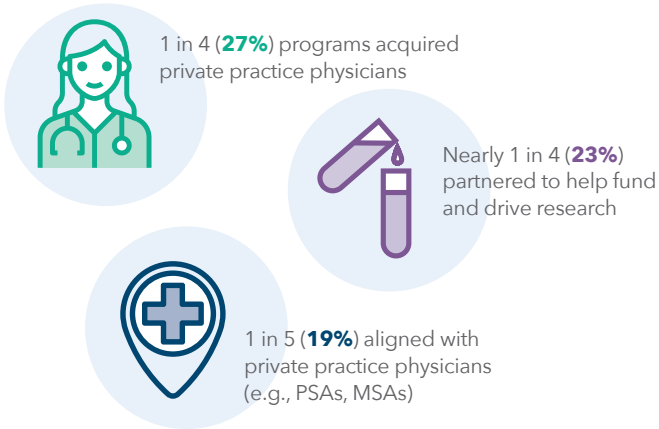


Highlights from the A joint survey of the Association of Community Cancer Centers (ACCC) and the Oncology Roundtable 2019 Trending Now in Cancer Care Survey

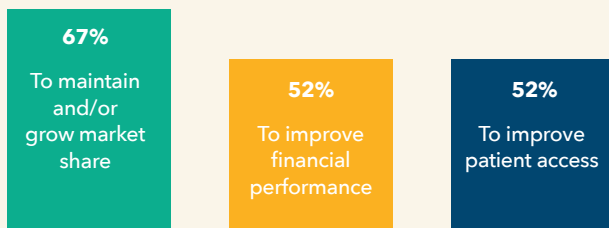
A total of 144 respondents took this year's survey, with cancer program administrators representing more than half (53%) and an additional quarter (23%) identifying themselves as cancer program leadership.

In the Past 2 Years, to Ensure Financial Sustainability... n = 144



LIVE POLLING AT THE 2019 ACCC NATIONAL ONCOLOGY CONFERENCE

Top 3 Reasons for Participating in an Affiliation, Agreement, and/or Partnership...



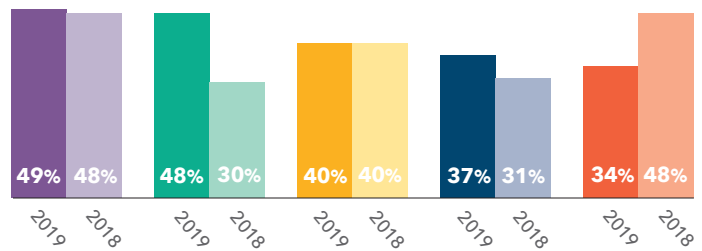
In a follow-up question, almost ¾ said the affiliation, agreement, and/or partnership caused concern and/or a loss of staff. Respondents cited specific frustrations such as, time it takes to get things done, provider engagement, lack of integration, and difficulties aligning culture.



Top 5 Threats to Future Cancer Program Growth

n = 124

- Reimbursement requirements from payers
- Shifting reimbursement away from fee-for-service to value-based care
- Uncertainties in drug pricing reform policies
- Cost of new treatment processes and equipment
- Cost of drugs

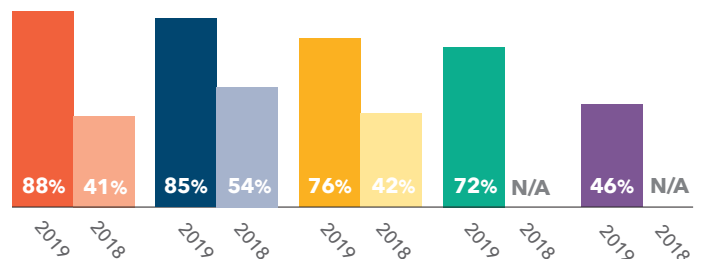
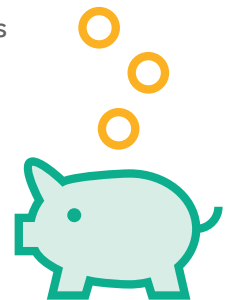


(Percentages represent the percentage of respondents who ranked the threat in their Top 5.)

Top 5 Opportunities for Cost Savings

n = 125

- Improving care coordination
- Improving symptom management
- Use of lower cost drugs
- Reducing unwarranted care variation
- Consolidating vendor contracts

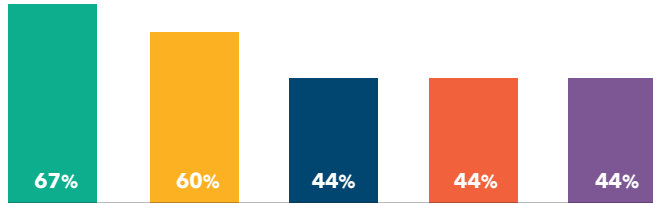


(Percentages represent the percentage of respondents who ranked the cost-savings opportunity in their Top 5.)

