

Thriving Independently, Together.

2022 Annual Report



01

LEADERSHIP

CEO Letter:
State of OneOncology

CMO Letter:
Clinical Innovation

COO Letter:
Local Market Growth

Executive Team
and Board Members

02

GROWTH

Growing with
OneOncology

Fastest Growing
Oncology MSO

Expanding Care
Continuum Services

Generating
Growth Capital

OneOncology
Across the Country

03

CLINICAL

Democratizing
Clinical Research

Delivering Precision
Medicine in the Community

Slack: Physician Digital HQ

Bringing Novel Therapies
into the Community

How Pathways
Help Oncologists

04

OPERATIONS

Expanding Cancer
Care Services

How Analytics Drives
Practice Value

Value-Based Care and
Practice Transformation

Demonstrating Value
to Managed Care

What a Successful
Integration Looks Like

05

VBC & POLICY

A Platform Approach
to Value-Based Care

Building Effective
Advocacy



01

Leadership

Across the platform, OneOncology delivers value through practice growth, clinical innovation, and operational excellence. Read about the value levers OneOncology employs to enhance a practice's growth, clinical performance, and operational excellence.

State of OneOncology

OneOncology started with three practices, 150 physicians, 14 corporate employees, and a business model that aligns incentives to provide world-class cancer care close to home at dramatically lower costs than hospitals.

In four short years, we've grown to 15 practices, 550 physicians, 940 providers, and 200 corporate employees supporting over 5,000 clinical and non-clinical employees across an amazing platform and partnership.

GROWTH CULTURE

The key ingredient to our success is the culture we've built based on the entrepreneurial spirit and commitment to independence we share with our practice partners.

Our enthusiasm for unleashing the intellectual capabilities and decision-making of our physicians, coupled with our growth mentality, makes OneOncology different.

Our partners and OneOncology are committed to delivering world-class cancer care that creates a choice in communities and value for payers, employers, patients, and physicians. We also share a passion for telling our story — so other like-minded oncologists have an opportunity to join us.

By partnering with people who've bet on themselves to run their own practice and delivering them expertise, resources, and scale to grow, our entrepreneurial culture creates a self-fulfilling prophecy of success for OneOncology and our practice partners.

The OneOncology platform has been the fastest-growing oncology Management Services Organization year over year since we launched, and 2022 was another year of growth with practices in Michigan, North Carolina, and Southern California joining the platform.

Additionally, our 15 current partners on the platform added 21 local practices to their larger groups. We also worked with our practices to hire 85 physicians across the continuum of care in oncology, including breast oncological surgeons, radiation oncologists, urologists, and others.

“

The key ingredient to our success is the culture we've built based on the entrepreneurial spirit and commitment to independence we share with our practice partners.”

—
Jeff Patton, MD
 Chief Executive Officer
 OneOncology



15

PRACTICES

940+

PROVIDERS

550+

PHYSICIANS

200

CORPORATE EMPLOYEES

Our Finance and Development teams worked last year with practices to identify accretive growth projects and deployed a significant amount of capital to support expanding our practices via new site builds, site expansion, and equipment purchases.

CLINICAL INNOVATION

Another key cultural ingredient accounting for OneOncology's success is clinical innovation. Dr. Davey Daniel just finished his first year as Chief Medical Officer, and his track record is impressive.

While he'll go into detail, OneOncology has demonstrated leadership on Next Generation Sequencing (NGS) utilization, stood up a genomics concierge service for our physicians, and held our first in-person meeting for all providers.

With 46 Abstracts presented at ASCO and the ASCO Quality Summit alone, our investigators throughout our partnership are walking the talk of scientific discovery, while improving diversity in clinical trials and generating novel real-world evidence.

VALUE-BASED CARE

The announcement that all practice partners would file an application to participate in Medicare's Enhancing Oncology Model (EOM) caused a buzz but shouldn't be surprising.

The Oncology Care Model (OCM) brought valuable experience in how to succeed in risk-based arrangements to all our groups. And even though the knock on the OCM was that it didn't save Medicare money, two of our partners, Cancer & Hematology Centers of Western Michigan and Tennessee Oncology, were among the practices that generated the most savings.

Beyond the EOM, our partners are leaders in other value-based programs. Astera Cancer Care has launched multiple episodes of care programs with Horizon Blue Cross Blue Shield in New Jersey. And [three of our partners](#) were among the nine cancer centers, in both hospital and community settings, chosen to participate in ASCO's Patient-Centered Cancer Care Certification program.

Value-based care (VBC) models will continue to proliferate and fit like jigsaw puzzle pieces into our fragmented system. OneOncology's philosophy is to lead with words and deeds to ensure these models are sustainable and can fulfill their promise of better care at reduced costs.

COMMUNITY ONCOLOGY HEADWINDS

The unsustainability of Medicare payment rates coupled with payer tactics, from DIR fees to monopolistic

specialty pharmacy dispensing requirements, create headwinds for practices.

That's why it's essential we have a seat at the decision-making table in Washington, D.C. and in state capitals. I'm thrilled Dr. David Eagle is leading our advocacy efforts and working with our practices to build political infrastructure to tell our story as the high-quality, lower-cost cancer care provider to legislators and regulators.

Getting involved in policy through the Community Oncology Alliance and state associations is an efficient way to create all-important relationships with legislative offices to educate lawmakers on the economics of cancer care.

SCALE MATTERS

As a low-cost, high-quality provider positioned well to bend the cost curve, you'd think all community oncology practices would be thriving. Think again. Without scale, it's nearly impossible.

Healthcare is not a free market. Hospital and payer consolidation, perverse hospital monopolistic power, and policy hurdles, coupled with the challenges of running a practice make independence more difficult than ever.

Practices need scale to innovate and negotiate with payers, manufacturers, and potential partners. OneOncology brings scale while retaining independence. And by pursuing

initiatives as a platform, including in value-based care and clinical innovation, OneOncology practice partners help their fellow OneOncology practices achieve national scale.

As evidenced across the country, by growing practices through adding local practices, hiring new physicians, and expanding access to services across the continuum of care, OneOncology is a flywheel for growth that creates scale so practices can do more.

IN THESE PAGES

Our 2022 annual report tells the story of how we're transforming cancer care.

It showcases the value that is unlocked when a superior business model, incredible people, and an entrepreneurial culture with an important mission come together. And it shows our vision for how oncology practices can remain independent and drive change in oncology.

I hope you enjoy reading about the journey we're on with our partners.

Sincerely,



Jeff Patton, MD
Chief Executive Officer
OneOncology



Clinical Innovation

Last February as I embarked on my Chief Medical Officer role at OneOncology, I pledged to make it easier and ultimately more efficient for physicians on our platform to practice by creating systems that allow us to work smarter, foster more connections, and get useful information to them quickly.

A year later, I'm thrilled with the strong foundation in place and the developments underway to support our physicians to deliver the latest cancer research and treatment options to patients close to home.

