

# *Winning in Primary Care: A Capitated PCP Model*



**Tamara StClaire, PhD**  
Chief Strategy and  
Business Transformation  
Officer, MaineHealth



Winter Roundtable: February 18 - 20, 2026

# *Mission Critical: Clinicians Need to Control the Pathways of Critical Care*



**Demetri Giannikopoulos**  
Chief Innovation Officer,  
RadAI



# Mission Critical



**Demetri Giannikopoulos**  
Chief Innovation Officer at Rad AI





# Cutting Through the Noise



# “If You Don’t Do Macro, Macro Does You”



**Keith  
McCullough**  
CEO  
Hedgeye Risk  
Management

It’s important to understand and actively manage macroeconomics, rather than passively being subject to its effects.



# Mary Meeker

AI Trends Report 2025  
(Kleiner-Perkins/BOND)

Mary Meeker is known as the "Internet Prophet" .



Her 2025 AI Trends report used the word unprecedented over

**50 times!**

AI Development Trending =

Unprecedented

BOND

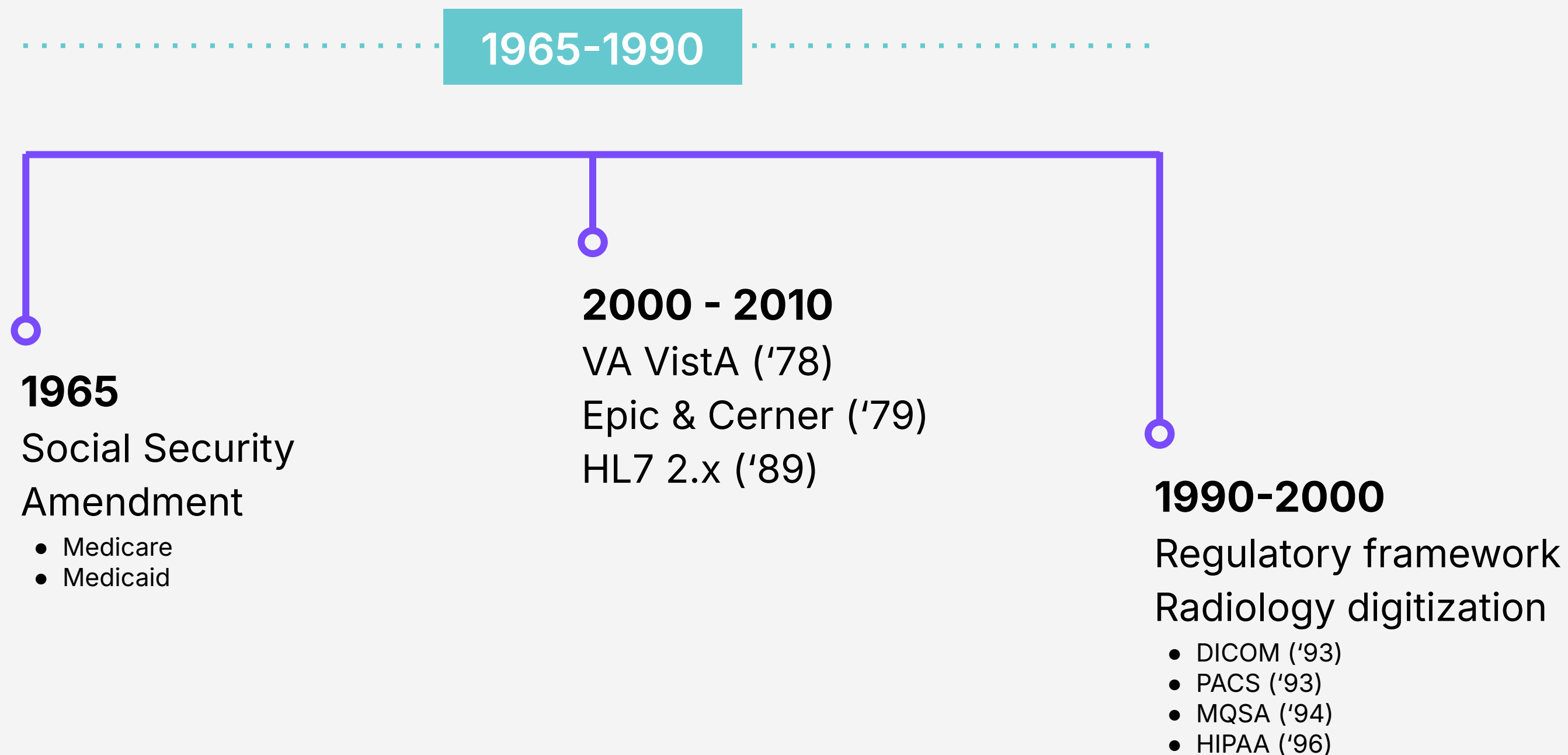


# Unprecedented Demand



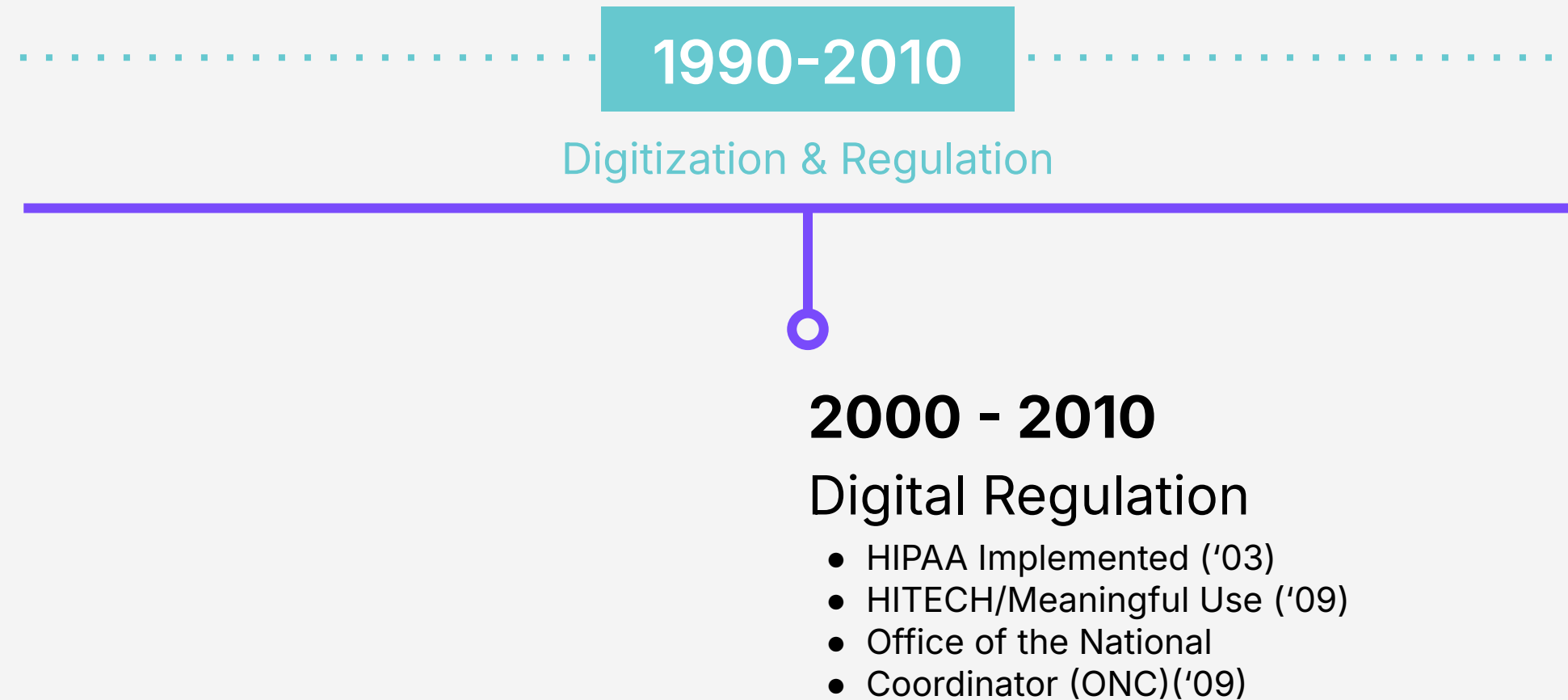