Top 5 Opportunities for Generating Revenue

n = 124

- Increasing the number of subspecialists
- Marketing to referring physicians
- Differentiating your program through provision of supportive services
- Increasing the overall number of general oncology physicians
- Investing in screening services

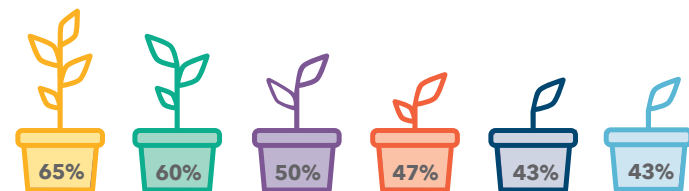


(Percentages represent the percentage of respondents who ranked the revenue opportunities in their Top 5.)

Top Services or Programs Respondents Plan to Add or Grow in the Next 12 Months

n = 125

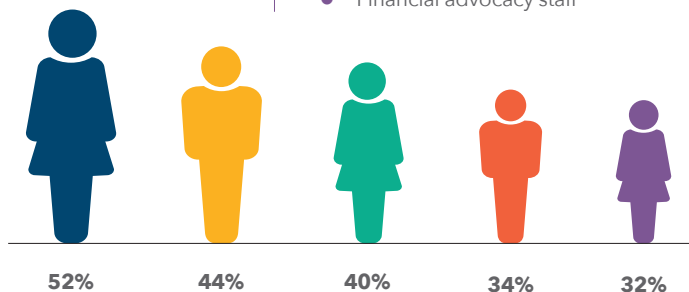
- Survivorship visits and/or clinics
- Palliative care consults
- Navigation
- Genetic counseling
- Oral chemotherapy adherence and support
- Financial advocacy



Top 5 Staff and/or Positions Respondents Plan to Add in the Next 12 Months

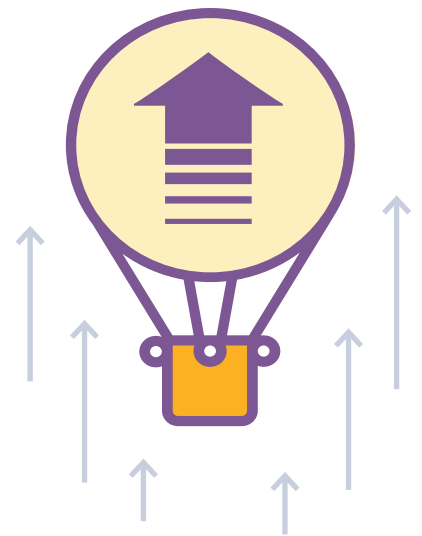
n = 124

- Medical oncologists
- Oncology nurses
- Advance practice providers
- Clinical navigators
- Financial advocacy staff



Nearly 1 in 3 respondents (29%) said that their organization is seeing an increase in AYA (adolescent and young adult) patients.

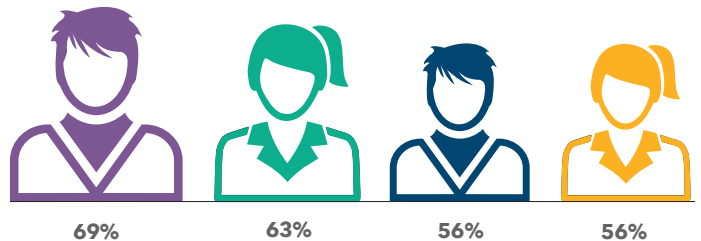
n = 119



Of those who reported an increase in AYA patients, 94% shared that they are providing these services to ensure that they are meeting the unique needs of AYAs:

n = 32

- Psychosocial services
- Genetic counseling services
- Fertility services
- Access to pertinent oncology clinical trials



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3 out of 4 (75%) of those polled reported that their cancer program uses quality measures to evaluate physician performance. Patient satisfaction (86%) and participation in tumor boards and/or multidisciplinary cancer care conferences (76%) are the most common metrics used in these evaluations.

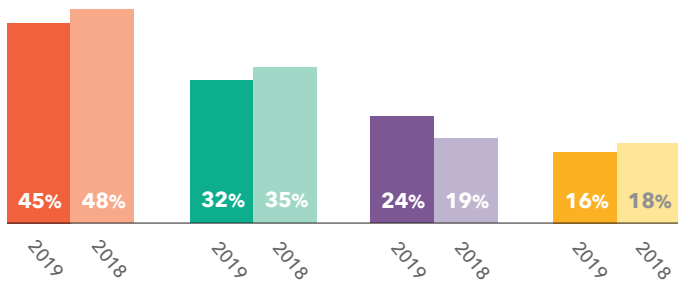


Other quality measures collected include involvement in clinical trials (52%), documentation metrics (52%), and end-of-life care (31%).

