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# 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. In 2017 Benfield-Gallagher saw the worksite clinic market ramp up and decided to partner with Larry Boress and the National Association of Worksite Health Centers (NAWHC) to conduct research to better understand and describe this market. While some employers have offered onsite clinics for more than 25 years, there's been a recent wave of leading edge employers adding worksite clinic offerings. This includes Comcast/NBC Universal who launched their first comprehensive onsite clinic in NYC, with plans to expand to 25 sites in 5 years. Further, Apple, Qualcomm and H-E-B, to name a few, have all added worksite clinics for their employees. Also, Amazon is said to be piloting clinics in Seattle with plans to expand in 2019 for their 50,000+ employees.

This report includes findings from a survey of 109 employers. In-depth interviews were conducted with 8 employers and 9 third party clinic providers.

Details found in this report support the following findings:

- 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

The research revealed 5 growth areas including population health management and patient-centric care, lifestyle management, telehealth, data integration and connected care solutions.

Clinics are incentivized to measure and improve health status, and are therefore open to working with manufacturers on pilot projects, proofs of concept and participation in studies. They are receptive to innovative ideas that improve employee engagement, adherence and utilization.

# Worksite Clinic Research Panel

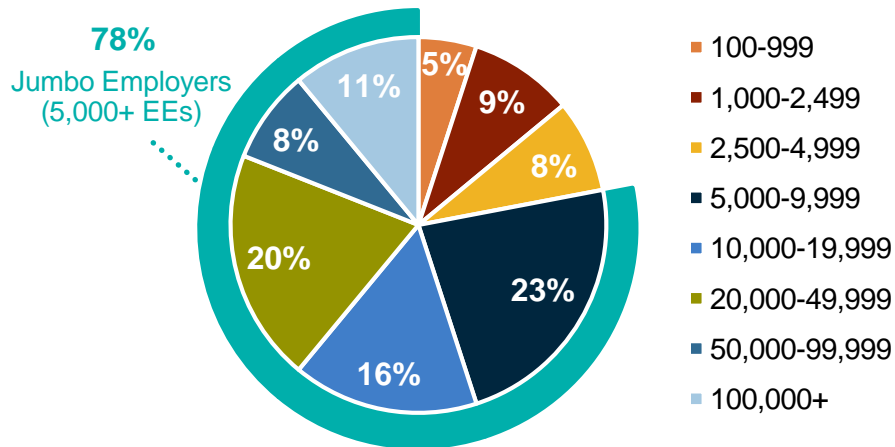


**109 Employer Surveys**

**80** with  
Worksite  
Clinics

**29** without  
Worksite  
Clinics\*

## Employer Participants by # of U.S. Employees



## 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



**17 Stakeholder Interviews**

**8**

**Employers**

**3rd Party Clinic Providers:**

**5**

**Specialized**

**4**

**IDNs**

Director to Principal-level respondents at **5 specialized worksite clinic providers:**

- » Activate Healthcare
- » Healthstat
- » Premise Health
- » QuadMed
- » Anonymous

A specialized worksite clinic provider is a third party vendor, many of which have a national footprint, with expertise in running and managing worksite clinics.

