

Attachment G
Concentra Financials

Concentra Business of Humana Inc.

**Combined Financial Statements
With Independent Auditors' Report
For the Years Ended December 31, 2014 and 2013**



Independent Auditor's Report

To Management and the Board of Directors
of Humana Inc.:

We have audited the accompanying financial statements of the Concentra Business of Humana Inc., which comprise the balance sheets as of December 31, 2014 and 2013, and the related statements of operations and comprehensive income, of cash flows, and of redeemable noncontrolling interests and invested equity for the years then ended.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express an opinion on the financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on our judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, we consider internal control relevant to the Company's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Company's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Concentra Business of Humana Inc. at December 31, 2014 and 2013, and the results of its operations and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

March 16, 2015

.....
PricewaterhouseCoopers LLP, 500 West Main Street, Ste. 1800, Louisville, KY 40202-2941
T: (502) 589 6100, F: (502) 585 7875, www.pwc.com/us

Concentra Business of Humana Inc. **Combined Balance Sheets**

(in thousands)

	December 31,	
	2014	2013
Assets		
Current assets:		
Cash and cash equivalents	\$ 4,866	\$ 5,717
Accounts receivable, net	114,240	118,474
Inventory and other current assets	17,084	19,743
Prepaid expenses	8,243	7,847
Total current assets	144,433	151,781
Property and equipment, net	195,186	187,124
Goodwill and other intangible assets, net	667,743	684,713
Insurance recoverable	36,047	38,595
Other assets	2,312	2,503
Total assets	\$ 1,045,721	\$ 1,064,716
Liabilities and Invested Equity		
Current liabilities:		
Accrued compensation	48,511	56,235
Accrued expenses	32,342	39,013
Accounts payable	13,906	4,475
Current portion of professional, general and workers' compensation reserve	8,032	6,754
Total current liabilities	102,791	106,477
Deferred income taxes	63,141	79,438
Professional, general and workers' compensation reserve	37,693	40,737
Long-term deferred rent	15,329	15,782
Other liabilities	4,283	4,216
Total liabilities	223,237	246,650
Noncontrolling interests - redeemable	28,116	28,189
Commitments and contingencies		
Invested Equity		
Net Parent Investment	789,304	784,884
Noncontrolling interests - nonredeemable	5,064	4,993
Total invested equity	794,368	789,877
Total liabilities and invested equity	\$ 1,045,721	\$ 1,064,716

The accompanying notes are an integral part of these combined financial statements.

Concentra Business of Humana Inc.
Combined Statements of Operations and Comprehensive Income

(in thousands)

	Years Ended December 31,	
	2014	2013
Patient services revenue, net	\$ 931,923	\$ 921,830
Capitated revenue	66,278	58,707
Total net revenues	998,201	980,537
Cost of services	826,326	835,731
Gross profit	171,875	144,806
General and administrative expenses	125,749	113,534
Amortization of intangibles	16,889	18,297
Loss on sale of assets	241	1,030
Operating income	28,996	11,945
Income tax expense	4,278	5,429
Income from continuing operations	24,718	6,516
Gain/(Loss) from discontinued operations, net of income taxes	145	(312)
Net income	24,863	6,204
Net income attributable to noncontrolling interests	4,716	3,027
Net income attributable to the Company	\$ 20,147	\$ 3,177
Other comprehensive income	-	-
Comprehensive income attributable to the Company	\$ 20,147	\$ 3,177

The accompanying notes are an integral part of these combined financial statements.

Concentra Business of Humana Inc. **Combined Statements of Cash Flows**

(in thousands)

	Years Ended December 31,	
	2014	2013
Operating activities:		
Net income	\$ 24,863	\$ 6,204
Adjustments to reconcile net income to net cash provided by operating activities:		
Depreciation and amortization of property and equipment	35,409	36,192
Amortization of intangibles	16,889	18,595
Provision for bad debt	16,379	17,986
Stock-based compensation	3,627	630
Loss on sale or disposal of assets	241	1,030
Deferred income tax (benefit) provision	(14,150)	2,990
Changes in assets and liabilities, net of effect of businesses acquired and dispositions:		
Accounts receivable	(12,145)	(16,088)
Prepaid expenses and other assets	3,688	(9,021)
Accounts payable and accrued expenses	(4,633)	20,416
Net cash provided by operating activities	<u>70,168</u>	<u>78,934</u>
Investing activities:		
Purchases of property and equipment	(46,564)	(60,669)
Acquisitions, net of cash acquired	-	(5,790)
Proceeds from the sale of assets	27	1,606
Net cash used in investing activities	<u>(46,537)</u>	<u>(64,853)</u>
Financing activities:		
Capital lease repayment	(410)	(1,629)
Distributions to noncontrolling interests	(4,718)	(3,161)
Net Transfers to Parent	(19,354)	(9,559)
Net cash used in financing activities	<u>(24,482)</u>	<u>(14,349)</u>
Decrease in cash and cash equivalents	<u>(851)</u>	<u>(268)</u>
Cash and cash equivalents, beginning of year	<u>5,717</u>	<u>5,985</u>
Cash and cash equivalents, end of year	<u>\$ 4,866</u>	<u>\$ 5,717</u>
Supplemental disclosure of cash flow information:		
Income taxes paid, net	\$ -	\$ -
Liabilities and debt assumed in acquisitions	\$ -	\$ 183
Non-cash investing and financing activities:		
Property and equipment acquired through accounts payable and accruals	\$ 5,033	\$ 7,883

The accompanying notes are an integral part of these combined financial statements.

Concentra Business of Humana Inc.
Combined Statements of Redeemable Noncontrolling Interests and Invested Equity

(in thousands)

	Redeemable Noncontrolling Interests	Net Parent Investment	Nonredeemable Noncontrolling Interests	Total Invested Equity
Balance, December 31, 2012	\$ 28,185	\$ 790,636	\$ 5,131	\$ 795,767
Stock-based compensation (see Note 13)	-	630	-	630
Net Transfers to Parent	-	(9,559)	-	(9,559)
Distributions to noncontrolling interests	(2,258)	-	(903)	(903)
Net income attributable to noncontrolling interests	2,262	-	765	765
Net income attributable to Company	-	3,177	-	3,177
Balance, December 31, 2013	28,189	784,884	4,993	789,877
Stock-based compensation (see Note 13)	-	3,627	-	3,627
Net Transfers to Parent	-	(19,354)	-	(19,354)
Distributions to noncontrolling interests	(3,810)	-	(908)	(908)
Net income attributable to noncontrolling interests	3,737	-	979	979
Net income attributable to Company	-	20,147	-	20,147
Balance, December 31, 2014	\$ 28,116	\$ 789,304	\$ 5,064	\$ 794,368

The accompanying notes are an integral part of these combined financial statements.

Attachment H
Leadership Team Qualifications

1457 NATCHEZ LOOP - COVINGTON, LA 70433
PHONE 713-542-6251 • TRANK20@MSN.COM

KRIS TRONCOSO

CAREER FOCUS

With more than 15 years with the same company, I am a sales executive with a proven track record. A record demonstrating a consistent ability to accept and excel at greater responsibilities, create quality solutions for clients, develop relationships quickly, close business, effectively manage current business, negotiate pricing and successfully lead a sales organization.

PROFESSIONAL EXPERIENCE

February 2012 - present Concentra Medical Centers (national)
Asst. Vice President, National Sales

- Concentra Medical Centers is the nation's largest provider of occupational medicine/urgent care/wellness with 300+ medical centers and 200+ worksite medical clinics in 40 states
- Executive, senior member of the elite sales team responsible for large national accounts
- Sell urgent care medical treatment, workers compensation injury treatment, worksite medical clinics for employer locations, non-injury services - such as drug testing, physical examinations, OSHA- & DOT-mandated medical testing to employers, municipalities, workers' compensation insurance carriers, insurance brokers, consultants and third party administrators
- Received the prestigious 2013 Humana President's Council award for highest sales growth over prior year for the elite sales team (+22%) - National Account Salesperson of the Year for 2013.
- Domestic US travel comprises 30-40% of the position

May 2009 -February 2012 Concentra Medical Centers (national)
Asst. Vice President, Broker & National Sales

- Hand-picked by Sr. VP of Sales to one of two high-profile corporate positions with insurance broker sales responsibilities throughout the Western half of the US
- Sold worksite medical clinics for employer locations, in addition to wellness programs including Health Risk Assessments (HRA), Biometric screening services and vaccinations to insurance brokers, benefit consultants, employers, municipalities & third party administrators
- Grew gross revenue by 400% over the first three years
- All sales and leads are generated through relationships built by

networking in the insurance broker, risk management, workers' compensation, environmental/safety/health, human resources and benefits industries, as well as cold calling.

