Figure 1. Barriers to Growth of Accountable Care Systems

“In your view, how significant are the following barriers to growth of population-based, accountable care systems?”

- Current financial interests and incentives of health care providers, suppliers, and other stakeholders: 93%
- Lack of financial incentives for integration: 86%
- Lack of alignment of public and private payer policies & practices: 75%
- Culture of physician autonomy: 71%
- The way in which providers are currently trained: 61%
- Availability of technical assistance to undergo necessary transformation: 52%
- Patient preference for open access to providers and services: 51%

* Percentages may not be equal to the net because of rounding.
Figure 2. Effectiveness of Reform Models

“Overall, how effective do you feel each of the following reform models will be in moving the U.S. health system toward population-based, coordinated, accountable care?”

- Integrated delivery systems: 22% extremely effective, 42% very effective, total 64%
- Accountable Care Organizations: 13% extremely effective, 41% very effective, total 54%
- Networks or partnerships among organizations delivering services across the continuum: 8% extremely effective, 31% very effective, total 40%
- Patient-centered medical homes with shared resources and services: 11% extremely effective, 28% very effective, total 39%

* Percentages may not be equal to the net because of rounding.
Figure 3. Strategies to Foster Accountability, Coordination, and Integration

“Policymakers have proposed several levers to foster accountability, coordination, and integration among providers who are responsible for providing care to a given population of patients. Please rate the effectiveness of the following strategies.”

* Percentages may not be equal to the net because of rounding.
Figure 4. Importance of Affordable Care Act Provisions

“The U.S. Department of Health and Human Services will need to implement numerous provisions of the Affordable Care Act. In setting priorities for Secretarial attention, please rate the importance of each of the following strategies in the short term (next one to two years).”

* Percentages may not be equal to the net because of rounding.
Figure 5. Support for Development of National ACO Accreditation System

“Some policymakers have advocated for an accreditation process for accountable care systems. Please indicate the degree to which you support or oppose developing a national accreditation system for such organizations.”

- Support 41%
- Neither support nor oppose 20%
- Oppose 9%
- Not sure 4%
- Strongly oppose 3%
- Strongly support 22%

* Percentages may not be equal to 100 percent because of rounding.
“Some experts have advocated requiring a strong primary care foundation for Accountable Care Organizations (ACOs). Please indicate the degree to which you support or oppose establishing standards for primary care capacity as a condition for qualifying for ACO payment.”

- Strongly support: 46%
- Support: 31%
- Neither support nor oppose: 12%
- Oppose: 7%
- Not sure: 2%

* Percentages may not be equal to 100 percent because of rounding.
Figure 7. Concern over Market Power and Dominance

“If, as the Affordable Care Act envisions, the nation moves toward population-based accountable care systems, how much of a concern is market power and dominance?”

- Very concerned: 37%
- Concerned: 38%
- Neither concerned nor unconcerned: 13%
- Unconcerned: 7%
- Very unconcerned: 2%
- Not sure: 5%

* Percentages may not be equal to 100 percent because of rounding.
Figure 8. Support for Public Utility Regulation of ACO Payment Rates

“To safeguard against undue market power, would you favor or oppose public utility regulation of Accountable Care Organization (ACO) payment rates where there is insufficient market competition?”

- Support: 35%
- Strongly support: 21%
- Oppose: 13%
- Strongly oppose: 8%
- Neither support nor oppose: 14%
- Not sure: 9%

* Percentages may not be equal to 100 percent because of rounding.
Figure 9. Support for ACO Exemptions

“Please indicate the degree to which you support or oppose exempting Accountable Care Organizations (ACOs) from the following requirements in exchange for meeting performance, reporting/disclosure, and accreditation standards.”

- Antitrust and other legal barriers to coordinating care or sharing cost information
  - Strongly support: 25
  - Support: 37
  - Total: 62%

- Provider scope of practice act laws
  - Strongly support: 26
  - Support: 30
  - Total: 56%

* Percentages may not be equal to the net because of rounding.