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THINGS
ARE
HAPPENING
HERE

NewYork-Presbyterian

An Academic, Integrated Delivery System

April 2017

Laura Forese, MD

EVP and COO

 **NewYork-Presbyterian**

NewYork-Presbyterian Hospital has 6 Campuses Across Manhattan and Westchester



 **NewYork-Presbyterian**
Columbia University Irving Medical Center



 **NewYork-Presbyterian**
Allen Hospital



 **NewYork-Presbyterian**
Morgan Stanley Children's Hospital



 **NewYork-Presbyterian**
Weill Cornell Medical Center



 **NewYork-Presbyterian**
Westchester Division



 **NewYork-Presbyterian**
Lower Manhattan Hospital

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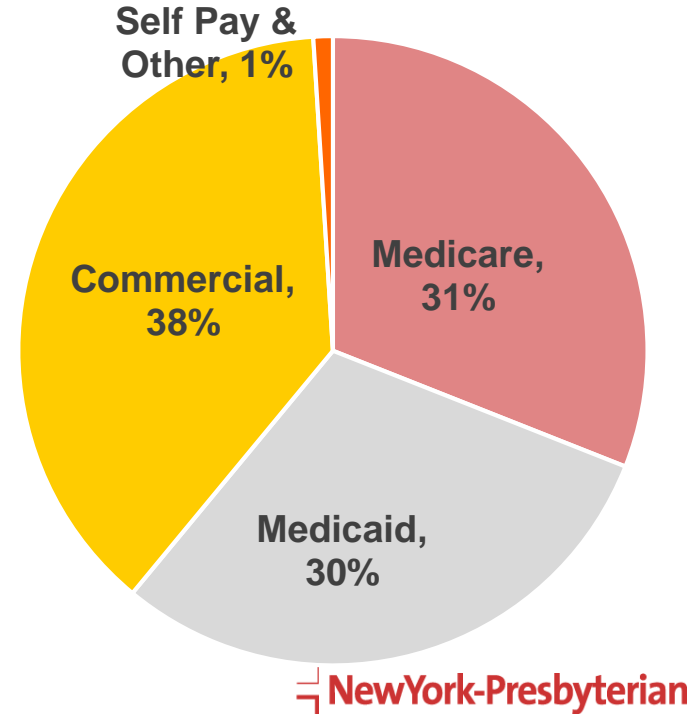
 **NewYork-Presbyterian**

NYPH: A Major Academic Medical Center (2016)

Key Facts

Inpatient Beds	2,515
Discharges	126,694
Deliveries	15,248
Ambulatory Surgeries	103,282
Clinic Visits	753,318
ED Visits	286,696

Payor Mix



Affiliated With Two Premier Medical Schools



COLUMBIA UNIVERSITY

*College of Physicians
and Surgeons*



Weill Cornell Medical College

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Source: 2016-2017 [U.S. News & World Report](#)

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NYPH: Goals of the Merger - 20 years ago