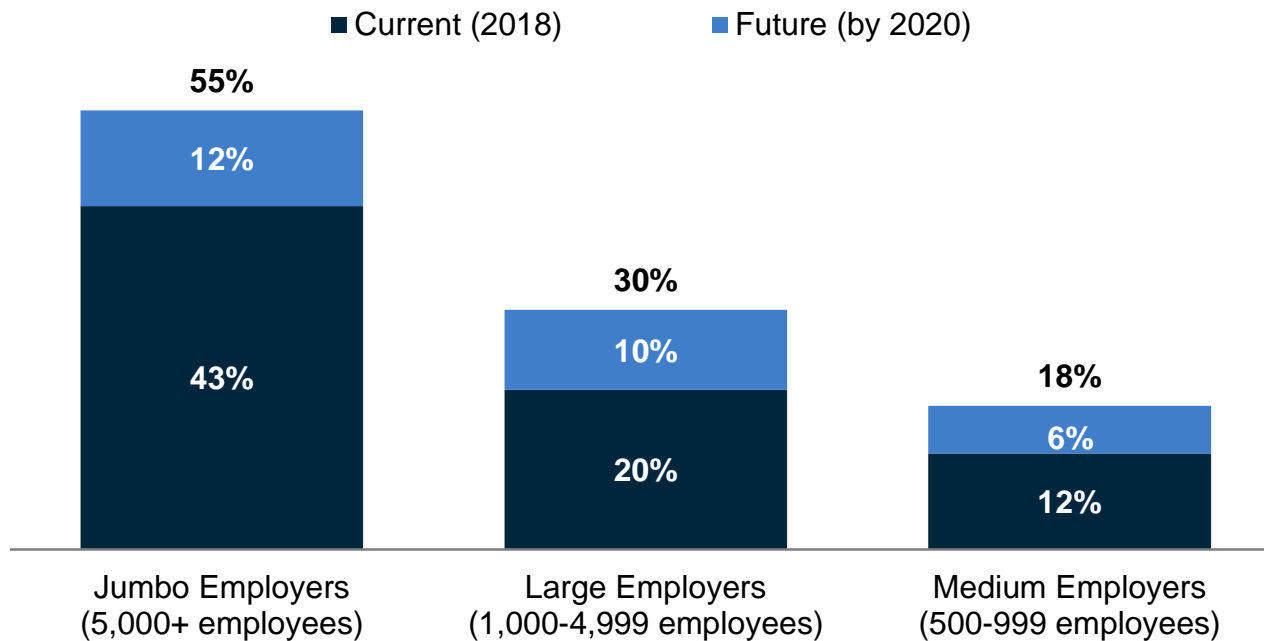
Employer-worksite clinic business leaders at **4 leading IDNs that are invested in the worksite clinic market:**

- » Ascension Health
- » Ohio Health
- » TriHealth
- » UPMC

An Integrated Delivery Network (IDN) is an organization that includes one or more hospitals plus a medical group that delivers primary and specialty care to their members.

# Overall Market Penetration of Worksite Based Health Clinics

## Employers Offering Onsite or Nearsite Health Clinics



Source for Jumbo Employers: Benfield-Gallagher, *EMI Trends*, 2018.

Source for Large & Medium Employers: Mercer, *National Survey of Employer-Sponsored Health Plans*, 2017.

# Worksite Clinic Models and Characteristics among Surveyed Employers



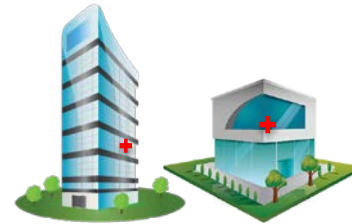
**63%**  
**Onsite**

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

n=80 Employers

## Examples of Worksite Clinic Approach by Employer Size

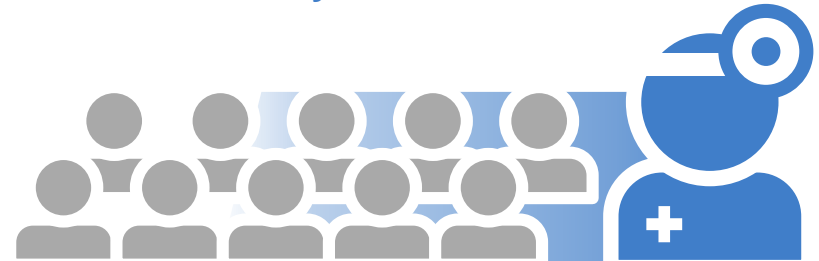
Size of Location	Small (<1k Employees)	Medium (1k – 5k Employees)	Large (>5k Employees)
Clinical Staffing	Limited (i.e., Full-time RN, Part-time Physician)	Moderate (i.e., Full-time Physicians, Medical Assistants, Wellness Coach)	Full (i.e., PCPs, Advanced Practice Providers, Medical Assistants, Wellness Coaches, Other)
Services Offered	<ul style="list-style-type: none"> <li>Acute/Urgent Care</li> <li>Wellbeing and Prevention</li> <li>Referral to community providers</li> </ul>	<ul style="list-style-type: none"> <li>Primary Care</li> <li>Occupational Health</li> <li>Care Management</li> <li>Pharmacy Dispensary</li> </ul>	<ul style="list-style-type: none"> <li>Primary Care</li> <li>Occupational Health</li> <li>Care Management</li> <li>Fitness/Rehab</li> <li>Full Pharmacy</li> </ul>

