomes data collection system (since 1995)
  • Expanding to regional sites via automated internet approach
  • Expanding data management and retrieval capability
  • Adding capability to use NIH PROMIS system in addition to traditional outcomes instruments (SF-36, SF-12, EQ-5D, etc)
How are we going to actually do it?

Emory SOM GOAL is to be Top 12
In ORTHO that is:

$2.1 M / year total NIH funding
$1.5 M / year in Direct NIH costs

6 R01 grants = $1.5 M/ yr

If each PhD has 1 R01, we need 6 funded PhDs

If some have 2 R01’s or a program project, then we cross into Top 10
Top Priorities for Emory Ortho/MSK

• Strive for **increased diversity**
  • This is a challenge in many surgical specialties, and especially in Orthopaedics
  • Change our culture to actively strive for diversity, not just hope for it.

• **Investment in our people**
  • Leadership development (physicians and administrators)
  • Build larger internal team of physician leaders
  • Create a **HEALTHY CULTURE** (Everyone must help achieve this!)

• **Be a good partner**
  • For EHC, SOM, AND WHSC as a whole
  • For other clinical and basic science departments where there is opportunity for synergy
Employee Engagement Indicator

EE Engagement – 50th = 4.14  75th = 4.25  90th = 4.35
Physician Engagement – Survey Overview

EHC Physician Engagement Indicator by Hospital

PE Engagement – 50th = 4.13  75th = 4.27  90th = 4.39
Space – The Final Frontier
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<th></th>
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<td>2.2% (18/809)</td>
<td>1.3% (7/553)</td>
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<td>2.3% (23/1001)</td>
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Executive Park Rezoning – Concept
Existing zoning is based on 2008 retail + office park plan

New Zoning: Office, MOB, hospital, residential, hotel

Existing Density:

New Density: 2.8M sf
Why Our Emory MSK Vision will Succeed

• MSK is privileged to have the opportunity to “give people back their lives” and thus must always remain patient and family-centered.

• MSK is also a large “front door” to the healthcare system and an opportunity to introduce or re-introduce patients/families to Emory.

• MSK is a high volume, high demand, high revenue service line that is vitally important to the overall health of the health care system.

• We have built an efficient and high quality service-oriented clinical enterprise that provides the foundation for excellence in education and research. It is now time to take those final two pillars from Good to GREAT.

• We have the hard part in place, now we just need to execute on leveraging that foundation to add the final touches.

• We now have the resources committed!!

• Failure is NOT an option. “I believe this is going to be our finest hour.”
KEY POINTS- MSK INSTITUTE

• **INNOVATE** – CREATE A CULTURE FOR INNOVATION AT YOUR INSTITUTION

• **DOMINATE** YOUR LOCAL MARKET WITH EXTREME CLINICAL EFFICIENCY

• **CREATE** A TOP NOTCH TRAINING EXPERIENCE

• **CREATE** A WORLD CLASS RESEARCH PROGRAM WITH LEADERS IN BASIC RESEARCH AND CLINICIANS THAT LEAD ORGANIZATIONS AND APPEAR ON THE PODIUM

• **CONSOLIDATE** SERVICE LINE VOLUME AND FINANCIAL METRICS TO BE VIEWED LIKE CANCER AND CARDIOVASCULAR SERVICE LINE. MUST BE BIG ENOUGH TO BE RELEVANT.

• **FUNDS FLOW** – ACCESS TO (in separate) or CREDIT FOR (in consolidated) ANCILLARY AND DOWNSTREAM REVENUES

• **IT’S A MARATHON** – START SMALL AND EARN TRUST BY BUILDING ON SUCCESS
## A Marathon: The Future Builds on Past Success

<table>
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<tr>
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<th>PR SH</th>
<th>LAB</th>
<th>COST*</th>
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<tr>
<td>Emory MSK I</td>
<td>2004</td>
<td>100k</td>
<td>75</td>
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<td>Em OSH I</td>
<td>2009</td>
<td>100k</td>
<td>65 beds</td>
<td>0</td>
<td>0</td>
<td>6 (9)</td>
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<td>-</td>
<td>-</td>
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<td>0</td>
<td>-</td>
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<td>100k</td>
<td>65 beds</td>
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<td>4</td>
<td>6</td>
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<td>117</td>
<td>6</td>
<td>6</td>
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<td>Indirect</td>
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> $300M

*IN 2019 DOLLARS*
IMAGINE

DREAM BIG
IF YOU CAN DREAM IT, YOU CAN BECOME IT.
Coming 2021
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END