# Healthcare AI: a decades-long journey disguised as an overnight success



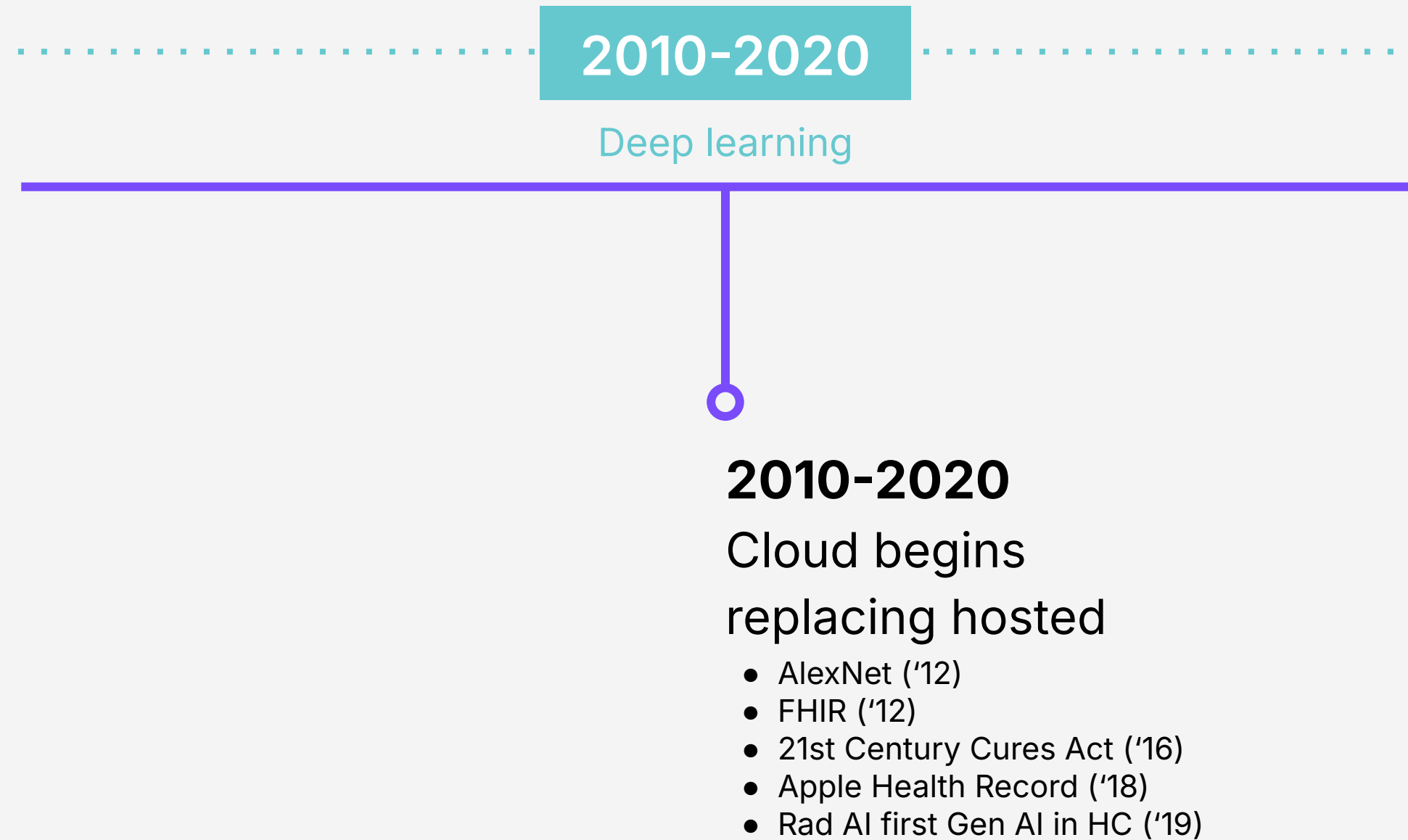


# Healthcare AI: a decades-long journey disguised as an overnight success



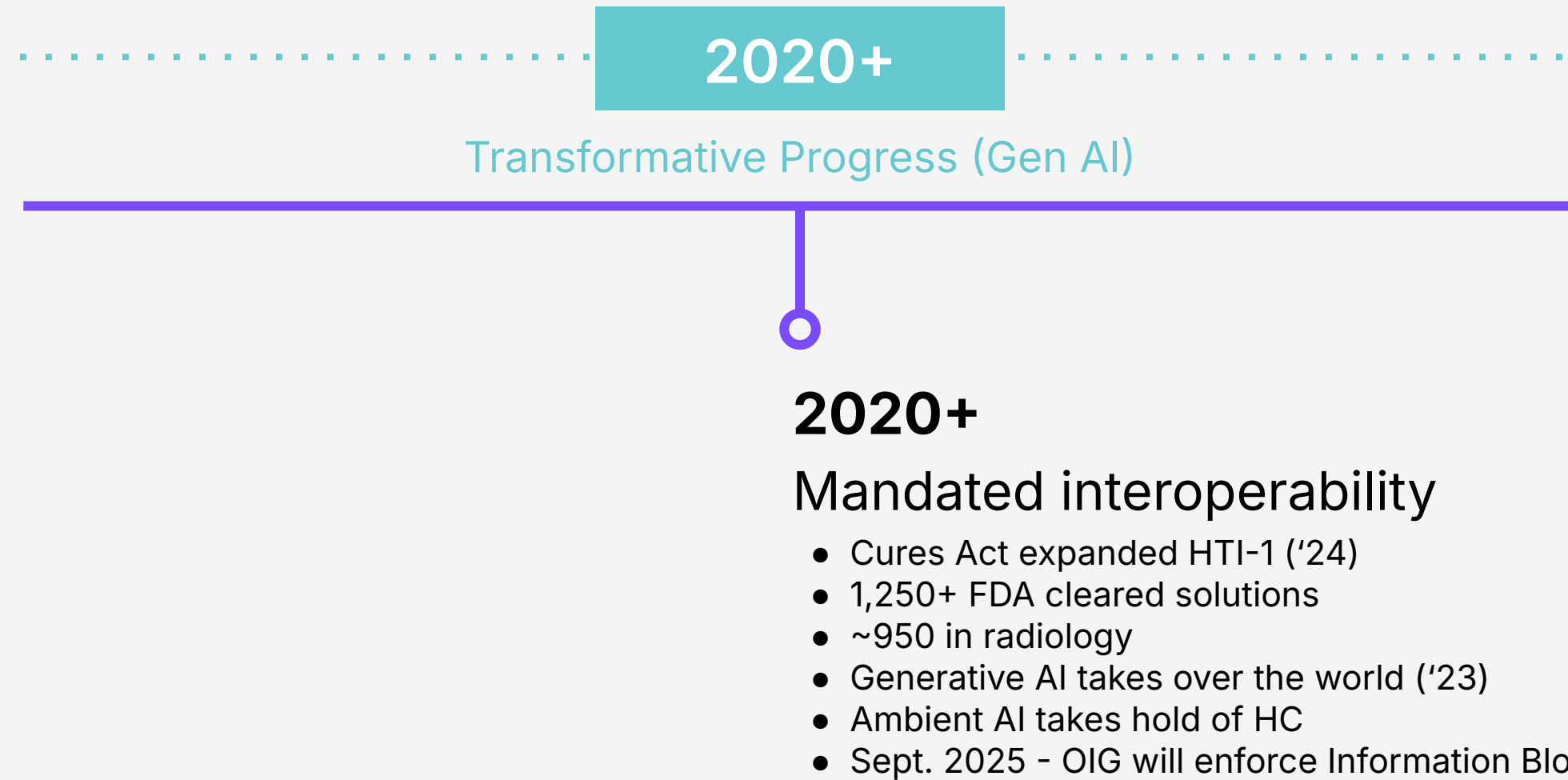


# Healthcare AI: a decades-long journey disguised as an overnight success



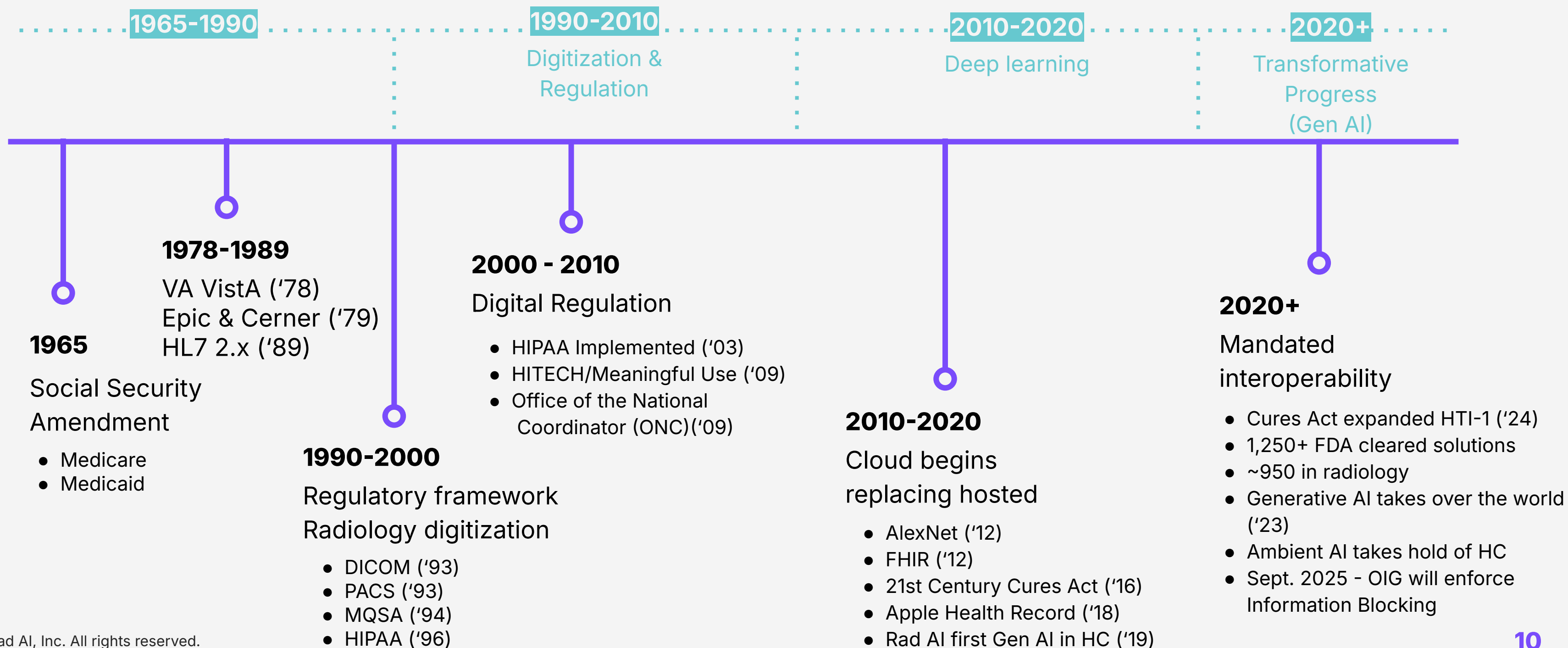


# Healthcare AI: a decades-long journey disguised as an overnight success





# Healthcare AI: a decades-long journey disguised as an overnight success





# 5 Step AI Framework

## Assess

Understand current state and context.

## Define

Clarify the problem and success metrics.

## Select

Choose the right partner.

## Execute

Implement with precision.

## Monitor

Track and optimize performance in real time.

