



Northeast Louisiana Healthcare Planning

Police Jury Update

July 8th, 2025





Today's Discussion



Introduction to Whitecap



Project Overview



National & Regional Trends



Market Overview



Q&A



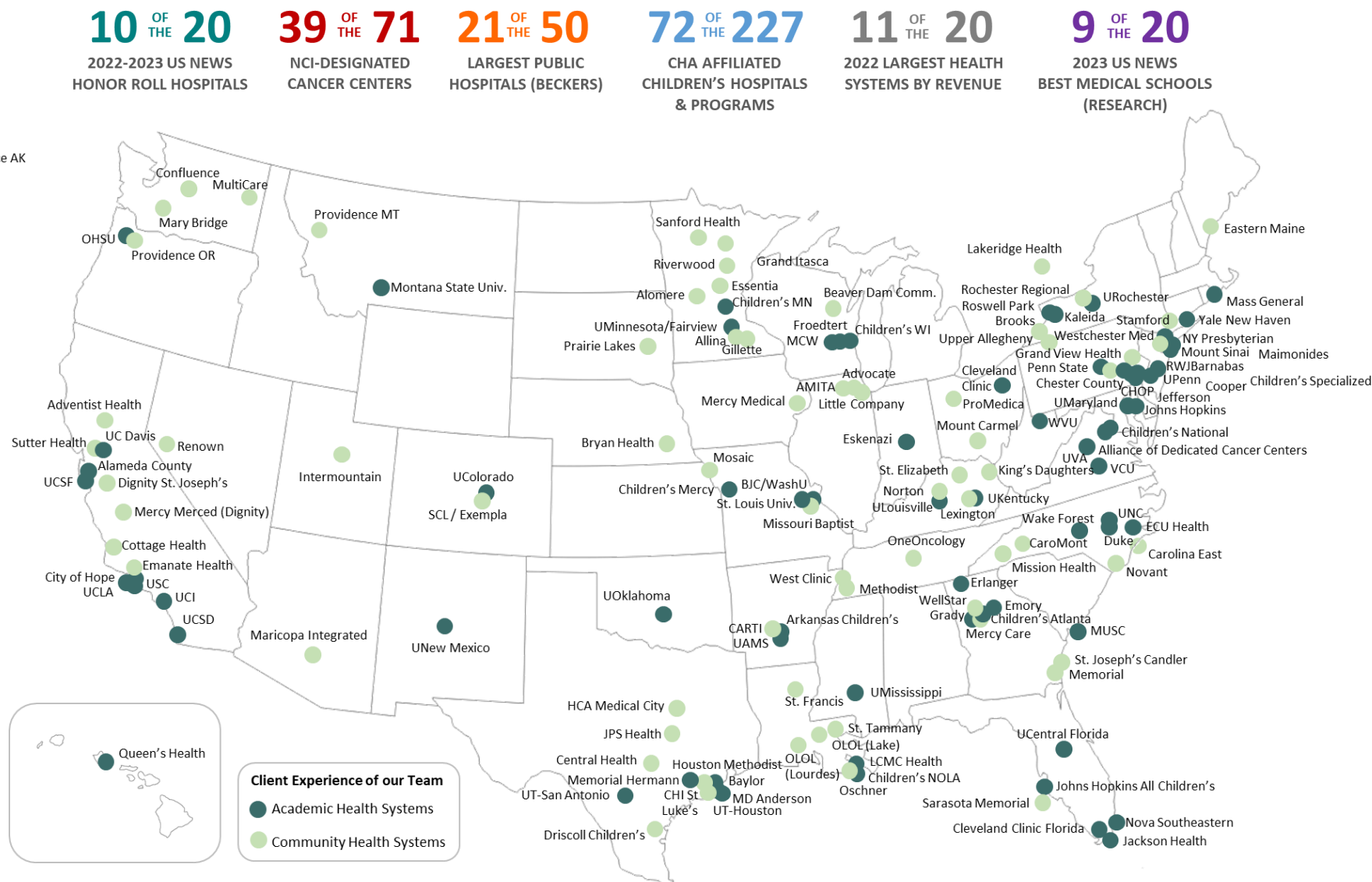
Next Steps



Introduction to Whitecap



- Whitecap works coast to coast primarily with academic and community health systems as well as other healthcare entities.
- Our team has also worked with hundreds of the nation's leading healthcare institutions.
- **Whitecap team members also have significant experience working on non-provider-specific healthcare community planning initiatives** (e.g., Alabama Health Authority, Minnesota Rural Health Consortium, Local Health Authorities in Texas)



Introduction to Whitecap



Service Portfolio

- Whitecap offers a full portfolio of strategic advisory services across various strategic sectors and functional areas