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

### Main Clinic Services

- **Primary Care and Coordination**
  - Acute and episodic care, lab testing/diagnostic ordering and referrals
  - Some clinics provide Rx dispensing
  - Telehealth
  - Mental health
- **Population Health Management**
  - Chronic condition management – Included in clinics with primary care
    - Education and counseling using onsite health coaches
  - Behavioral health – many onsite clinics are adding
- **Wellbeing and Preventive Health**
  - Physicals, coaching, vaccinations, health assessments, biometric screenings, wellness education
- **Occupational Health**
  - Drug testing, workers' compensation, accident triage

One in three employers report that  
**>40% of Clinic Patients are Without a  
Primary Care Provider**



n=80 Employers

*“We decided on family nurse practitioners so we could give the full range of primary care services to employees, to dependents and even children... Nurse practitioners are geared to coach and to help folks improve. We wanted that holistic approach.”*

–Benefits Director, Employer

# 95% of employers are satisfied with their clinic outcomes, with 39% being very satisfied

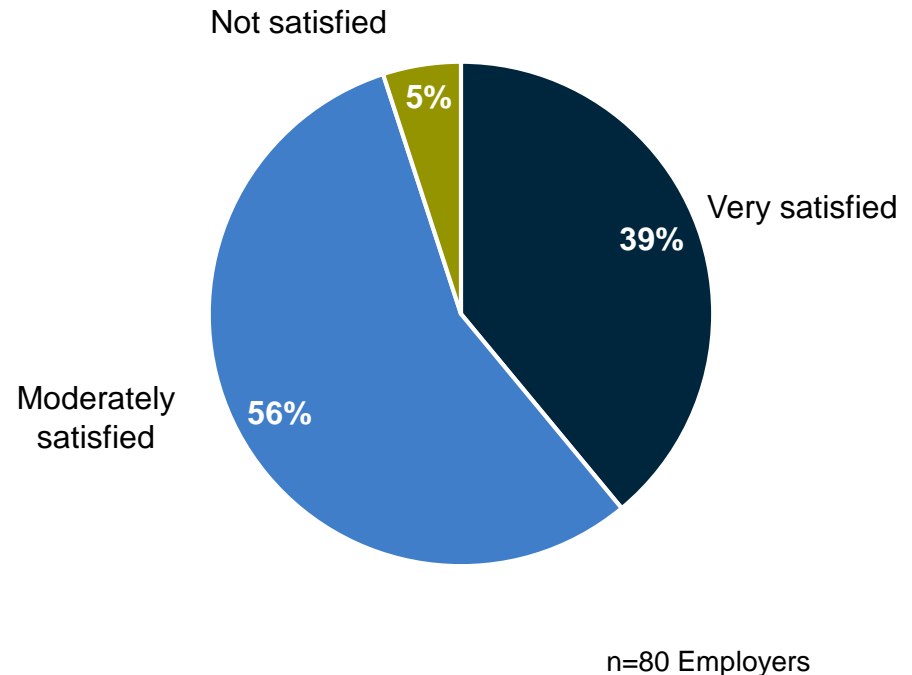
*“Our goal is to have our entire population improve or maintain their health, and even if more maintain than improve I’ll accept it because we are aging at the same time. I’d love to see the numbers even greater. There’s too many things that are undone out there, so I’ll never be fully satisfied.”*

—Benefits Director, Employer

*“It’s a journey; we’re headed in the right direction. There are a number of opportunities that we’re working to improve upon. We’re always looking to be best in class, market-leading, and innovative, so we’re never going to rest on our laurels of just being satisfied with the status quo down the road. We’ll continue to try to look for further ways to innovate and improve.”*