DISEASE GROUPS AND SERVICE LINE SUPPORT

In 2022 we announced the formation of five OneOncology Disease Groups. Each Disease Group offers sub-specialized expertise and disease-specific educational initiatives to all physicians on the platform. Each group also guides and approves OneOncology pathways that are consistent with many evidence-based national guidelines. Thank you to each of our Disease Group chairs for their commitment to furthering education and best practices across the platform:

- **Lung:** Melissa Johnson, MD, Tennessee Oncology
- **Breast:** Gregory Vidal, MD, PhD, West Cancer Center & Research Institute
- **Genitourinary:** Jahan Aghalar, MD, New York Cancer & Blood Specialists
- **Gastrointestinal:** Henry Xiong, MD, PhD, The Center for Cancer and Blood Disorders
- **Hematologic Malignancies:** Jonathan Abbas, MD, Tennessee Oncology

In addition to our Disease Group leadership, OneOncology also has service support lines that are underway including Precision Medicine, Radiation Oncology, Palliative Care, and our Advanced Practice Provider support.

PRECISION MEDICINE

With access to our patients' genomic data, a top remit of our Precision Medicine Team, led by Medical

Director for Precision, Tom Stricker, MD, PhD, and Senior Director for Precision Medicine, Neha Jain, PhD, is to deliver this value to our physicians and patients.

Tom and Neha have developed a concierge service across the platform that utilizes an email helpline to answer questions on individual comprehensive genomic profile reports. The growing data lake with information on Next Generation Sequencing reports from four major vendors will soon be a versatile tool for driving patient care, clinical trial enrollment, and the generation of real-world evidence.

Additionally, OncoKB, developed by Memorial Sloan Kettering, is another resource we've brought to OneOncology-affiliated physicians to offer them an additional curated precision medicine knowledge channel.

PHYSICIAN DIGITAL HQ

Physicians rely on our clinical colleagues to shape how we practice medicine. It may be when discussing a difficult treatment decision, challenging patient dilemma, what to make of new data released, or a recent FDA approval. The bottom line is that a physician's growth is impacted by our colleagues.

We are fortunate at OneOncology to have hundreds of physicians who can shape our performance, and the technology to easily connect them to have meaningful interactions. Late last year, we moved our physician digital headquarters, [OneCommunity](#), to [Slack](#) making it far easier for physicians to weigh into [tumor board cases](#), review new FDA approval discussions, or discuss a new technology adoption.

While our tumor boards remain popular, hot takes by our disease group leaders, precision medicine updates, and the EOM are high-traffic conversations. As the rate of information oncologists

need to know increases, Slack will be an increasingly important tool for how we communicate.

VALUE-BASED CARE

We're three months from the launch of the EOM, and I've enjoyed working with Ed Licitra, MD, PhD, our Value-Based Care Medical Director, and OneOncology's clinical and analytics teams to help prepare our practice partners.

The decision for each of our fifteen practices to apply to participate in the EOM demonstrates the importance

of preparing for change. The Center for Medicare & Medicaid Innovation's (CMMI) point of view is oncology risk-based models will join up with larger accountable care models. With the continued growth of value-based models in Medicare and commercial markets, participating in these models is the only avenue to improve them.

NATIONAL AND REGIONAL MEETINGS

It was great to see 2022 mark the return of in-person meetings. In-person meetings are an important way for our physicians to come together

to discuss cancer care trends and develop closer relationships. Our first annual OneOncology conference for all providers delivered novel business content and valuable scientific updates from internal and external experts.

Based on the success of our annual meeting, we have launched a series of regional meetings in 2023 to bring more breaking content directly to our physicians, close to where they practice. Last month, we held our first regional meeting in Dallas, and we were heartened by the response from the physicians who attended. As we continue our regional meetings, we will reach out to you when we have a local event.

ADVOCACY

With the growing headwinds in community oncology, it's more important than ever to have a voice in the room where decisions are made. When you realize how well-intentioned changes to drive down drug costs have perverse, unintended consequences on oncology practices, it becomes abundantly clear how important it is for physicians to actively educate lawmakers about the value community oncology provides.

Dr. David Eagle is working with our practice leaders to tell our story to lawmakers, but influencing public policy, especially when it comes to Medicare reimbursement, is a marathon, not a sprint. From donating to practice political action committees to meeting with congressional representatives to writing Op-Eds, there are numerous ways physicians are choosing to engage in the public policy arena.

PHYSICIAN FELLOWSHIP

I'm truly proud of our vibrant network of physicians who are truly changing oncology care. Their work and dedication to caring for patients and advancing medical science are inspiring.

On behalf of the entire clinical team at OneOncology, I couldn't be more enthused about our work together to transform oncology care.

Sincerely,



Davey Daniel, MD
Chief Medical Officer
OneOncology

DISEASE GROUP CHAIRS



Lung
Melissa Johnson, MD
Tennessee Oncology



Breast
Gregory Vidal, MD, PhD
West Cancer Center & Research Institute



Genitourinary
Jahan Aghalar, MD
New York Cancer & Blood Specialists



Gastrointestinal
Henry Xiong, MD, PhD
The Center for Cancer and Blood Disorders



Hematologic Malignancies
Jonathan Abbas, MD
Tennessee Oncology

Local Market Growth

OneOncology exists to empower community oncology practices to thrive as independent groups. By helping physicians remain in the community rather than being forced into the hospital setting, we live our mission of *improving the lives of everyone living with cancer every day.*

OneOncology's Operations Team takes this mission seriously as we strive to help our partner practices optimize their operations and improve both financial acumen and the patient experience. Our team brings a wealth of experience in all aspects of community oncology and works with each practice to implement value drivers that are important to our physician partners.

INTEGRATIONS

Our partners are making a big commitment to join the OneOncology platform, and the OneOncology integrations team is there to help with the transition. The key to our success is that we create a customized integration plan for each practice, and make sure that our partners are informed and have input at every step.

Whether a practice has two medical oncologists or is a large group seeking independence from a health system, our team has done it before. Everything revolves around what a practice needs, its timeline, and resources. While change is difficult, a practice will never feel overwhelmed since we've led successful integrations in any situation and for any sized practice. And besides, what other oncology platform has a former **U.S. Navy submarine officer** who built and drove a \$3 billion nuclear-powered submarine leading integrations?

VALUE DRIVERS

Once a practice is integrated into the platform, its physicians and staff are connected to all the OneOncology teams, who are excited to provide their expertise, guidance, and help. A practice that joins the platform suddenly has augmented services from physician recruiting to strategic finance to a host of value levers provided by the Operations Team including:

Managed Care

OneOncology employs a centralized payer relations team that has experience working with providers, payers, and health systems. Our contract administrators are divided regionally to establish connections with local payers, recognize trends and put into practice strategies for success. We leverage aggregated claims data to highlight cost differences to payers and lobby for competitive rates for practice partners. Armed with experience from across the platform, our teams devise a plan of action with each practice to improve their local managed care rates.