FUNCTIONAL EXPERTISE	SECTOR FOCUS						
	Academic Health Systems	Community Health Systems	Children's Hospitals	Cancer Programs	Public Hospitals	Rural Hospitals	
	Corporate & Financial Strategy	Keck Medicine of USC		 Children's Mercy	USC Norris Comprehensive Cancer Center	 Grady	ST. ANTHONY Regional Hospital
	Network Development	 Penn Medicine		 Children's Specialized Hospital An RWJBarnabas Health facility	 DukeHealth	 Jackson HEALTH SYSTEM	 ST. CROIX REGIONAL MEDICAL CENTER
	Partnerships & Affiliations	UC San Diego HEALTH SYSTEM	 Wellstar	 Children's MINNESOTA	 UR WILMOT MEDICINE CANCER INSTITUTE	 HARRISHEALTH SYSTEM	 Medi-Sota Serving Rural Healthcare
	Organizational Design & Funds Flow	 OHSUHealth	 FRANCISCAN MISSIONARIES OF OUR LADY HEALTH SYSTEM	 Children's Hospital New Orleans LCMC Health	 MASSEY COMPREHENSIVE CANCER CENTER VCU	 CENTRAL HEALTH	 Vernon Memorial Healthcare
	Capital Asset Planning	 UNC HEALTH	 Providence	 MaryBridge Children's MultiCare	THE UNIVERSITY OF TEXAS MD Anderson Cancer Center	 SARASOTA MEMORIAL HEALTH CARE SYSTEM	 Riverwood HEALTHCARE CENTER
	Service Line Planning	Yale NewHaven Health	 AdventistHealth	 Children's Healthcare of Atlanta	 UK HealthCare MARKEY CANCER CENTER	 UMC UNIVERSITY MEDICAL CENTER NEW ORLEANS	 Tri-County Health Care



Project Overview

Project Overview



Project Background

Lincoln Health Foundation

Mission Statement:

To improve health care outcomes for residents of Lincoln Parish

Vision Statement:

To facilitate health-related initiatives, programs, and services that improve the quality of life for the residents of Lincoln Parish

- Lincoln Parish is one of the fastest growing communities in the state of Louisiana, both residentially and economically, and there is almost \$200 million of economic development on the books in the city of Ruston alone.
- Meanwhile, the healthcare landscape in the region is ever-changing (e.g., AHM purchased NLMC in 2020 and Green Clinic in 2024), but critical gaps remain, and the region's healthcare infrastructure must continue to modernize to support economic development and population growth.
- **Project Objective:** Develop a practical and financially viable healthcare strategy that addresses the critical healthcare gaps in the community, establishes a robust healthcare foundation for the next 20+ years, and enables the Foundation and its Partners to maximize their missions.



Project Overview

Project Workplan & Phasing

01

BASELINE ASSESSMENT

Stakeholder Interviews

National & Regional Trends

Define the Market

Market Assessment

Identify Critical Gaps

02

DEFINING THE FUTURE

Visioning

Clinical Investment Priorities

Service Distribution Priorities

Build/Buy/Partnership Evaluation

Provider Engagement Strategy

03

BUSINESS PLANNING

Strategic Scenario Development

Prioritization & Phasing

Preliminary Financial Feasibility

Preferred Direction & Finalize Plan

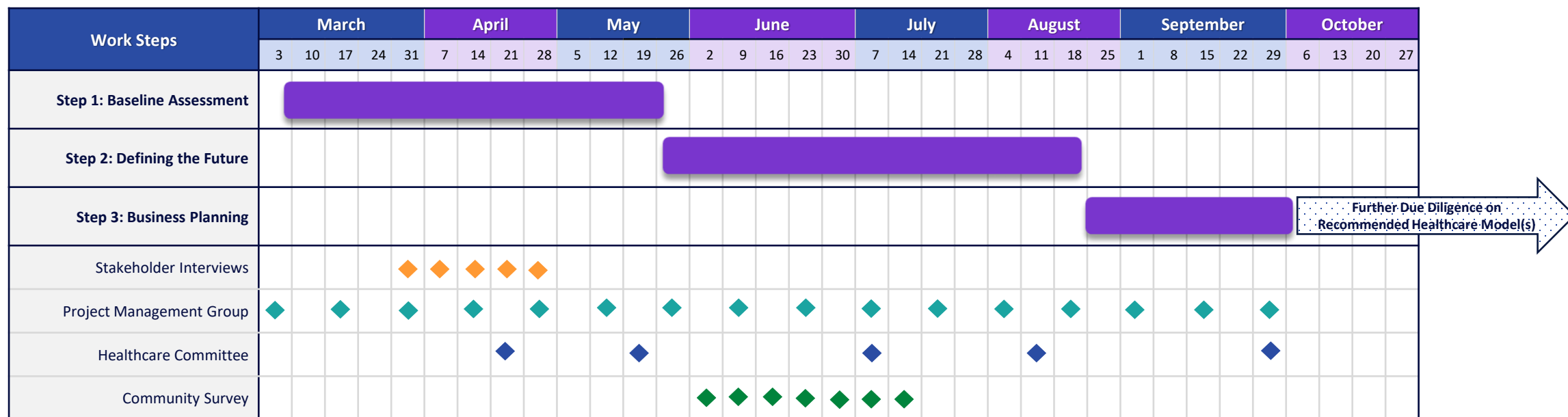
Initiate Provider Engagement

Project Overview



Project Timeline

- Whitecap anticipates needing ~6 months to complete Steps 1 through 3. The engagement kicked off in earnest by early March, and we believe we can deliver the scope of work by the end of September.
- Following the completion of Step 3 below, Whitecap will be available, as requested, to help your healthcare committee engage in further due diligence on recommended healthcare model or models.





