NRAA YEAR IN REVIEW
We look back on some highlights of the 2017-2018 fiscal year.

MEMBERSHIP
NRAA Members in 45 States

PATIENTS
194,174+ of patients served by independent, HBDC, SDO or MDO facilities

EDUCATION
23 new education webinars launched
1,236 total webinar attendees

ADVOCACY
46 meetings in Washington DC attended by members
14 comment letters submitted to CMS, CDC, Ways & Means Committee

COMMUNITY
5 total NRAA committees
22 council, committee, and task force meetings

NRAA VOICES
593 discussions
1,803 online community members

SERVICES
NRAA HIE CrownWeb used by 225 contracted organizations
1,067 registered facilities
216 downloads of the RSE benchmarking tool in 2017

*Data pulled from the RSE Provider Database, June 2016, NRAA Database, Mehlmant Castadetelli Rosen & Thomas and United States Renal Data System, 2016 Annual Data Report
<table>
<thead>
<tr>
<th>Page</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>I. The Year in Review</td>
</tr>
<tr>
<td>4</td>
<td>II. Letter from Executive Director Marc Chow</td>
</tr>
<tr>
<td>5</td>
<td>III. Letter from President William Poirier</td>
</tr>
<tr>
<td>6</td>
<td>IV. NRAA at Work</td>
</tr>
<tr>
<td>13</td>
<td>V. NRAA Today</td>
</tr>
<tr>
<td>17</td>
<td>VI. NRAA Strategic Plan</td>
</tr>
</tbody>
</table>
Dear Members and Colleagues,

As I reflect upon this year, I am immensely proud of the progress NRAA continues to make as an association. I would like to extend my sincerest gratitude to the Board, our members and numerous industry partners for all your contributions to the association’s growth over the past year.

Throughout 2018, both NRAA and RSE continued to provide access to valuable products, tools and services to the kidney care community. In addition, NRAA continues to offer diverse education through our in-person meetings and online webinars. We are pleased more than 1,200 kidney professionals have participated in one of our live webinars or on-demand programming via Education Station.

This year the RSE launched the RSE Industry Spotlight Program. This program is a valuable resource for kidney care providers to learn about new products and services that could improve patient care at their facilities. Likewise, Industry Spotlight has created an innovative way for industry partners to engage providers.

Finally, the NRAA furthered our advocacy efforts with the release of the NRAA Key Principles. These Key Principles have strengthened our policy positions with Congress, CMS, CMMI, MedPAC and the administration. This year our efforts resulted in 14 comment letters being submitted to government agencies and 46 member-led meetings with elected officials in Washington D.C., ensuring our members voices were heard on the Hill.

Looking ahead, we are fortunate the Board has the opportunity to assess where NRAA has been and where we need to go to provide the most relevant products and services to our members and the community at large. Using our Initiative for Kidney Care Advancement Model, the Board identified multiple areas of focus during 2018’s Strategic Planning session. These focuses will allow us to lead our members to be successful today and in the future.

With this plan, the NRAA and RSE are in a prime position to help lead the provider community with the ongoing changes to integrated delivery models. I am confident our education, information exchange and key priorities have set the foundation for our success and we will continue to ensure the voices of our members are heard. I look forward to seeing the progress of this association over the coming years.

Sincerely,

Marc Chow
Executive Director
NRAA and RSE
Dear Members and Colleagues,

It’s hard to believe a year has gone by. I heard as you get older, time tends to move quicker and of course the busier you are, the quicker time moves as well. I am sure you all agree, and I would say I fall into both categories. I would like to thank all members for allowing me the opportunity to serve as NRAA’s leader. I am incredibly proud of this organization for several reasons. The first and foremost is I truly believe and stand by its mission, to serve as the resource and voice for its members. As I’ve seen throughout my service, NRAA is truly committed to this. I would also like to thank the Executive Director and staff for an unending amount of support in taking care of day-to-day operations. You are all remarkable and reflect all this organization stands for.