OneOncology also works at a national level with the largest health plans to create awareness of the platform, fight for fair reimbursement for our partner practices, and educate payers on the high-quality care they provide. We have made significant investments in value-based care to enable novel risk-based programs, such as episode-based payment models or risk-enhanced fee-for-service strategies. In fact, for just one partner, we've negotiated more than 20 new managed care contracts including direct-to-employer and value-based programs.



Increasing Market Share

Our tools and teams help practices accelerate new patient acquisition and increase retention. The regional VP of Operations guides targeted referral analytics and analysis to identify market trends to drive growth. In addition, our national Practice Liaison Lead provides a best-practices playbook with tools, collateral, and workflows to drive patient growth. The result is that new patients seen by medical oncologists across the OneOncology platform increased by more than 12 percent last year.

Data/Analytics

Central to many OneOncology initiatives is a system-wide approach to capturing data and using our analytical powers to help practices grow and thrive. This platform-wide tech alignment allows OneOncology to enhance our proprietary platform, OneAnalytics, which provides practices clinical and operational insights on key performance indicators (KPIs). We combine internal data from the EMR, practice management system, and other technology vendors, along with external claims and market data to give a full picture of actionable insights to a practice.

Self-serve dashboards on clinical quality, operations support, KPIs, and value-based programs created by OneOncology present our partners actionable data in a user-friendly format. Our analytics are reviewed with practices regularly to identify strategies for enhanced growth and the ability to provide high-quality patient care.

Community Oncology Expertise

We've built teams with a wealth of experience to enhance operational excellence, including Revenue Cycle Management, vendor management, and a Practice Optimization Team with subject matter expertise in all areas of clinical oncology practice. In addition, our Regional VP Team of seasoned leaders is well poised to work with practices on organizational alignment and physician partnership structures. These services support the development of best-in-class patient experience and practice growth plans. Through a network of oncology peers, OneOncology also connects its partners together to learn from each other and share best practices.

Joining the OneOncology platform is a commitment with unrivaled upside — practice independence, connection with like-minded peers and the resources as well as expertise for growth enabling practices to better compete with hospital systems.

The Operations Team at OneOncology stands with our practice partners every step of the way — from before they join to helping accomplish their goals. As you read about some of our work in this report's pages, I hope you'll see the passion our teams have for our partners, and how committed we are to helping each succeed.

Sincerely,



Bob Gallagher
Chief Operating Officer
OneOncology

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The key to our success is that we create a customized integration plan for each practice, and make sure that our partners are informed and have input at every step.”

Bob Galligher
Chief Operating Officer
OneOncology

Executive Team



Jeff Patton, MD
Chief Executive Officer



Karen Kizzia
Chief Human Resources Officer



Phil Watts
Chief Legal Officer



Bob Gallagher
Chief Operating Officer



Davey Daniel, MD
Chief Medical Officer



Jimmy Harper
Chief Development Officer



Jon M. Billington
Chief Financial Officer



Andy Corts
Chief Technology Officer

Board Members



Natalie Dickson, MD, MMHC, FACP
Tennessee Oncology, Chief Strategy Officer



Edward Licitra, MD, PhD
Astera Cancer Care, Chairman & CEO



Curtis Warfield
Windham Advisors, President and CEO; Texas Roadhouse, Board Member



Jeff Vacirca, MD, FACP
New York Cancer & Blood Specialists, CEO



Senator Bill Frist, MD
Retired Surgeon; Cressey & Co, Partner; Frist-Cressey Ventures, Founder/ Partner; Former US Senator



Jeff Patton, MD
OneOncology, CEO



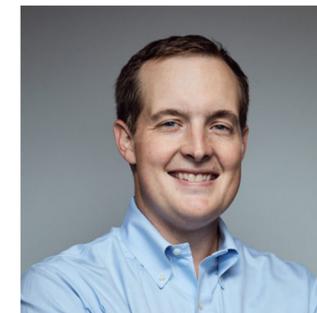
David Chernow
Select Medical, President and CEO



Robbert Vorhoff
General Atlantic, Managing Director and Global Head of Healthcare



Justin Sunshine
General Atlantic, Managing Director



Nat Turner
Collectors Universe, CEO; Flatiron Health, Chairman



02

Growth

Using capital, talent, and scale, read how OneOncology leverages its resources to continuously improve our practice partners through reinvestment.

Growing with OneOncology

OneOncology continues to recognize impressive year-over-year growth, closing out 2022 by adding more physicians to the platform than ever before. In 2022, we added 170 physicians (314 providers) by entering three new high-growth markets, growing our existing practices, and hiring providers.

This sustained growth momentum illustrates that our partnership model and value are proven, and our emphasis on independence, clinical innovation, and strategic growth is attractive to like-minded physician leaders.

With our commitment to practice growth, we strive to enable community oncology viability in an increasingly difficult market where hospital power and acquisitive activity continue unabated, financial pressures accumulate, and payment reform looms ominously on the horizon.

All of this is achieved through our differentiated business development efforts, consisting of the brightest business minds in community oncology — ranging from expert practice developers to analytics stakeholders.

OneOncology recognizes that each market is different, and we pride ourselves on creating customized and proven growth playbooks that buck a one-size-fits-all approach. Upon partnership, our practices have access to these resources to help drive the following growth strategies and execution:

Provider recruiting: Industry-leading recruiting team placing physicians and APPs across markets and specialties; placed 170 providers with practice partners in 2022.

Local market expansion: Partnership in-market with other local practices; OneOncology completely manages a tried-and-true deal process and integrations, making this growth effort seamless for our practices. In 2022, OneOncology integrated more than 10 local practices across the platform.

Service line expansion: OneOncology drives the optimization of expansion opportunities across lab, pharmacy, imaging, and radiation; we also evaluate the addition of specialists or primary care physicians on a market-by-market basis to help enhance the continuum of care.

Capital projects: OneOncology provides the capital required to invest in practice growth, enabling practices to continue delivering comprehensive cancer care to more patients in expanded markets. This funding significantly de-risks and accelerates the pursuit of aggressive growth opportunities. 🌱



CLICK ON LINK BELOW TO LEARN MORE

- [OneOncology Partners Add Practices and Physicians to National Platform](#)



Dr. Amy Vander Woude
Partner
Cancer & Hematology Centers
of Western Michigan

WHY WE JOINED ONEONCOLOGY?

In the short time since CHCWM joined forces with OneOncology, our practice has already realized important gains. With more robust analytics, we have been able to assess our needs and plan more accurately for the future. The combination of two innovative organizations working together has enhanced patient care, strengthened our research platform, and established a foothold for community oncology in Michigan. The first Annual OneOncology Conference held in Nashville this past November showcased the expertise available to all of us. This unique agenda brought together the business and clinical knowledge we need on a day-to-day basis in the community setting. CHCWM is proud to be a member of OneOncology.

Together we will do great things!