Enhance Quality



Improve Access



Demonstrate Fiscal Stability

Moving to the NewYork-Presbyterian Enterprise

**NewYork-Presbyterian
Hospital**

**NewYork-Presbyterian
Regional Hospital
Network**

NewYork-Presbyterian

**NewYork-Presbyterian
Physician Services**

**NewYork-Presbyterian
Community and
Population Health**

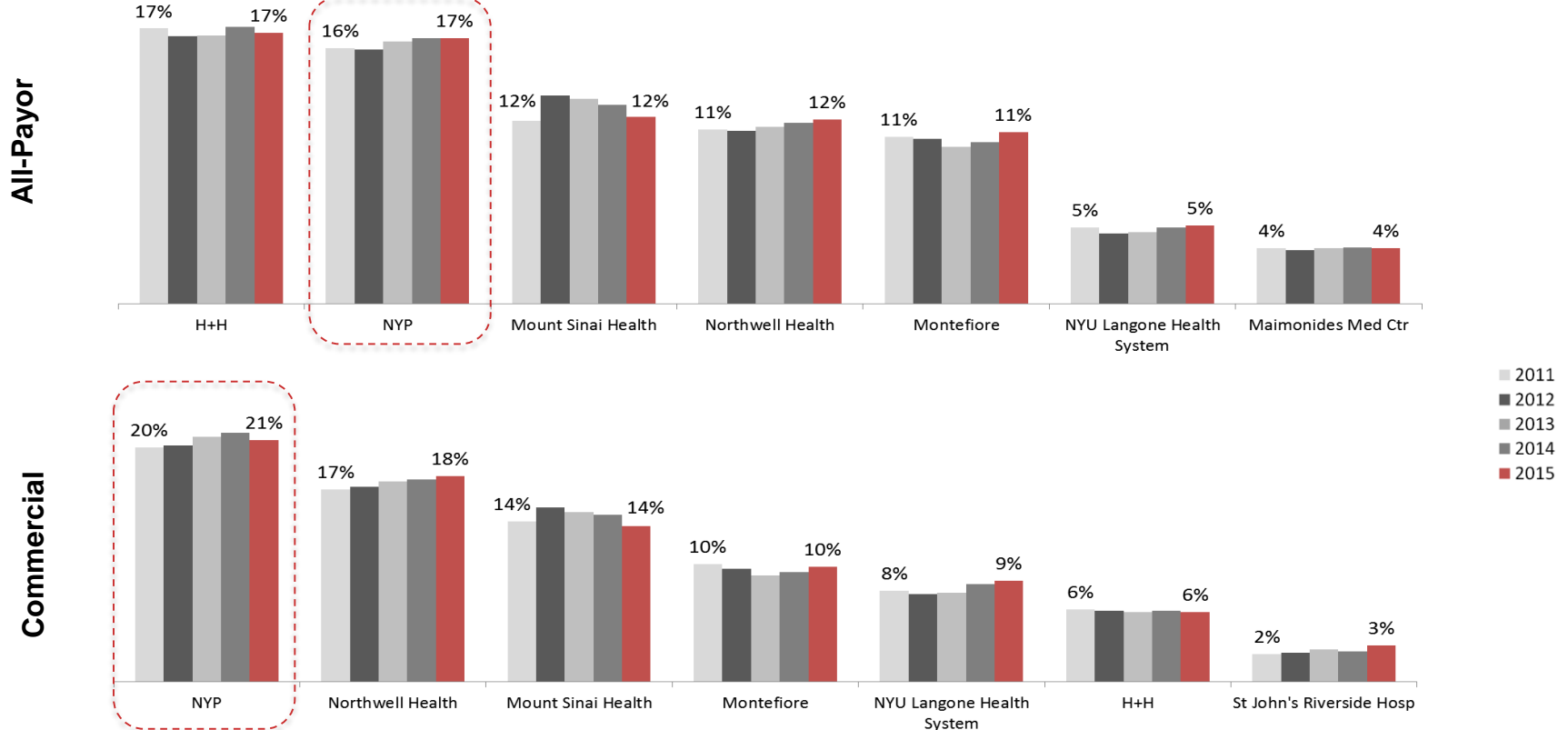
NYP Market Trends: Shrinking Inpatient Market (2011-2015)

2011-2015 Inpatient Discharges: 5-County

5-County	2015 Volume	2011-2015 Change
<i>All-Payor</i>	998,300	↓ 7%
<i>Commercial</i>	221,771	↓ 9%