As we began the year, both NRAA and RSE journeyed through a strategic plan process. Without missing a beat, both boards reflected on the past plan, focused on the future and re-energized a strategic plan to lead the association into future success. NRAA kept its strategic themes, Advocacy, Education, External Relations and Membership, and created a focus on opportunities going forward; it was a re-alignment if you will. Under each theme a council was created to plan, create task forces and move through the vision. This is where all members can participate, actively shape and influence the plan. This was an incredible collaborative effort.

I am very proud of the advocacy efforts over the past year as well. NRAA had a multitude of opportunities to meet with various offices in Washington D.C. Teamed with the NRAA government affairs office, Mehlman Castagnetti Rosen & Thomas, NRAA met with CMS, MedPAC, HHS, many elected officials and other kidney care organizations.

Lastly, I would like to applaud the exceptional educational resources NRAA has provided to members. I can think of no other organization with the ability to offer such robust and valuable education materials in the kidney care industry. We are always improving how education occurs through our website, on NRAA Voices and Education Station. This is a strength of NRAA and sets us apart from other organizations.

As I close my year as President, I feel bittersweet. I can emphatically say you will be in good hands with the incoming leadership. I am confident the future for NRAA is bright under the elected leadership after this latest strategic planning session. To me, this association has consistently proven its agility in a continuously fluid healthcare environment. I am forever grateful for the opportunity to have served as your President and look forward to the future of NRAA.

Sincerely,

William Poirier
2017-2018 NRAA President
IV. **NRAA AT WORK**

**2017-2018 ACHIEVEMENTS**

---

**LEGALISATIVE ENGAGEMENT**

NRAA represented its members on specific legislative issues related to dialysis and kidney care on an ongoing basis, through Mehlman Castagnetti, Rosen and Thomas' engagement with key members of Congress.

To ensure the voice of organization members was heard, NRAA wrote 14 comment letters to various bodies, including CMS, CDC and the Ways & Means Committee. Comment letters addressed timely legislative issues, such as CMS's IFR on Third Party Payments, AKI patient reporting to NHSN, the Quality Payment Program Proposed Rule and the Medicare Red Tape Project.

**Charting Medicare Cost Report Influence on the ESRD PPS**

*Analysis of CMS Payment Setting Procedures, Underlying Data and Policy Implications*

Dobson | DaVanzo has been commissioned by the NRAA to examine the link between Medicare Cost Reports by dialysis providers and the Medicare End Stage Renal Disease Prospective Payment System (ESRD PPS). We conducted qualitative and quantitative analyses as well as convened a Technical Expert Panel for input on cost reporting practices that contribute to ESRD PPS payment rate setting.

The report resulted in five key findings which have supported the data-driven recommendations NRAA is advocating on the Hill.

---

**NRAA DAY ON THE HILL EVENTS**

With the support of our advocacy firm, Mehlman Castagnetti Rosen & Thomas, Days on the Hill has expanded to various visits throughout the year. The program participants met with federal elected officials on both sides of the political aisle, across the House and the Senate for one-on-one conversations about legislative change. NRAA members attended a total of 61 meetings with political officials in Washington D.C.

---

---

---
IMPROVE RENAL CARE QUALITY AND STREAMLINE QUALITY MEASUREMENT PROGRAMS
Medicare should align all quality improvement efforts and establish a new quality program to replace the current one. In addition, independent providers should receive funding for quality improvement activities and hospitals should share data with facilities to improve transition and coordination of care.

EXPAND EARLY INTERVENTION EFFORTS TO DELAY OR PREVENT ONSET OF END-STAGE RENAL DISEASE
Kidney Disease Education (KDE) should be expanded to benefit all beneficiaries with chronic kidney disease (CKD). Furthermore, the Center for Medicare and Medicaid Innovation (CMMI) within the Centers for Medicare and Medicaid Services (CMS) should test alternative payment models that evaluate treatment strategies to delay and prevent the onset of end-stage renal disease (ESRD).

IMPROVE CARE DELIVERY FOR DIALYSIS PATIENTS
Coverage of chronic care management (CCM) services for beneficiaries with CKD should be expanded to include any nephrologist-referred service authorized under the Physician Fee Schedule (PFS). Furthermore, alternative payment models for independent facilities that provide comprehensive and coordinated care should be developed. Medicare should also work to eliminate geographic restriction requirements for patients and incentivize use of home dialysis when appropriate.

