Special Report on Employer Worksite Clinics

An Evolving Employer-Based Healthcare Delivery System

Developed by Benfield, a part of the Gallagher Human Resources & Compensation Consulting Practice in partnership with the National Association of Worksite Health Centers (NAWHC)
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Introduction

The worksite clinic market represents an evolving healthcare delivery channel for primary and specialty care. The National Association of Worksite Health Centers (NAWHC) and Gallagher-Benfield conducted research in 2018 to study this market and increase the ability of employers to benchmark their worksite clinic operations. This report includes findings from an in-depth survey of 109 employers.

Key research findings include:
- Adoption & growth of worksite clinics is expected to continue
- High quality care is delivered via worksite health clinics
- Employer approach to clinic decision making and management varies based on organizational priorities and internal expertise
- Measuring and achieving outcomes is challenging but essential for long-term clinic investment and success
Worksite Clinic Research Panel

109 Employer Surveys
80 with Worksite Clinics
29 without Worksite Clinics*

Employer Participants Industry Classification

- 39% Manufacturing
- 9% Education
- 9% Retail
- 8% Healthcare
- 6% Finance
- 5% Hospitality
- 5% Public Entity
- 4% Business Services
- 4% Energy
- 4% Transportation
- 2% Construction
- 2% Wholesale
- 3% Other

n=80 Employers with worksite clinics
*Those w/o a clinic were asked about future plans and current barriers

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Clinic Offerings and Approach

Onsite and Nearsite
Worksite Clinic Models and Characteristics among Surveyed Employers

63% Onsite
Onsite clinics are located on an employer’s campus and the services offered typically reflect the needs of that specific location’s population.

16% Nearsite
Nearsite clinics are located in close proximity to an employer providing services to one or multiple organizations in the area.

21% Onsite + Nearsite
Some employers provide a combination of onsite and nearsite clinics to service employees at multiple locations.

Half of employers (51%) with a worksite clinic plan to add an onsite or nearsite clinic within two years.

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A majority of employers favor multiple clinic locations, regardless of clinic type

Number of Onsite and Nearsite Health Clinics

Current Onsite Health Clinics
- 1 Onsite clinic: 33%
- 2 Onsite clinics: 21%
- 6-9 Onsite clinics: 16%
- 3-5 Onsite clinics: 14%
- 10+ Onsite clinics: 16%

Current Nearsite Health Clinics
- 2 Nearsite clinics: 23%
- 3-5 Nearsite clinics: 20%
- 1 Nearsite clinic: 10%
- 10+ Nearsite clinics: 47%

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A limited number of employers share their onsite clinic with nearby employers, but 6 in 10 report their nearsite clinic is shared.

**Shared Employer Clinic**

Shared or multi-employer clinics are open to employees from several employers in an area. They can be onsite or nearsite locations.

**Shared Onsite Health Clinics**

- Yes: 12%
- No: 88%

**Shared Nearsite Health Clinics**

- Yes: 63%
- No: 37%

n=67 Employers with an onsite clinic

n=30 Employers with a nearsite clinic

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Over one-third of existing clinics are accredited, putting them on par with accredited traditional, community-based providers.

**Accredited by NCQA, The Joint Commission, URAC or AAAHC**

- Yes: 36%
- No: 64%

n=80 Employers

**Accreditation Rates by Clinic Management**

- Specialized clinic provider (e.g., Premise Health) (n=35): 43%
- Run internally by Employer (n=23): 35%
- Community health provider (e.g., medical group, IDN) (n=22): 27%

What does it mean to be accredited by NCQA, The Joint Commission, URAC or AAAHC?

For a worksite clinic, accreditation stands as recognition of a legitimate healthcare facility, practicing at or above the quality of, and with all the capabilities of a traditional community-based provider with the same accreditation(s).
More challenging than costs, employers rate putting systems in place to measure results as the top challenge to opening the clinic.