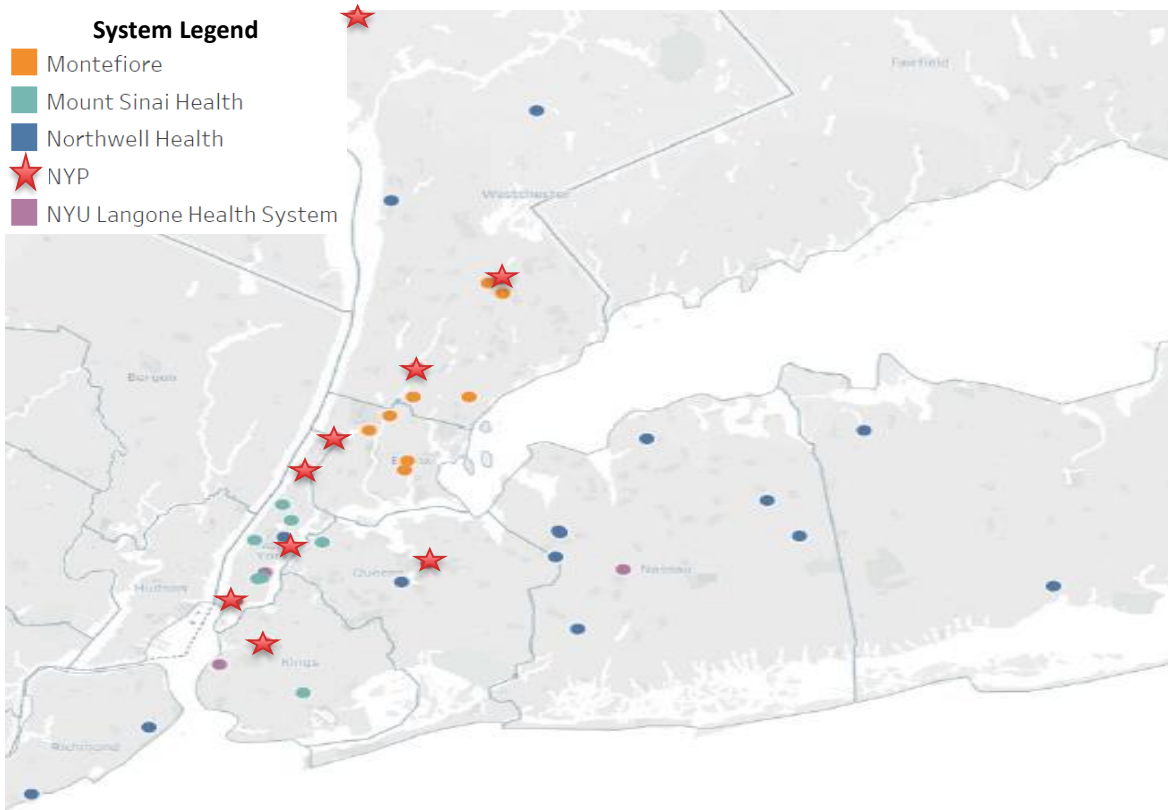
NYP Market Trends: NYP is the Market Leader

5-County Inpatient Discharge Distribution (2011-15)



Source: SPARCS data; New York State Hospital Inpatient Discharges; Excludes normal newborns; Market defined by Bronx, New York, Kings, Queens, Westchester counties; NYP defined as NYP/CU, NYP/WC, NYP/Allen, NYP/LMH, NYP/Hudson Valley, NYP/Lawrence, NYP/Queens, NYP/Brooklyn Methodist

NYP Market Trends: Key Competitors Are Consolidating



System Name	# of Hospitals in 2013	# of Hospitals Now
NewYork-Presbyterian	5	10
Montefiore HEALTH SYSTEM, INC.	3	8
Mount Sinai	2	7
Northwell Health	13	16
NYU Langone MEDICAL CENTER	3	5

Note: Map only includes locations of facilities in the Montefiore, Mount Sinai, Northwell, NYP and NYU Health Systems. Only active parent relationships are included. Only acute care facilities are included.

What We Don't Know

- **Impact / Pace of change**
- **Future market size**
- **Political environment / government intervention**
- **New entrants / disruption**
- **Penetration of tiered/narrow networks**

NYPH Strategic Investments: What Are We Not Doing?