Fastest Growing Oncology MSO

OneOncology has grown at over 38% year-over-year making it the fastest growing oncology MSO in the United States.

2018-2019

Providers: ~380
MDs: ~250

TENNESSEE
ONCOLOGY



2020

Providers: ~490
MDs: ~320



2021

Providers: ~695
MDs: ~410



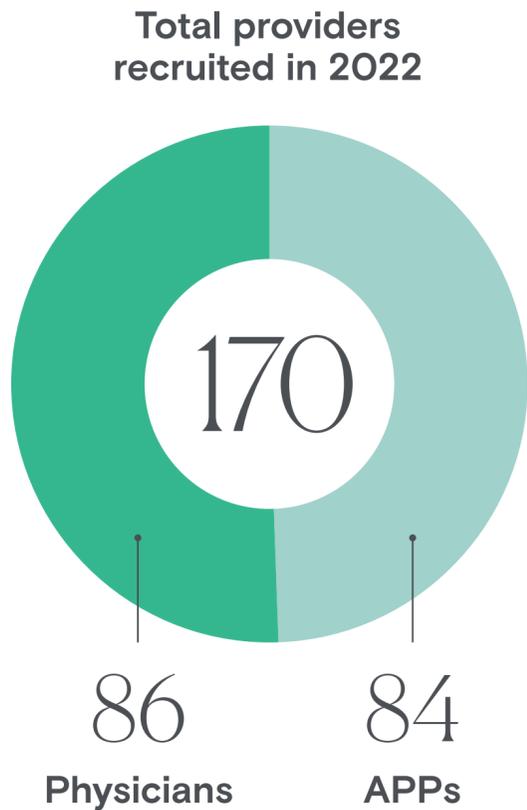
2022

Providers: ~940
MDs: ~560



170 Providers Added, Expanding Care Continuum Services

OneOncology works hand-in-glove with our partners to hire and retain the brightest minds, and most compassionate medical practitioners.



Nicole Deline
Assistant Director,
Advanced Practice Provider
Tennessee Oncology

HOW ONEONCOLOGY SUPPORTS APPs

OneOncology appreciates the vital role APPs play in providing community oncology care, especially as patient survivors continue to grow across the country. OneOncology has created a forum for a wider network of APPs to connect virtually, and in person, to share best practices and increase APP education. Having a dedicated APP track at the OneOncology meeting is an incredible learning opportunity for all APPs. And having an APP Slack channel furthers connection with each other regularly.

Last year, OneOncology gave practice APPs the opportunity to utilize an institutional Advanced Practitioner Society for Hematology and Oncology (APSHO) membership, giving APPs access to amazing content and connection with other APPs. OneOncology is the first community oncology group to have an institutional membership in APSHO outside of academia.

I look forward to our continued partnership with OneOncology and all our partner practices as we grow and celebrate the important role APPs have in our patients' lives.

Generating Growth Capital

How exactly do economies of scale benefit practices? As part of the partnership agreement, OneOncology is responsible for all working capital — accounts receivable and accounts payable — and due to the size of the platform and attractiveness of working with its physicians, OneOncology can generate operating cash flow that exceeds income due to improved collections, active cash management and favorable payables terms with manufacturers and vendors.

That operating cash flow is invested back into our practices in the form of growth capital used to purchase new equipment, outfit cancer clinics, recruit physicians, expand care services or invest in joint ventures. This has a flywheel effect. The cash is reinvested back into practices, which put it to work on expanding cancer care services. Those needed services generate additional revenue that is put right back into the platform to expand additional growth.

Historically, physicians funded their own capital through bank loans involving personal guarantees or personally using their own cash. Now OneOncology can alleviate outside debt by bringing its practice partners a mechanism to efficiently fund growth.

Additionally, OneOncology's Finance Team works directly with practices to evaluate opportunities, perform all accounting support services, and analyze and forecast their financial outlook giving them more actionable economic and operational information about their practice than they've ever had. This strategic finance support gives our practices a line of sight that helps them grow much faster than they could on their own.

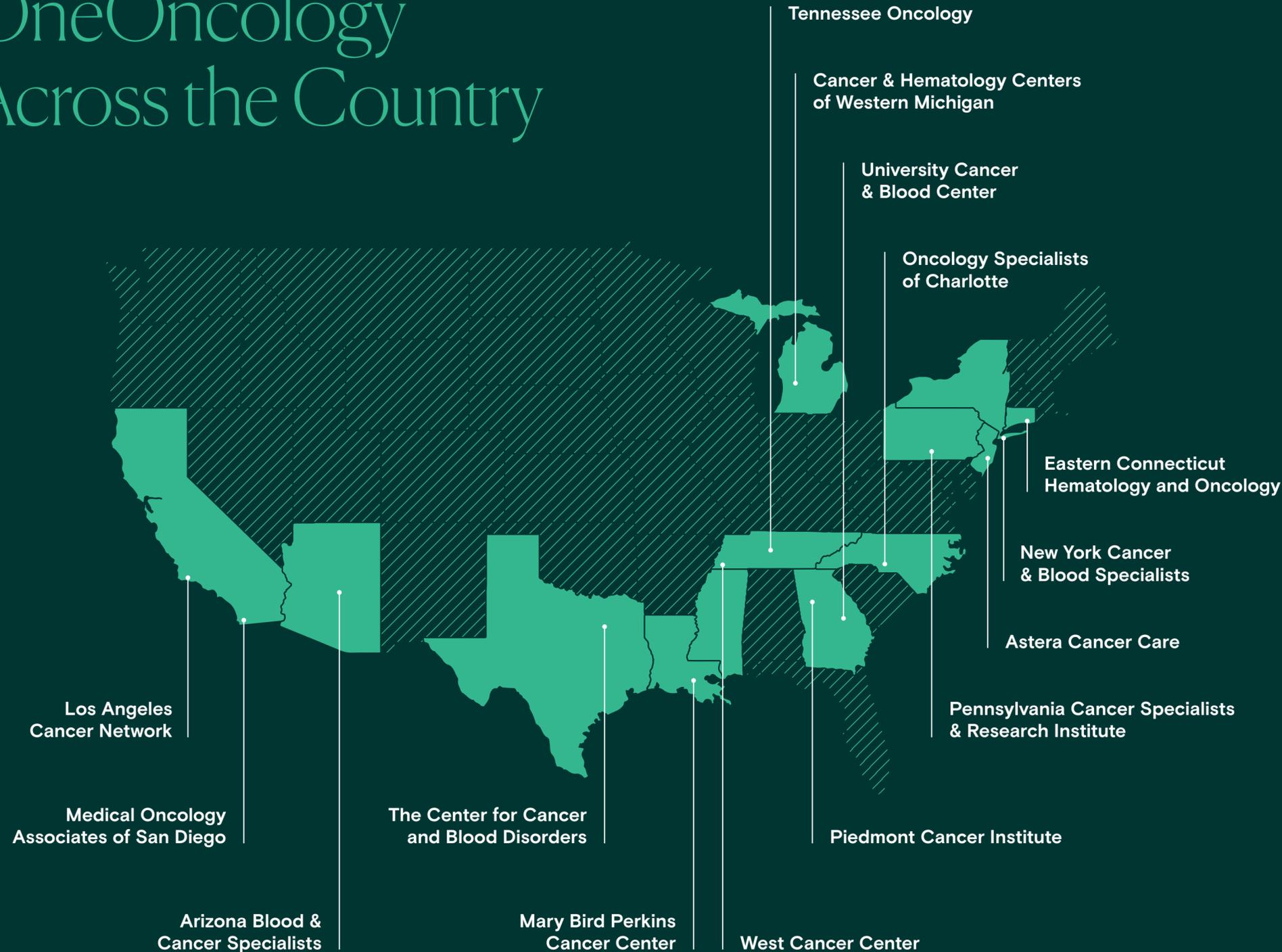
Lastly, OneOncology has a dedicated Strategic Pharmaceutical Finance Team which constantly drives better pricing and terms on drugs than practices can achieve on a standalone basis. We're continuing to drive additional drug rebates and discounts, which improves our practices' bottom line.