### Challenges to Opening a Worksite Clinic
(among employers with a worksite health clinic)

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Putting systems in place to measure results</td>
<td>40%</td>
</tr>
<tr>
<td>Costs</td>
<td>28%</td>
</tr>
<tr>
<td>Hiring high quality providers</td>
<td>24%</td>
</tr>
<tr>
<td>Establishing technology platform</td>
<td>24%</td>
</tr>
<tr>
<td>Space</td>
<td>18%</td>
</tr>
<tr>
<td>Buy-in from internal decision makers (e.g., C-suite, etc.)</td>
<td>15%</td>
</tr>
<tr>
<td>Employee concern over confidentiality of patient information</td>
<td>13%</td>
</tr>
<tr>
<td>Selection of a third party clinic provider partner</td>
<td>13%</td>
</tr>
<tr>
<td>Equal treatment of employees (can't offer at all locations)</td>
<td>10%</td>
</tr>
<tr>
<td>HSA-based HDHP requirement for enrolled employees to pay fair market value for clinic services</td>
<td>9%</td>
</tr>
<tr>
<td>Decision to self-manage the clinic or contract with a third party</td>
<td>8%</td>
</tr>
<tr>
<td>Competition with local medical community</td>
<td>8%</td>
</tr>
<tr>
<td>Worksite clinic services counted toward Cadillac tax calculation</td>
<td>5%</td>
</tr>
<tr>
<td>Healthcare liabilities</td>
<td>5%</td>
</tr>
</tbody>
</table>

n=80 Employers
For employers that have not adopted worksite clinics, cost and lack of C-suite support are major barriers; Execution challenges like hiring providers and measuring results rank far lower vs. those with a clinic.

**Top Barriers to Worksite Clinic Adoption Among Employers Without a Worksite Health Clinic**

*Percentage indicating a top 3 barrier*

- **Cost**: 62%
- **Buy-in from internal decision makers (e.g., C-suite, etc.)**: 41%
- **Space**: 38%
- **Beyond the scope of current health management strategy**: 31%
- **Equal treatment of employees (can’t offer at all locations)**: 28%
- **Employee concern over confidentiality of patient information**: 21%
- **Healthcare liabilities**: 17%
- **Selection of a third party clinic provider**: 10%
- **Hiring high quality providers**
- **HSA-based HDHP requirement for enrolled employees to pay fair market value for clinic services**: 10%
- **Competition with local medical community**: 7%
- **Putting systems in place to measure results**
- **Decision to self-manage the clinic or contract with a third party**
- **Worksite clinic services counted toward Cadillac tax calculation**: 3%

Of those without a current worksite clinic… **45% plan to add a clinic within 2 years**

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Most employers with a worksite clinic have over 1,000 eligible employees at their largest clinic location, two-thirds rely on external parties to run the clinic, and 59% have 3-10+ healthcare providers.

**Characteristics of Employers’ Largest Health Clinics**

- **# Eligible Company Employees at Location**
  - 86% > 1,000 employees
  - 26% 1,000-2,499
  - 29% 2,500-4,999
  - 20% 5,000-9,999
  - 11% 10,000+

- **Party Responsible for Running Largest Clinic**
  - 45% Employer (run internally by company employees)
  - 29% Specialized clinic provider (e.g., Premise Health, QuadMed, etc.)
  - 26% Community health provider (e.g., hospital, medical group, Integrated Delivery Network)

- **Years in Operation**
  - 40% <6 years old
  - 31% 2-5 years
  - 29% 6-9 years
  - 14% 10-24 years

- **# of Licensed Healthcare Providers (FTE)**
  - 36% <2
  - 26% 2
  - 15% 3-5
  - 13% 6-9
  - 10% 10+
About half of employers allow spouses, dependents and employees NOT enrolled in the health plan to utilize their worksite clinics.

**Patient Eligibility for Clinics**

- Employees enrolled in our health plan: 100%
- Spouse/domestic partners: 55%
- Dependent adult children of employees (18-26 years): 51%
- Dependent children of employees (<18 years): 48%
- Employees not enrolled in our health plan (same fee schedule as plan enrollees): 46%
- Employees not enrolled in our health plan (separate fee schedule): 25%
- Retirees: 25%
- Contract employees: 16%
- Local community: 5%
- Other*: 5%

*n=80 Employers

*Other includes: All employees no fee (2); Dependents on plan ages 3 and up at one location only; Part-time employees working more than 20 hours

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Employers remain in control of strategy, vendor relations and services offered; if applicable, clinic providers are heavily involved in patient care, education and operations.