- **Health Plan**
- **Home Health**
- **Nursing Home**
- **Extensive Primary Care**

NYPH Strategic Investments: What Are We Doing? Innovation & Ventures

1

Strategic
Partnerships



2

Venture
Investment



3

Technology
Transfer



Collaboration With Our Medical Schools Differentiates NYP

Service Lines

Strategic Growth

Operations

Growth/
Operations

Regionalization

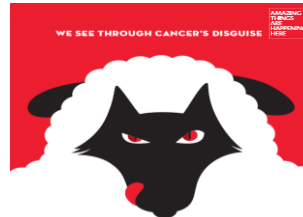
1997

Today

Precision Medicine



Tri-institutional Branding



And we're teaching patients' own immune systems to do likewise.

Why do our bodies detect and attack even the tiniest foreign substance but leave a cancerous tumor alone to grow unchecked?

Researchers at Columbia and Weill Cornell found some answers. Then, working with NewYork-Presbyterian, they used their research to develop treatments that trigger patients' own immune systems to recognize cancer and destroy it. And the results, in difficult-to-treat cancers like melanoma, lung, kidney, and colon cancer have been remarkable.

Immunotherapies for other types of cancer are in the works. We're even working on a cancer vaccine. It's all pretty amazing—and it's happening right here at NewYork-Presbyterian. To find a cancer specialist, call 877-NYP-WELL.

Well Cornell Medicine
Gandhi and Edward
Meyer Cancer Center

ColumbiaDoctors
Herbert Irving
Comprehensive Cancer Center

NewYork
Presbyterian

NewYork-Presbyterian

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Regional Hospital
Network

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NewYork-Presbyterian
Physician Services

NewYork-Presbyterian
Community and
Population Health

NYPH Has Expanded its Geographic Reach Through the Regional Hospital Network



Total Licensed Beds = 4,020

H NewYork-Presbyterian Hospital Campuses
H NewYork-Presbyterian Regional Hospital Network

And, the Addition of Over 800 Physicians through NYP Medical Groups



- 2017 Site
- 2018 Site
- 2019 Site
- Existing NYP/MG Location

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NYP Is Building a High Quality and Integrated Enterprise Using a Phased Approach

2013

2014

2015

2016

2017

2018

2019+

Phase 1 - Build
Growth/Accumulation
unified brand

Phase 2 - Assimilation
Management & Governance Integration/Standardization

Phase 3 – Integrated Performance
Regionalization of Care

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NYP Regionalized Care Focus Areas



Protocol Development



Quality Metrics



Clinical Trials



Technology



MD Expertise



Service Standards
(Including Access)

Regionalization Strategy by Service Line

 **New York-Presbyterian**
Allen Hospital

 **New York-Presbyterian ***
Lower Manhattan Hospital

 **New York-Presbyterian**
Brooklyn Methodist Hospital

 **New York-Presbyterian**
Community Health

 **New York-Presbyterian ***
Hudson Valley Hospital

 **New York-Presbyterian**
Queens

 **New York-Presbyterian**
Columbia University Irving Medical Center

 **New York-Presbyterian**
Medical Groups

 **New York-Presbyterian**
Lawrence Hospital

 **New York-Presbyterian**
Weill Cornell Medical Center

General Cardiology
Imaging

Cardiac Cath
Pacemaker
Implantation

Full EP Services
Peripheral Stenting
STEMI
Heart Failure

Cardiac Surgery
TAVR
ECMO

LVAD

Transplant

CARDIAC CARE

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*Planned

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NewYork-Presbyterian Enterprise

NewYork-Presbyterian
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NewYork-Presbyterian
Regional Hospital
Network