- Addition of 18 national employers to current workload in February 2012 to increase occupational medicine revenue and visits
- Domestic US travel comprises 30-40% of the position
- Concentra was acquired by Humana in December 2010

January 2008 – May 2009

Concentra Medical Centers (national)

National Account Executive

- Promoted to one of five high-profile corporate positions with sales responsibilities for 50+ Fortune 500 employers throughout the US, and their subsequent visit growth, revenue growth & revenue retention
- Sold urgent care medical treatment, workers compensation injury treatment, wellness programs including Health Risk Assessments (HRA) and Biometric testing, non-injury services - such as drug testing, physical examinations, OSHA- & DOT-mandated medical testing and vaccinations to insurance brokers, employers, municipalities, workers' compensation insurance carriers & third party administrators
- Successfully exceeded annual goal of \$1.5 million increase in book of business
- National sales leader in new product lines of Urgent Care sales and Health Improvement Programs, including Health Risk Assessments, Biometric Testing and Health Coaching.
- Domestic US travel comprises 50-60% of the position

July 2004 – January 2008

Concentra Medical Centers (TX & LA)

Area Sales Manager

- Direct oversight of 15 sales representatives, as well as the visit growth, revenue growth & revenue retention of 15 occupational medicine clinics throughout Houston, New Orleans & Baton Rouge
- Promoted to manage additional territory of New Orleans & Baton Rouge, LA in January 2006
- Houston market grew to \$27.4 million from \$20 million (37% increase) in gross revenue over my tenure
- Houston market - 2006
 - Largest injury & non-injury visit growth in the nation
 - 6.7% injury visit growth, 11.7% physicals visit growth & 14.5% drug screen visit growth vs. 2005
 - 19.7% gross revenue growth vs. 2005
- Houston market - 2005
 - -2.5% injury visit growth, 10.4% physicals visit growth & 7.7% drug screen visit growth vs. 2004

- 13.8% gross revenue growth vs. 2004
- Houston market – 2004
 - 3.2% injury visit growth, 10.9% physicals visit growth & 8.4% drug screen visit growth vs. 2003
 - 3.5% gross revenue growth vs. 2003
- Worked as one part of an Area Leadership Team, along with the Regional Medical Director, Area Physical Therapy Director and Director of Operations to manage, set policy/procedure and develop customer service standards for our markets (approx. \$38 million in gross revenue combined)
- Successfully transitioned 200+ customers of a \$5 million clinic acquisition into the Concentra system
- Relocated to Houston, TX to accept the position

March 1999 – July 2004 Concentra Medical Centers (New Orleans, LA)

Team Leader of Sales / Health Services Manager

- Responsible for business-to-business sales efforts of four occupational medicine clinics located in New Orleans, LA with more than \$6 million in gross revenue annually
- Surpassed weekly sales call minimum goals of 75 cold calls, which included 12 appointments, 7 new client closes and 28 maintenance calls for five consecutive years
- Met all monthly goals of 12 new client utilization of the clinics (ranking #2 out of 230 reps nationally) for new revenue generated (approx. \$500K)
- Promoted to Team Leader of Sales for Louisiana territory in August 2000 – expanding sales leadership role to assist Area Sales Manager in managing and training Health Services Managers in the market

January 1998 – March 1999 Purple & Gold Magazine (Baton Rouge, LA)

Assistant Editor

- Responsible for covering Louisiana State University and SEC athletics for *Purple & Gold Magazine*, as well as writing feature stories, beat writing, editorial content & layout
- Promoted our weekly publication through weekly radio, television and public speaking engagements, thereby doubling subscription numbers & tripling circulation numbers for P&G Communications Inc.

CONCENTRA AWARDS EARNED

- **2013:** National Salesperson of the Year (+22% growth); Humana's President Council member
- **2004-2012:** Concentra did not have recognition or award programs for Sales Managers, National Account Executives or Executives.
- **2003:** Health Services Manager of the Year – South Region (#1 regionally & 1 of only 5 reps nationally), Market of the Year – South

Region (1 of only 5 territories nationally), Highest New Revenue Generated (#2 out of 230 reps nationally), HSM of the 2nd Quarter for Highest First Use Revenue, Sales Award of Excellence (SAE) for entire year

- **2002:** Highest Revenue Growth in Louisiana, Sales Award of Excellence for entire year
- **2001:** Sales Award of Excellence for 1st & 2nd Quarters (4 of 30 reps regionally), Client Wish List Usage Winner for South Region (#1 of 30 reps regionally), National Background Check Contest Runner-Up (#2 of 230 reps nationally)
- **2000:** National Silver Award for exceeding weekly sales goals for the entire year (11 of 230 reps nationally), National Leads Award for providing national business opportunities (6 of 230 reps nationally), Top Sales Performance – 1st Quarter, Outstanding Leadership Award – 1st & 2nd Quarters

EDUCATION

1992-1997 Louisiana State University Baton Rouge, LA
Bachelor of Arts in Mass Communication w/ a Public Relations concentration
■ Minors: Speech Communication & History

PROFESSIONAL ORGANIZATIONS (PAST & PRESENT)

Port Louis Owners Association (Townhome Assoc.) Board Member (2008-11), President of Delta Safety Society (2003-2004), 1st VP (2001-2002), 2nd VP (2000), Risk & Insurance Managers Society (RIMS), Associated Builders & Contractors' Programs & Activities Committee, American Society of Safety Engineers, Louisiana Association of Self-Insured Employers, Louisiana Association of Business & Industry, Louisiana Claims Association, New Orleans Claims Association, Jefferson Chamber of Commerce, and Jefferson Young Leaders Junior Chamber (Jaycees) Charter Member

INTERESTS & ACTIVITIES (PAST & PRESENT)

Family-owned catering business with the New Orleans Jazz & Heritage Festival (30 yrs.), Co-owner of Fleur de Lis Development Inc. land developers, LSU football season ticket holder, Sand Volleyball recreational leagues

REFERENCES AVAILABLE (ALL DIRECT SUPERVISORS)

- **Christi Coleman** (former Vice President of National Sales, Concentra Medical Centers – Dallas, TX) – (817) 748-1208
- **Renee Cowan-Aguiare** (former Area Sales Manager, Concentra Medical Centers - New Orleans, LA) – (615) 390-2190
- **David Mikula** (former Vice President of Sales, Concentra Medical Centers – corporate office) – (214) 335-2441

Christine Royal

8845 Galloway Ct Sylvania, Ohio 43560

586-817-1610 Cell

Chris_royal@concentra.com

Professional Profile

Seeking an opportunity to advance my career utilizing my 18 years of experience in occupational medicine, Urgent Care and quality improvement. I would like to draw on my experience in the quality improvement arena to assist developing a quality improvement department in the primary care business line.

Professional Experience

Concentra, Bingham Farms, MI

05/2012-Present

National Director Quality Improvement & implementation Field Operations

- Direct oversight and management of Zone QII Directors
- Responsible for creating, piloting, implementing and compliance monitoring of operational improvement programs, initiatives and processes that will result in increased efficiency, cost reduction, improved customer service in coordination with other team and zone leaders.
- Identify current operational processes and procedures and assess for improvement opportunities using continuous quality improvement methodologies
- Work collaboratively with National, Zone, Area and Market leadership to identify and understand operational challenges that may require modification.
- Maintain consistent and fluid communication with organizational leadership regarding center/field findings, concerns and ideas relative to operational improvement ideas as well as providing consistent feedback relative to center/market compliance.
- Field representative and operational voice in the management and oversight of new and existing initiatives that effect center operations

Concentra, Bingham Farms, MI

2008-2012

Midwest Zone Director Quality Improvement & implementation Field Operations

- Responsible for creating, piloting, implementing and compliance monitoring of operational improvement programs, initiatives and processes that will result in increased efficiency, cost reduction, improved customer service in coordination with other team and zone leaders.
- Identify current operational processes and procedures and assess for improvement opportunities.
- Worked directly with Quality Improvement & implementation team to streamline or alter processes to allow for improved efficiency, effectiveness and customer service.
- Worked collaboratively with Zone, Area and Market leadership to understand operational challenges that may require modification.
- Maintain consistent and fluid communication with Zone, Area and Market leadership regarding center/field findings, concerns and ideas relative to operational improvement ideas as well as providing consistent feedback relative to center/market compliance.
- Field representative and operational voice in the management and oversight of new and existing initiatives that effect center operations.
- Worked closely with all leadership at the center/area/zone levels, providing oversight and reinforcement of accountability and field compliance with projects, initiatives and implementation initiatives.
- Identify best practices across organization and develop methodology for accelerating adoption across all entities.
- Project manage center acquisitions, consolidations, closures, and denovos in concert with area and zone leadership.
- Coordinate with Training Department to effectively roll out all new initiatives, programs, processes that effect center operations.
- Coordinate internal non financial audits in centers in zone of responsibility.
- Audit internal processes and procedures to further support compliance and efficiencies gained by respective operational programs and initiatives.

Concentra, Bingham Farms, MI

2007-2008

Midwest Zone Urgent Care Manager

- Work closely with all leadership at the center/area/zone levels to implement Urgent Care in Occ Med centers
- Nationally Trained front line colleagues on new practice management systems that supported Urgent Care practice.
- Worked closely with center level leaders to implement new Urgent care
- Acted as Urgent Care resource for center/area/zone level leadership
- Worked closely with Urgent Care CBO to ensure that maximum reimbursement was obtained for Urgent care services.