Healthcare Committee Agendas

Healthcare Committee #1

- National & Regional Trends
- Initial Market Assessment
- Interview Summary
- Gap Assessment Scorecard

Healthcare Committee #2

- Market Assessment Update
- Lincoln Parish Supply/Demand Dynamics
- Visioning and Guiding Principles
- Strategic Scenarios & Options

Healthcare Committee #3

- Preliminary Survey Results
- Build/Buy/Partnership Evaluation
- Provider Engagement Strategy
- Future State Vision

Healthcare Committee #4

- Prioritization & Phasing of Strategic Scenarios
- Preliminary Financial Feasibility
- Determine Preferred Direction
- Finalize Plan



Vision Statement:

To facilitate health-related initiatives, programs, and services that improve the quality of life for the residents of Lincoln Parish



Strategic Focus Areas

Community Impact

Growth & Access

Fiscal Responsibility

Partnerships

Quality & Outcomes



Guiding Principles (DRAFT)

Focus Area	Strategic Aim
Community Impact	Future healthcare investment will be informed by input from the Lincoln Parish community at large and resources will be prioritized in a manner that maximizes community impact.
Access & Growth	Future healthcare resources will be prioritized in a manner that expands local access to high quality healthcare and enables more patients to receive care locally within Lincoln Parish.
Fiscal Responsibility	Resources are not unlimited, and therefore future healthcare investments must be supported by a viable financial business plan that will enable even further investment in the Parish.
Partnerships	Lincoln Parish must be supported by reliable partnerships between the Parish community, its healthcare providers and potential donors – whereby all parties are aligned and transparent with each other around how best to advance healthcare services in Lincoln Parish.
Quality & Outcomes	All future healthcare investments will be geared towards advancing the healthcare quality and outcomes for residents of Lincoln Parish and anyone seeking care in Lincoln Parish.



Community Survey

To capture community feedback on the healthcare landscape for Lincoln Parish, a community survey was distributed in June.

Example Questions:

- In one word, how would you describe current healthcare services in Lincoln Parish?
- Do you seek healthcare at Northern Louisiana Medical Center (Allegiance) in Ruston?
- Which healthcare services do you leave Lincoln Parish to access?
- Do you feel that the uninsured and underinsured populations have adequate healthcare resources in Lincoln Parish?
- Which healthcare provider do you trust to provide care for you and your family?
 - Allegiance (Northern Louisiana Medical Center and/or Green Clinic),
 - St. Francis
 - Ochsner
 - Willis Knighton
 - Glenwood
 - Reeves Memorial Medical Center
 - Jackson Parish Hospital
 - Other
- What are key outcomes that you would expect from a healthcare plan for Lincoln Parish?





Final Report

- The final report will address several building block questions to establish a viable strategy for elevating healthcare delivery services in Northeast Louisiana





National & Regional Healthcare Landscape



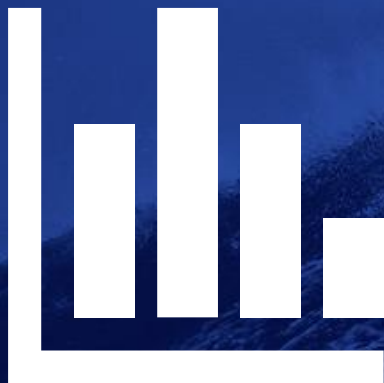
National Healthcare Landscape: *What We Know*

- **Higher cost of doing business is here to stay**
 - 19% increase in total expense per calendar day, YTD 2021–2024
- **The economics of healthcare for hospital providers are shaky – winners (conglomerates) and losers (rurals)**
 - Growth is king when it comes to economic performance
 - 40% of hospitals are operating in the red; 31% of rural hospitals at risk of closing
 - 4.3:1 = Ratio of S&P downgrades to upgrades of not-for-profit hospitals
- **Healthcare provider consolidation – both at the hospital and physician group level – continues unabated, even though the FTC has been cracking down on “in-market” mergers**
 - Only 30% of community hospitals are considered “independent” (i.e., not affiliated with a larger health system)
- **Current state of hospital bed capacity is calamitous, unsustainable**
 - National spikes in bed occupancy rates and ALOS show the extent of current capacity constraints in urban markets – but rural hospitals remain largely underutilized (rural)
- **Exacerbated physician shortages in rural areas**
 - Rural doctors are on average 18 years older than their rural counterparts
 - Only 10% of physicians live in rural areas compared to 20% of the population
 - More physicians becoming specialists, furthering the gap in primary care coverage, especially for rural areas



Lincoln Parish Healthcare Landscape: *What We've Heard So Far*

- Ruston is a vibrant, family friendly community and a “hidden gem” in the southeast. A thriving healthcare ecosystem is the missing component in Ruston and Lincoln Parish in an otherwise flourishing community.
- Significant concern that economic and community development within Lincoln Parish will be stalled unless a more modern and robust healthcare ecosystem is developed.
- Significant uncertainty from the community around future plans for expansion of healthcare services and assets/facilities within the Parish.
- There is a stark contrast between what the community expects and what is being provided to the community in terms of healthcare.
- Too many people are leaving the local community today for healthcare services that should be provided locally – either due to lack of services or lack of trust.
- Significant changes will be needed to restore the faith in local healthcare and keep the community from leaving the Parish for healthcare services.