IMPROVE PEDIATRIC CARE DELIVERY
The treatment of pediatric patients comes with a unique set of challenges. Medicare should provide additional payment to facilities for treating patients under one year old. Medicare should also adjust payment for treating young acute kidney injury (AKI) patients. Payment for facilities treating young patients should also be increased to ensure these patients complete school.

IMPROVE MEDICARE FEE-FOR-SERVICE PAYMENTS TO PROVIDERS
Medicare should adjust the existing ESRD Prospective Payment System (PPS) to better reflect the cost of treating patients with highly complex medical needs. CMS should also require all providers to use standardized cost reports to ensure more accurate payment. Furthermore, Medicare Advantage plans should maintain open networks and payments should adequately reimburse providers for the cost of care.

PROTECT PATIENT ACCESS TO PROVIDERS
To ensure patients can access unique facilities providing high-quality care, Medicare should implement a payment adjustment for independent facilities. CMS should also implement policies that discourage “patient dumping” and “patient avoidance” practices and better account for the distinctive needs and challenges rural and low-volume facilities face.
2017-2018 ACHIEVEMENTS

MEMBERSHIP HIGHLIGHTS

As of July 2018, NRAA had 1,336 total members, as represented in the following categories.

<table>
<thead>
<tr>
<th>Category</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active Member Companies</td>
<td>237</td>
</tr>
<tr>
<td>Active Member Company Additionals</td>
<td>637</td>
</tr>
<tr>
<td>Affiliate Member Companies</td>
<td>39</td>
</tr>
<tr>
<td>Affiliate Member Company Additionals</td>
<td>19</td>
</tr>
<tr>
<td>Associate Member</td>
<td>15</td>
</tr>
<tr>
<td>Corporate Sponsor Member</td>
<td>7</td>
</tr>
<tr>
<td>Honorary Member</td>
<td>2</td>
</tr>
<tr>
<td>Past President (not added to total)</td>
<td>29</td>
</tr>
</tbody>
</table>

TOTAL 1,076

TOP 7 STATES FOR NRAA MEMBERSHIP

- New York: 97
- Texas: 81
- California: 59
- Florida: 55
- Georgia: 43
- Illinois: 41
- Ohio: 41

MEMBERSHIP INCREASE 27%

580,000+ TOTAL PATIENTS IN U.S. FACILITIES

45 STATES

194,174+ PATIENTS OF PATIENTS SERVED BY INDEPENDENT, HBDC, SDO OR MDO FACILITIES
2017-2018 ACHIEVEMENTS

MEMBER COMMUNITY ENGAGEMENT

Now in its second year, NRAA Voices, the members-only online community continues to grow in size and relevance. The goal of the site is to improve the overall user experience, highlight NRAA’s latest news and events and build an interactive forum for members.

The new website resulted in an overall increase in site engagement. Visitors viewed 22% more pages per session and spent 128% more time on the site. In addition, the site saw a 13% increase in returning visitors.

BY THE NUMBERS

1,803 Community members
593 Total number of discussion posts on community
142 Total new threads
451: Replies to discussions
118: Unique Discussion Contributors

Members actively engage on the platform and in these specialty communities:

1. Open Member Community
2. AKI, Billing & Reimbursement Community
3. Staffing Community
4. Quality Community
5. Survey Preparedness Community
6. Central Regional Community
7. Northeastern Regional Community
8. Southeastern Regional Community
9. Western Regional Community
2017-2018 ACHIEVEMENTS

Education Council

NRAA has enlarged the Education Council in order to becoming more inclusive of different committees that have education as a part of their activities. This integrated approach has allowed NRAA to provide timely topics of education to our members.

In addition, the Council has identified the need for an evaluation and has formed a Needs Assessment Task Force. Their goal is to continue to find ways to innovate and expand the educational offerings of the NRAA.