**Clinic Decision Making Influence by Stakeholder**

<table>
<thead>
<tr>
<th></th>
<th>C-Suite</th>
<th>VP/Director of Benefits or Medical Director</th>
<th>Employer Clinic Program Manager</th>
<th>Third Party Clinic Provider</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinic strategy</td>
<td>SECONDARY</td>
<td>PRIMARY</td>
<td>SECONDARY</td>
<td>SECONDARY</td>
</tr>
<tr>
<td>Clinic partner relations†</td>
<td>PRIMARY</td>
<td>SECONDARY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Services offered</td>
<td>PRIMARY</td>
<td>SECONDARY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Patient care</td>
<td>SECONDARY*</td>
<td></td>
<td>PRIMARY</td>
<td></td>
</tr>
<tr>
<td>Employee/patient and clinician educational resources</td>
<td>SECONDARY</td>
<td>SECONDARY</td>
<td>PRIMARY</td>
<td></td>
</tr>
<tr>
<td>Day-to-day operations</td>
<td>SECONDARY</td>
<td>SECONDARY</td>
<td>PRIMARY</td>
<td></td>
</tr>
</tbody>
</table>

†If clinic is run by third party provider

**Primary** if clinic is run internally by company employees.

n=80 Employers

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Clinic Services
For many employers, offering worksite clinic services closes a gap for their employees that don’t currently have a primary care provider.

One in three employers report that

>40% of Clinic Patients are Without a Primary Care Provider

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One in three respondents have clinics that serve as a patient-centered medical home

A patient-centered medical home is a team-based care delivery model with a primary care emphasis. It focuses on better access and better care coordination to improve quality, effectiveness, adherence and, ultimately, health outcomes.

Clinic Considered a Patient-Centered Medical Home (PCMH)

- 27%: Our clinic serves as a standalone PCMH
- 14%: Our clinic serves as a primary care extension of a community-based PCMH
- 3%: Not currently, but plan to evolve to a PCMH
- 4%: Don’t know
- 52%: No, and no plans

n=80 Employers
The evolution of a broad range of clinic services continues, with large clinics leading the way

### Services Offered at Largest Clinic Location

#### Blue services = Top growth areas:

<table>
<thead>
<tr>
<th>Service</th>
<th>Currently offer (2018)</th>
<th>Future (within 2 years)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health education</td>
<td>88%</td>
<td>8%</td>
</tr>
<tr>
<td>Preventive screenings</td>
<td>86%</td>
<td>6%</td>
</tr>
<tr>
<td>Immunizations</td>
<td>84%</td>
<td>5%</td>
</tr>
<tr>
<td>Acute/episodic care</td>
<td>83%</td>
<td>5%</td>
</tr>
<tr>
<td>Preventive care</td>
<td>81%</td>
<td>9%</td>
</tr>
<tr>
<td>Health coaching</td>
<td>76%</td>
<td>11%</td>
</tr>
<tr>
<td>Wellness programming</td>
<td>75%</td>
<td>9%</td>
</tr>
<tr>
<td>Nutrition/weight management counseling</td>
<td>73%</td>
<td>11%</td>
</tr>
<tr>
<td>Smoking cessation</td>
<td>71%</td>
<td>10%</td>
</tr>
<tr>
<td>Laboratory services</td>
<td>70%</td>
<td>4%</td>
</tr>
<tr>
<td>Occupational health</td>
<td>68%</td>
<td>10%</td>
</tr>
<tr>
<td>Chronic condition management</td>
<td>65%</td>
<td>15%</td>
</tr>
<tr>
<td>Primary care</td>
<td>64%</td>
<td>10%</td>
</tr>
<tr>
<td>Travel medications/travel vaccinations</td>
<td>61%</td>
<td>8%</td>
</tr>
<tr>
<td>Prescribing (Rx) healthcare provider</td>
<td>60%</td>
<td>11%</td>
</tr>
<tr>
<td>Physical/occupational therapy</td>
<td>53%</td>
<td>15%</td>
</tr>
<tr>
<td>Telehealth</td>
<td>39%</td>
<td>25%</td>
</tr>
<tr>
<td>Behavioral health</td>
<td>31%</td>
<td>15%</td>
</tr>
<tr>
<td>Massage therapy</td>
<td>25%</td>
<td>8%</td>
</tr>
<tr>
<td>Imaging services</td>
<td>23%</td>
<td>5%</td>
</tr>
<tr>
<td>Specialty medical care (e.g., contracted specialist providers)</td>
<td>18%</td>
<td>14%</td>
</tr>
<tr>
<td>Vision services</td>
<td>15%</td>
<td>4%</td>
</tr>
<tr>
<td>Chiropractic care</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>Acupuncture</td>
<td>10%</td>
<td>5%</td>
</tr>
<tr>
<td>Onsite infusions</td>
<td>9%</td>
<td>14%</td>
</tr>
<tr>
<td>Dental services</td>
<td>9%</td>
<td>5%</td>
</tr>
</tbody>
</table>

