SPBA

Hybrid Spring Meeting 2025 Agenda

May 19–20
In-Person and Online
The Capital Hilton – Washington, DC
(Meeting Time is Eastern Standard Time)

Monday Morning, May 19
8:00 – 11:40 AM Pre-Meeting PBM Training for TPAs (bonus session for registered meeting attendees)

7:30 – 8:00 AM - Continental Breakfast for PBM Session Registrants

8:00 – 8:05 AM - Welcome to PBM Training for TPAs

8:05 – 8:50 AM - Top Integration Issues with PBMs (including PBM Terminology 101)
Presenters: Eric Barker + Drew Alexander, TrueRx. Moderator: Jared Delacerda, Edison Health Solutions

8:50 – 9:00 AM - Table Discussion of content

9:00 – 9:15 AM - Break

9:15 – 10:05 AM - Navigating PBM Procurement – TPAs are continuously asked and required by their clients to stay ahead of the curve in all healthcare topics. Pharmacy costs over the last 10 years have skyrocketed and grown to be upwards of 40-50% of the overall plan spend for many employers. The complexity of negotiating pharmacy contracts with PBMs, as well as finding point solutions to drive the lowest net costs, is a major concern for many TPAs, as they do not have internal resources with this expertise or background. Education around best practices for negotiating PBM contracts is paramount for the continued success of the TPA market. This presentation will focus on delivering key factors for evaluating and maintaining strong PBM contracts.

Learning Objectives:

- Clear definitions of discounts and rebates
- Understanding the impact of exclusion language on rebates
- The fine print in PBM contracts and tightening up contract language to remove red flags
- The pros and cons of traditional versus pass-through PBMs
- The ability to evaluate and defend TPA PBM contracts versus Broker PBM contracts

▪ Clinical and alternative sourcing mechanisms to drive the lowest net cost

Presenters: Brian Shonat + Monica Gindhart, Navion. Moderator: Jared Delacerda, Edison Health Solutions

10:05 – 10:15 AM - Table Discussion of content

10:15 – 10:30 AM - Break

10:30 – 11:35 AM - Emerging Models in the Network Pricing and Rebate Ecosystem – This presentation introduces the complex and evolving landscape of pharmacy network pricing and rebate structures. It examines the relationships between PBMs, pharmacies, pharmaceutical manufacturers, and plan sponsors. Attendees will gain insights into fundamental pricing methodologies, including Average Wholesale Price (AWP), Maximum Allowable Cost (MAC), National Average Drug Acquisition Cost (NADAC), and Cost-Plus Models. Additionally, the session will cover emerging trends such as transparent pricing, alternative sourcing, biosimilars, and manufacturer direct models. By the end of this session, participants will have an understanding of how to navigate and leverage new pricing models to drive cost savings and improve transparency for their clients. 340B access will be touched on as well.

Learning Objectives:

▪ Participants will be able to:
- Understand Key Pricing Mechanisms
  o Explain the differences between AWP, MAC, NADAC, and Cost-Plus pricing models
  o Identify how these methodologies impact plan sponsor costs
- Analyze the Role of Rebates in Drug Pricing
  o Describe the "Gross to Net" of high-cost drugs
  o Evaluate how rebate structures affect brand and specialty drug costs
- Assess Emerging Trends in Pricing Innovation
  o Compare the benefits and challenges of alternative sourcing models, including international sourcing and cost-plus arrangements
  o Discuss how biosimilar adoption and PBM private-label initiatives are shifting cost structures
- Navigate the Transition to Transparency
  o Explore how full disclosure requirements and pass-through models are shaping PBM contracts
  o Assess the impact of transparency on plan sponsors and pharmacy networks

Presenter: Justin Jasniewski, Serve You Rx®. Moderator: Ken Harvey, Culpepper Devereaux

11:35 – 11:40 AM - Closing comments for PBM Training

Monday Afternoon, May 19
SPBA Spring Meeting – Day 1

1:00 – 1:20 PM - Welcome, Opening Announcements – *Chairman of the Board Kris Smith, President Anne Lennan*

1:20 – 2:05 PM - Legislative and Administration Outlook – With Donald Trump returning to the US Presidency, we will address the new Administration's announced (or potential) legislative and economic priorities including but not limited to:

- The Trump tax bill completed via the reconciliation process
- Executive Orders pausing Biden-era actions and directives
- Outlook for Congressional action across key policy areas for the balance of 2025

Presenter: Rich Meade, Chairman, Prime Policy Group

2:05 – 3:00 PM - The Strength of Talent: How to Grow Your People to Grow Your Profit – Organizations face a critical challenge: achieving company goals when team performance is not optimized. Alarmingly, in a study of 1,200 leaders, only 2% found their performance management system to deliver exceptional value. With 35 years as a leadership performance expert, Mike Goldman created *The Strength of Talent* framework as the solution, introducing a new metric – the Talent Density Indicator – to track progress, drive accountability, and strengthen the team. In this session you will learn:

- A 5-step process to maximize the performance of each member of their team.
- How and when to make the tough decision to transition someone out of the organization that's not a strong fit.
- A quarterly talent assessment process that encourages challenge, debate and accountability.
- What actions to take to leverage, develop and retain their highest performers.
- A new process to replace the tired, harmful and dreaded annual performance review.