THE 2017 NRAA ANNUAL CONFERENCE
(COMPRISED OF THE FOLLOWING EVENTS)

WORKSHOP ON DIALYSIS MANAGEMENT

A one-day workshop for dialysis managers, this event is designed for hospital directors and facility leaders who want to improve their leadership skills, operational knowledge and clinical expertise.

2017 ANNUAL CONFERENCE & EXHIBIT HALL

The largest gathering of dialysis health care leaders in the United States, this event brings together the dialysis and kidney care community. It also provides attendees an unparalleled conference experience.
2017-2018 ACHIEVEMENTS

After launching last year, NRAA continued to see strong attendance for their monthly webinar series, Webinar Wednesday. Topics throughout the year included mental health, obesity and CKD, quality measurement and new AKI regulations.

In 2017-2018:

10 Webinars conducted
494 participants in program

NRAA Specialty Legal Series

As part of our monthly education program, we presented a specialty three part Legal Series with McGuire Woods' LLP that included:

They Zig and They Zag: What You Need to Know About recent employment law changes

Health care compliance: what you need to know and watch the anatomy of a health care deal

120 + attended this specialty series

NRAA continues to provide education on demand to dialysis providers through its Education Station. The platform currently contains audio content from the past Annual Conferences, previous Webinar Wednesdays, and much more. Both members and non-members can access this online education portal.
It is the goal of the NRAA External Relations/Outreach Council to establish relationships with ESRD and non-ESRD specific associations and organizations to develop a population health infrastructure.

PROGRAMS NRAA IS INVOLVED WITH

- AAKP KidneyWorks Initiative
- CDC Making Dialysis Safer Coalition
- ESRD Quality Conferences

ORGANIZATIONS NRAA IS ENGAGED WITH ON VARIOUS LEVELS

- Alliance for Home Dialysis
- American Hospital Association
- American Nephrology Nurses’ Association (ANNA)
- American Society of Nephrologists (ASN)
- American Society of Pediatric Nephrology (ASPN)
- Annual Dialysis Conference (ADC)
- Joint Commission Task Force
- Kidney Care Partners (KCP)
- Kidney Community Emergency Response Group
- Kidney Health Initiative (KHI)
- The National Kidney Foundation (NKF)
- National Quality Forum
CHARITABLE GIVING

To better promote its mission, NRAA provides funding to select industry partners. In 2018, NRAA carefully selected key initiatives and organizations to receive support. Every dollar donated translates directly to increased education, support or access to care for dialysis patients nationwide.

RENAL SUPPORT NETWORK
Both NRAA and RSE support Renal Support Network initiatives each year with generous individual donations. RSN is a nonprofit, patient-run organization that holds a number of events each year to educate and support CKD patients.

AMERICAN KIDNEY FUND (AKF) HOPE AFFAIR
NRAA was proud to be a Crystal Sponsor last year. Also, ten NRAA board members attended the Annual American Kidney Fund’s National Gala.

PRODUCTS & SERVICES OFFERED BY RSE

ICH-CAHPS PREFERRED VENDOR PROGRAM
RSE ESRD PPS CALCULATOR
RSE BENCHMARK REPORTS
RSE INDUSTRY SPOTLIGHT PROGRAM
NRAA HIE FOR CROWNWEB OFFERED BY RENAL SERVICES EXCHANGE

NUMBERS FOR NRAA HIE CROWNWEB

CONTRACTED ORGANIZATIONS: 230
REGISTERED FACILITIES: 1,100
APPROVED EMR/EHR SYSTEMS: 14
WHO WE ARE

We are the kidney care professional association dedicated to achieving optimal patient outcomes through improved education, advocacy, and collaboration.

WHO ARE OUR MEMBERS

NRAA supports members from all types of providers, including freestanding, hospital-based and national chains.

Our members include dialysis facilities, renal administrators, medical directors, nephrologists, dialysis nurses, dialysis administrators, medical administrators, nurses, medical social workers, physicians, dietitians, dialysis consultants, as well as CMOs, CEOs and CFOs of dialysis facilities nationwide.