In healthcare, market share matters, but funding growth is difficult. With OneOncology's size and ability to generate cash and fund strategic growth, our practices have a partner who understands cash flows and prioritizes investments back into each practice. 🌱

THE FLYWHEEL EFFECT

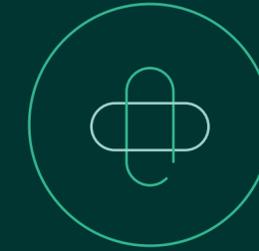


OneOncology Across the Country



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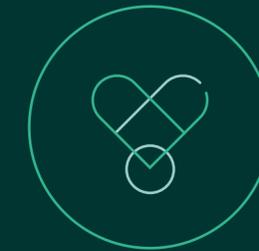
PRACTICE PARTNERS



940+

TOTAL PROVIDERS

560+ Physicians / 380+ APPs



520K

TOTAL PATIENTS SEEN



300+

TOTAL SITES OF CARE

Click on each practice name to learn more.



03

Clinical

Adopting the latest technologies and trends are key to setting up our practices for success, and our playbook is maintained by cutting-edge leaders in the space.

Democratizing Clinical Research

Clinical trial participation is the most innovative care available to patients both in the community and in academic medical centers, yet clinical trial enrollment is a persistent challenge in oncology. 19 out of 20 cancer patients cannot enroll in a trial because of rigid eligibility criteria.

As our understanding of cancer biology and the myriad ways cancer cells can evade treatment improves, the complexity of oncology trials increases as the scope of patients included narrows. So, even as the number of clinical trials has increased annually, it has become even more challenging to match the right trial for the right patient.

Clinical trials were historically the sole domain of academic centers. Trials were often initiated by an investigator based on a lesson or insight from the laboratory. However, with most trials now part of a drug development plan from pharmaceutical manufacturers, we should question why site preference persists. Most patients continue to be cared for in the community. Focusing

on academic centers as the main source for trials limits access and compounds health equity challenges. Patients should not have to travel for access to important trials, and trial enrollment must reflect our community for basic fairness as well as to ensure that therapy is safe and effective for different sub-populations in our diverse society.

OneOncology's vision is to democratize clinical trials to improve access, driving faster and more diverse accruals — thereby moving the science of oncology forward with equity at the core. With community oncology practices increasingly active in clinical trial programs, these care innovation centers that deliver hyper-local, high-quality, and more affordable cancer care than hospitals, are also revolutionizing scientific discovery — and who has access to it.

We support our community oncology-leading practice programs and augment their efforts by delivering additional trials through OneR, the OneOncology Research Network. Currently, both within OneR and individually, the 15 OneOncology partner practices offered 700 clinical trials and enrolled 2,000 patients in 2022. OneOncology physician partner investigators participate in trials beginning at Phase I development of early novel therapies and continuing through late phase trials that lead to new therapies.

Since our practice partners are consistently opening new trials in centers in different communities across the country, community oncology investigators are better able to assess how therapies work in diverse populations. One of the major trial enrollment challenges community oncology practices can address is mistrust people of color may have based on historical research misconduct, access to trials, and other structural barriers. Gregory Vidal, MD, Chair of OneOncology's Breast Cancer Disease Group and member of the Research Steering Committee and Director of Clinical Research at West Cancer & Research Institute, counsels

colleagues across OneOncology to confront inequities by offering trials to all appropriate patients and directly addressing skepticism of some due to historical racism in healthcare. We recognize the need to open trials not just in urban or affluent areas but also in underserved communities as well.

As OneOncology practices drive more scientific discovery, we will continue to be a big part of the solution to matching more patients to important clinical trials.

Clinical trials aren't the only mechanism to enhance access to cutting-edge care underway at OneOncology practices. We hold one of the largest data warehouses of clinical data and genomics data. With 3.2 million unique patient records and 50,000 unique patient genomic records funneled to our OneAnalytics portfolio, OneOncology's data set lays the foundation for real-world evidence initiatives, prospective registries, and trial matching.

Insights derived at OneOncology practices through active and diverse clinical trial programs and real-world evidence initiatives address the challenges impacting clinical trials today while expanding patient access and putting the community oncologist at the cancer research hub. 



In 2022, OneR and the 15 OneOncology partner practices offered:

700

CLINICAL TRIALS

2,000

ENROLLED PATIENTS

Delivering Precision Medicine in the Community

At OneOncology, we are committed to providing patients with the highest quality of care and developing precision medicine support tools for our physicians. In 2022, we piloted a “molecular helpline” at Piedmont Cancer Institute in August and have gradually expanded it to six additional sites on the platform.

This service enables physicians to get on-demand support for interpreting NGS reports and treatment selection. We have provided support for 39 requests in the last five months. We plan to launch this to all sites by end of 2023.

Leveraging the structured genomic data at our fingertips, our precision team also provides a “Variant Identification & Notification Service” that allows for quick identification of patients with a specific mutation

who may be eligible for open clinical trials. This is currently being offered at Tennessee Oncology and will be scaled up in 2023 as we get more of our genomic data in a structured format.

The weekly Molecular Tumor Boards (MTB) got a revamp in 2022. The MTB meetings are now run by OneOncology with regular reminders on Slack and email. Provider attendance and engagement have increased with the introduction of visual content via slides that are prepared by us for each patient case, reducing physician burden. Since the precision oncology field is ever-growing, we wanted to create educational resources that our providers can turn to for clinical use cases.

The #precision-oncology channel on Slack was created with this aim and has one the highest engagement in terms of viewership and messages posted. We host micro-learning videos and precision-focused newsletters on recent FDA approvals related to a biomarker. 

