



**Where Home Care Deals Happen**



# CEO Panel: Growth & Innovation in a Managed Care World

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**Tim Craig**  
*Moderator*  
Managing Director

HI<sup>2</sup>



**Andy Agwunobi, MD**  
CEO

**CenterWell  
Home Health**

Home Health  
38 States



**Barb Jacobsmeyer**  
President & CEO

**Enhabit Home  
Health & Hospice**

HH & Hospice  
34 States



**Andrew Molosky**  
President & CEO

**Chapters Health  
System**

Hospice & Palliative  
4 States + DC



**Scott Powers**  
CEO

**Elara Caring**

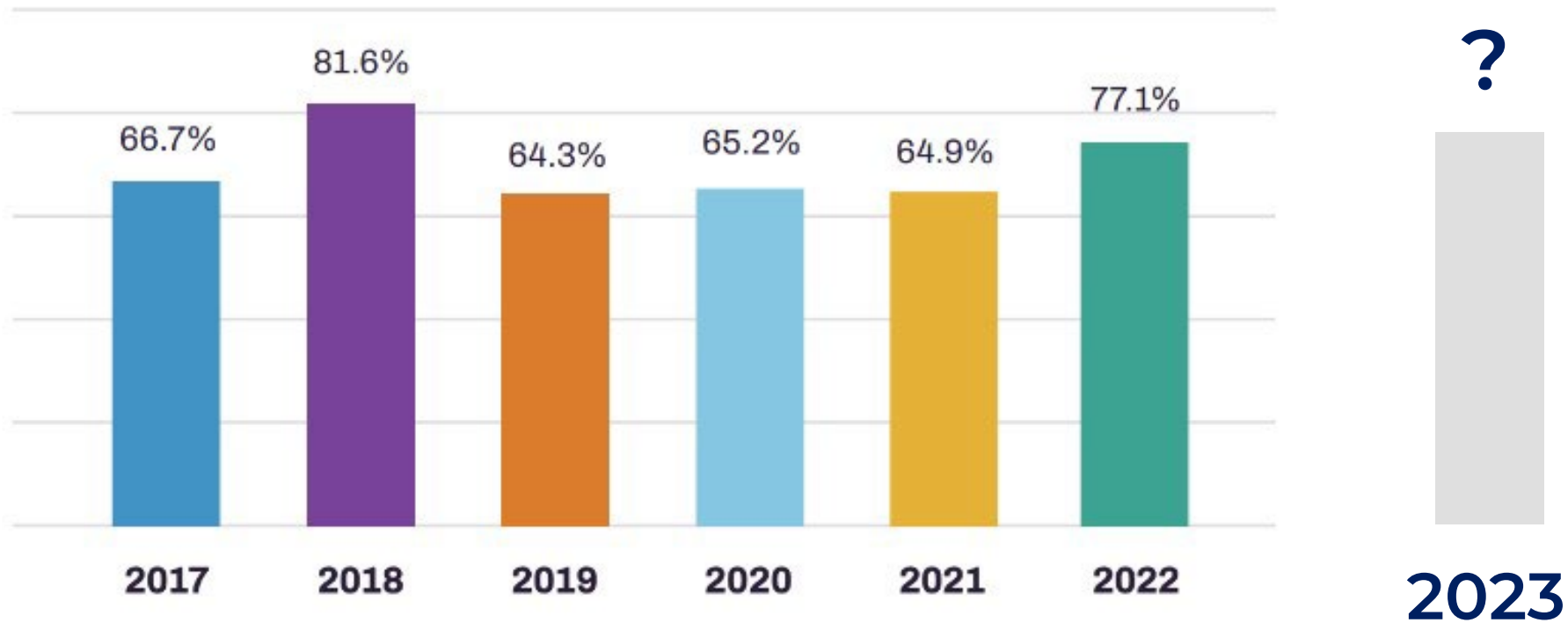
HH, Hospice,  
Palliative,  
PC & BH  
17 States



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## Home Care Historical Median Professional Caregiver Turnover Rate