#1 growth area:

n=80 Employers
Worksite clinics try hard to connect and integrate services with community-based providers

<table>
<thead>
<tr>
<th>Communication Channels Established Between Worksite Clinic and Community-Based Healthcare Providers</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Referral to community providers</td>
<td>66%</td>
</tr>
<tr>
<td>Referral system to a clinic-defined network of high quality providers</td>
<td>45%</td>
</tr>
<tr>
<td>Integration of electronic medical records</td>
<td>28%</td>
</tr>
<tr>
<td>Periodic meetings</td>
<td>21%</td>
</tr>
<tr>
<td>Other information sharing</td>
<td>15%</td>
</tr>
<tr>
<td>No communication channels in place</td>
<td>15%</td>
</tr>
</tbody>
</table>

n=80 Employers
Half of employers prioritize a core set of services across all of their clinics; Clinic service variation is due to specific location needs and/or use of community health clinic provider.

**Core Service Offerings Across Clinic Locations**

*among employers with multiple clinics*

- **50%**: We make every attempt to maintain consistency of services offered across all clinic locations.
- **27%**: We have core services offered at all clinics and additional services vary by location.
- **23%**: Clinic services vary by location.

n=52 Employers
Over half of employers provide worksite pharmacy services—most commonly by dispensing pre-packaged medications or through a comprehensive pharmacy.

**Worksite Pharmacy Services Offered at Largest Clinic**

- **Comprehensive Pharmacy**: In addition to dispensing medications, offers a robust range of services to promote patient health through administration of immunizations, medication adherence programs and chronic condition management.

- **Dispensary Pharmacy with Pre-packaged Medications**: A limited menu of pre-packaged medications (i.e., generics, antibiotics, acute and maintenance medications) are dispensed at smaller clinics or kiosks, typically without requiring a pharmacist.

- **Concierge Pharmacy**: Pharmacist service that focuses on patient support, working in tandem with physician’s office or site of care to provide personalized medication management. This includes consultation on drug interactions, lower cost alternatives, patient assistance programs and lifestyle changes.

*Other includes: Limited first fill only for some meds (2); Pharmacy management, health coaching; We have a FT Pharmacist for consultee services to members and physicians; We offer onsite pharmacy delivery service.*

n=80 Employers

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82% of employers offer disease-specific clinic offerings, most commonly around diabetes, smoking cessation, hypertension and obesity

Focus of Condition-Specific Clinic Services, Education, Initiatives or Resources

<table>
<thead>
<tr>
<th>Condition</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diabetes</td>
<td>68%</td>
</tr>
<tr>
<td>Smoking Cessation</td>
<td>61%</td>
</tr>
<tr>
<td>Obesity</td>
<td>56%</td>
</tr>
<tr>
<td>Hypertension</td>
<td>56%</td>
</tr>
<tr>
<td>High Cholesterol</td>
<td>51%</td>
</tr>
<tr>
<td>Asthma</td>
<td>49%</td>
</tr>
<tr>
<td>Back Pain/Other Musculoskeletal</td>
<td>48%</td>
</tr>
<tr>
<td>Allergy</td>
<td>45%</td>
</tr>
<tr>
<td>Cardiovascular Disease</td>
<td>39%</td>
</tr>
<tr>
<td>Depression</td>
<td>35%</td>
</tr>
<tr>
<td>Metabolic Syndrome</td>
<td>30%</td>
</tr>
<tr>
<td>Women's Health</td>
<td>30%</td>
</tr>
<tr>
<td>Pain</td>
<td>25%</td>
</tr>
<tr>
<td>Chronic Obstructive Pulmonary Disease (COPD)</td>
<td>23%</td>
</tr>
<tr>
<td>Insomnia</td>
<td>23%</td>
</tr>
<tr>
<td>Pneumonia</td>
<td>21%</td>
</tr>
<tr>
<td>Substance Use Disorders (incl. Alcohol, Opioids)</td>
<td>20%</td>
</tr>
<tr>
<td>No condition-specific offerings</td>
<td>18%</td>
</tr>
</tbody>
</table>

<20% provide specific offerings for: Congestive Heart Failure, Migraine, Atopic Dermatitis, Cancer, Crohn's Disease/Ulcerative Colitis, Osteoporosis, Osteoarthritis, Rheumatoid Arthritis, Psoriasis, Hepatitis C, HIV, Hemophilia, Multiple Sclerosis
Outcomes & ROI
95% of employers are satisfied with their clinic outcomes, with 39% being very satisfied.
Clinic utilization is by far the most measured clinic outcome, followed by ROI and use of appropriate preventive care.