Concentra, Bingham Farms, MI

2005-2007

Assistant Area Operations Director

- Ensured compliance with all operational policies, procedures, and training programs, in all assigned Centers.
- Assisted in monitoring operational and financial performance of all assigned Centers as defined in the budgetary process.
- Reviewed and analyzes operating statements on a monthly basis to ensure center objectives are met.
- Reviewed center operating systems and available operational reports to ensure ongoing process improvement.
- Provided support to Center Administrators and support staff for compliance with regulations in various functions and processes in accordance with current company and/or other regulatory requirements.
- Monitored, evaluated and recommended changes to procedures and policies to enhance service.
- Coordinated all operational initiatives with all center leadership team members to ensure adequate support of Concentra's clinical processes.
- Assisted Director of Operations in preparing and maintaining annual budgets for assigned centers.
- Coordinated involvement of center leadership teams in the budget process in conjunction with other market leadership team members.
- Interviewed, hired, counseled and disciplined according to established policies and in conjunction with the Human Resources department.
- Facilitated the implementation of and ensures adherence to all corporate policies, procedures and initiatives.
- Assisted the Center Administrator with the hiring, training and development of all support staff.
- Hired, trained, and developed all Center Administrators for assigned centers.
- Assisted Center and Market Leadership team members with resolution of client issues.

Concentra Medical Centers, Atlanta, GA
Center Administrator

4/2000-2005 (Novacare acquisition)

- Oversee daily operations of the center
- Monitor patient flow
- Account management
- Customer service calls with clients
- Daily cash deposits
- Reconcile daily visit reports
- Audit daily charges
- Payroll
- Accounts payable
- Medical case closure
- Financial/salary analysis
- Monitor supply orders and inventory
- Financial/Salary Analysis

- Christine Royal • 586-817-1610 Cell • chris_royal@concentra.com
-

Page 2 of 2

NovaCare, Atlanta, GA
Center Administrator

06/98-4/2000 (Atlantic Health Group Acquisition)

- Oversee daily operations of the center
- Monitor patient flow
- Account management
- Customer service calls with clients
- Daily cash deposits
- Reconcile daily visit reports
- Audit daily charges
- Payroll
- Accounts payable
- Medical case closure
- Financial/salary analysis
- Monitor supply orders and inventory

Financial/Salary Analysis

Atlantic Health Group, Atlanta, GA
Program Specialist

4/95-6/98 (Company Acquired by NovaCare)

Responsibilities:

- Designed work hardening programs for patients
- Performed HPE's
- Performed FCE's

Education

University of Toledo, Toledo, Ohio
BS Exercise Science/Concentration in Kinesiotherapy
03-95

References

References are available upon request.

Brandy Mitchell

Background and Skills

My goal is to establish full time employment in the healthcare field where my knowledge, skills and education can be utilized to benefit my employer as well as provide an opportunity for learning and growth.

Practice Operations

- Experience with managing operations and strategy for large multi-specialty, multi-site and onsite physician practices.
- Evaluate KPI's and trends to provide solutions to close any performance gaps.
- Overall responsibility for the routine business and clinical functions through administrative and clinical staff and services to ensure maximum utilization of resources and the efficient delivery of services.
- Ensure practices are appropriately staffed to meet the needs of patients, physicians and clients.
- Develop and oversee implementation and administration of internal practice policies and procedures.

Fiscal Management

- Management and budget of FTEs and operational expenses to ensure sound fiscal operations of the practices.
- Lead financial and operational performance of assigned area.
- Analyze financial and practice activity reports. Perform financial analysis of P&L, plan corrective strategy and execute.
- Assist in marketing and expansion related initiatives. Develop short and long term plans for revenue growth.
- Identify practice/business development opportunities to increase market share.

Leadership/People Development

- Establish work procedures and standards to improve efficiency and effectiveness of each practice. Ability to gain "buy in" from support teams.
- Monitor and document performance of team members and site leaders.
- Reward and discipline team members.
- Create team member retention strategy.
- Lead team on maximizing the customer experience.
- Success in working with cross-functional teams.

Experience

11/11-Present

Concentra

Louisville, KY

Director, Strategic Onsite Accounts

- Strategic client support for high profile onsite accounts

Area Operations Director, Onsite Accounts

- Operational and strategic client support for Louisville market
- Frequently selected as SME for various stretch projects
- Moved to this role upon the specific request of key clients asking to have my focus. Frequently requested by clients to present on their behalf to their leadership regarding program strategy.

Regional Worksite Director, Midwest Zone

- Operational oversight of 40 onsite centers with various staffing models and services
- Negotiate client contracts, fiscal management, maintain client relationships
- Telemedicine implementation and responsibility
- Strategic partner of assigned clients for growth and expansion

Center Operations Director, Humana Health & Well-being Center

- Implemented successful clinical processes, staffing model and strategic programs

502-396-5561 • brandymitchell00@gmail.com

Brandy Mitchell

10/09-11/11

University of Louisville Physicians-Department of
Medicine

Louisville, KY

Practice Operations Director

- Operational and fiscal responsibility for multi-specialty and multi-site practices: Primary Care, Rheumatology, Pulmonary & Sleep Medicine, Endocrinology, Cardiology, Gastroenterology, Infectious Disease as well as ancillary testing labs: Echo/Stress Lab, Pulmonary Function Lab, and GI Motility Lab.
- Successfully manage support staff and support 80+ clinicians within primary care and 6 subspecialty groups

1/09-10/09

The Physician Group, JHSMH

Louisville, KY

Practice Manager

- Press Ganey customer satisfaction scores from 75% to 93%
- Team member satisfaction scores from 32% to 85%
- Transitioned 2 orthopedic private practice groups with 9 total locations to employed network successfully

4/07-1/09

BaptistWorx, BCHS

LaGrange, KY

Clinic Manager

- Developed marketing strategies to promote services of occupational medicine center
- Oversight of both clinic and onsite locations in the assigned area
- Revised staff structure to obtain better efficiency

Education

Ashford University

Online Program

Bachelor of Arts, Healthcare Administration

- Integrated learning program reflecting the realities of the healthcare system. Explores topics such as: health administration, regulation and financing, health care planning and health policy.

Xavier University

Cincinnati, OH

Associate of Science, Radiologic Technology

- Clinical education was completed at Good Samaritan Hospital.

Dixie Heights High School

Edgewood, KY

International Baccalaureate Program

- Rigorous college prep program with a variety of accelerated courses designed to create a well-rounded student as well as reward dedicated students with completing college curriculum early.
- College level course requirements were completed at Thomas More College.

Certifications

- Strategic Organizational Leadership Certification- **SOLC**
Management and Strategy Institute
- Project Management Qualified-**PMQ**
Management and Strategy Institute

Laura Sanchez

223 Continental San Antonio, TX 78228 210-378-3079, lsgemini612@yahoo.com

Experienced LEADER

EXECUTIVE SUMMARY

Dynamic, professional seeking to leverage 15+ years of extensive experience in the entire gamut of operations management, human resources management and customer service. Keen leadership skills and management abilities, as well as excellent problem solving, team building, and decision-making skills.

♦ Key areas of expertise ♦

- Ability to read, write and speak Spanish.
- Extensive experience in multi-site management across the nation with a successful proven track record with “turn-around” situations in team performance & culture. “LEAD BY EXAMPLE” management style.
- Strong work ethic who continuously promotes a positive environment.
- Clearly understands and has extensive experience in a “sales through service” environments, call-center environments and fast-paced environments.
- Ability to provide quality management by demonstrating commitment and enthusiasm to exceed client expectations and ensure service level agreements are clearly understood.
- Ability to build commitment and leadership to establish a professional atmosphere of trust and support.
- Ability to set a model for employees that reflect the highest ethics, integrity and standards of excellence.
- Ability to manage diversity and demonstrate commitment to company efforts to achieve a diverse workforce.
- Ability to direct, plan, supervise, coordinate and evaluate the work of subordinate personnel in an effective manner
- Ability to establish and maintain effective working relationships with departmental managers, administrative staff, referral sources and the general public.

CAREER PATH

Regional Director of Operations 2012-present
Bestica, Inc. (Nationwide)

- Report directly to the President/CEO and serve as the interim in his absence. Manage the day to day operations of our local corporate office in addition to our staff located at our satellite offices across the nation with a focus on the systems and procedures required to accomplish the company’s mission and goals. Establish and implement departmental goals, standard operating procedures, policies and process improvements to maximize efficiency, improve profitability and increase productivity. Formulate policies, managing daily operational activities and planning use of materials and human resources toward maximum productivity while determining needs, reducing costs and analyzing areas that require improvement. Manage and maintain company compliance and policies as well as the company certifications to ensure that an active and compliant status is maintained. Responsible for all functions relating to Human Resources such as recruiting, performance management, employee development & training, compensation, benefits, payroll and performance.
- Manage the entire lifecycle of our commercial and government customers. Foster customer loyalty through high-quality interactions at each step. Responsible for resolving any customer issues or concerns timely to ensure customer retention and satisfaction. Manage and increase the effectiveness and efficiency of support services (HR, IT, accounting, vendor management, etc.) through improvements to each function as well as coordination and communication between support and business functions. Assist in hiring, training and setting goals and metrics for the team while ensuring accountability by conducting meetings weekly, monthly and quarterly to perform account reviews. Assist in the supervision of our staff and provide on-going feedback and recommendations to the team relating to their performance. Establish performance goals, monitor performance, promote positive energy and support all departments to meet goals.