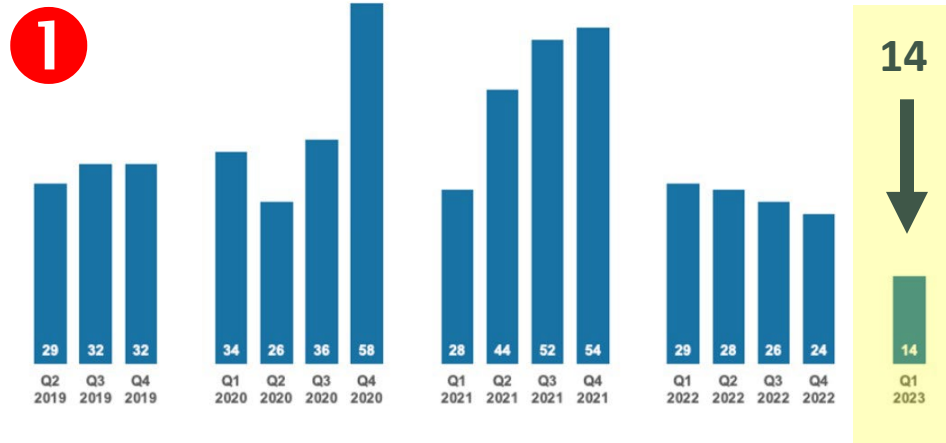




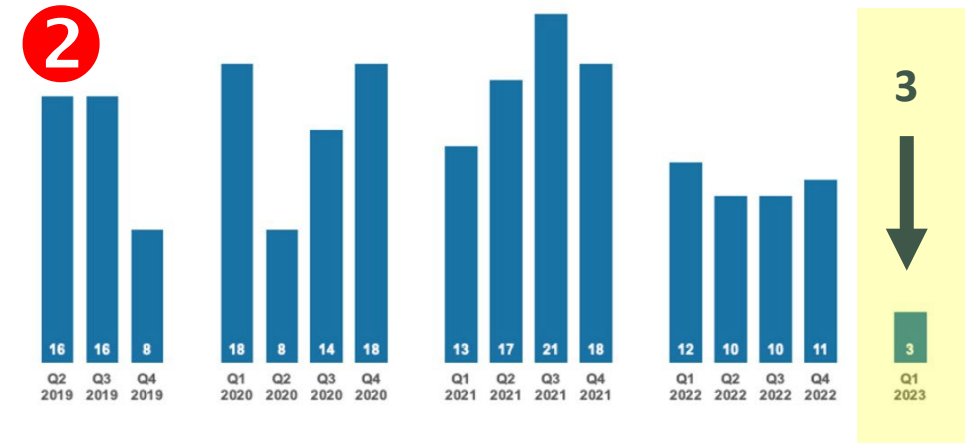
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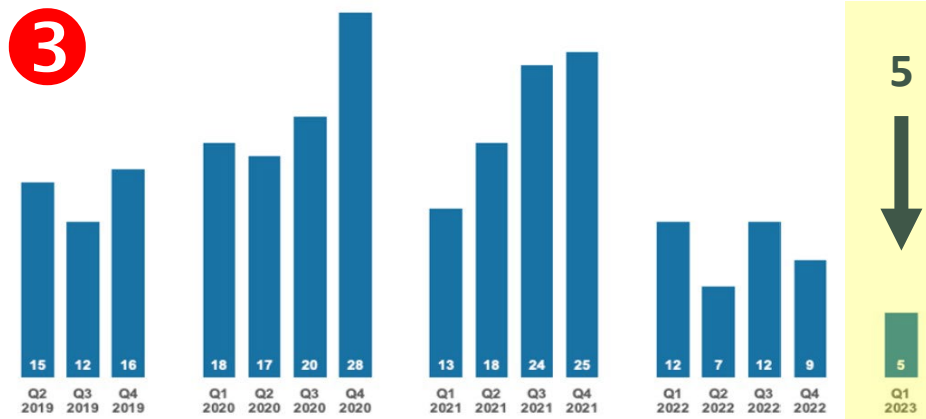
## 1 HH, Hospice & HC (1Q M&A Vol.)



