

**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

**Offered in Conjunction with Health Care Value Week, March 2 – 6, 2026
www.HCValueWeek.org**

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

www.valuebasedpaymentsummit.com

AGENDA SUBJECT TO UPDATES AND CHANGE • CURRENT AS OF JANUARY 21, 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

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 Pfloderer, 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

A FIRESIDE CHAT ON MEDICARE ADVANTAGE MODELS



Boris Vabson, PhD, Senior Advisor and Head of MA Strategy, Center for Medicare and Medicaid Innovation; Faculty Member and Researcher (on leave), Harvard Medical School, Washington, DC



Interviewed by:

Jennifer Podulka, MPAff, Senior Vice President of Federal Policy, America's Physician Groups; Former Senior Policy Analyst, MedPAC, Washington, DC

2:15 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)

3:00 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)

3:45 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