- Regularly assess how our organization's sales, marketing and service departments work together to deliver seamless customer service. Continuously work with our team to understand, define and refine our customer base. Gather customer feedback, analyze it and design specific practices to put into place so that customers benefit while profits improve.
- Oversee monthly and quarterly assessments and forecasts of organization's financial performance against budget, financial and operational goals. Assist the CEO in developing long-range forecasts and maintaining long-range financial plans. Oversee short and long-term financial and managerial reporting to include monthly, quarterly and annual reports. Direct and assist in annual budget creation and process planning for the organization's annual budget with the CEO.
- Develop and manage contractor, vendor and government contracts in its entirety to ensure compliance. Manage vendor accounts to include accounts payable/receivable while also providing ongoing support by visiting key clients as needed. Manage and maintain current business relationships as well as assisting in developing and capturing new business to ensure continued growth. Extensive interface with clients to ensure client satisfaction. Key areas: operations management, customer service, all HR functions, vendor management, contracts management, business development both in the commercial & government sectors, accounts payable/receivable and safety and compliance. Travel as needed.

Branch Manager III 2009 – 2012

Apria Healthcare Services (San Antonio, TX/Austin, TX/Victoria, TX)

- Manage all aspects of healthcare/clinical & business operations in a clinical setting of high volume multi-site locations to include patient care management ranging from infant children to geriatric patients, branch management, staff management, and revenue cycle management. Manage client care organization to include any new or existing clinical programs to accommodate our patients & clients' needs. Responsible for planning & developing the entire branch's operational structure policies and procedures. Responsible for all departments of the branch to include clinical, customer service, logistics/fleet management, facility management, safety & compliance, as well as P&L responsibility for each branch to support the growth and development of the branch. Facilitate ongoing maintenance & repairs of each site's equipment and facility with frequent communication/follow up with all vendors.
- Support the branch's financial management by frequently reviewing financial reports, managing par levels and inventory control, payroll completion and billing. Manage and oversee the ongoing functions of the branch while also providing sales support by collaborating with the sales team to identify & pursue new business opportunities. Direct, coordinate and administer the overall development of the branch while ensuring sales and margin targets are met. Responsible for a staff consisting of customer service specialists, respiratory therapists, clinical liaisons, patient service technicians, delivery technicians, supervisors, managers and account executives. Actively participate in procurement of external business while maintaining relationships with existing customers for continuation of repeat business and/or referrals for new business.
- Ensure proper staff and branch compliance with federal and state regulations. Achieve all annual core product goals to ensure profitability of product mix. Ensure all regulatory requirements are met and compliant to ensure that audits/inspections are passed. Develop a competent, committed and confident workforce that consistently meets or exceeds performance expectations. Ensure that an excellent customer experience is delivered consistently to include high quality patient care.
- Responsible for the onboarding process: hiring, terminating, assessing and managing performance, developing, training and managing branch employees. Effectively communicate the company's standards of practice and measure performance accordingly. Responsible for coordinating patient emergencies outside of normal work hours while minimizing any form of premium overtime pay. Accurately manage submission of payroll for non-exempts. Supervise and manage issues and concerns involving employees, patients, doctor's offices, hospitals & referral sources. Travel as needed.

Area Operations Manager 2007 – 2009

Pitney Bowes Management Services (San Antonio, TX/ Austin, TX)

- Responsible for the day to day operations of multi-unit departments in several sites. Provide onsite support services for the customer in a hospital environment which include materials management, facilities management, forms management, mail-room operations, inventory control and reprographic services for a large hospital system (4 hospitals) and for a large reputable insurance company (4 sites).
- Coordinate and manage the maintenance of fleet vehicles for each site as well as facilitate ongoing maintenance & repairs of each site's equipment and facility with frequent communication/follow up with all vendors. Maintain constant contact with vendors to ensure contract compliance, proper billing and timely execution of orders. Sit as co-chair, recorder and point of contact for the Forms Committee as well as manage and maintain the minutes of monthly meetings. Plan, organize, manage and direct activities and/or tasks related to the overall operation and objectives of each site. Provide ongoing analysis and evaluation of services provided as well as employee performance to establish activities aimed at continuous process improvement.
- Ensure that policies, procedures and guidelines are met while maintaining contact with the administrative and medical staff including physicians to ensure compliance. Maintain a high level of client contact, develop site personnel and maintain a cost effective and profitable site operation. Provide leadership, direction and motivation to all team members while providing quality service and ensuring customer satisfaction. Responsible for the financial budget of each site while continuously seeking new business opportunities.
- Responsible for the onboarding process: Interview, select, hire and train new personnel; evaluate work performance of subordinate personnel and recommend personnel actions such as merit increases and promotions; resolve disciplinary matters and counsel with staff as necessary. Schedule employees' workload, maintain attendance and evaluation reports on all staff.
- Assist with a variety of special projects. Closely monitor and evaluate staff performance through observation and daily performance reports. Solve complex billing issues for the customer as well as vendors. Implement, enforce and maintain established departmental policies, procedures and objectives. Review performance in area of supervision in relation to established goals; assist in implementing changes to affect continual improvement in services provided. Responsible for the administering, directing and coordinating all operational, administrative, financial, personnel, clerical and purchasing activities of multi-sites. Maintain the highest levels of customer satisfaction while providing world class service. Travel as needed.

Regional Director of Operations 1995 – 2007
Freeze Frame, L.L.C. (Nationwide)

- Extensive experience in fast paced, multi-site operations management requiring high quality guest experience with financial performance accountability. Responsible for the entire process from opening a new location to closing a location. Manage multi-sites in different locations across the nation with over 250 direct and indirect reports with high volume sales at each location.
- Manage daily, weekly and monthly budgets, sales reports, payroll, inventory and schedules for all locations. Maintained and ensured high levels of customer satisfaction while exceeding goals relating to sales, profitability and operating costs. Managed and maintained merchandise and inventory for each site by ensuring that proper levels of inventory were provided to each site. Maintained high levels of contact with customers as well as vendors to ensure timely arrivals of merchandise/inventory. Worked with outside organizations and provided managerial & logistical support as needed.
- Manage and lead the recruitment process for multi-sites. Interview, hire, train, develop, discipline, mentor, coach and motivate all new and existing staff members including managers and supervisors. Perform monthly evaluations on each team member with possibilities of promotions and merit increases. Instruct, educate and guide new and existing managers with HR company policies, procedures and methods of practice including benefits. Managed & evaluated regional performance through sales, operating cost, inventory shrink, labor cost and other data analysis.
- Responsible for contract administration, event coordination and activities of all services performed. Responsible for

planning and managing multi-sites from the ground up which included ensuring an adequate location as well as all aspects of facilities management (i.e. repairs, maintenance, electrician, plumbing, etc.). Assisted in ensuring that each site met standards by inspecting and surveying areas. Responsible for ensuring that all sites were properly maintained and enhanced where needed.

•Responsible for all areas and aspects of customer services as well as any loss prevention, customer or employee issues. Ensuring that quality service is provided while maintaining customer service at its highest standards. Responsible for making certain that sales met and/or exceeded budget while maintaining labor and costs below budget. Responsible for the timely collection of any owed balances from customers. Expert in re-building problematic sites to ensure and maintain a successful operation. Overall, manage, lead, guide and maintain each site along with its employees. Heavy travel.

COMPUTER SKILLS

-
- Microsoft Office/Outlook/Excel/Power Point
- Lotus Notes
- Taleo
- ACIS
- Radix(EMR)
- Meditech
- Sharepoint
- Quickbooks & PayCycle
- Order Pro
- Content Manager (EMR)
-

EDUCATION

- High School Diploma • Associates in Applied Science
Rainbow Hills Baptist School, San Antonio, TX San Antonio College, San Antonio, TX
- Six Sigma Green Belt Training • Bachelor's Degree- pursuing
- PHR Certification – In process

REFERENCES

Available upon request

David P. Wasserman, DO

1927 Lohman's Crossing, Suite 200
Austin, TX 78734
512-263-1988
docdpw@gmail.com

Summary of Qualifications

- Physician in private practice for 10 years.
- Board certified in Family Practice 1999 and recertification 2007.
- Proven skills in medical diagnosis, care planning and preventive health maintenance.
- Solid experience in business operations, including personnel management, contract negotiations, cost management and budgeting.

Professional Experience

Concentra Urgent Care

February 2011 - Present

- PRN physician
- 2012 - Center Medical Director – Round Rock
- 2013 - Promoted to Assistant Medical Director – Austin and Waco
- 2015 - Promoted to Director of Medical Operations – Central, South, and West TX

Family Practitioner / Urgent Care Lake Travis Medical Center

April 2007-Present

- Sole owner/operator of urgent and family care private practice. Focus on the immediate and ongoing health care needs of the people in the Lakeway area.