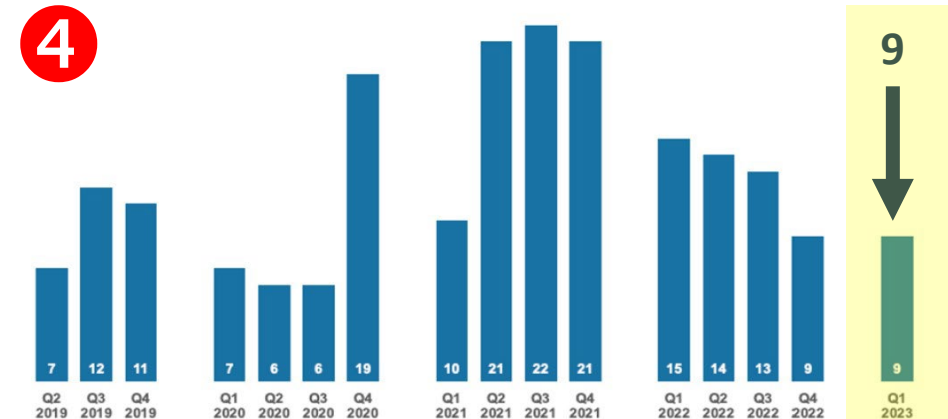
## 2 Home Health (1Q M&A Vol.)



## 3 Hospice (1Q M&A Vol.)



## 4 Home Care (1Q M&A Vol.)



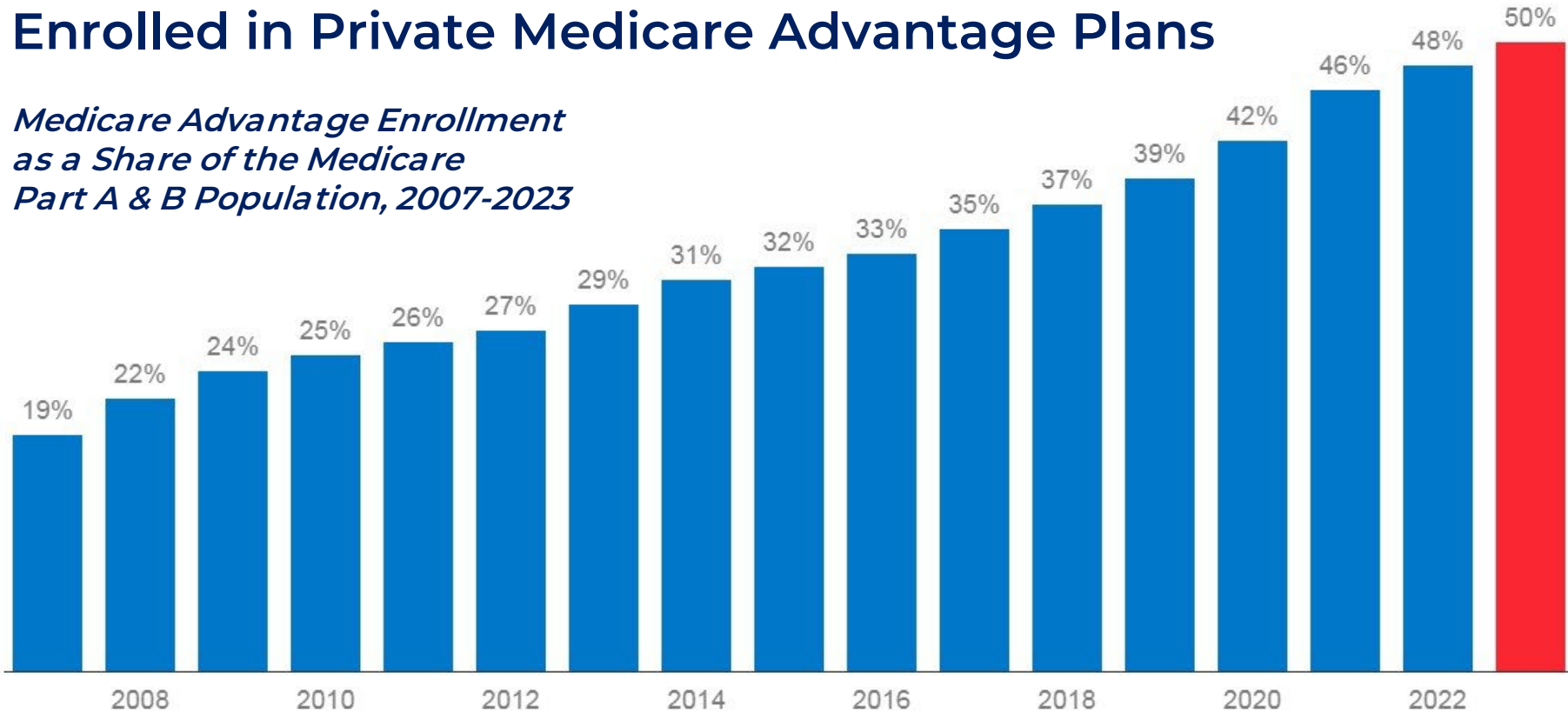


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## Half of All Eligible Medicare Beneficiaries Are Now Enrolled in Private Medicare Advantage Plans