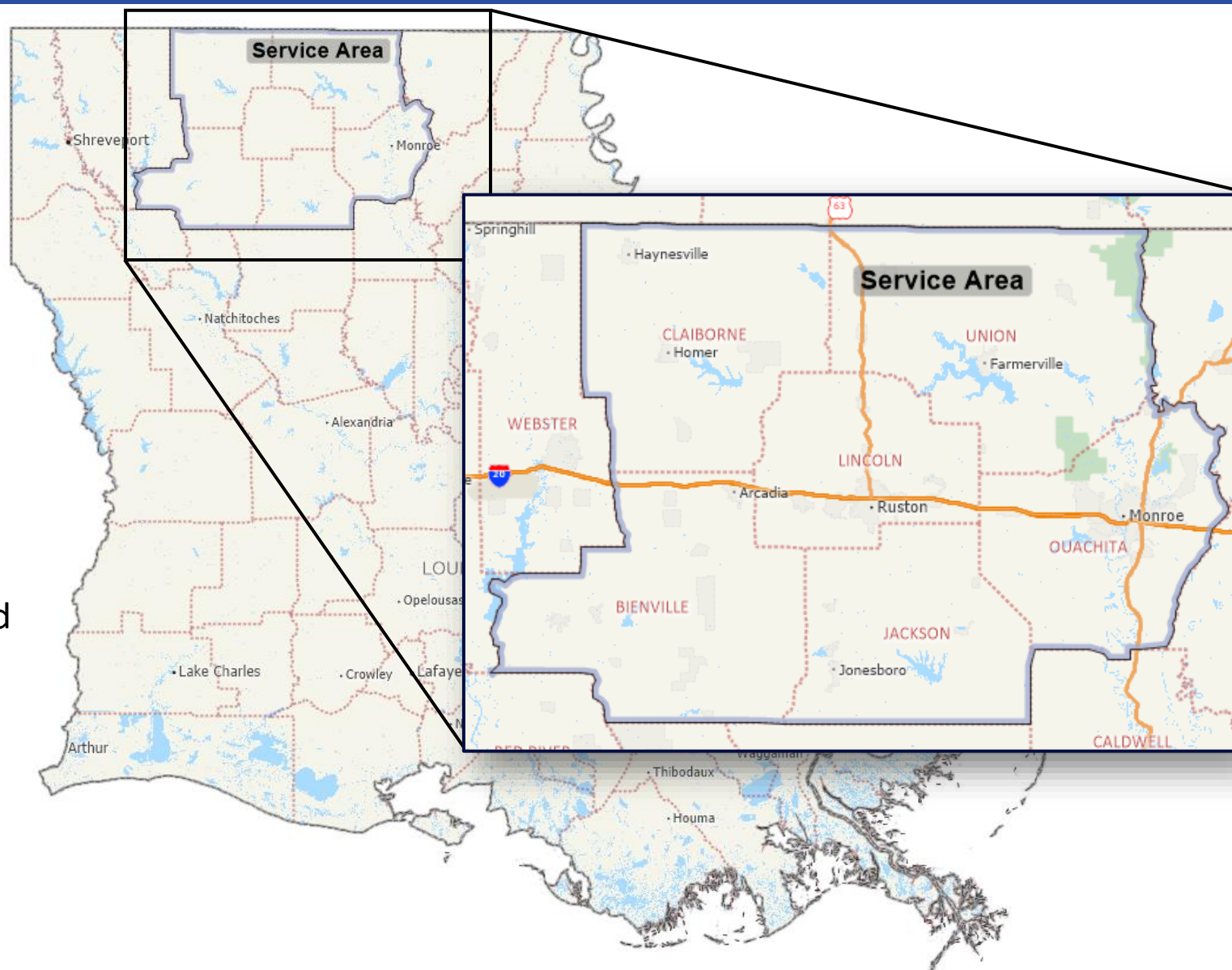
Market Overview

Market Overview



Service Area Definition

- A critical first step to evaluating the market opportunity for healthcare development in northeast Louisiana is to define the target geography
- The service area used in this market assessment encompasses six parishes across northern Louisiana:
 - Bienville
 - Claiborne
 - Jackson
 - Lincoln
 - Ouachita
 - Union
- Webster and Winn parishes were not included due to few patients receiving care in Lincoln Parish
- Ouachita was included as it is the regional population center, but the western ZIPs of Ouachita may be more relevant to Lincoln Parish