Family and Urgent Care Physician Contractor David P Wasserman, DO, PA

March 2004-April 2007

- Established a new professional association for the purpose of making myself available as an independent contractor.
- Secured full-time contract employment as an independent physician, providing excellent medical care in several urgent care centers in the Austin area.
- Focused on learning the business operations of an urgent care medical practice.

Medical Director of Quality

March 2004 - October 2004

Round Rock Medical Center, Round Rock, Texas

- Participate in reviews of hospital policies and procedures.
- Work with established quality management teams; liaise between committees on quality-related issues.

Occupational Medicine Physician

July 2002 - December 2003

St. David's Occupational Health Clinic, Austin, Texas

- Evaluated and treated patients suffering with job-related health issues.

- Developed plan of care for each patient, focusing on returning patient to work as quickly as possible.
- Performed pre-employment physical examinations, drug screens, and immunizations.

Associate Clinical Professor March 2000 - Present
University of North Texas Health Science Center, Fort Worth, Texas

- Mentor 2nd- through 4th-year medical students in primary care in a clinical environment.
- Focus teaching on efficient medical history taking, problem-oriented diagnosis, treatment and follow-up care.

Family Practitioner July 1999 - March 2004
Cornerwood Family Medicine Associates, Austin, Texas

- Established and operated 2-physician practice, growing patient base to over 6000.
- Directed 12-person staff in daily operations.
- Renegotiated contracts with insurers, achieving significant increases in reimbursement rates.
- Full staff privileges at Round Rock Medical Center, Round Rock, Texas, and St. David's Medical Center, Austin, Texas

Licensure and Certification

- State of Indiana, Unrestricted, 1997
- State of Texas, Unrestricted, 1999
- ACOFP Board Certification, 1999

Education

Degrees

University of North Texas, Fort Worth Texas, D.O.	June 1995
University of Dallas, Irving Texas, B.A. in Psychology	June 1983

Post-Graduate Training

Westview Hospital, Indianapolis, Indiana	1997 - 1999
Family practice residency. Served as Chief Resident 1998 - 1999.	

Indiana University Medical Center, Indianapolis, Indiana	1996 - 1997
PGY-2, Physical Medicine and Rehabilitation	

Memorial Hospital, Johnson City, New York	1995 - 1996
General rotating internship	

Committee Work

Credentials Committee, Round Rock Medical Center

- Member for 3 years, Committee Chair for 1 year.
- Reviewed physician and allied health applications for initial appointment and reappointment for staff privileges. Successfully prepared for and completed JCAHO review.

Bylaws Committee, Round Rock Medical Center

- Member for 2 years.
- Worked to reformat and update hospital bylaws as they pertain to the physicians and support staff.

Medical Executive Committee, Round Rock Medical Center

- Member for 2 years.
- Active in membership to review all physician related committee workings including sanctions on critical issues that violated hospital policies and bylaws.

Physician Oncology Education Program, Texas Medical Associations

- Member for 2 years.
- Assisted in the development in educational materials for primary care physicians concerning cancer prevention and early detection.

References available upon request

TEXAS MEDICAL BOARD	
IDENTIFICATION CARD	
LICENSE/PERMIT NUMBER	EXPIRATION DATE
K7413	02/28/2017
DAVID P WASSERMAN, DO 117 LOUIS HENNA BLVD # 200 ROUND ROCK TX 78664-7343	
PHYSICIAN FULL PERMIT	

TEXAS MEDICAL BOARD

P.O. BOX 2029 • AUSTIN, TEXAS 78768-2029

PHYSICIAN FULL PERMIT

LICENSE/PERMIT NUMBER

K7413

EXPIRATION DATE

02/28/2017

DAVID P WASSERMAN, DO
117 LOUIS HENNA BLVD # 200
ROUND ROCK TX 78664-73438617

THIS CERTIFIES THAT THE LICENSEE/PERMIT HOLDER NAMED AND NUMBERED HEREON HAS PROVIDED THIS BOARD
THE INFORMATION REQUIRED AND HAS PAID THE FEE FOR REGISTRATION FOR THE PERIOD INDICATED ABOVE
PLEASE KEEP THIS BOARD NOTIFIED OF CHANGE OF ADDRESS

TEXAS CONTROLLED SUBSTANCES REGISTRATION CERTIFICATE

TEXAS DEPARTMENT OF PUBLIC SAFETY
REGULATORY SERVICES DIVISION, LICENSING AND REGISTRATION SERVICE
CONTROLLED SUBSTANCES REGISTRATION, PO Box 4087, AUSTIN, TEXAS 78773

DPS REGISTRATION NUMBER

DATE EXPIRED

FEE PAID

R0110199

02/28/2017

YES

SCHEDULES

BUSINESS ACTIVITY

DATE ISSUED

2, 2N, 3, 3N, 4, 5

PRACTITIONER

01/23/2015

REGISTERED NAME AND ADDRESS

DAVID P WASSERMAN, DO
117 B LOUIS HENNA BLVD STE 200
ROUND ROCK, TX 78664

THE TEXAS CONTROLLED SUBSTANCES ACT, CHAPTER 481 OF THE HEALTH AND SAFETY CODE, PROVIDES THAT THE TEXAS DEPARTMENT OF PUBLIC SAFETY MAY DENY A CONTROLLED SUBSTANCES REGISTRATION OR THAT A CONTROLLED SUBSTANCES REGISTRATION MAY BE SUSPENDED OR REVOKED.



THIS REGISTRATION IS NOT TRANSFERABLE ON CHANGE OF OWNERSHIP, CONTROL, LOCATION, OR BUSINESS ACTIVITY AND NOT VALID AFTER THE EXPIRATION DATE.

NAR-79 (6-10) CERTIFICATE MUST BE READILY RETRIEVABLE AT ALL TIMES

TEXAS DEPARTMENT OF PUBLIC SAFETY

DPS REGISTRATION NUMBER

DATE EXPIRED

R0110199

02/28/2017

SCHEDULES

2, 2N, 3, 3N, 4, 5

REGISTERED NAME AND ADDRESS

DAVID P WASSERMAN, DO
117 B LOUIS HENNA BLVD STE 200
ROUND ROCK, TX 78664

Concentra

April 30, 2013

David P. Wasserman, DO
117-B Louis Henna Boulevard
Suite 200
Round Rock, TX 78664

Dear David P. Wasserman, DO:

Our records indicate that the following certificate or license will expire on the date indicated below.

License Type	State	License #	Expiration Date
DEA Certificate	TX	BW5881417	05/31/2013

Please fax us a copy of your renewal certificate and/or license to 214-775-4515 so that we may update your records. Please note that proof of renewal must be received in the credentialing department on or before the expiration date noted above.

Thank you for your prompt attention to this request.

Very truly yours,

Joan VanVleet

Credentialing Services Department

WASSERMAN, DAVID P DO
CONCENTRA
117B LOUIS HENNA BLVD
STE 200
ROUND ROCK, TX 78664-0000-000



DEA REGISTRATION NUMBER	THIS REGISTRATION EXPIRES	FEE PAID
BW5881417	05-31-2016	\$731
SCHEDULES	BUSINESS ACTIVITY	ISSUE DATE
2,2N, 3,3N,4,5,	PRACTITIONER	04-18-2013
WASSERMAN, DAVID P DO CONCENTRA 117B LOUIS HENNA BLVD STE 200 ROUND ROCK, TX 78664-0000		

CONTROLLED SUBSTANCE REGISTRATION CERTIFICATE
UNITED STATES DEPARTMENT OF JUSTICE
DRUG ENFORCEMENT ADMINISTRATION
WASHINGTON D.C. 20537

Sections 304 and 1008 (21 USC 824 and 958) of the Controlled Substances Act of 1970, as amended, provide that the Attorney General may revoke or suspend a registration to manufacture, distribute, dispense, import or export a controlled substance.

THIS CERTIFICATE IS NOT TRANSFERABLE ON CHANGE OF OWNERSHIP, CONTROL, LOCATION, OR BUSINESS ACTIVITY, AND IT IS NOT VALID AFTER THE EXPIRATION DATE.

CONTROLLED SUBSTANCE REGISTRATION CERTIFICATE
UNITED STATES DEPARTMENT OF JUSTICE
DRUG ENFORCEMENT ADMINISTRATION
WASHINGTON D.C. 20537

DEA REGISTRATION NUMBER	THIS REGISTRATION EXPIRES	FEE PAID
BW5881417	05-31-2016	\$731
SCHEDULES	BUSINESS ACTIVITY	ISSUE DATE
2,2N, 3,3N,4,5,	PRACTITIONER	04-18-2013

WASSERMAN, DAVID P DO
CONCENTRA
117B LOUIS HENNA BLVD
STE 200
ROUND ROCK, TX 78664-0000

Sections 304 and 1008 (21 USC 824 and 958) of the Controlled Substances Act of 1970, as amended, provide that the Attorney General may revoke or suspend a registration to manufacture, distribute, dispense, import or export a controlled substance.

THIS CERTIFICATE IS NOT TRANSFERABLE ON CHANGE OF OWNERSHIP, CONTROL, LOCATION, OR BUSINESS ACTIVITY, AND IT IS NOT VALID AFTER THE EXPIRATION DATE.