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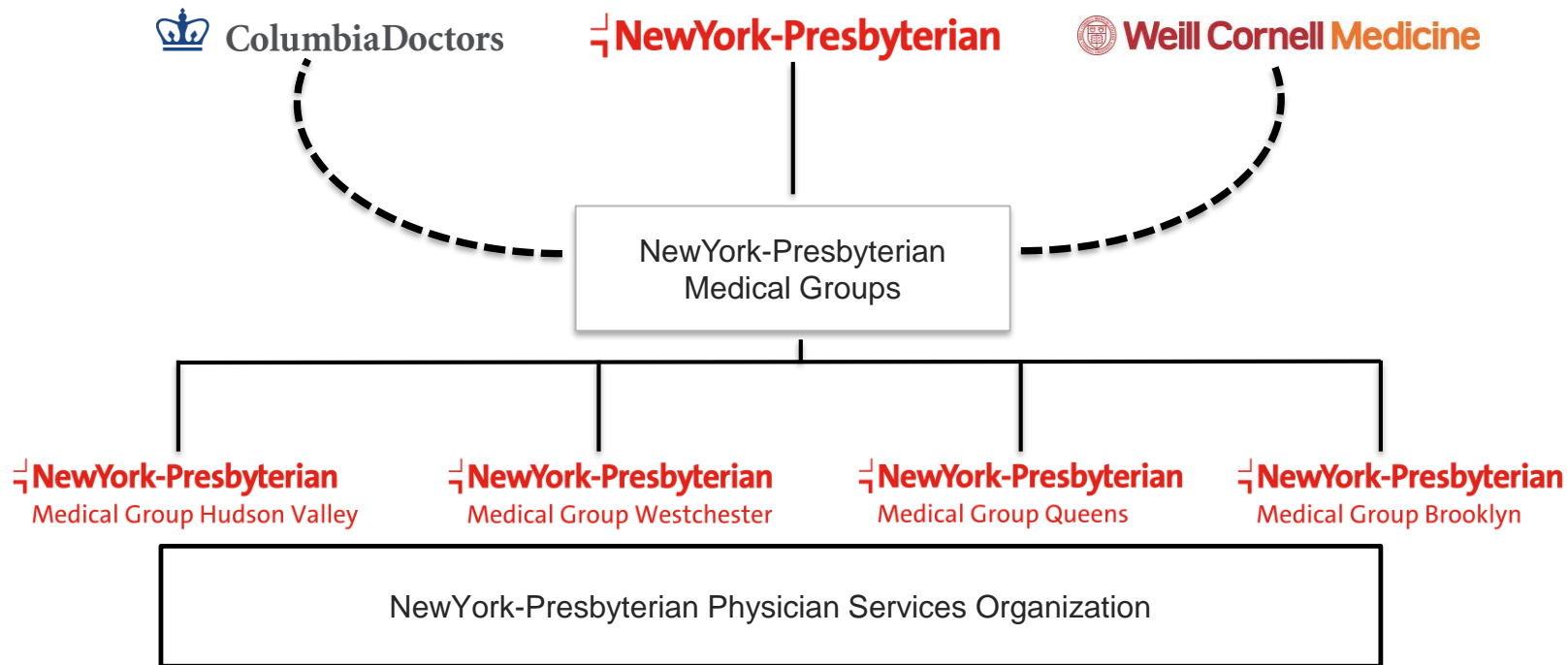
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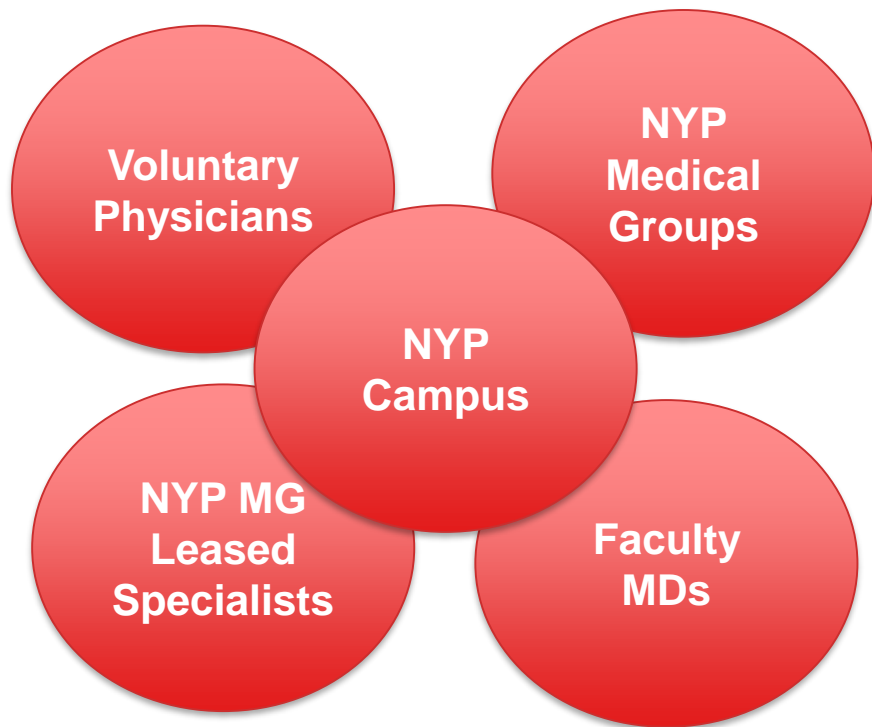
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Physician Strategy Aligns Academic and Community Physicians