Initial Market Assessment

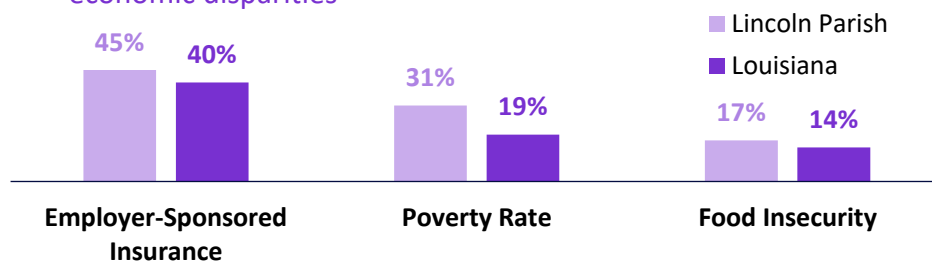


Key Findings

- 1 POPULATION & AGING**
- An aging population will drive increased healthcare activity across the entire the service area
 - In Lincoln Parish, economic growth is expected to attract a growing 30- to 50-year population, adding unique healthcare demand pressures

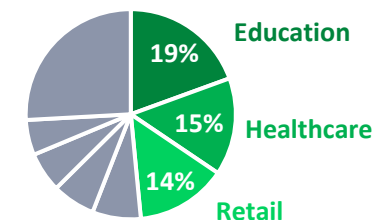
Parish	Pop	2024		2024 – 2029 CAGR		
		% 30-50	% 65+	Total	30-50	65+
Ouachita	159,927	25%	16%	0.0%	0.2%	1.9%
Lincoln	48,478	22%	15%	0.0%	0.9%	1.5%
Union	20,575	22%	23%	-0.5%	-0.1%	1.2%
Jackson	14,689	23%	22%	-0.4%	-0.4%	1.5%
Claiborne	13,552	24%	23%	-0.9%	-0.7%	1.0%
Bienville	12,443	22%	23%	-0.8%	-0.8%	1.2%
Total SA	269,664	24%	18%	-0.1%	0.2%	1.7%

- 2 DEMOGRAPHIC DIVIDE**
- Lincoln Parish has high rates of employer-sponsored insurance and relatively lower levels of Medicaid and uninsured populations
 - At the same time, the parish faces notable challenges with poverty, food insecurity, and housing, highlighting underlying social and economic disparities



- 3 ECONOMIC DEVELOPMENT**
- Lincoln Parish is experiencing a business boom, with nearly \$140M in planned development over the next several years
 - With 15% of employed residents working in healthcare (and more businesses on the way), continued healthcare investment will be essential to the region

Employment by Industry

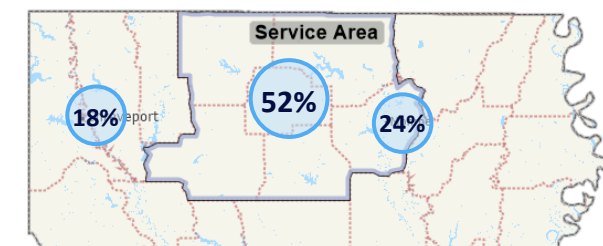


- 4 PROVIDER DEMAND**
- Lincoln Parish's population can support full-time physicians in many high-demand specialties
 - More specialized services (e.g., allergy, endocrinology, nephrology, neurosurgery, CV surgery), are better sustained at a regional level

Lincoln Parish FTE Demand



- 5 HEALTHCARE OUTMIGRATION**
- In 2021, nearly half of Lincoln Parish patients seeking inpatient care traveled outside the parish, primarily to Monroe or Shreveport hospitals
 - OB/GYN, Cardiovascular, and Neuroscience services were among the top out-migrating service lines, some of which could be retained with strengthened local offerings and increased confidence in care closer to home