City of Corpus Christi, TX ♦ RFP No. 103
Employer-sponsored Wellness Clinic
Technical Proposal

Attachment I
Sample Invoice



INVOICE

Tax Id:
Account:
Invoice:

Balance: \$64028.31

Remit To: Occupational Health Centers
of Ohio, P.A., Co.
PO Box 31420
Cleveland, OH 44131-0420
(888)476-0460
Invoice Date: 10/31/2015 - 10/31/2015
Date Printed: 02/04/2016

Bill To:

Location:

PLEASE RETURN THIS PORTION WITH YOUR REMITTANCE.

Date	Name / PO Number	SSN / Birth date	Charge Description	Charge Amount	Pmts / Adjmts
10/31/2015			CS-Laboratory Fees	5.00	
10/31/2015			CS-Printing	646.64	
10/31/2015			CS-Physician Oversight 50.25 hrs @ \$157.42	7910.36	
10/31/2015	,		CS-Nurse Practitioner Quantity @ 176	13525.60	
10/31/2015	,		CS-Physical Therapist 116.50 hrs @ \$78.98	9201.17	
10/31/2015	,		CS-Nurse Manager Quantity @ 176	9255.84	
10/31/2015	EMT Day,		CS-Over Time Pay 58.47 hrs @ \$36.96	2161.05	
10/31/2015	EMT Day,		CS-Emergency Medical Technician 447.36 hrs @ \$24.64	11022.95	
10/31/2015	EMT Night,		CS-Over Time Pay 20.18 hrs @ \$54.54	1100.62	
10/31/2015	EMT Night,		CS-Emergency Medical Technician Quantity @ 253	9199.08	

Balance Due: \$64028.31

Remit To: Occupational Health Centers
Account: of Ohio, P.A., Co.
Inv Date: 10/31/2015 - 10/31/2015

We appreciate your business. For your convenience we accept all major credit cards. Please reference the invoice number when remitting payment. Please contact our Central Business Office at 888-476-0460 for additional information.

Page: 1/1

Attachment J
Client Case Studies

Plans for the future

64.7 employees with access to the Wellness Center are living unhealthy lifestyles (categorized as "Unaware") or are not engaged with the wellness resources available (Reluctant). They are either unaware of the implications of their choices, or seem unwilling to make the sacrifices required for change.

Increase engagement of Reluctant and Unaware employees.

By leveraging additional wellness resources to engage this population, we project increased engagement of employees categorized as "Reluctant" or "Unaware."

Increase utilization by 20%.

Due to strong utilization, the center hit maximum capacity for medical provider visits in the first year. Plans are in place to add additional medical provider staff, as well as another wellness resource. With these additional resources, we will drive increased utilization with the 24% of employees categorized as "Reluctant" or "Unaware."

Louisville Metro Government Employee Wellness Center

A health care center in Louisville, KY serving the 5,400+ employees who work for Louisville Metro Government.



Business relationship

Using their consultant, BB&T Insurance Services, Louisville Metro Government selected Concentra from a field of several possible national partners.

Concentra operates the center, employs all staff members, and provides regular reporting on outcomes, including usage, financial results, employee engagement, and possible goals for improvement in these areas.

Business needs

- Improve medical care for employees.
- Reduce the cost of medical expenses.
- Improve overall employee health.

Positive outcomes

Member engagement.

Employees who had no medical claims are now engaging in medical care, improving overall employee health and helping to reduce future claims. More than a third of the Center's visitors are engaged in long-term behaviors to affect their health and wellness positively.

Nearly 63% of the employees who visited the Center more than once in its first year of operation are considered high risk because of their BMI or blood pressure measures. These employees are being proactively engaged in benefit programs to reduce these risks.

Employee satisfaction.

Employees responded to a web-based survey on their level of satisfaction with the Center:

- 96.7% patient experience-satisfaction rating
- 96.8% satisfaction with the wait time
- 97.8% likelihood that an employee would recommend the Center to another employee or family member.

Financial impact

At the current rate of utilization, the Center will break even in its first 12 months of operation on diversion of hard costs alone.

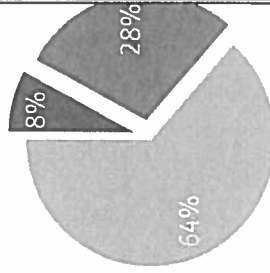
The average time required for a visit off-site is nearly 4 hours, but the average time spent in the Center per visit is less than 1 hour. For visits that must take place during work hours, this represents an important time savings for the employer.

Employees who visited the Center had fewer outside office visits than did those who did not visit the Center, lowering total plan costs. When compared to employees who did not use the center in the first 9 months, those employees who did had:

- 11% lower costs for urgent care
- 45% lower costs for inpatient medical claims
- 20% lower costs for outpatient medical claims
- 28% lower costs for pharmacy
- 19% lower total claim costs

Patient visits by type

- Primary care
- Urgent care
- Wellness



Utilization of services

In the first year since the Employee Wellness Center opened, 1,663 (38.5%) of the eligible employees made at least one visit to the Center, and 990 (59%) of those made more than one visit. In addition, 114 employees visited the Center's health specialist, while 158 employees attended at least one of the 13 health specialist events.

The monthly utilization rate is 9.8% of eligible employees. Having risen from 5.4% in the Center's first month, the current utilization rate indicates a rapid increase in employee awareness of the Center's value in terms of health benefits, easy access, cost savings, and time savings.

"Quick service, friendly, compassionate staff. Very convenient to have a clinic where I don't have to fight the crowds or have a long wait."

"My visit here is very private and professional, from registration all the way to the doctor or nurse practitioner."

"I have been a Metro employee for eight years, and this is the best thing Metro could have done for their employees and families."

Client Case Study



City of Dallas

Dallas is the third-largest city in Texas and the ninth-largest city in the U.S., and provides community services for approximately 1.3 million residents.

Business Needs

- ★ Quality medical care for employees
- ★ Cost-effective, on-site medical services for all employees
- ★ Reduction of workforce health care costs
- ★ Develop company culture around better health practices

Business Problem

The City of Dallas oversees transportation services, economic development, police, fire and rescue services, code enforcement, public utility services, and much more. As one of the fastest growing cities in the nation, and the epicenter for multiple national and international businesses, managing all the needs of Dallas, TX requires a large workforce. With more than 12,500 employees, covering the health of the workforce while managing the tight constraints of a city budget meant looking for more innovative ways to maintain coverage while reducing costs.

Leaders at the City of Dallas decided upon an on-site health care facility that is centrally-located and geared toward providing basic medical services, as well as health programs that would help improve the overall health and productivity of employees. City leaders identified a series of objectives for its on-site health clinic, as shown in Table 1.

Table 1.

City of Dallas Objectives for On-site Clinic

1. Improve access to quality health and wellness services
Provide convenient means to get preventive and urgent care services
2. Improve the overall health of participants
3. Promote the City of Dallas' wellness program
Provide health care to employees not currently enrolled under the City's current plan
4. Reduce employee absenteeism
5. Support the City's mission to promote a caring culture
6. Reduce the City's overall health care spending

"Once we get our employees into one of Concentra's facilities, we know they are receiving great care and are on the path to a quick recovery."

Client Case Study (continued)



City of Dallas

Our Solution

To help bring this center to reality, City officials selected Concentra to build, operate and staff the worksite center. Concentra's 15 community-based medical centers located throughout the Dallas-Fort Worth area offer additional resources to care for the city's employees, dependents, and retirees.

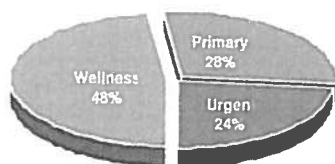
Implemented in 2009, the Health and Wellness center at Dallas City Hall offers a variety of acute and urgent injury and illness care, health screening services, diagnostic testing, and preventive health services to improve the health and well-being of employees. Wellness services include disease prevention programs, health promotion and counseling, and employee health education. As part of the City's total plan design to reduce costs, providers at the center also write generic prescriptions for patients, as needed.

"Concentra has been an excellent provider and valued partner in helping the City of Dallas improve the health of its employees, and lowering the cost of the City of Dallas' health care expenses."

— David Gibson
Buck Consulting

Our Results

Utilization numbers for the clinic have shown fairly consistent growth during the first year, including utilization of primary care, wellness, and urgent care services. On average, the clinic averages 25 patient visits per day, with the majority of services provided at a reduced rate for non-covered employees and no cost to employees enrolled in the City's health plan. Nearly 55 percent of visits are primary care, with wellness programs accounting for 20 percent of visits, and 12 percent for urgent care. The City's health plan, which is designed to increase the use of generic prescriptions, saw utilization of close to 63 percent. In comparison, 75 percent of prescriptions written through the clinic were for generics – creating an increase in the use of generic drugs by 12 percent.