**Outcomes Measured in Organizations' Largest Clinic**

- Clinic utilization: 90%
- Overall return on investment (ROI): 59%
- Use of appropriate preventive care: 58%
- Immunization rates: 54%
- Employee satisfaction and retention: 53%
- Rate of ER visits: 51%
- Quality of care: 50%
- Impact on direct healthcare costs: 49%
- Improvement in health risk assessment results: 46%
- Health outcomes: 45%
- Management of chronic conditions: 44%
- Rx adherence: 33%
- Reduced absence: 25%
- Reduced disability: 20%
- Productivity: 16%

n=80 Employers

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A majority of employers are integrating their worksite clinic data with health plan data for identification of high risk patients, care coordination and comprehensive outcomes measurement.

Integration of Clinic Data with Health Plan Data

- Yes: 56%
- No: 40%
- Don’t know: 4%

n=80 Employers

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Employers are pleased with outcomes like quality of care and employee satisfaction and retention, but less satisfied with Rx adherence and productivity impact.

<table>
<thead>
<tr>
<th>Outcome</th>
<th>Satisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of care (n=40)</td>
<td>68%</td>
</tr>
<tr>
<td>Employee satisfaction and retention (n=42)</td>
<td>67%</td>
</tr>
<tr>
<td>Health outcomes (n=36)</td>
<td>58%</td>
</tr>
<tr>
<td>Immunization rates (n=43)</td>
<td>56%</td>
</tr>
<tr>
<td>Clinic utilization (n=72)</td>
<td>54%</td>
</tr>
<tr>
<td>Overall return on investment (ROI) (n=47)</td>
<td>53%</td>
</tr>
<tr>
<td>Use of appropriate preventive care (n=46)</td>
<td>52%</td>
</tr>
<tr>
<td>Management of chronic conditions (n=35)</td>
<td>52%</td>
</tr>
<tr>
<td>Reduced disability (n=16)</td>
<td>50%</td>
</tr>
<tr>
<td>Impact on direct healthcare costs (n=39)</td>
<td>49%</td>
</tr>
<tr>
<td>Reduced absence (n=20)</td>
<td>45%</td>
</tr>
<tr>
<td>Rate of ER visits (n=41)</td>
<td>36%</td>
</tr>
<tr>
<td>Improvement in health risk assessment results (n=37)</td>
<td>35%</td>
</tr>
<tr>
<td>Rx adherence (n=26)</td>
<td>27%</td>
</tr>
<tr>
<td>Productivity (n=20)</td>
<td>25%</td>
</tr>
</tbody>
</table>
65% of employers have 40% or more of their eligible employees utilizing their largest clinic site

Utilization at Largest Clinic Location

- 65% ≥40% Utilization
- 20% 20-39%
- 34% 40-59%
- 24% 60-79%
- 9% 80%
- 6% 80%+
- 7% Don’t know

n=80 Employers

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Employers identify a number of effective measures in driving utilization, including offering services that align with employee needs, reducing the cost and orienting new hires to clinic services.

### Effectiveness of Driving Clinic Engagement and Utilization

<table>
<thead>
<tr>
<th>Measure</th>
<th>Effectiveness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offering services that align with employee needs</td>
<td>61%</td>
</tr>
<tr>
<td>Offering free or reduced cost healthcare services</td>
<td>58%</td>
</tr>
<tr>
<td>Providing clinic information as part of new employee orientation</td>
<td>54%</td>
</tr>
<tr>
<td>Ensuring employees that care is confidential</td>
<td>53%</td>
</tr>
<tr>
<td>Testimonials from employees</td>
<td>53%</td>
</tr>
<tr>
<td>Communicating quality of providers</td>
<td>49%</td>
</tr>
<tr>
<td>Messaging about clinic availability, services and incentives</td>
<td>44%</td>
</tr>
<tr>
<td>Incenting employees in a way that motivates them to utilize clinic</td>
<td>34%</td>
</tr>
<tr>
<td>Offering free or reduced cost prescription medications</td>
<td>34%</td>
</tr>
<tr>
<td>Offering compelling educational programs or resources</td>
<td>18%</td>
</tr>
</tbody>
</table>

n=80 Employers
Third Party Clinic Management & Support
More than 70% of employers outsource management of their largest clinics to specialized clinic providers or community health providers.