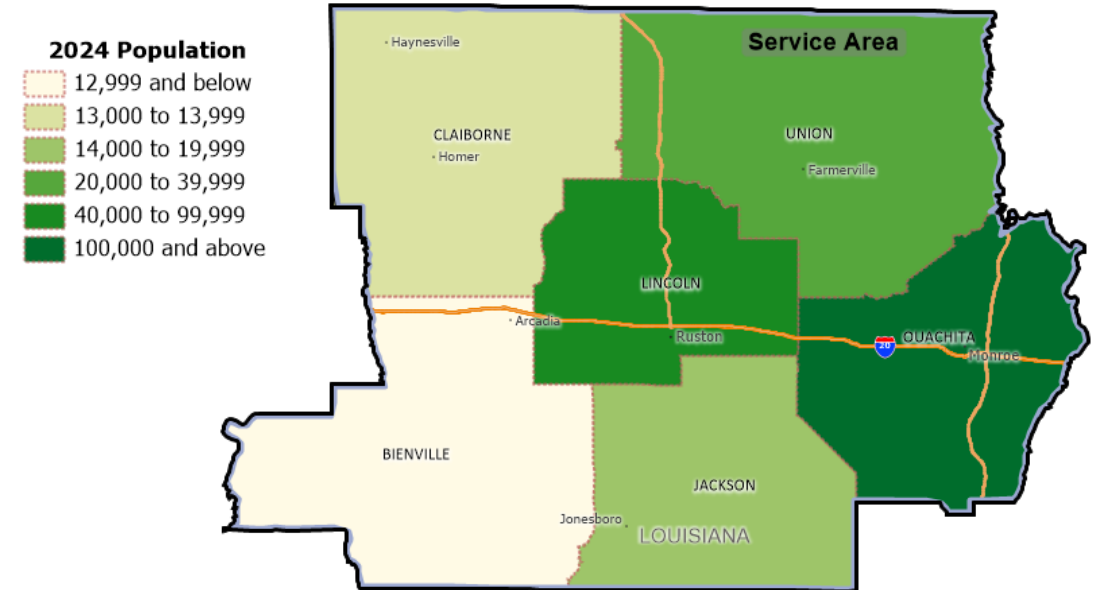


Market Overview



Population & Demographics

- In 2024, the service area had a population of 269K, with 77% residing within Ouachita and Lincoln Parishes
- Over the next five years, the total population is expected to decrease; however, the 65+ population is expected to grow from 18% to 19% of the total
- Unlike most parishes in the region, Lincoln is expected to see growth in the 30 to 50-year population, signifying an increase in the parish's working population



Parish	2024					2029					2024-2029 Change			
	Pop	30-50 Pop	% 30-50	65+ Pop	% 65+	Pop	30-50 Pop	% 30-50	65+ Pop	% 65+	Pop Δ	CAGR	30-50 CAGR	65+ CAGR
Ouachita	159,927	40,585	25%	26,208	16%	159,899	41,062	26%	28,838	18%	-28	0.0%	0.2%	1.9%
Lincoln	48,478	10,460	22%	7,154	15%	48,567	10,962	23%	7,725	16%	89	0.0%	0.9%	1.5%
Union	20,575	4,608	22%	4,800	23%	20,046	4,580	23%	5,088	25%	-529	-0.5%	-0.1%	1.2%
Jackson	14,689	3,439	23%	3,209	22%	14,364	3,368	23%	3,462	24%	-325	-0.4%	-0.4%	1.5%
Claiborne	13,552	3,297	24%	3,150	23%	12,971	3,185	25%	3,313	26%	-581	-0.9%	-0.7%	1.0%
Bienville	12,443	2,709	22%	2,828	23%	11,958	2,606	22%	3,001	25%	-485	-0.8%	-0.8%	1.2%
Total SA	269,664	65,098	24%	47,349	18%	267,805	65,763	25%	51,427	19%	-1,859	-0.1%	0.2%	1.7%