For two years prior to the implementation of the clinic, the City had seen its group health costs remain flat due to strategic cost reduction measures. Following the implementation of the clinic, total group health costs per plan members were reduced by nearly seven percent. Through various cost saving elements, including the Concentra Health and Wellness Center, the City saved \$7.5M on against original plan estimates. First year cost savings related to the clinic alone, including additional gains in productivity as a result of the center, were \$128,000. Additionally, first year co-pay savings for employees were more than \$87,000.

What's Next

Given these first year trends, projected second year savings are estimated at \$415,000.

Based on the first-year savings, high utilization of services by employees, and enhancement of services, the City of Dallas and Concentra will be developing a clinic-based pharmacy benefit for employees in the second year. In addition Concentra will continue to provide wellness seminars to promote both individual educational needs, as well as increase clinic use.

Concentra[®]

Case Study: Mountaire Corporation

Program Overview	
Location	Millsboro, DE
Industry	Food processing
Scope of Services	Primary care, urgent care, biometric testing, immunizations, preventive exams, injury treatment, physical exams
Eligible Participants	4,000
Hours of Operation	Extended hours, Monday through Friday <ul style="list-style-type: none"> Monday through Thursday: 8 a.m. – 7 p.m. Friday, 8 a.m. – 5 p.m.
Staffing Model	<ul style="list-style-type: none"> 1 Full-time Nurse Practitioner (40 hours per week) 1 Part-time Nurse Practitioner (8 hours per week) 1 Full-time Nurse Manager (40 hours per week) 2 Full-time Medical Assistants (40 hours per week per Medical Assistant) 1 PRN Nurse Practitioner 2 PRN Medical Assistants Physician oversight (two days per month)
Highlights	<ul style="list-style-type: none"> Partnered with the client to develop a video series to display in the employee lunchroom that educates employees on the on-site services options, highlights the costs and conveniences of using the facility, and introduces them to various on-site staff members Provide educational seminars to employees and dependents at no charge that address topics relating to the employer health plan's cost drivers (i.e., hypertension, diabetes, etc.) On-site personnel perform mandatory biometric screenings during an employee's first use of the onsite's primary care/urgent care offering; as a result of the screening, the participants receive teachable moments (know your numbers) and/or are scheduled for follow-up appointments to elaborate on health education/management Host "blitz days" for sports/school physicals in which the provider performs these exams all day, every 30 minutes Offer chronic condition management services for the diabetic population to improve well-being
Outcomes	<ul style="list-style-type: none"> 52% penetration in 2015 96% patient experience rating 96.1% net promoter score 99% wait time communication score 97% generic medication prescribing Produced a positive return on investment for the employer

Program Description. We have managed and operated this client's onsite since 2010 where we serve a multi-cultural workforce and offer an extensive list of services that includes urgent care, preventive care, occupational health, and wellness. During our engagement, we have taken strides to streamline our staffing model and processes to best serve the needs of the eligible population through the enhanced care delivery available through the onsite. Examples of our efforts include:

- Adjusting staff levels and hours of operation to support utilization increase and improve patient flow
- Adding a nurse manager to assist in the daily operations and increase employee engagement
- Regularly integrating with community partners to offer a broader range of services

Success Stories. These efforts, along with ongoing collaboration between on-site staff, designated operational and clinical resources, and client leadership have resulted in positive outcomes for our patients as demonstrated by the following care stories:

<p>Patient 1</p> <ul style="list-style-type: none"> ▪ Male, 52 years old ▪ Diabetes is finally under control after struggling for years ▪ 18 pounds lost ▪ A1C level has dropped to 6.3 ▪ Patient "feels like a million bucks" and has more energy 	<p>Patient 2</p> <ul style="list-style-type: none"> ▪ Female, 53 years old ▪ Quit smoking after 36 years ▪ Asthma, bronchitis, and high blood pressure are resolved ▪ Patient "feels like a new person" and tells co-workers how much better she feels in hopes that she can inspire others 	<p>Patient 3</p> <ul style="list-style-type: none"> ▪ Male, 63 years old ▪ Arrived at the onsite blind in one eye ▪ On-site staff referred him to a specialist and following surgery patient is seeing clearly ▪ Patient diagnosed with diabetes ▪ As a result of ongoing support and counseling of on-site staff, the patient is now compliant and making positive choices ▪ Quit smoking after almost 40 years
<p>Patient 4</p> <ul style="list-style-type: none"> ▪ Male, 45 years old ▪ Treated at the onsite for occupational health but based on medical history, was advised by on-site staff to see a cardiologist, follow up with his PCP, and consider a sleep study ▪ Patient states, "You all probably saved my life. I don't know if I would still be here if I hadn't come here that day" 	<p>Patient 5</p> <ul style="list-style-type: none"> ▪ Male, 55 years old ▪ Hypertensive driver sent for sleep study and is using Continuous Positive Airway Pressure (CPAP) therapy daily ▪ Patient states, "I am 100 times better and my whole outlook has changed" 	<p>Patient 6</p> <ul style="list-style-type: none"> ▪ Male, 64years old ▪ Diagnosed with diabetes but is now compliant ▪ More than 30 pounds lost ▪ Quit smoking ▪ Chronic bronchitis has been eliminated

Attachment K
Executive Summary



Executive Summary

Viverae® is Concentra's fully integrated, comprehensive wellness partner that has been providing best in class wellness programming for leading companies across the country.

Concentra and Viverae believe it is absolutely essential that the City of Corpus Christi's on-site clinic services be fully integrated with your health and wellness programming. Through our shared experience, integrating wellness within the on-site clinics creates a high impact program that improves the health of employees while significantly decreasing overall health care costs and is one of the most efficient uses of the City's budgeted health care dollars.

In addition to the obvious financial advantage, but perhaps of equal importance, is the ability of this model to capture a larger portion of your population. Considering what Concentra and Viverae know about clients with similar demographics to Corpus Christi, it is essential to maximize each clinic visit. For example, if an employee visits the clinic for an occupational injury/illness and the provider identifies high blood pressure, treating both conditions (though under different pathways) will ultimately lead to positive health outcomes. Concentra and Viverae also realize that some medical issues elongate the treatment time for occupational injuries (i.e., obesity can exacerbate a low back injury).

Viverae's integrated wellness programs place a heavy emphasis on personal engagement. We at Viverae feel the key to helping move people from extrinsic to intrinsic motivation, or "owning" their own health, is in providing them with many different engagement options. We offer tools around total wellbeing (fitness, nutrition, weight management, financial, behavioral, etc.) and believe in providing each individual with the personal choice to work on the topics most relevant to them. Also, our programs create a positive social experience where motivation is not an individual endeavor and year-round participation is encouraged.

Our wellness portal technology has been designed by and is wholly owned by Viverae. Every line of code was written by their in-house programmers. Consequently, we are able to design a custom program from the ground up to meet the specific needs of the City. The MyViverae® member site features easy, one-click access for all content and features smart, branching technology which only brings forward content relevant to each individual. It includes personal care plan management, custom challenges, personalized video content and seamless integration with over 130 apps and devices.

The program includes an evidence-based, proprietary Health Risk Assessment (HRA) that has been designed and is regularly updated by Viverae's in-house clinical team led by Medical Director, Dr. Boyd Lyles and Chief Clinical Officer, Dr. Jeff Brizzolara. Viverae has received Health Information Product (HIP) certification in two areas - Health Appraisal and Encouraging Wellness and Prevention by the National Committee for Quality Assurance (NCQA).

We also offer biometric screening events that are completely staffed and managed by

Viverae employees. Viverae handles all aspects of each event; communication, registration, coordination, flow, supplies, and set-up. Wireless tablet technology is utilized so each employee has instant access to their results (in the case of finger stick). These events are extremely efficient, with most employees completing the entire process in 15 minutes. In 2015, our average rating from screening participants was 94% or "very satisfied." Biometric data is also accepted via physician forms or third-party data feeds.

Health Coaching has proven to be extremely effective when designed correctly. Consequently, Viverae offers comprehensive lifestyle coaching through the Viverae Health Center. This telephonic outreach offers both unlimited inbound and targeted outreach coaching based on a member's health score. All Health Coaches hold degrees, are certified, and have professional experience in weight management, tobacco cessation, stress management, nutrition, physical activity, family wellness, and goal setting.

Viverae's best-in-class, fully integrated Disease Management program experiences 8 to 10 times the engagement of traditional chronic care/disease management programs. This translates into medical and pharmacy cost savings for City sponsored health plan. This program is unique in that it manages an industry leading 22 conditions and utilizes all of the data points collected on members from our proprietary services (portal, screenings, health assessment, lifestyle coaching) in addition to medical and pharmacy claims. Since Viverae does not outsource any services, therefore, and are able to identify more members with chronic conditions earlier in the process and get them engaged in the program. Additionally, Viverae supports clients in designing an incentive structure that rewards members for being compliant with their conditions. This particular approach has been very successful in driving behavior change.

Lastly, since this technology is completely integrated, Viverae offers some of the most sophisticated reporting capabilities you will find in the industry. Aggregate statistics, year-over-year comparison reports, participation statistics, incentive tracking and much more are available to you 24-7 through our Metrics on Demand feature. Back-office access lets the City not only view this data, but also create boardroom ready reports with ease.