Currently, NRAA has members from 45 states. NRAA offers the following membership categories: Active Member, Affiliate Member and Associate Member.
### V. WHO WE ARE TODAY

#### NRAA BOARD OF DIRECTORS 2017-2018

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
<th>Title</th>
<th>Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td>William Poirier, MBA, BSN, BA, RN</td>
<td>Regional Administrator</td>
<td>Greenfield Health System</td>
</tr>
<tr>
<td>President Elect</td>
<td>Julie Williams</td>
<td>Administrator</td>
<td>Branson Dialysis</td>
</tr>
<tr>
<td>Past President</td>
<td>Karen Kelley, MHA, BSN, RN, CNN</td>
<td>Director of Dialysis</td>
<td>UP Health Systems - Portage Dialysis</td>
</tr>
<tr>
<td>Secretary</td>
<td>Sue E. Rottura</td>
<td>CEO</td>
<td>Specialty Physician Partners Management, LLC</td>
</tr>
<tr>
<td>Treasurer</td>
<td>David Oppenlander</td>
<td>Chief Financial Officer</td>
<td>Centers for Dialysis Care, Inc.</td>
</tr>
<tr>
<td>Director</td>
<td>Debbie Cote, MSN, RN, CNN, NE-BC</td>
<td>Administrator</td>
<td>University of Virginia Dialysis Program</td>
</tr>
<tr>
<td>Director</td>
<td>Chris Lovell, RN, MSN, CNN</td>
<td>Director of Medical Informatics &amp; Systems</td>
<td>Dialysis Clinic, Inc.</td>
</tr>
<tr>
<td>Director</td>
<td>Helen Currier, MA, BSN, CENP, CNN</td>
<td>Director, Renal Services</td>
<td>Texas Children’s Hospital</td>
</tr>
<tr>
<td>Director</td>
<td>Bridget Pfaff</td>
<td>Administrative Director</td>
<td>Gundersen Health System</td>
</tr>
<tr>
<td>Director</td>
<td>Maria Regnier, RN, MSN, CNN</td>
<td>Director, Dialysis Services</td>
<td>Sanford Health</td>
</tr>
<tr>
<td>Director</td>
<td>Lynn Riesenber, MSLA, BSN, CPA, RN</td>
<td>Director of Dialysis</td>
<td>St. Anthony Regional Hospital</td>
</tr>
<tr>
<td>Director</td>
<td>Katrina Russell</td>
<td>COO</td>
<td>Olympic Peninsula Kidney Centers</td>
</tr>
<tr>
<td>Director</td>
<td>Caprice Vanderkolk, RN, BS, MS, BC-NE</td>
<td>Nurse Manager</td>
<td>University of Minnesota Masonic</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Children’s Hospital and Fairview Hospital</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Adult Acute</td>
</tr>
<tr>
<td>Director</td>
<td>Anthony Messana</td>
<td>Former Executive Director, Renal Services</td>
<td>St. Joseph Hospital</td>
</tr>
<tr>
<td>Director</td>
<td>Cindy LaMunyon</td>
<td>Senior Director of Reimbursement</td>
<td>Fresenius Medical Care</td>
</tr>
<tr>
<td>Executive Director</td>
<td>Marc Chow</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To contact NRAA board members or staff, email nraa@naa.org
**WHO WE ARE TODAY**