Slack: Physician Digital HQ

Physicians turn to physicians for input — from a difficult case to a recent FDA approval. With oncologists practicing across the country, OneOncology created [OneCommunity](#) to promote knowledge sharing for oncologists beyond their practice colleagues unlocking economies of intelligence on a national platform.

The next phase for OneCommunity occurred when it moved to [Slack](#) to create a superior physician experience that puts actionable information at the fingertips of every oncologist on the Slack platform.

With a digital collaboration headquarters for real-time physician communications, which include a genomic concierge service, and a robust menu of content including clinical trial listings, tumor boards, and asynchronized learning opportunities, OneOncology brings physicians an innovative tool unrivaled in community oncology.

THE MAIN FEATURES THAT ARE POPULAR WITH PHYSICIAN USERS INCLUDE:

- 1 Molecular Help Line:** With the integration of genomic reports, physicians have a real-time line to OneOncology’s Precision Medicine team to consult on patient genomic findings.
- 2 On-Demand Expertise:** Hot takes on drug approvals, the Enhancing Oncology Model, and pathways.
- 3 Virtual Tumor Boards:** Essential for oncology in the digital era, virtual tumor boards offer a greatly enhanced [experience with an ability to discuss cases and have a prompt response which will allow for better consultation, discussion, and therapeutic decision.](#)

Bringing Novel Therapies into the Community

The recent approval of two new bispecific T-cell engager (BiTE) therapies within the past six months for the treatment of hematologic malignancies, and the extensive pipeline of BiTE therapies yet to come prompted OneOncology to create a cellular therapy working group to make the introduction of these therapies into community practices feasible, but most importantly safe.

In comparison with BiTE therapies, which are “off-the-shelf” readily available, the availability of chimeric antigen receptor (CAR)-T cell therapies is limited by the manufacturing process, which currently requires collecting a patient’s T cells and then re-engineering those cells in a laboratory to produce the CARs.

The Cellular Therapy Working Group addresses the many workflows, as well as adverse event identification and management challenges, including cytokine release syndrome (CRS), neurologic toxicities, and immune effector cell-associated neurotoxicity syndrome (ICANS), to offer these practice-changing therapies to patients in the community setting.

After evaluation of the literature, review of the American Society for Transplantation and Cellular Therapy

(ASTCT) Consensus Guidelines for CRS and Neurologic Toxicity Associated with Immune effector Cells, and extensive input from our hematology thought leaders on the management and treatment of CRS and/or ICANS, OneOncology’s Cellular Therapy Working Group constructed a BiTE therapy playbook, as well as educational material for healthcare professional providing care to patients receiving these therapies.

With more BiTE therapies soon to be introduced to the oncology and hematology treatment landscape, OneOncology will continue to update its playbook and educational material to ensure that these practice-changing therapies can be offered to patients in the community cancer setting safely and effectively. 

How Pathways Help Oncologists

With the highly dynamic oncology treatment landscape it is not possible for OneOncology partner practice physicians to be experts across the 25 different oncology and hematology diagnoses offered inside of OneOncology’s clinical decision support tool.

OneOncology takes a unique, physician-led approach to pathway development. OneOncology’s five disease groups, comprised of thought leaders across OneOncology’s platform, supported by our Medical Director of Pathways and Senior Director of Pharmacy, Therapeutics, and Pathways, consistently evaluate literature and current standards of care to author and approve OneOncology-specific treatment pathways.

These proprietary pathways, which are concordant with many nationally recognized evidence-based guidelines, are then authored inside of our clinical decision support tool, and are made readily available inside of OncoEMR, OneOncology’s electronic medical record, in real-time to all oncologists and hematologists across the platform,

aiding them in providing the best care they can for their patients.

OneOncology pathways are consistently updated as new treatment options are approved and/or new data and literature are presented at nationally recognized meetings. The ability of OneOncology to build and maintain its own clinical decision support tool allows the push of these practice-changing updates to providers through our clinical decision support tool with quick turn-around times.

Additionally, with the introduction of the EOM and other emerging value-based agreements, OneOncology is poised to reflect concordant pathways within these value-based arrangements. 



**DOWNLOAD PATHWAYS
CASE STUDY**



04

Operations

With bespoke technology, analytics and expertise, read how OneOncology's Operations Team drives transformational value.



Expanding Cancer Care Services

The key to a successful community oncology practice is providing life-giving care where patients live. Putting in place comprehensive services that patients need throughout their treatment allows practices to deliver on the full promise of community oncology: a continuum of cancer care built around the patient's needs.

We work with our partner practices to understand their current services, opportunities to offer related and complementary care, the surrounding competitive market for these services, and options for bringing additional oncological programs to patients. OneOncology has helped our practices establish radiation oncology programs, build in-office dispensing pharmacies, construct in-house labs and recruit multi-specialty physicians. Patients benefit from more timely, convenient, and coordinated care. And independent oncology practices improve their financial viability by offering the full range of services that cancer patients require.

Our team has decades of experience building and growing oncology practices and can identify the right opportunities to help a practice thrive. This evaluation process starts in early discussions with our practices — before they have joined OneOncology — and continues throughout our partnership. The result is a plan for practice growth and essential patient care offerings that we can jointly use to grow and measure success.

To help our partner practices deliver world-class cancer care to more patients, OneOncology also helps identify areas of growth: whether new markets, health system joint ventures or other partnerships.

In everything OneOncology does, we align with individual practice leadership to create a practice vision, build a roadmap for practice growth, and put in place a system to measure our joint progress and success.

OneOncology also ensures that our partner practices can offer their patients the latest, most innovative treatments. OneOncology leverages the scale of a growing network of leading community oncology practices to access new technologies, negotiate preferred pricing, and learn from practices that have already been there. We have helped our partner practices procure novel therapies, like theranostics, build genomics labs with the latest diagnostic and analytical equipment, and access new services that improve practice performance. 

How Analytics Drives Practice Value

OneOncology’s proprietary analytics platform, OneAnalytics, powered by our highly experienced Analytics Team, enables practices to monitor operational metrics, measure clinical quality, and optimize performance in value-based care arrangements. Our system-wide approach to data management and analytics use equips practices with the insights needed to thrive in competitive markets.

PRACTICE OPERATIONAL METRICS

Practices need continual insight into their performance to optimize operations. Self-serve dashboards on KPIs give practices the capacity to track operations, benchmark against other practices in the network, and inform decision-making at the

practice, provider, and patient levels. Providing this insight in real-time allows OneOncology practices to create meaningful change.