The City will hear more about Viverae's philosophy and see some of the things that make our integrated technology special within this submission and the attached demo. Viverae appreciates the chance to showcase our total population health solution to the City, and would welcome the opportunity to fully engage your employees in their own health.

Attachment L Learning Library Overview



MyViverae® members enjoy a variety of educational resources uniquely designed to assist and enrich their health goals. Available through our Learning Library, these programs can be accessed on multiple platforms 24 hours a day. Discover engaging Webinars, Online Courses, and Targeted Programs complete with interactive supplemental material. Explore essential information on a number of health topics including diet, exercise, and daily motivation.

Webinars



Each month MyViverae introduces a new Webinar and corresponding newsletter highlighting relevant health topics. These concise, entertaining programs are designed to both enlighten and inspire engagement. Each Webinar is followed by a supplemental quiz to promote motivation and basic comprehension. Explore practical health topics for everyday life encompassing home, work, and leisure pursuits.

Online Courses



Explore Online Courses designed to provide an educational overview on common areas of health and wellness. Each program is approximately 10 minutes in length and features a supplemental quiz, handouts, and worksheets that enhance the course experience. Certain courses are recommended based on a member's individual health report.

Online Courses include:

How to Start Making Changes.

Changing daily habits can yield long-term health benefits. Change is difficult but not impossible, especially if you learn to adopt cognitive and behavioral skills. Readiness to change can be a deciding factor in determining where to start.

Online Courses ... continued

Blood Pressure: Healthy Habits

Controlling blood pressure is important for health and longevity. High blood pressure is associated with serious health problems, including heart disease, stroke, kidney disease, and blindness. You can maintain normal blood pressure with lifestyle changes including healthy eating, physical activity, and sustaining a healthy weight.

Physical Activity: Getting Going

Regular physical activity produces many short-term and long-term health benefits. Physical activity does not have to be strenuous or done all at once. Reducing sedentary activities and increasing steps taken per day are good initial goals.

Physical Activity: Keeping at It

Making physical activity a priority is important for long-term success. Engaging in a variety of physical activities is key to enhancing fitness and preventing boredom. The primary types of physical fitness are cardiorespiratory fitness, muscular strength and endurance, and balance and flexibility.

Healthy Eating: What is a Healthy Diet?

Eating a variety of nutritious foods daily promotes good health. Understanding balanced nutrition can help you choose foods that meet nutrient needs, support an active life, and reduce the risk of chronic disease.

Healthy Eating: Mindful & Portion Control

To achieve and maintain goals for weight loss and better health, it's important to learn the difference between needing and wanting food. Triggers, including behaviors, feelings, thoughts and attitudes, and one's environment, can make it hard to make healthy food choices. Practicing portion control for every meal is important to avoid eating too much from any one food group.

Weight Loss: Diet and Physical Activity

Body Mass Index (BMI) is a ratio of weight to height. Weight management is a matter of calorie balance. Expending more energy (calories) than you take in is the key to losing weight. There is no "one size fits all" approach to diet and physical activity for weight loss.

Preventing Diabetes

Diabetes mellitus is a disease characterized by a lack of insulin or the inability to utilize insulin effectively. Health problems in long-term diabetics include cardiovascular disease, capillary damage, renal failure, neuropathy, blindness, and loss of limbs. Lifestyle factors that improve blood glucose and insulin levels include increasing physical activity, decreasing body fat (if needed), and consuming a healthy diet.

Lipids: Managing Your Risk

Abnormal blood cholesterol levels are a major risk factor, and elevated blood triglycerides are a contributing factor, for coronary heart disease (CHD), the most common type of cardiovascular disease (CVD). Cholesterol is produced by the liver and obtained from the diet. Genetics, diet, physical activity, percentage of body fat and distribution, stress, age, gender, and other unknown factors determine blood cholesterol and triglyceride levels. Dietary modifications, increased physical activity, and smoking cessation can often improve blood cholesterol and triglyceride levels so that medications are not needed.

Online Courses ... continued

Stress Management Techniques

Stress negatively affects health and quality of life. Learning practical coping methods and problem solving skills can help you manage the stress associated with everyday hassles as well as major life events. Physical activity and healthy eating can help you better cope with stress, and protect you from the negative health effects of stress.

Tobacco: Are You Ready to Quit?

Tobacco use is prevalent in both youth and adults, and is a significant public health problem. Tobacco use is harmful to your health and increases your risk for a variety of diseases, including cancer and heart disease. All forms of tobacco—cigarettes, cigars, pipe tobacco, and smokeless tobacco—have associated health risks. There is no such thing as safe tobacco. Quitting is hard but not impossible, especially if you use medical, behavioral, and environmental strategies to help you.

Life Satisfaction: My Plan to Take Control

Life satisfaction includes one's assessment of personal and professional competence and well-being. Positive self-image and high self-esteem are associated with good health and a positive life outlook. Identifying how satisfied you are with different life areas can help you see where and how to make life changes. Setting and achieving meaningful personal goals can help increase your life satisfaction.

Targeted Programs (four lessons each)



MyViverae's Targeted Programs feature a series of videos focusing on individual lifestyles to help foster healthy changes. Each program consists of four consecutive weekly online sessions accompanied by educational handouts and supplementary quizzes.

Targeted Program topics include

Breaking Free From Tobacco

This program is designed to encourage lifestyle habits that support tobacco cessation. The focus is on the understanding and developing of basic tobacco cessation principles. Members set personal goals and learn practical skills for behavior change.

Reaching Your Healthy Weight

This program is designed to both support and inspire practical weight management. The emphasis is on long-term behavior changes in diet and exercise. Members set realistic goals based on their individual health and lifestyle needs.

Focusing on Your Heart

Develop a better understanding of heart health principles for a variety of lifestyle and health needs. This course highlights important dietary changes and exercises (including cardio fitness). It emphasizes essential nutrition goals as well as practical food preparation for healthier eating.

Tackling Your Stress

This program is designed to encourage lifestyle habits that support mindfulness and stress management. It focuses on reducing stress-related health risks and offers practical solutions for everyday well-being.

Targeted Programs ... continued

Taking Control of Your Diabetes

Explore the essentials of diabetes management for improved health and daily living. This program emphasizes the role of diet, exercise, and motivation in diabetes management. It offers medical and lifestyle tips to reduce the risk of complications from diabetes.

Strengthening Your Bones and Muscles

Ensure you age gracefully (and actively) with a healthy musculoskeletal system. This program imparts skills for proper body mechanics. Emphasis is on practical diet and nutrition essentials for better musculoskeletal function. It is uniquely designed to fit individual health and lifestyle needs.

Supporting Your Healthy Pregnancy

This program is designed to encourage a healthy pregnancy for both mother and baby. The focus is on proper nutrition and easy, practical menu ideas. It offers exercise and daily physical activity tips for maximum health throughout the pregnancy.

Building Your Exercise Routine

Learn new exercise and motivational skills for reaching fitness goals. This program focuses on the learning, and continued practice, of exercise techniques. It is designed to facilitate personal fitness goals in any environment.

Food For Life

Develop and maintain healthy eating habits for a lifetime. This program imparts a better understanding of healthy portion principles. It offers tips on improving food, snack, and meal choices on an everyday basis.

Attachment M
2016 Health Topics Calendar



2016 MONTHLY HEALTH TOPICS

Each month, MyViverae™ features a new Webinar and Newsletter that focuses on one of three topics: nutrition, fitness, or lifestyle. Stay up to date on what topics are coming up in 2016 using this calendar.

JANUARY

NUTRITION

Webinar: New Year – New Eating Resolutions
Newsletter: Quick and Healthy Eating Tips

FEBRUARY

FITNESS

Webinar: 5 Ways Out of an Exercise Rut
Newsletter: Finding the Right Athletic Shoe

MARCH

NUTRITION

Webinar: How to Pick Produce
Newsletter: Fruits and Vegetables – When to Go Organic

APRIL

LIFESTYLE

Webinar: How Much Sleep Do You Really Need
Newsletter: Sleep Deprivation and Stress

MAY

LIFESTYLE

Webinar: How to Manage Everyday Anxiety
Newsletter: Managing Stress – You Aren't Alone

JUNE

NUTRITION

Webinar: 5 Ways to Reinforce Good Eating Habits
Newsletter: 8 Keys to Weight Loss Success

JULY

FITNESS

Webinar: Get to Stepping – Track Activity with a Pedometer
Newsletter: Walking Off the Weight

AUGUST

NUTRITION

Webinar: 5 Tips for Healthy Grocery Shopping
Newsletter: Eating Healthy in a Hurry

SEPTEMBER

LIFESTYLE

Webinar: Risks and Signs of Gum Disease
Newsletter: Don't Fear the Dentist – How to Find One

OCTOBER

LIFESTYLE

Webinar: Why It's Important to Take Time Off
Newsletter: Do You Know How to Cope with Job Stress?

NOVEMBER

NUTRITION

Webinar: 5 Mind-Over-Matter Tricks to Help you Curb Calories
Newsletter: How Much Do You Know About Portion Size?

DECEMBER

FITNESS

Webinar: 5 Ways to Boost Workout Motivation
Newsletter: Making Fitness a Healthy Habit