

**PART OF THE HERITAGE  
VALUE-BASED CARE CONFERENCE SERIES**

# Virtual Fifth Value-based Payment Summit

**March 2 – 6, 2026**

**Virtual Online Video Event Live and Archived**

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**Offered in Conjunction with Health Care Value Week, March 2 – 6, 2026  
[www.HCValueWeek.org](http://www.HCValueWeek.org)**

**Media Partners: *Harvard Health Policy Review, Health Affairs and Inside Health Policy***

**[www.valuebasedpaymentsummit.com](http://www.valuebasedpaymentsummit.com)**

**AGENDA SUBJECT TO UPDATES AND CHANGE • CURRENT AS OF JANUARY 16, 2026**



**DAY 1: MONDAY, MARCH 2, 2026**

**AN OVERVIEW OF THE CURRENT STATE OF VALUE-BASED CARE**

11:00 am



**CO-CHAIR INTRODUCTIONS AND OVERVIEW OF HEALTH CARE VALUE WEEK AND THE FIFTH VALUE-BASED PAYMENT SUMMIT**

**Mara McDermott, JD**, Chief Executive Officer, Accountable for Health; Former Senior Vice President of Federal Affairs, America's Physician Groups, Washington, DC



**Kristen Ratcliff McGovern, JD**, Executive Director, Partnership to Empower Physician-Led Care; Partner, Sirona Strategies; Former Chief of Staff, National Coordinator for Health IT, Washington, DC

11:15 am

**HERITAGE VALUE-BASED CONFERENCE SERIES SPONSOR FIRESIDE CHAT WELCOME**



**Richard Merkin, MD**, Founder, President and Chief Executive Officer, Heritage Group; Board, California Institute of Technology and USC Keck School of Medicine; Founder Richard Merkin Foundation for Stem Cell Research, Broad Institute, Harvard and MIT, Los Angeles, CA



**Interviewed by:**  
**Mara McDermott, JD**, Chief Executive Officer, Accountable for Health; Former Senior Vice President of Federal Affairs, America's Physician Groups, Washington, DC

11:30 am

**KEYNOTE FIRESIDE CHAT WITH CMS ADMINISTRATOR MEHMET OZ, MD**



**Mehmet Oz, MD, MBA** (Invited), Administrator, Centers for Medicare & Medicaid Services; Professor Emeritus, NY Presbyterian-Columbia Medical Center, Washington, DC



**Interviewed by:**  
**Mara McDermott, JD**, Chief Executive Officer, Accountable for Health; Former Senior Vice President of Federal Affairs, America's Physician Groups, Washington, DC

Noon

**LUNCHEON BREAK**

1:00 pm



**A DIALOGUE WITH HEALTH SYSTEM LEADERS ON THE EVOLVING APPROACHES OF INTEGRATED SYSTEMS TO VALUE**

**Nancy Beran, MD**, Vice President and Chief Quality Officer Ambulatory, Northwell Health; Chief Medical Officer, Westchester Health Medical, PC, White Plains, NY



**Philip M. Oravetz, MD, MPH, MBA**, Chief Population Health Officer, Ochsner Health; Former Senior Medical Director, Mills Peninsula Medical Group; Former CMO, Palo Alto Medical Foundation, New Orleans, LA



**Stephen Parodi, MD**, Executive Vice President, The Permanente Medical Group and The Permanente Federation, San Francisco, CA



**Jerry Penso, MD, MBA**, President and Chief Executive Officer, American Medical Group Association; Former Medical Director, Continuum of Care, Sharp Healthcare, New Alexandria, VA (Moderator)

1:45 pm

**VALUE-BASED CARE INVESTORS ROUNDTABLE**



**Jon Phillips, MBA**, Managing Director, Head of Venture Capital and Private Equity, First Trust Capital Partners; Founder and Managing Director, A1 Digital Health Ventures; Founder and Managing Partner, First Health Capital Partners, LLC, Sarasota, FL



**Ravi Sachdev**, Partner, Clayton, Dubilier & Rice; Founder and Director and Board Vice Chair, agilon, New York, NY



**Thomas A. Scully, JD**, General partner, Welsh, Carson, Anderson & Stowe; Principal, Federal Health Policy Strategies; Partner, Scully, Roskey & Missmar; Former Administrator, Centers for Medicare and Medicaid Services, New York, NY



**Andy Slavitt, MBA**, Co-Founder & General Partner, Town Hall Ventures; Chairman, United States of Care; Former Acting Administrator, Centers for Medicare & Medicaid Services (Obama), Pasadena, CA



**Navid Farzad**, Managing Partner, Frist Cressey Ventures; Board, Nashville Health Care Council, RightMove Health, Thrive Health Tech, Oshi Health, SpectrumAi, Psych Hub, Nashville, TN (Moderator)

All times are EST.