NYP Physician Services: Key Challenges

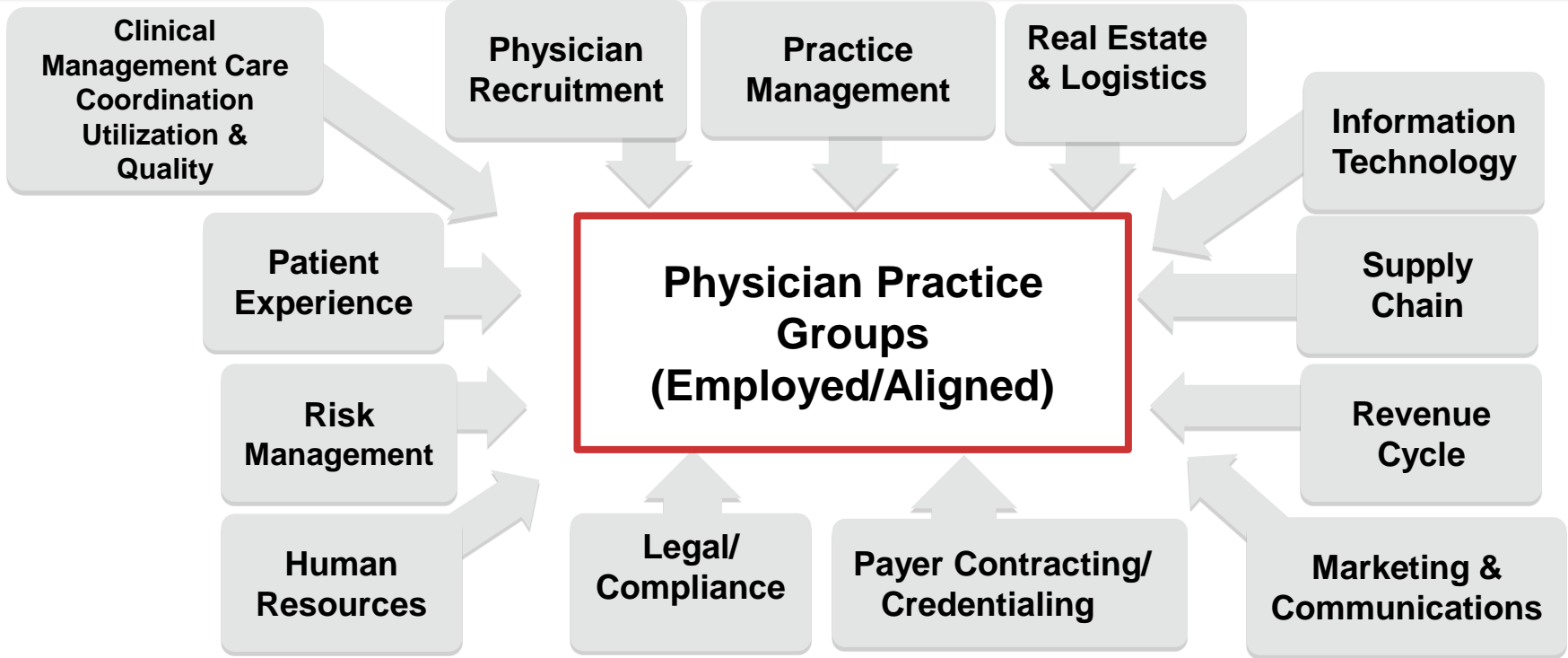
Physician Management



- Quality Care
- Access
- Align Strategic Priorities & Investment
- Clarify Roles and Accountability

NYP Physician Services: Key Challenges

Physician Service Organization



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NewYork-Presbyterian
Physician Services

NewYork-Presbyterian
Community and
Population Health

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NYP's Multi-Faceted Population Health Strategy is Focused on Five Primary Objectives



**Access /
Primary Care**

**Data
Analytics**

**Care
Management**

**Post-Acute
Care**

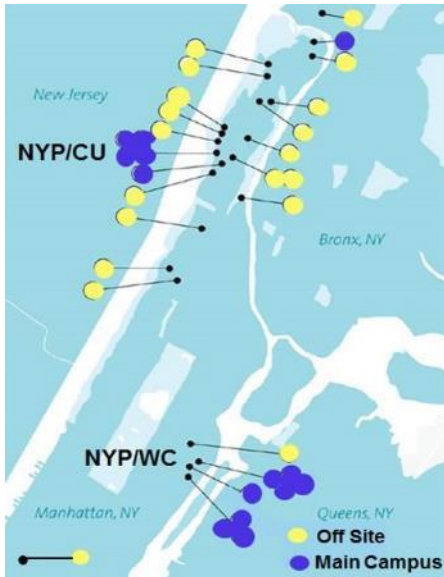
**Patient
Engagement**

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NYP is Committed to Serving our Population's Health Needs

Ambulatory Care Network (Manhattan)



14

Primary Care Practices

50

Specialty Practices

650,000

Annual Visits

185,000

Unique Patients

900+

Providers

86%

Governmental Pay

ACO



Collaborative Effort with the Medical Schools

30,000

Attributed Medicare Lives

Faculty of 2 affiliated medical schools provide another 3M+ visits annually

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Source: 2015 ACN Quality and Performance Improvement
Note: Does not include Regional Hospital Network

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Enhancing The Quality Of Care Delivery And Managing Utilization



- Regional Health Collaborative - launched in 2011