Top 4 Services CURRENTLY PROVIDED via Telehealth

n = 119

- Tumor boards
- Genetic counseling
- Molecular tumor boards
- Second opinions



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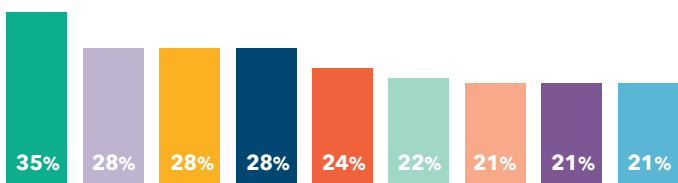


Nearly half (**44%**) of those polled said that their program did not currently use telehealth. Top barriers: reimbursement (**74%**), regulatory requirements (**58%**), and operational changes required, e.g., staffing or technology (**58%**).

Most Popular Services Cancer Programs PLAN TO PROVIDE via Telehealth in Next 2 Years

n = 119

- Genetic counseling
- Symptom management consults
- Oral chemotherapy adherence and support
- Symptom monitoring (e.g., through use of an app)
- Psychosocial counseling
- Nutrition counseling
- Financial navigation
- Survivorship visits
- Tumor boards



LIVE POLLING AT THE 2019 ACCC NATIONAL ONCOLOGY CONFERENCE

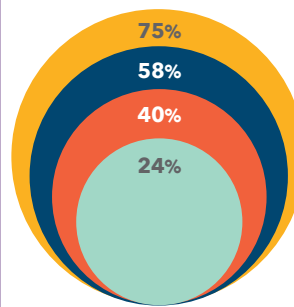
Meeting attendees shared these data about their infusion programs



- The majority conduct data analysis on infusion center performance (**60%**) and report on staff productivity (**63%**).
- Most collected metric is patient satisfaction scores (**93%**) followed by nurse satisfaction scores (**52%**).
- Inefficient infusion chair utilization is the number one pain point (**70%**).
- **80%** of respondents have conducted a QI or PI initiative in their infusion center.

Thinking about your typical workday, which of the following issues have been concerns for you?

n = 120



- Workflow inefficiencies
- Heavy workload
- Staff complaints about workload and burnout
- Lack of work-life balance
- Decreasing focus on patient care

In the 2018 *Trending Now in Cancer Care* survey, nearly **70%** of respondents said that "EHRs have lengthened the workdays of physicians and staff."



LIVE POLLING AT THE 2019 ACCC NATIONAL ONCOLOGY CONFERENCE

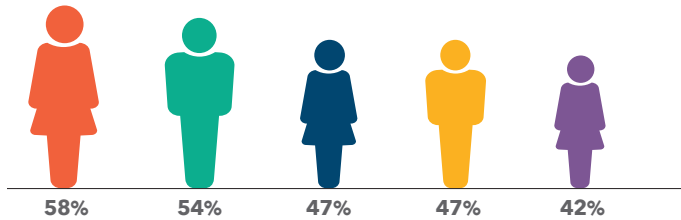


Only **8%** of those polled said that their programs collect data on time spent in the EHR, and only **4%** track EHR documentation after hours.

Top 5 Concerns Related to Workforce Planning

n = 118

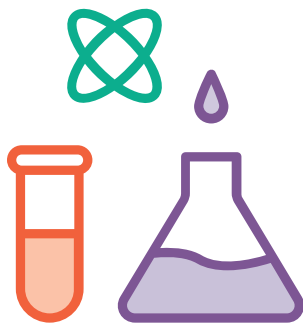
- Clinician burnout
- Staff and clinician engagement
- Siloed communication between departments
- Top-of-license practice
- Clinician workforce shortages



Top 5 Positions Respondents Are Most Concerned About When It Comes to Bandwidth and/or Ensuring Patient Access

n = 117

- 59% Medical oncologists
- 53% Oncology nurses
- 49% Financial advocacy staff
- 44% Navigators
- 43% Palliative care specialists



Top 3 Challenges to Offering Cancer Patients Clinical Trials

n = 121

- 53% Staff resources and training
- 50% Program infrastructure
- 46% Lack of patient understanding of clinical trial process

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1 in 3 (**36%**) of those polled said that almost every patient they meet with is experiencing a financial hardship related to their cancer care, with **78%** reporting that their cancer program is not adequately staffed with financial advocates.

Top 5 Strategies to Address Healthcare Disparities and/or Access-to-Care Issues

n = 120

- 78% Use translators or translation software to ensure patients can participate in shared decision-making
- 74% Use clinical navigators to help underserved patients
- 73% Partner with community organizations in outreach efforts to underserved populations
- 58% Offer patient education and resources to help improve health literacy
- 54% Partner with an organization to provide transportation for patients



The **Association of Community Cancer Centers (ACCC)** is the leading education and advocacy organization for the cancer care community. Founded in 1974, ACCC is a powerful network of 25,000 multidisciplinary practitioners from 2,100 hospitals and practices nationwide. As advances in cancer screening and diagnosis, treatment options, and care delivery models continue to evolve—so has ACCC—adapting its resources to meet the changing needs of the entire oncology care team. For more information, visit accc-cancer.org or call 301.984.9496. Follow us on Facebook, Twitter, and LinkedIn; read our blog, ACCCBuzz; and tune in to our podcast, CANCER BUZZ.

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