2:30 pm **CONCURRENT MINI SUMMITS GROUP 1**

**Mini Summit 1: Making Consumer Empowerment Real**

**Debra Ness, MS**, *Health and Economic Policy Consultant: Debra L Ness Consulting; Former President, National Partnership for Women & Families, Rockville, MD*

**Melanie (Gleiman) Phelps, DrPH, JD**, *Senior Advocacy Advisor, Health System Transformation, American Heart Association; Former Senior Vice President, Health System Innovation, North Carolina Medical Society, Wilmington, NC*

**Sophia Tripoli, MPH**, *Senior Director of Health Policy, Families USA; Former Project Officer, State Innovation Group, Center for Medicare and Medicaid Innovation; Former Senior Health Policy Analyst, National Governors Association, Washington, DC*

**Randall L. Rutta, MA**, *Chief Executive Officer, National Health Council; Board, Patient Focused Medicines Development, Partnership to Fight Chronic Disease & Medical Device Innovation Consortium; Former President & CEO, American Autoimmune Related Disease Association; Former President and CEO, Easterseals, Washington, DC (Moderator)*

**Mini Summit 2: The Future of Accountable Care: Sustaining Success Through Bold Innovation**

**Stephen W. Nuckolls, MA**, *Chief Executive Officer, Coastal Carolina Health Care, PA; Former Chief Financial Officer, Atlantic Integrated Health, Inc., New Burn, NV*

**Megan Reyna, MSN, RN**, *Chief Operating Officer, Population Health, Bon Secours Mercy Health; Former Group Vice President, Population Health, Advocate Health, Cincinnati, OH*

**Aisha Pittman, MPH**, *Senior Vice President of Government Affairs, National Association of ACOs; Former President, Policy, Premier, Washington, DC (Moderator)*

**Mini Summit 3: The 2026 Risk Adjustment Engine: Aligning Clinical and Coding Teams to Drive Accuracy & Reduce Burden**

**Joe Hafner, CRC, CPC**, *Vice President of Risk Adjustment, Upperline Health; Former Director of Risk Adjustment, Millennium Physician Group, North Port, FL*

**Dana McCalley, MBA**, *Vice President of Value-Based Care, Navina; Former Director of Quality & Risk Adjustment, Honest Medical Group, North Port, FL*

**Zac Oty**, *Enterprise Solutions Engineer, Navina; Former Solutions Engineer, Aledade, Inc., Columbus, OH*

3:15 pm

**DAY 1 ADJOURNMENT**

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**DAY 2, TUESDAY, MARCH 3, 2026**

**UPDATE ON CMMI VALUE-BASED CARE INITIATIVES**

1:00 pm

**CO-CHAIR INTRODUCTION**



**Mara McDermott, JD**, Chief Executive Officer, Accountable for Health; Former Senior Vice President of Federal Affairs, America's Physician Groups, Washington, DC

1:15 pm

**KEYNOTE FIRESIDE WITH CMS CENTER FOR INNOVATION DIRECTOR ABE SUTTON**



**Abe Sutton, JD** (Invited), Director, Center for Medicare and Medicaid Innovation; Former Policy Advisor at the Domestic Policy Council, The White House (Trump), Washington, DC

**Interviewed by:**



**Valinda Rutledge, MBA**, Executive Vice President, Policy and Advocacy, America's Physician Groups; Former Group Director, Patient Care Model Group and BPCI Lead, Centers for Medicare and Medicaid Services (Obama), Washington, DC

1:45 pm

**THE NEXT ROUND OF INNOVATION: A REVIEW OF CMS/CMMI INITIATIVES PAST, PRESENT & FUTURE**



**Aisha Pittman, MPH**, Senior Vice President of Government Affairs, National Association of ACOs; Former President, Policy, Premier, Washington, DC



**Valinda Rutledge, MBA**, Executive Vice President, Policy and Advocacy, America's Physician Groups; Former Group Director, Patient Care Model Group and BPCI Lead, CMS, Washington, DC

2:15 pm

**HIGH NEEDS ACO REACH: MODERNIZING CARE FOR COMPLEX POPULATIONS**



**Marc Berg, PhD**, Head of Value Based Care, Ennoble Care; Founder and Chief Executive Officer, Penn Ave Health ACO, Washington DC



**Kim Phan, MBA**, Founder and Chief Executive Officer, CareConnectMD; Former Co-Founder & CEO, HealthEssentials, Santa Ana, CA