*Medicare Advantage Enrollment as a Share of the Medicare Part A & B Population, 2007-2023*



**Source: KFF** Includes Medicare Advantage plans: HMOs (including POS), PPOs (local and regional), PFFS, and MSAs. Excludes cost plans, PACE plans, HCPPs, and MMPs. About 59.82 million people are enrolled in Medicare Parts A and B in January 2023.

Based on KFF analysis of CMS Medicare Advantage Enrollment Files, 2007-2023; Medicare Chronic Conditions (CCW) Data Warehouse from 5 percent of beneficiaries, 2007-2017; CCW data from 20 percent of beneficiaries, 2018-2020; and Medicare Enrollment Dashboard 2021-2023

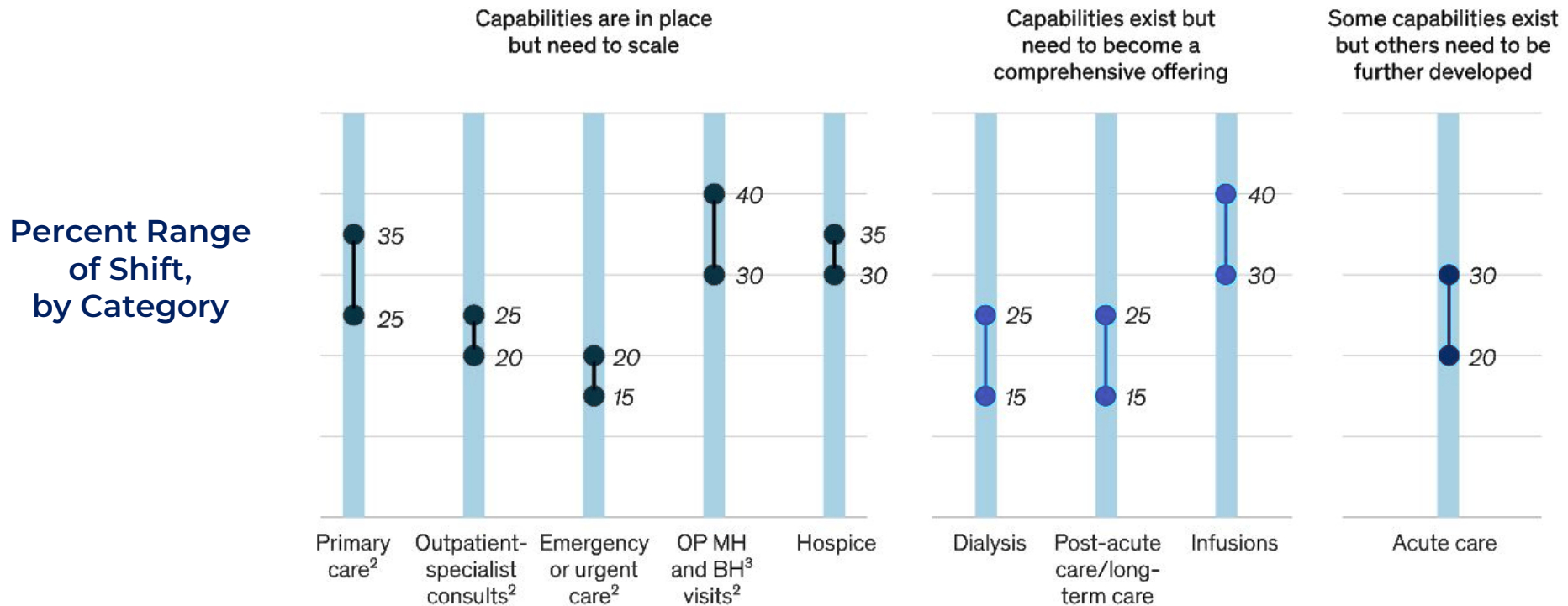


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## Shift to Care at Home by 2025<sup>1</sup>

Care currently being performed in clinics, facilities and physicians' offices.



Source: McKinsey Report, ["From facility to home: How healthcare could shift by 2025"](#)



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