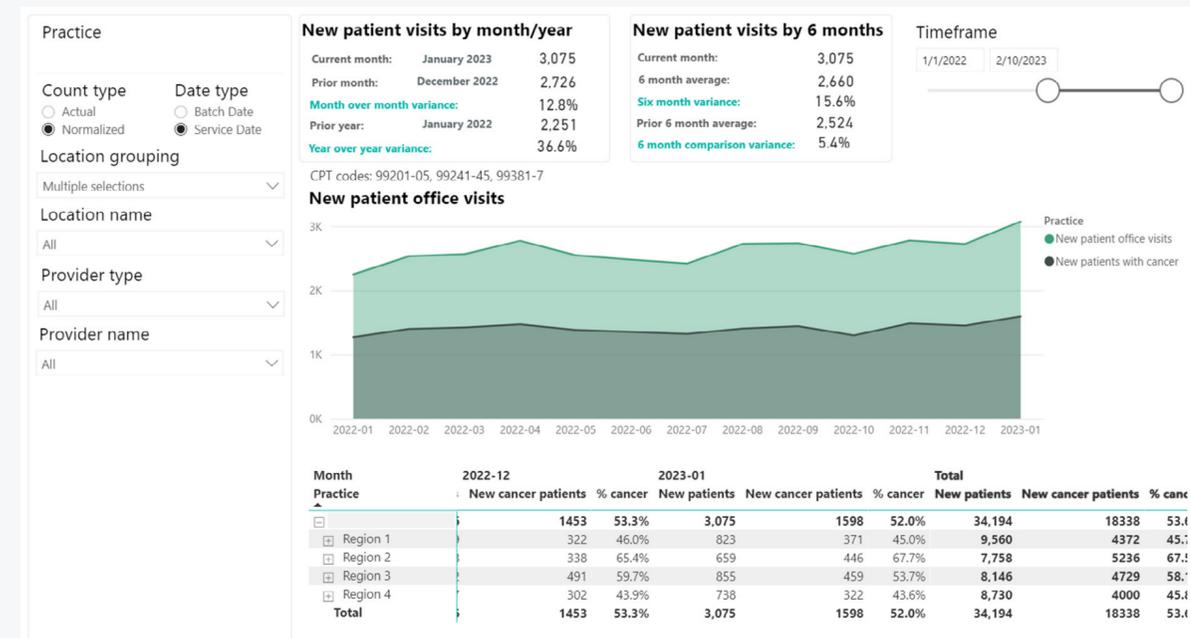
Practices use OneAnalytics to track a wide range of KPIs from drug inventory, revenue cycle management, provider

productivity, and patient volume to payer mix, drug utilization service line performance, and patient case mix.

CLINICAL QUALITY

Analytics related to clinical quality is critical for delivering superior patient care. In collaboration with OneOncology’s clinical leadership, the OneOncology Analytics Team enables practices in measuring clinical performance and comparing against internal and external benchmarks, ensuring patients receive the highest quality care.

Our clinical analytical capabilities examine NCCN guideline adherence, emergency department utilization, palliative care referrals, active treatment at end of life, staging completion, controlled substance ordering, pain and depression screening, patient satisfaction, and advance directive documentation.



Value-Based Care and Practice Transformation

With risk-based oncology models becoming more common, practices must be armed with the right tools and information to succeed. From commercial programs to the EOM, OneOncology’s analytical insights empower practices to understand their risks and opportunities in these models and surface opportunities to drive high performance in both government and commercial risk arrangements. Powered by the knowledge of OneOncology’s VBC thought leaders, the Analytics Team identifies provider-level trends, patient-specific opportunities, and provides tools that make it easier for practices to meet VBC program requirements. The use of tools that reduce administrative burden and insights that drive program performance help OneOncology practices thrive in a dynamic reimbursement environment.

Demonstrating Value to Managed Care

Community oncology continues to face severe economic challenges relative to hospital competitors with commercial reimbursement rates often 50% lower than their hospital peers, despite providing equal or superior quality of care, and materially better access and patient experience. Therefore, one of OneOncology's core priorities for 2023 is supporting our practices in managed care negotiations. Many community-based practices, including those in OneOncology, are under-reimbursed relative to the quality of care they provide, and we can now demonstrate this through publicly available price transparency data.

Public [discourse has increasingly highlighted hospital excesses](#): aggressive rate increases, under-investment in needed clinical staff, and expansion of 340B to wealthy areas, while leaving behind the constituents the program was meant to serve. However, neither public policy nor commercial payers have yet connected hospital anti-competitive behavior to the need to support independent providers, particularly community oncology.

Many payers have left community-based fee schedules flat for close to ten years despite the current inflationary environment, while hospital competitors continue to secure 5%, 10%, or even 15% rate increases. We understand the pressure payers are under with premiums built once annually and their reluctance to provide rate increases to the community. But without community oncology, everybody pays more for cancer care — patients, employers, payers, and taxpayers. That's why public and commercial payers must recognize the value of community oncology. We believe there is a large opportunity at many of our practices to improve reimbursement and better position them to capture share against anti-competitive hospital behavior.

Our approach is simple. We bring a value proposition that delivers quality outcomes, cost sustainability, and shared risk. Currently, we have three proven models that allow us to collaboratively engage with payers to share risk. By leading with value-based programs and educating them on the benefits of community oncology, we are seeing payers engage faster and with more interest than in the past and are optimistic about our ability to form differentiated payer partnerships to support our practices. 

What a Successful Integration Looks Like

We've heard it all from oncology leaders: My practice is too complex. Even if we wanted to join, there is too much to do. Plus, we don't even know where to start, nor do we have the time or expertise to join an oncology platform.

While change is difficult and requires planning to succeed, there isn't an integration the OneOncology team hasn't addressed. Our Integrations Team tailors everything based on what the practice needs, its timeline, and resources.

From onboarding practices with 100 physicians to those with three, the team has experienced it all when it comes to integrating complex systems for oncology practices.

Community oncology is complex, and change is hard. But with OneOncology's [experienced team](#), preparation, and attention to detail, joining the OneOncology platform is an expertly managed process that yields rewards for practices, care teams, and patients for years to come.



**DOWNLOAD INTEGRATIONS
SCENARIO CASE STUDY**

THREE KEYS FOR A SUCCESSFUL INTEGRATION:

- 1 Collaboration between OneOncology teams and the practice:** The number one key to success is an ongoing collaboration between the practice and our Integrations Team. Collaboration is key to creating the right plan and then executing it.
- 2 Thoughtfulness around change:** The absolute musts to get connected on the platform revolve around accounting and finance given the importance of group drug purchasing, finance management, and data analytics. When those are accomplished at "go-live," we always can layer in practice priorities and additional OneOncology value levers. Joining the platform doesn't have to happen all at once.
- 3 Practice leadership engagement:** Partnership between the physician owners, administrative leaders, and the Integrations Team is paramount. Transparent stakeholder communication and alignment mitigate the surprises physicians hate.



05

VBC & Policy

As we look to the future of community oncology, preparing to practice in any risk-based arrangement and building effective federal and state advocacy are keys to success. Find out how OneOncology is preparing for tomorrow's cancer care.

















100%

OF ONEONCOLOGY PARTNER PRACTICES
SUBMITTED THEIR APPLICATIONS FOR THE EOM.

A Platform Approach to Value-Based Care

In September all 15 OneOncology partner practices submitted their applications for the EOM. With a scheduled launch in July 2023, EOM is the successor to OCM, in which several OneOncology partner practices participated.