**Imelda Tavas MD, MBA**, Chief Administrative Officer, Es-sen Health Care; Advisory Board, NYREACH, New York, NY



**William (Will) Robinson**, Senior Vice President Accountable Care, HarmonyCares; Former Acting Deputy Director, Division of Outpatient Care, Centers for Medicare & Medicaid Services, Portland, OR (Moderator)

3:00 pm



**EARLY INTERVENTION, BETTER OUTCOMES: CLINICAL APPROACHES TO HIGH VALUE KIDNEY CARE THROUGH CMMI**

**Syed Sumair Akhtar, MD, MHCDS**, Chief Clinical Officer, Strive Health; Former Vice President, Blue Cross and Blue Shield of Minnesota, Chicago, IL



**George Hart, MD**, Former Chief Medical Officer, Interwell Health; Former President, Metrolina Nephrology Associates, PA, Charlotte, NC



**Timothy Pflederer, MD**, Chief Medical Officer, Evergreen Nephrology; Former President, RenalCare Associates SC and Illinois Kidney Disease and Hypertension Center, Peoria, IL



**Jeff Giullian, MD, MBA**, Chief Medical Officer, DaVita Kidney Care; Former Chairman, Healthcare Payment Committee, Renal Physicians Association, Denver, CO



**Brendan Fulmer**, Vice President, CareBridge; Former Advisor to the Secretary, HHS; Former Senior Advisor, CMS, Nashville, TN (Moderator)

3:45 pm

**CONCURRENT MINI SUMMITS GROUP 2**

**Mini Summit 4: The Future of Mandatory Models**

**Elizabeth Fowler, PhD, JD**, Distinguished Scholar, Johns Hopkins Bloomberg School of Public Health; Former Deputy Administrator and Director, CMMI; Former EVP of Programs, The Commonwealth Fund; Former VP, Global Health Policy, Johnson & Johnson; Former Special Assistant to President Obama; Former Chief Health Counsel, Senate Finance Committee, Washington, DC

**Hoangmai (Mai) Pham, MD, MPH**, Founder and President, Institute for Exceptional Care; Former VP, Provider Alignment Solutions, Anthem; Former Chief Innovation Officer, CMMI, Washington, DC

**William Shrank, MD, MSHS**, Chief Executive Officer, Paradigm; Venture Partner, Andreessen Horowitz; Former Chief Medical Officer, Humana; Former Senior Vice President, Chief Scientific Officer and Chief Medical Officer of Provider Innovation, CVS Health; Former Director of Evaluation, CMMI, Washington, DC

**Theresa Dreyer, MPH**, Chief Executive Officer, Health Care Transformation Task Force; Former Lead, Value Based Care, Association of American Medical Colleges; Former Model Lead, CMMI, Washington, DC (Moderator)

**Mini Summit 5: The Future of Direct Contracting**

**Adam Boehler**, Founder & Managing Director, Rubicon Founders; Former CEO, International Development Finance Corporation; Former Deputy Administrator and Director, CMS Center for Medicare, Nashville, TN

**Gabriel Drapos**, Chief Operating Officer, Pearl Health; Expert, Primary Venture Partners; Former Director, Network Product, Centivo, East Brookfield, MA

**Andrea Osborne, MSc**, Chief Operating Officer, On Belay Health Solutions; Former SVP, ACO Operations & Delegated Services, VillageMD, Camel, IN

**Valinda Rutledge, MBA**, Executive Vice President, Policy and Advocacy, America's Physician Groups; Former Group Director, Patient Care Model Group and BPCI Lead, CMS Washington, DC (Moderator)

4:30 pm

**DAY 2 ADJOURNMENT**

## DAY 3, WEDNESDAY, MARCH 4, 2026

# THE ROLE OF AI AND SPECIALTY CAPITATION IN VALUE-BASED CARE

10:30 am

### CO-CHAIR INTRODUCTION



**Kristen Ratcliff McGovern**, Executive Director, Partnership to Empower Physician-Led Care; Partner, Sirona Strategies; Former Chief of Staff, National Coordinator for Health IT, Washington, DC

10:45 am

### KEYNOTE FIRESIDE CHAT: THE ROLE OF AI AND TECHNOLOGY IN IMPROVING VALUE-BASED CARE



**Stephanie Carlton** (Invited), Deputy Administrator and Chief of Staff, Centers for Medicare & Medicaid Services; Former Partner, McKinsey & Company; Former Republican Staff, US Senate Finance Committee; Former Principal Health Advisor, Jeb Bush's 2016 Presidential Campaign, Washington, DC