**RSE BOARD OF DIRECTORS 2017-2018**

<table>
<thead>
<tr>
<th>POSITION</th>
<th>NAME</th>
<th>TITLE/COMPANY</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRESIDENT</td>
<td>Larry Jones</td>
<td>President</td>
</tr>
<tr>
<td>VICE PRESIDENT</td>
<td>Jeff Lehman</td>
<td>President</td>
</tr>
<tr>
<td>SECRETARY/TREASURER</td>
<td>Ellen R. Davis</td>
<td>President</td>
</tr>
<tr>
<td>BOARD MEMBER</td>
<td>Daniel Jacob</td>
<td>President</td>
</tr>
<tr>
<td>BOARD MEMBER</td>
<td>Maria Regnier, RN, MSN, CNN</td>
<td>Director, Dialysis Services</td>
</tr>
<tr>
<td>BOARD MEMBER</td>
<td>Larry Emerson</td>
<td>Chief Executive Officer</td>
</tr>
<tr>
<td>BOARD MEMBER</td>
<td>Mark Hamilton, FACHE</td>
<td>Vice President, UWHC</td>
</tr>
<tr>
<td>BOARD MEMBER</td>
<td>Glenn Davis</td>
<td>Chief Innovation &amp; Commercial Officer</td>
</tr>
<tr>
<td>BOARD MEMBER</td>
<td>Joseph J. Lee, MD</td>
<td>President</td>
</tr>
<tr>
<td>BOARD MEMBER</td>
<td>Dan Nye</td>
<td>VP Controller</td>
</tr>
<tr>
<td>BOARD MEMBER</td>
<td>Sue E. Rottura</td>
<td>CEO</td>
</tr>
<tr>
<td>BOARD MEMBER</td>
<td>Diane Wish, RN, MBA</td>
<td>President/ CEO</td>
</tr>
<tr>
<td>EXECUTIVE DIRECTOR</td>
<td>Marc Chow</td>
<td></td>
</tr>
</tbody>
</table>

To contact NRAA board members or staff, email nraa@nraa.org
V. WHO WE ARE TODAY

**NRAA Resources**

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>EXECUTIVE DIRECTOR</td>
<td>Marc Chow (Kidney Collaborative)</td>
</tr>
<tr>
<td>ASSOCIATION MANAGEMENT COMPANY</td>
<td>Fernley &amp; Fernley, Inc.</td>
</tr>
<tr>
<td>DIRECTOR OF EDUCATION</td>
<td>Valerie Okrend</td>
</tr>
<tr>
<td>MARKETING &amp; COMMUNICATIONS</td>
<td>Koi Kollective</td>
</tr>
<tr>
<td>LEGAL COUNSEL</td>
<td>McGuire Woods</td>
</tr>
<tr>
<td>GOVERNMENT AFFAIRS</td>
<td>Mehlman Castagnetti Rosen &amp; Thomas</td>
</tr>
<tr>
<td>ANALYTICS</td>
<td>Prima Health Analytics</td>
</tr>
<tr>
<td>PAC COUNSEL</td>
<td>Perkins Coie</td>
</tr>
<tr>
<td>NRAA/RSE HIE PROVIDER</td>
<td>OneHealthPort</td>
</tr>
<tr>
<td>IT CONSULTANT</td>
<td>Howard Thomas Consulting</td>
</tr>
</tbody>
</table>

**NRAA Sponsors**

<table>
<thead>
<tr>
<th>Tier</th>
<th>Sponsor</th>
</tr>
</thead>
<tbody>
<tr>
<td>PLATINUM</td>
<td>Amgen, Ascend Clinical, Renal Purchasing Group</td>
</tr>
<tr>
<td>GOLD</td>
<td>-</td>
</tr>
<tr>
<td>SILVER</td>
<td>NxStage Medical, Keryx, Baxter</td>
</tr>
<tr>
<td>PARTNER</td>
<td>Nephrology News &amp; Issues</td>
</tr>
</tbody>
</table>

*As of June 30, 2018
OUR VISION
We envision a robust kidney health community that is patient-focused, diverse, collaborative, and competitive.

OUR MISSION
We advance kidney health by serving the educational and advocacy needs of kidney care professionals.

WHO WE ARE
We are the kidney care professional association dedicated to achieving optimal patient outcomes through improved education, advocacy, and collaboration.

WHAT WE VALUE
We value healthy diversity of kidney care providers in the marketplace. We value patient-centered quality care.
As we embark under an updated strategic plan, we look forward to expanding new areas of opportunity for our association to work toward over the years ahead. We will continue seeking out the tools, resources, people and innovative ideas we need to help our members and build our community.

In particular, we look forward to expanding our advocacy and education pillars in addition to continuing to adopt new technologies so we can better serve our members.

JOIN THE CAUSE!

Be a part of the great work NRAA is doing for renal health!

Whether through donation, membership, active participation in a committee, event planning, or an educational partnership, NOW is the time!

NOW is the time to join the effort to support independent and community-based dialysis care providers nationwide!