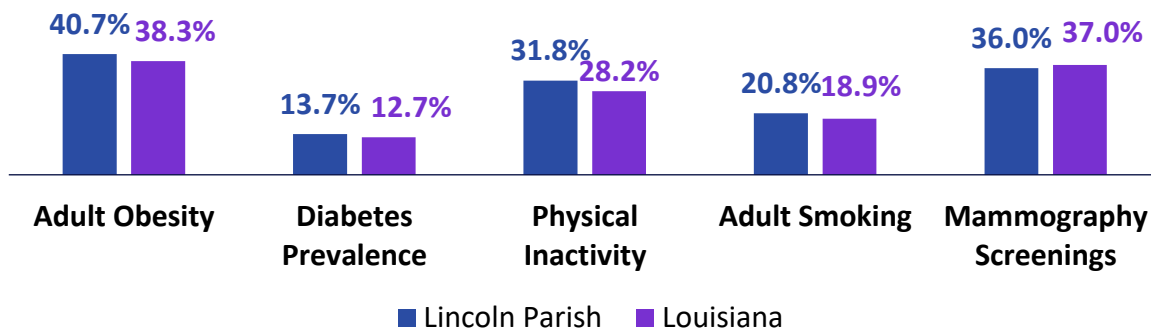
Market Overview



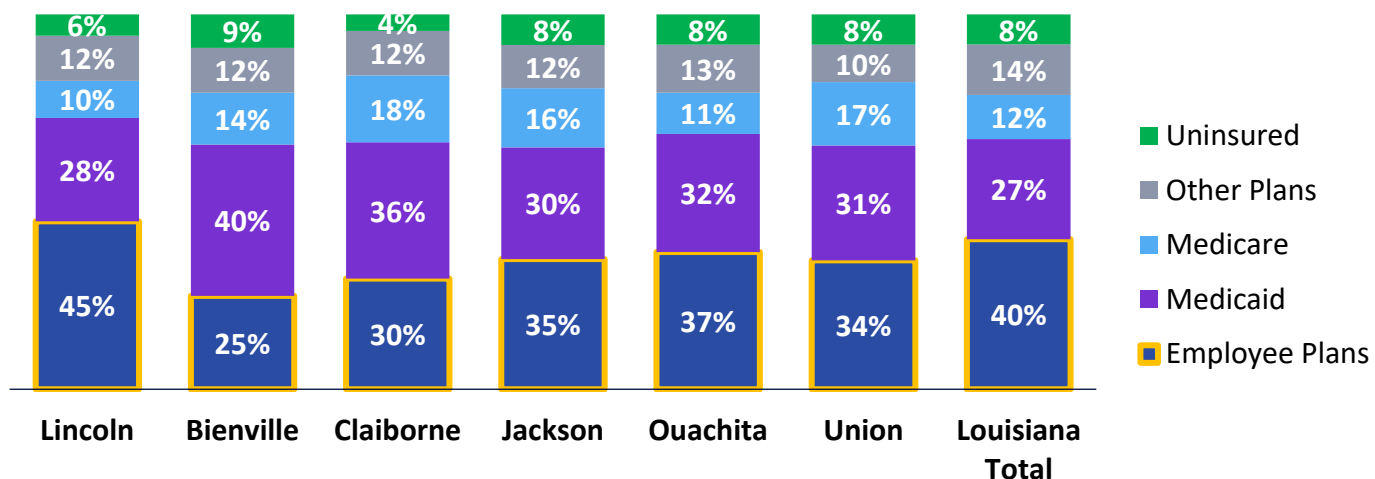
Lincoln Parish Public Health Profile

- Lincoln Parish has a higher employer insurance coverage rate compared to surrounding parishes and the state
- Lincoln Parish also faces higher poverty, food insecurity, and housing issues, indicating economic and social disparities
- Health indicators are slightly worse compared to the state, with higher rates of obesity, diabetes, and smoking