Throughout the fall of 2022, we broke down Medicare's value-based oncology care model by highlighting key differences between EOM and OCM and insights into key factors that practices should consider in deciding whether to participate. OneOncology has also engaged CMMI in a series of discussions regarding potential improvements to EOM and methodology enhancements for calculating target expenditures.



CLICK ON LINKS BELOW
TO LEARN MORE

- [Key differences between EOM and OCM](#)
- [Key factors that practices should consider in deciding whether to participate](#)

Despite challenges with the EOM, the application of all OneOncology practices to the latest government program reinforces our platform-wide approach to value-based care. This common participation will support centralized investments in high-value clinical pathways, leading value-based analytics, and clinical research that will drive performance in both government and commercial risk arrangements. Additionally, it enables us to provide a tailored support model, including vendor management, practice transformation planning, and help with program compliance.

As competitive pressures, as well as government and commercial payer policy headwinds increasingly strain community oncology, participating in EOM provides practices with an opportunity to forge an alternative path with potential economic upside that will position them to be successful in any reimbursement environment.

In the near-term, value-based programs can serve as an effective way to engage with payers to curb burdensome utilization management or support steerage to high-value community sites. In the long run, further movement to risk arrangements can insulate practices from the effects of government regulation, such as the Inflation Reduction Act. At OneOncology, we are proud of our practices' commitment to value-based care and look forward to making investments to support their success. 

Building Effective Advocacy

25 years ago, approximately 85% of cancer patients were treated in community cancer centers. Today, that number is closer to 50%. This shift has not occurred because of any reduced value that community practices deliver to patients.

Community practices continue to deliver high-quality cancer care at an affordable price close to where patients live. Rather, the major inflection points for this shift can be traced directly back to government policy. This included the Medicare Modernization Act of 2003 and even more importantly the Affordable Care Act that went into effect in 2010.

Oncology care is provided by very different models (academic centers, non-profit hospitals, community clinics) but the reimbursement among these models varies substantially. Over these 25 years, we have seen a predictable shift to care models that are reimbursed at higher levels, which has increased costs for patients. Examples of these payment differentials include 340B and vastly higher commercial payments to consolidated hospital-

based care. Government policy also dictates other crucial relationships such as the influence of pharmacy benefit managers over patients and practices.

Simply stated, government policy now sets the table for virtually all of the oncology market's competitive aspects. Seen through this lens, it becomes self-evident that effective advocacy efforts are critical to the success of any oncology organization. Recognizing this, OneOncology has expanded its efforts to impact policy. This includes the formation of an Advocacy Committee which includes member representatives from each OneOncology practice. The committee has enlisted Jeff Mortier, a partner at Farragut Partners for lobbying expertise. Jeff has years of experience specifically in the oncology policy space. His knowledge and existing relationships are invaluable.

Jeff is currently mapping out the OneOncology practice footprint as it overlaps with influential US House Representatives and Senators. Based on this overlap, OneOncology can build a targeted strategy for outreach to elected officials.

The list of national issues to address is long: hospital consolidation, payment parity, 340B, PBMs (including DIR fees), CMS fee schedule changes, prior authorization, the recently passed Inflation Reduction Act, the EOM, and value-based care. Notably, national-based advocacy has become more difficult over the past several years due to the difficulty of moving legislation through a dysfunctional Congress. This is expected to be even more true over the next two years given the divided Congress. However, an important exception is the possibility of hearings in the House of Representatives for issues such as 340B, PBMs, and prior authorization. Many of these programs are so dysfunctional and extreme, even modest public scrutiny could substantially impact the perception of legislators. Recent articles on 340B in the *New York Times* and the *Wall Street Journal* are already having a meaningful impact. Legislators who did not have to understand or have an opinion on this program have now been forced to pick a side.



Hospital pricing is coming under increasing scrutiny. The previous administration passed a federal law mandating hospital price transparency. Initially, the financial penalties were so low that it was far more advantageous for hospitals to ignore the law and pay the fine. Nevertheless, data from the few hospitals that did comply added substantially to the analysis of the 340B program. The current administration is weakly enforcing the current federal law. However, states have taken up the issue. Last year, Colorado passed a law that stipulated that hospitals that were not compliant

with federal law could not pursue patients in debt collection. Interest in this type of law has now spread to Pennsylvania and the New York City Council.

CMS recently released a proposed rule regarding prior authorization. Anyone on the front lines of medicine recognized what a broken process prior authorization has become. Insurance prior authorizations routinely delay or deny appropriate medical care producing real harm to patients. We welcome CMS's efforts for reform. However, the current proposed rule leaves out drugs entirely, effectively excluding cancer patients from most of the potential benefits of the rule.

OneOncology is drafting a formal comment letter to CMS which will include this criticism among others.

Because of the persistent national-level dysfunction described previously, opportunities for advocacy have shifted to the state level. These state-level opportunities particularly include PBMs, Medicaid, prior authorization, and price transparency. The Advocacy Committee seeks to empower each OneOncology practice to address the specific issues and opportunities in their state. We will assist each practice in setting up its own practice-level Political Action Committee (PAC)

including a turn-key agreement with Wiley Rein for legal consulting to establish the PAC. The Advocacy Committee will hold quarterly calls for information sharing and strategies for state-level issues. The Committee utilizes the OneCommunity Slack Channel as a repository for many of these best practices. Included on the Slack Channel are Op-Eds published on topics such as prior authorization and clinical peer review. We encourage all members to revise and publish similar Op-Eds in their local market.

New York Cancer & Blood Specialists has created an in-house advocacy tool. This tool can send out emails to patients that enable them to send issue-specific messages to their respective legislatures based on their personal addresses. It is effective for a practice to tell its legislative representatives that they represent a practice of over 200 doctors. It is far more impactful to tell these same legislators that they care for and can contact thousands of patients in their district! New York Cancer & Blood Specialists would like to share this tool with any OneOncology practice that has a state-level issue requiring patient outreach.

We also encourage OneOncology members to become leaders of their respective state oncology societies. Many of our current members serve on the boards of their state

oncology societies. We are hopeful that more members will seek these leadership positions. Ensuring that all OneOncology practices are members of their respective state societies is a good start.

In closing, I will not ask you to like or condone our current political environment - that is too big of an ask. I will ask you to recognize the critical aspect that healthcare policy will have on the future of OneOncology. I welcome any outreach to help any practice succeed with state-level advocacy efforts. I am always just a phone call or email away. I hope to hear from you soon.

Sincerely,



David Eagle, MD
Chair of Legislative Affairs
and Patient Advocacy
New York Cancer & Blood Specialists

“

25 years ago, approximately 85% of cancer patients were treated in community cancer centers. Today, that number is closer to 50%. This shift has not occurred because of any reduced value that community practices deliver to patients.”

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Join the Partnership.
Drive the Future.

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