- Patient Centered Medical Home (PCMH)
- 3-year results
 - 28% in admissions
 - 30% in ED visits
- Spencer Foreman Award for Outstanding Community Service

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In the Washington Heights-Inwood section of Manhattan

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NYP Financial Strength Continues to Build



	<u>NYPH</u>	<u>NYP**</u>
 Operating Revenue***	\$5.2B	\$7.4B
 Medical School PO Revenue†	\$2.0B	\$2.0B
 Operating Margin	>5%	>4%
 Operating Cash Flow Margin	12.1%	10.3%
 Days Cash on Hand	305.2	249.5
 Total Net Assets	\$5.8B	\$6.6B
 Cash to Debt	151.4%	173.0%

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**The data presented in this column is unaudited and, in addition to NYPH, include NYP/Hudson Valley, NYP/Lawrence, NYP/Queens and NYP/Brooklyn Methodist, as if each of these entities had been an indirect subsidiary of NYPH for all of the periods presented.

*** Annualized.

† Source: The Trustees of Columbia University in the City of New York Consolidated Financial Statements June 30, 2015 and 2014 and Cornell University 2014-2015 Financial Report

 New York Presbyterian

NewYork-Presbyterian's Strategic Vision

GOAL: To be the BEST

- Recognized leader - quality/safety/patient experience
- Culture of respect and empathy
- Integrated, mobile, cutting-edge technology
- Patient-friendly space
- Strong operating margin

Thank You

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