#### Interviewed by:



**Valinda Rutledge, MBA**, Executive Vice President, Policy and Advocacy, America's Physician Groups; Former Group Director, Patient Care Model Group and BPCI Lead, Centers for Medicare and Medicaid Services, Washington, DC

11:15 am

### THE ROLE OF AI IN VALUE-BASED CARE: THE HOSPITAL AND HEALTH SYSTEM PERSPECTIVE



**Dawn Francis, MD, MHS**, Medical Director, Finance and Digital Products, Center for Digital Health, Mayo Clinic; Associate Professor of Medicine and Consultant, Division of Gastroenterology & Hepatology, Department of Internal Medicine, Mayo Clinic, Ponte Vedra Beach, FL



**Linda Stevenson, CHCIO, CDH-E, PMP, MBA**, Chief Digital Information Officer, Fisher-Titus Health, Norwalk, OH



**Jennifer Holloman, MHA, MBA**, Director of Policy, American Hospital Association; Former Acting Chief of Virtual Health, US Army Office of The Surgeon General, Washington, DC (Moderator)

12:00 pm

### LUNCHEON BREAK

1:00 pm

### THE PROMISE OF AI-ENABLED PATIENT-CENTERED TOOLS TO ADVANCE ACCOUNTABLE CARE AND POPULATION HEALTH



**Lisa Bari, MBA, MPH**, Vice President of Policy and Partnerships, Innovaccer; Founding CEO, Civitas Networks for Health; Former Health IT, Interoperability & AI Lead, CMS Center for Medicare & Medicaid Innovation, San Francisco, CA



**Sanjay Doddamani, MD**, Founder and Chief Executive Officer, GuideHealth; Former Cofounder & CEO, UpStream; Former Senior Advisor, CMS Center for Medicare and Medicaid Innovation, Dallas, TX



**David Gellis, MD, MBA**, CEO Arches Medical Rhode Island; Former VP & National Medical Director, Medicare Population Health, One Medical, Boston, MA



**Erin Hurlburt, MD**, Chief Medical Officer Population Health Services, Lumeris; Former Chief Medical Officer, Bon Secours Mercy Health, Mason, OH



**Jacob Shiff, MBA**, Chief AI and Technology Officer, Center for Medicare and Medicaid Innovation, Center for Medicare & Medicaid Services; Founder, Anomaly (Healthcare AI), Washington, DC



**Emily (DuHamel) Brower, MBA**, President and Chief Executive Officer, National Association of ACOs; Former SVP, Clinical Integration & Physician Services, Trinity Health, Detroit, MI (Moderator)

1:45 pm

### SCALING SPECIALTY CAPITATION: WHAT WORKS, WHAT DOESN'T, AND WHAT'S NEXT



**Paul Hendley, CSM, ASPO**, Assistant Vice President, Value-based Care, Blue Cross North Carolina, Durham, NC



**Julia Ivanova, MBA**, Senior Vice President of Growth and Partnerships, Thyme Care; Former SVP Business Development, Value Based Care & Payor Solutions Group, US Renal Care, San Francisco, CA



**Theresa Dreyer, MP**, Chief Executive Officer, Health Care Transformation Task Force; Former Lead, Value Based Care, Association of American Medical Colleges; Former Model Lead, Centers for Medicare and Medicaid Services (Obama), Washington, DC (Moderator)

2:30 pm

### INTEGRATING SPECIALTY VALUE-BASED PAYMENT: HEALTH PLAN PERSPECTIVES



**Alexander Ding, MD, MBA**, Enterprise Deputy Chief Medical Officer, Humana, Louisville, KY



**Renee McLaughlin, MBA, MD, FACS**, National Medical Senior Director, Value-based Care, Cigna; Chairs the AHIP Value-Based Care Work Group, Chattanooga, TN



**Danielle Lloyd, MPH**, Senior Vice President, Private Market Innovations & Quality Initiatives, America's Health Insurance Plans; Former Senior Associate Director, American Hospital Association, Washington, DC (Moderator)

3:15 pm

### UNLOCKING VALUE: POLICY SOLUTIONS FOR INTEGRATING SPECIALISTS INTO ACCOUNTABLE CARE ORGANIZATIONS



**Seth Edwards, MHA**, Managing Director & Vice President of Strategy, Innovation and Population Health, Premier Inc., Charlotte, NC



**Somaieh McMullan**, Senior Director, Payment Policy, Premier Inc., Washington, DC

3:45 pm

### DAY 3 ADJOURNMENT

**DAY 4: THURSDAY, MARCH 5, 2026**

**VALUE-BASED CARE IN MEDICARE ADVANTAGE**

1:00 pm

**CO-CHAIR INTRODUCTION**



**Kristen Ratcliff McGovern**, Executive Director, Partnership to Empower Physician-Led Care; Partner, Sirona Strategies; Former Chief of Staff, National Coordinator for Health IT, Washington, DC