—Benefits Manager, Employer

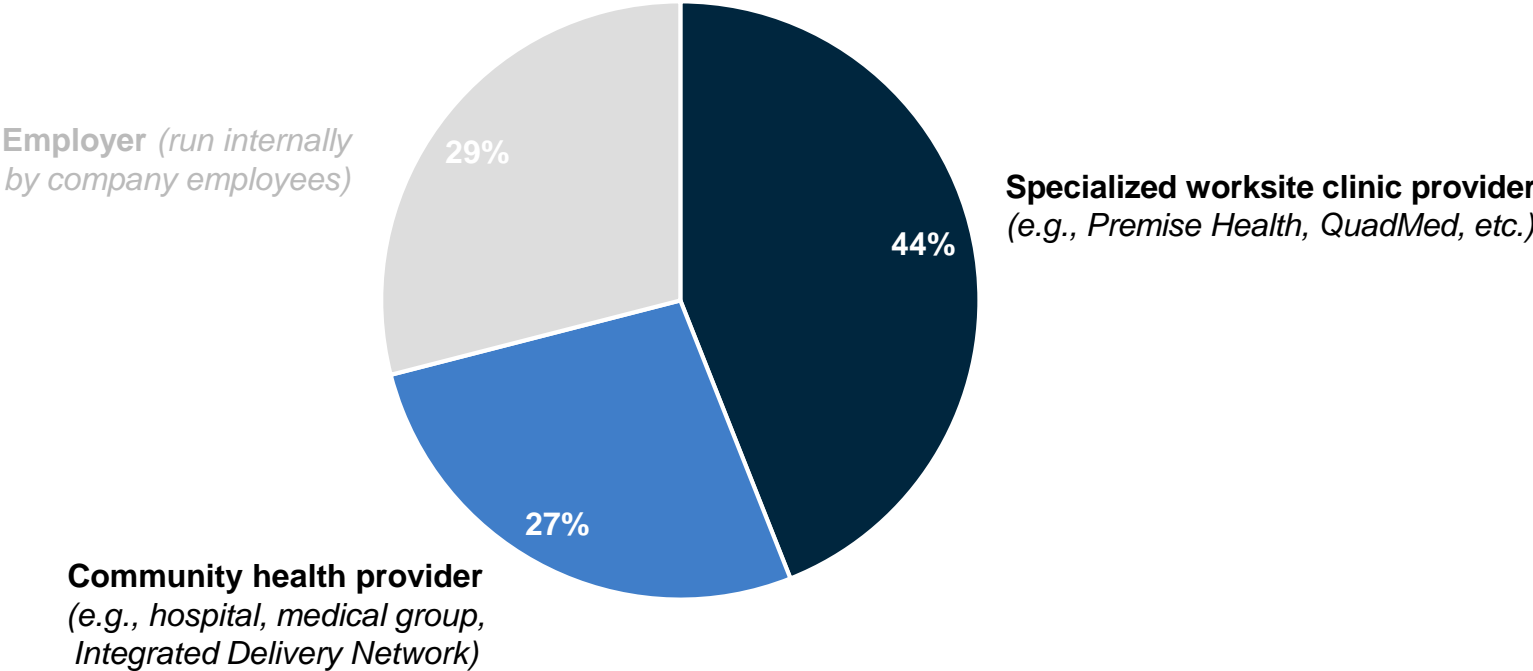
## Overall Satisfaction with Clinic Outcomes





# 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



n=80 Employers

# Growth Strategies of IDNs

IDNs are pursuing a range of growth strategies to increase the value of their worksite clinic businesses.

**1. Greater Penetration of Employers**  
in their current geographic markets  
(e.g., solutions for mid-sized employers)



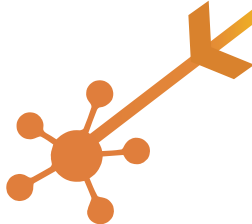
**3. Increasing Penetration of Primary Care** services in response to employer demand



**4. Comprehensive Population Health Management** using worksite clinics as a tool to integrate with IDN affiliated ACOs



**2. Geographic Expansion**  
through mergers, acquisitions and alliances with other IDNs



# Thank You!

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