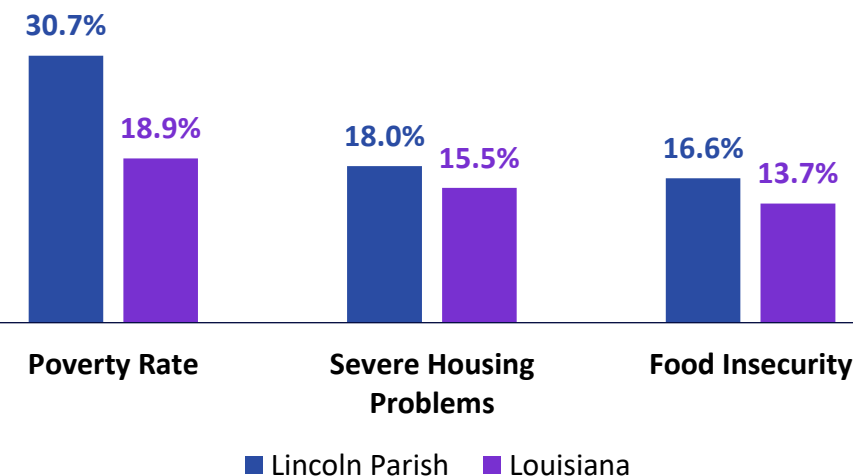
Health Indicators



Health Coverage Mix



Socioeconomic Indicators

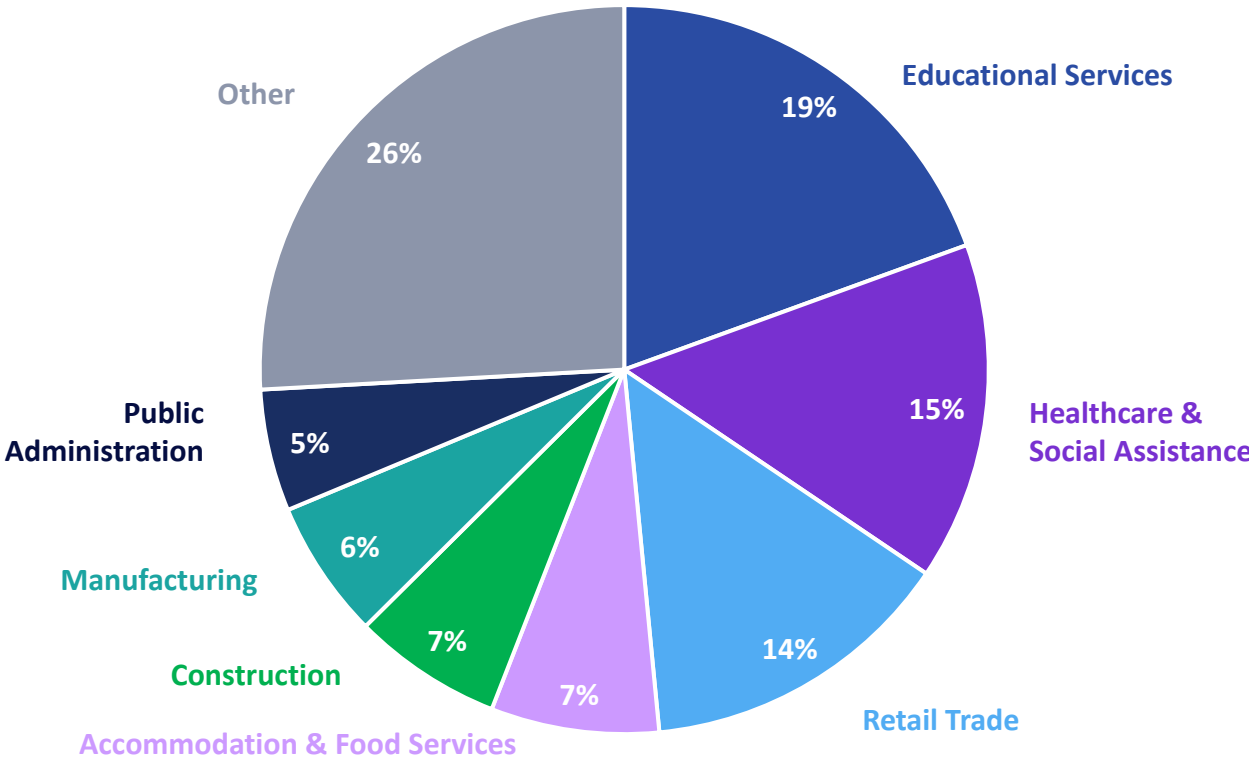




Lincoln Parish Economic Development

- Home to three colleges, nearly 1/5th of employed Lincoln Parish residents work in the education industry
- 15% of employed residents work in the healthcare industry, highlighting the importance of investing in the future of healthcare in Lincoln Parish

Lincoln Parish Employment by Industry



Top Employers

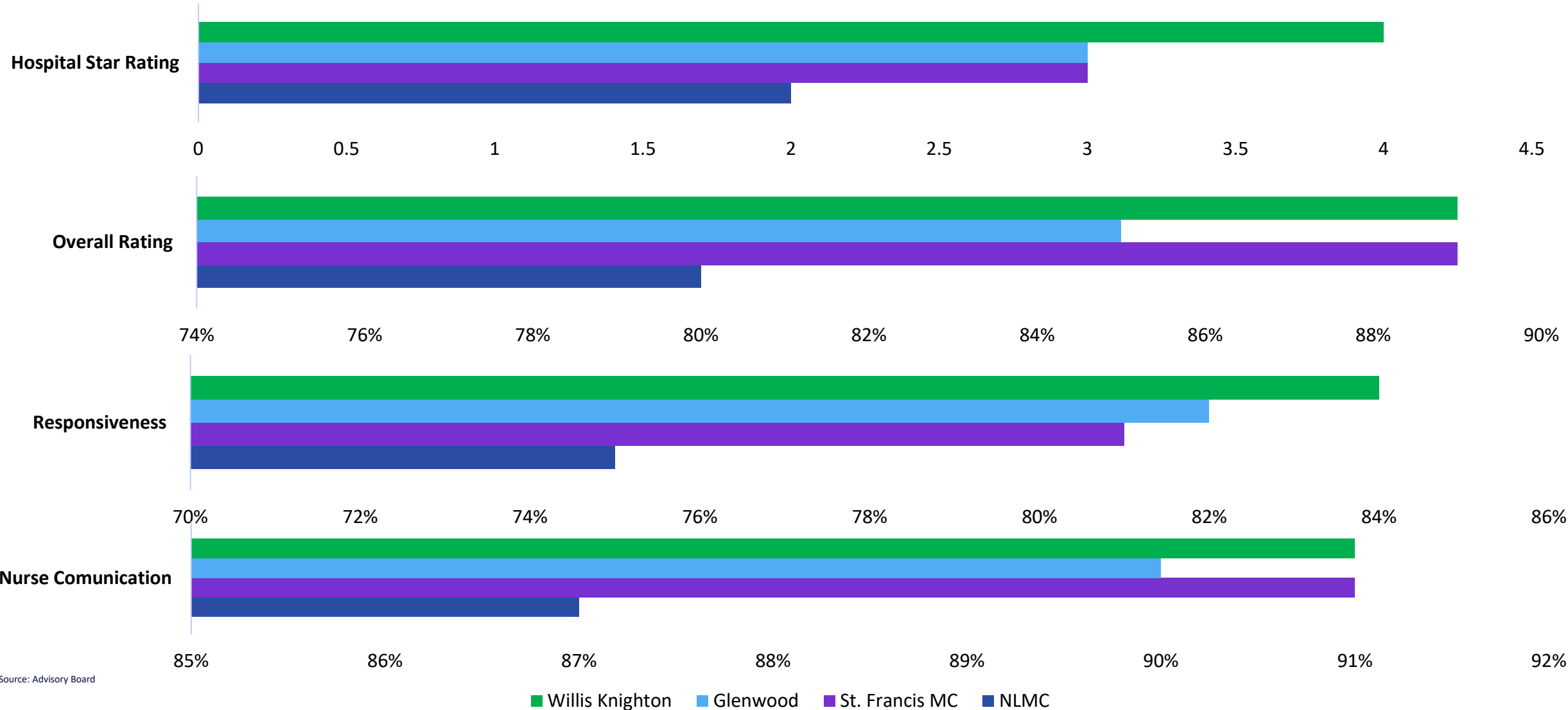
Louisiana Tech University
Lincoln Parish School Board
Grambling State University
Northern Louisiana Medical Center
Green Clinic
Methodist Children’s Home
HGA
City of Ruston

Universities

Louisiana Tech University
Grambling State University
Louisiana Delta Community College - Ruston Campus



HCAHPS Quality Comparison



Source: Advisory Board



Q&A



Next Steps



Next Steps

- Healthcare Committee Meeting #3 on 7/9
- Finalize Survey Results by the end of July
- Finalize Report by the end of September