

## Central Florida (Tampa and Orlando) Health Care Market Assessment

Thank you for taking the time to complete this market assessment survey, which is being fielded by Catalyst for Payment Reform (CPR) in collaboration with the Florida Alliance for Healthcare Value (the Florida Alliance).

Your participation will help analyze the best opportunities to implement innovative models of healthcare payment to improve the value of healthcare spending in Tampa / Orlando. **CPR and the Florida Alliance will not attribute your responses to you nor your organization, but will aggregate your response across stakeholder groups.**

If you have any questions about the survey, please contact Karen van Caulil, President and CEO of the Florida Alliance at [karen@FLHealthValue.org](mailto:karen@FLHealthValue.org) or (407) 425-9500.

**Please select one of the following choices regarding your response.**

(For the purposes of this survey, Polk County should be considered in the Tampa market.)

- ☐ I am responding solely for Tampa
- ☐ I am responding solely for Orlando
- ☐ I am responding for both Tampa and Orlando

Please provide your name and email address below.

**Individual survey responses will remain confidential and will be reported only in aggregate.** However, we ask that you provide your name and e-mail so that we can track who has completed the survey, and so that we can follow up with questions as needed.

- ☐ Name \_\_\_\_\_
- ☐ Email \_\_\_\_\_

For the purposes of this survey, **payment reform** refers to a range of healthcare payment models that use payment to promote or leverage greater value for patients, employers, health plans, and providers.

***Unless otherwise specified, please respond with a pre-COVID-19 perspective.***

Please indicate your perception of the level of involvement in payment reform efforts in Tampa / Orlando among:

	Uninvolved	Marginally involved	Moderately involved	Very involved
Individual public and private employers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Health plans acting on behalf of their fully--insured business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Physicians/Other healthcare professionals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hospitals/health systems	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regulatory/legislative/state bodies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Do you think the level of involvement in payment reform among any or all of these groups is likely to change due to COVID-19?

☐ Yes

☐ No

Briefly explain.

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Please list the individuals best positioned to lead payment reform in Tampa / Orlando (name and organization) and briefly explain why:

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Please indicate what you think is the level of purchaser engagement in multi-stakeholder coalitions focused on payment reform or other healthcare issues in Tampa / Orlando?

	Unengaged	Marginally engaged	Moderately engaged	Very involved	N/A
Past focus/activity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Current focus/activity and plans for future	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

To what degree are employers/ healthcare purchasers in Tampa / Orlando shaping the market through their influence and activities?

- ☐ Not at all
- ☐ Marginally
- ☐ Moderately
- ☐ Very

If employers/ healthcare purchasers have attempted to innovate in the following areas of payment and delivery reform, please indicate your perception of their degree of success (use N/A if there have been no attempts in that area):

	Unsuccessful	Marginally successful	Moderately successful	Very successful	N/A
Fee-For-Service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bundled Payment/Episode of Care Payment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Capitation/Global Payment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Delivery System Reforms- Medical Home/Accountable Care Organization (ACO)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Do you think COVID-19 will impact the degree of success in any or all of these areas of payment and delivery reform?

☐ Yes

☐ No

Briefly explain.

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If employers/healthcare purchasers have attempted to innovate in the following areas of consumer engagement, please indicate your perception of their degree of success (use N/A if there have been no attempts in that area):

	Unsuccessful	Marginally successful	Moderately successful	Very successful	N/A
Transparency of provider performance (cost, quality)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Consumer--directed health plans (CDHPs)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tiered or narrow (select) networks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Value--based insurance design (i.e., using cost-sharing to influence patient decision-making)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wellness incentives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Have employers/ healthcare purchasers been involved in promoting or using any of the following in Tampa / Orlando?

	No	Yes
Employer-sponsored pay--for--performance initiatives	<input type="radio"/>	<input type="radio"/>
Leapfrog Hospital Survey	<input type="radio"/>	<input type="radio"/>
HEDIS and CAHPS measures	<input type="radio"/>	<input type="radio"/>
Prometheus Potentially Avoidable Complications	<input type="radio"/>	<input type="radio"/>
Employer efforts to contain provider rates and insurer rates	<input type="radio"/>	<input type="radio"/>

To what extent do you think health plans in Tampa / Orlando are ready and have the capability to implement new forms of payment?

- ☐ Not at all
- ☐ Minimally
- ☐ Moderately
- ☐ Very

Please indicate your perception of the level of interest the health plan(s) you work with have demonstrated in implementing payment reforms in Tampa / Orlando.

- ☐ None
- ☐ Marginal
- ☐ Significant

Do you think the level of health plans' readiness and/or interest in implementing payment reforms has changed due to COVID-19?

- ☐ Increase in interest and/or readiness
- ☐ Decrease in interest and/or readiness
- ☐ Increase and/or readiness has stayed about the same

Is your health plan or are your health plans working to accommodate your interest in implementing payment reforms or are they resistant?

- ☐ At least one plan is accommodating
- ☐ Some plans are accommodating
- ☐ All plans are accommodating
- ☐ At least one plan is resistant
- ☐ Some plans are resistant
- ☐ All plans are resistant

To what degree are there physicians/healthcare professionals or hospitals/health systems in Tampa / Orlando that command market power due to reputation and/or "must have" status?

	Not at all	Minimally	Moderately	Very
Physicians/Healthcare professionals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hospitals/Health systems	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Do you think the degree of market power of any of these provider types will change due to COVID-19?

- ☐ Increase
- ☐ Decrease
- ☐ Stay about the same

Do you view the regulatory environment of the State of Florida as a benefit or barrier to private-sector/commercial payment reform efforts?

	Not at all	Marginally	Moderately	Largely
Benefit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Barrier	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please elaborate on your response, if possible.

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Where do you think the balance of power lies in Tampa / Orlando among health plans, employers/ healthcare purchasers, and providers/hospitals? Select who you think has the greatest power or influence when it comes to payment reform.

- ☐ Health plans
- ☐ Employers/ Healthcare Purchasers
- ☐ Providers/ Hospitals

Do you think the balance of power will change due to COVID-19?

- ☐ Yes
- ☐ No



Briefly explain.

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What do you think are the biggest barriers to payment reform in Tampa / Orlando?

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What do you think are the next best opportunities for payment reform in Tampa / Orlando?

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Are there any payment reform models that you would like to see put in place over the next couple of years?

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