**Party Responsible for Running Largest Clinic**

- **Specialized worksite clinic provider** (e.g., Premise Health, QuadMed, etc.) - 44%
- **Community health provider** (e.g., hospital, medical group, Integrated Delivery Network) - 27%
- **Employer** (run internally by company employees) - 29%

n=80 Employers
Market share for specialized clinic providers is highly concentrated, with Premise Health responsible for 33% of clinics. Community health providers are more fragmented, but most of them are IDNs.

### Specialized Worksite Clinic Provider

*among employers contracting with a specialized provider to run at least one clinic*

<table>
<thead>
<tr>
<th>Provider</th>
<th>Market Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Premise Health</td>
<td>33%</td>
</tr>
<tr>
<td>QuadMed</td>
<td>13%</td>
</tr>
<tr>
<td>CareATC</td>
<td>8%</td>
</tr>
<tr>
<td>Marathon Health</td>
<td>8%</td>
</tr>
<tr>
<td>Healthstat</td>
<td>5%</td>
</tr>
<tr>
<td>Other vendor*</td>
<td>36%</td>
</tr>
</tbody>
</table>

*Other vendors include: Cerner (2); Paladina Health (2); Cigna OnSite Health; Concentra; Corporate Care; InHouse Physicians; Medical Analysis; One to One Health; OnSite Care; SSM Health; Stanford Health Care; SummaCare

### Community Health Provider Partners Used:

**Integrated Delivery Networks (IDNs)**
- Atrium Health
- Banner Health
- Bellin Health
- Emory Healthcare
- Florida Hospital; Integrity Health
- Lexington Medical
- Ohio State University
- Park Nicollet/HealthPartners
- Reedsburg Area Medical Center
- St. Joseph's/Candler
- TriHealth
- Unity Point
- University of Colorado–Colorado Springs
- University of Oklahoma Physicians
- University of Pittsburgh Medical Center
- Vanderbilt University Medical Center

**Other Community Health Providers**
- Central Ohio Primary Care
- Satellite Med
- Other local hospitals and provider groups

n=39 Employers

n=22 Employers
Factors of highest importance to employers when selecting a clinic partner are the ability to improve population health, closely followed by the ability to hire high quality providers.

**Importance of Factors in Selecting Clinic Provider Partners**
*(among clinics with a third party clinic provider)*

- Ability to improve population health: 79%
- Ability to hire high quality providers: 77%
- Strong integration of service with our existing programs and/or health plan: 65%
- Data/reporting capabilities: 65%
- Transparency of cost and performance: 61%
- Flexibility/ability to customize offerings: 61%
- Ability to integrate care with community providers: 51%
- ROI measurement: 47%
- Price of service: 44%
- Accountability, including risk-based payment contracting: 42%
- Communication capabilities and marketing materials to boost utilization: 39%
- Recommendations from peer companies: 30%
- Third party organization’s size: 23%
- Consultant recommendation: 16%

n=57 Employers
Health plans, wellbeing vendors, provider groups and PBMs are the top stakeholders providing employers with worksite clinic support.

**Healthcare Stakeholders that Provided Education, Resources, and/or Tools for Clinics Within the Last Two Years**

- Health plan/TPA: 56%
- Health & wellbeing vendor: 46%
- Physician, provider group or health system: 41%
- Pharmacy Benefits Manager (PBM): 41%
- Benefits advisor (employee benefits consultant/broker): 39%
- Employer health coalition: 14%
- Employer interest group (e.g., IBI, NBGH, EBRI): 13%
- National Association of Worksite Health Centers (NAWHC): 8%
- Biopharmaceutical company: 6%
- Other**: 1%
- None of the above: 15%

**Other includes: Unknown, this is handled by our vendor**

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Although they’re the top stakeholder providing employers with worksite clinic support, just 4 in 10 employers are highly satisfied with their health plan’s tools and resources.

**Satisfaction with Education, Resources, and/or Tools Provided by Healthcare Stakeholders (percent very satisfied)**

- **National Association of Worksite Health Centers (NAWHC) (n=6)**: 50%
- **Physician, provider group or health system (n=33)**: 48%
- **Health & wellbeing vendor (n=37)**: 43%
- **Health plan/TPA (n=45)**: 40%
- **Employer interest group (e.g., IBI, NBGH, EBRI) (n=10)**: 40%
- **Pharmacy Benefits Manager (PBM) (n=33)**: 39%
- **Benefits advisor (employee benefits consultant/broker) (n=31)**: 35%
- **Biopharmaceutical company (n=5)**: 20%
- **Employer health coalition (n=11)**: 0%
Thank You!

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