1:15 pm

**A FIRESIDE CHAT ON THE ROLE OF VALUE-BASED CARE IN MEDICARE ADVANTAGE**



**Joseph J. Albanese, Jr., MPP** (Invited), Director of Policy, Center for Medicare, Center for Medicare and Medicaid Services; Former Senior Policy Analyst, Paragon Health Institute; Former Program Examiner, Medicare Team, Office of Management and Budget, the White House, Washington, DC



**Interviewed by:**

**Mary Beth Donahue, MPP**, President and Chief Executive Officer, Better Medicare Alliance; Former Executive Vice President, Advocacy and Operations, AHIP; Former Chief of Staff, Secretary Donna E. Shalala, US Department of Health and Human Services, Washington, DC

1:45 pm

**HOW PHYSICIAN GROUPS DELIVER VALUE IN ESSENTIAL RISK RELATIONSHIPS WITH MEDICARE ADVANTAGE PLANS**



**Ken Cohen, MD, FACP**, Executive Director of Translational Research, Optum Health; Former Chief Medical Officer, New West Physicians, Golden, CO



**Caroline Goldzweig, MD**, Vice President and Chief Medical Officer, Cedars-Sinai Medical Group; Chief Medical Officer, Cedars-Sinai Medical Care Foundation, Los Angeles, CA



**Samuel A. Skootsky, MD**, Chief Population Health Officer, UC Health; Chief Medical Officer, UCLA Health; Professor of Medicine, David Geffen School of Medicine at UCLA, Los Angeles, CA



**Susan Dentzer, MS**, President and Chief Executive Officer, America's Physician Groups; Former Editor in Chief, Health Affairs; Former Health Correspondent, PBS NewsHour, Washington, DC (Moderator)

2:30 pm

**THE FUTURE OF MEDICARE ADVANTAGE**



**Mark Fendrick, MD**, Director, V-BID Center, Professor of Internal Medicine, School of Medicine, Professor of Health Management, School of Public Health, University of Michigan, Ann Arbor, MI



**Mary Beth Donahue, MPP**, President and Chief Executive Officer, Better Medicare Alliance; Former Executive Vice President, Advocacy and Operations, AHIP; Former Chief of Staff, Secretary Donna E. Shalala, US Department of Health and Human Services, Washington, DC (Moderator)

3:15 pm

**DAY 4 ADJOURNMENT**

**DAY 5: FRIDAY, MARCH 6, 2026**

**THE FUTURE OF VALUE-BASED CARE**

1:00 pm

**CO-CHAIR INTRODUCTION**



**Mara McDermott, JD**, Chief Executive Officer, Accountable for Health; Former Senior Vice President of Federal Affairs, America's Physician Groups, Washington, DC



**Kristen Ratcliff McGovern**, Executive Director, Partnership to Empower Physician-Led Care; Partner, Sirona Strategies; Former Chief of Staff, National Coordinator for Health IT, Washington, DC

1:15 pm

**A FIRESIDE CHAT ON ACCELERATING PROGRESS ON VALUE-BASED CARE: PUTTING THE PIECES TOGETHER**



**Chris Klomp, MBA** (Invited), Director of Medicare and Deputy Administrator, Center for Medicare & Medicaid Services; Senior Advisor to the Secretary, US Department of Health and Human Services, Washington, DC



**Mark McClellan, MD, PhD**, Director, Robert J Margolis Center for Health Policy and Margolis Professor of Business, Medicine and Health Policy, Duke University; Former CMS Administrator and FDA Commissioner, Washington, DC (Moderator)

2:00 pm

**A FIRESIDE CHAT ON THE FUTURE OF VALUE-BASED CARE**



**Adam Boehler**, Founder & Managing Director, Rubicon Founders; Former CEO, International Development Finance Corporation; Former Deputy Administrator and Director, Center for Medicare, Centers for Medicare & Medicaid Services (Trump 1), Nashville, TN



**Elizabeth Fowler, JD, PhD**, Distinguished Scholar, Johns Hopkins Bloomberg School of Public Health; Former CMS Deputy Administrator and Director, Center of Medicare and Medicaid Innovation, Centers for Medicare & Medicaid Services (Biden), Washington, DC



**Interviewed by:**

**Mara McDermott, JD**, Chief Executive Officer, Accountable for Health; Former Senior Vice President of Federal Affairs, America's Physician Groups, Washington, DC

2:30 pm

**CO-CHAIRS CLOSING COMMENTS**