All in-person attendees will receive a copy of Mike Goldman's book to be released in the Fall.
Mike Goldman, Performance Breakthrough

3:00 – 3:15 PM - Table Discussion

3:15 – 3:30 PM - Break

3:30 – 4:15 PM - PBM Reform Outlook in Current Congress – Lawmakers ended 2024 on the cusp of passing a significant health package, including changes to the PBM industry payment practices. While that legislative language was not included in the final spending bill, most of the work on possible PBM reform has already been completed and a draft bill has been teed up. Additionally, there is broad bipartisan support on Capitol Hill for a solution. Hear Nick Bath, a

former Senate health committee staffer, give us his insights as to what shape a bill may look like and what effects it could have on the benefits industry. *Nick Bath, Manatt*

4:15 – 5:15 PM - New Administration Potential Compliance Impacts – This session will focus on the potential impacts of the second Trump Administration on the ever-changing landscape of health and welfare plans and associated compliance obligations. Regulatory enforcement trends, litigation, plan design considerations, best practices and other strategies that can be employed to mitigate risk will be discussed. *Shanna Cramer, Groom Law Group. Moderator: Lisa Carrington, Compass Health Administrators*

5:15 – 5:30 PM - Table discussion

5:30 – 6:45 PM - Cocktail Reception

Tuesday, May 20
SPBA Spring Meeting – Day 2

7:15 – 8:00 AM - Continental Breakfast

8:00 – 8:45 AM - Independent Dispute Resolution (IDR) Challenges – TPAs report that IDR disputes are remaining open for an average of 150 days (from when the IDR is initiated to when a determination is made). Determinations are coming back higher than billed charges. Providers are breaking apart claims by service code and opening an IDR dispute on each one. TPAs are answering inquiries for services that the plan does not cover. *Scott Bennett, The Phia Group. Moderator: Hayley Putnam, Kelly and Associates Insurance Group, Inc.*

8:45 – 8:55 AM - Table Discussion

8:55 – 9:45 AM - MHPAEA – This session will cover the latest MHPAEA regulations, including new rules on meaningful benefits, fiduciary certifications, and data requirements. We'll address current legal challenges and walk through the comparative analysis process, highlighting common pitfalls for plan sponsors and TPAs, and offering practical strategies. *Jennifer Spiegel Berman, Kelly & Associates Insurance Group, Inc., Jennifer McCormick, The Phia Group. Moderator: Paul Kaiser, Hawaii-Western Management Group*

9:45 – 10:30 AM - Potential of Gen AI for TPA Operational Efficiency: How Plan Document Development Drives Costs and Risk – *Anoop Mehendale, Xficient. Panelists: Andrea Gambardella, 90 Degree Benefits; Eric Ludwig, Interactive Medical Systems; Michael Holthaus, Summit Reinsurance Services, Inc.; and Robb Bounin, Xchange Benefits*

10:30 – 10:45 AM - Break

10:45 – 11:45 AM - Developments in Health Privacy (New HIPAA Cybersecurity Proposed Regulations) – Privacy law in general is evolving at a rapid pace but perhaps no specific area of data protection law is changing as quickly as health privacy. Companies that process health

information (or data that is adjacent to health information) need to constantly be assessing the legal landscape to understand their potential compliance obligations. This session will touch upon recent developments in health privacy including the proposed HIPAA Cybersecurity Rule updates, new state laws regulating consumer health data, and enforcement trends. *Ali Jessani, WilmerHale. Moderator: Chase Donnelly, Insurance Design Administrators*

11:45 – 1:15 PM – Lunch

1:15 – 2:15 PM - Workshops

- ▪ **Workshop A – Cyber Policy and Procedures.** *Arianna Evers & Sam Kane, WilmerHale. Moderator: Chase Donnelly, Insurance Design Administrators*
- ▪ **Workshop B – Stop Loss and TPA Discussion (in-person only).** *Co-Hosts: Eric Schulman, 90 Degree Benefits; Jennifer Magel, Symetra*

2:15 – 2:30 PM - Break to return to ballroom

2:30 – 3:15 PM - Explanation and Impact of Employer Reporting Law – Recent legislation finally passed in the last Congress to "ease" the burden of ACA reporting, but has it? We will explore the state of the ACA's employer mandate including IRS enforcement of the mandate and the associated reporting requirements. *Jennifer Spiegel Berman, Kelly & Associates Insurance Group, Inc. Teshonna Walters, Edison Health Solutions*

3:15 – 4:00 PM - GLP-1 – This session will address issues you need to know. What is a GLP-1 agonist and what do they treat? What type of criteria is used to determine if a GLP-1 agonist is appropriate for a patient? What factors do plans use in making decisions as to whether or not to cover GLP-1s for the treatment of diabetes vs. obesity? What is Medicare's stance on GLP-1 agonists in the treatment of obesity? What are the challenges in the supply chain? What's next in the GLP-1 agonist space (new drugs, label expansion, price increases)? *Deborah Dempsey, ProAct, Inc. Moderator: Erik Wroblewski, Nova Healthcare Administrators, Inc.*

4:00 – 4:15 PM - Break

4:15 – 5:00 PM - Transparency, Drug Pricing and Beyond: A Regulatory Update on Self-Funded Coverage Policies – *Taylor Hittle, Washington Council Ernst & Young*

5:00 – 5:45 PM - Engaging Plan Members with AI Chatbots – Hear about the potential of AI chatbots to reduce the burden on TPA customer service representatives. Hear how AI chatbots can support plan members in finding high-quality, low-cost health care. *Ramesh Kumar, Zakipoint Health. Moderator: Frankie Kelly, Kelly & Associates Insurance Group, Inc.*

5:45 – 5:50 PM - Closing Remarks. *Chairman of the Board Kris Smith*

5:50 – 6:50 PM - Cocktail Reception