# Radiology's Global Influence



In recent KLAS survey of 256 US health system leaders, Rad AI was named **one of the top 5 companies** being considered as AI partners, alongside Oracle, Epic, Microsoft and Workday

(KLAS, April 2025)



**Epic**

 Microsoft

 workday.

 Rad AI

# Radiology is the Backbone of Care, but It's Under Siege

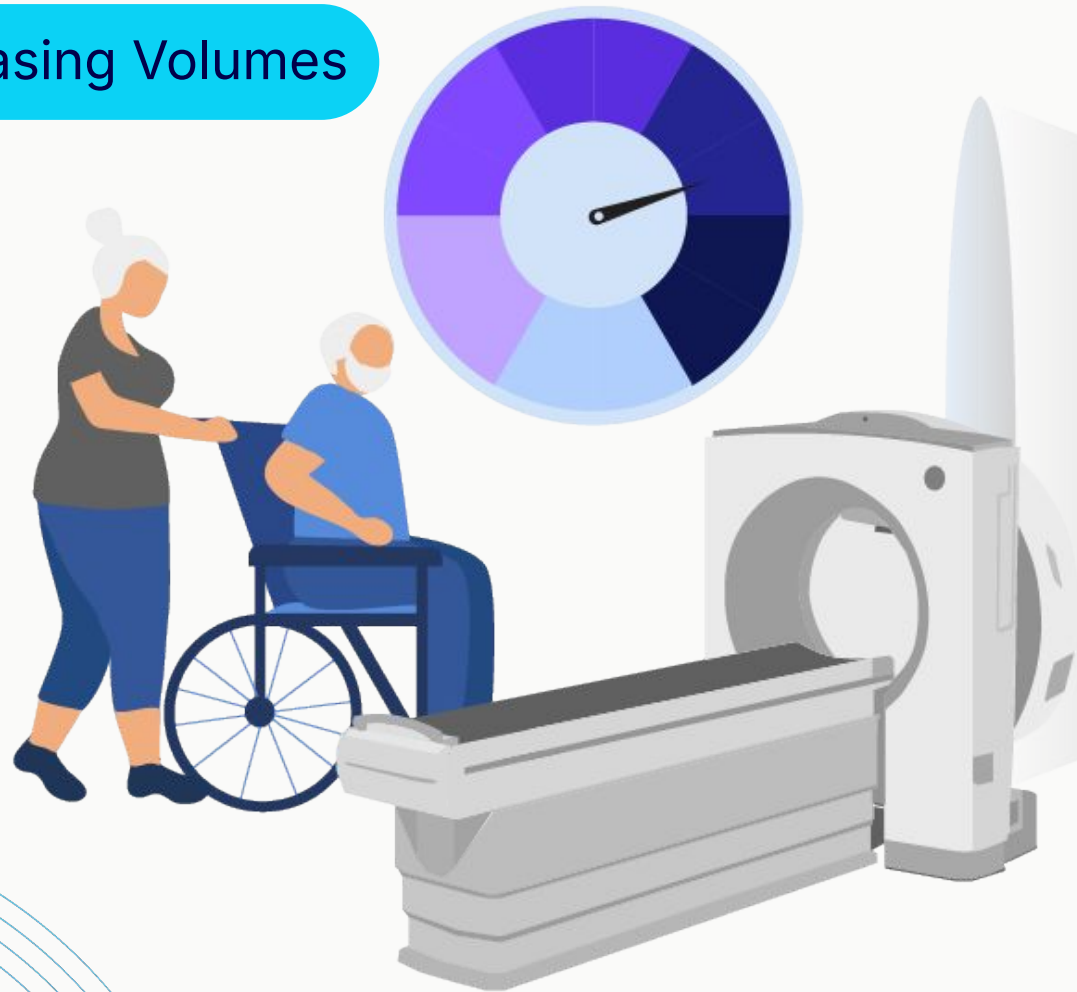
Aging Populations

Rising Imaging Complexity

Higher Accuracy Expectations

Increasing Volumes

## RADIOLOGISTS



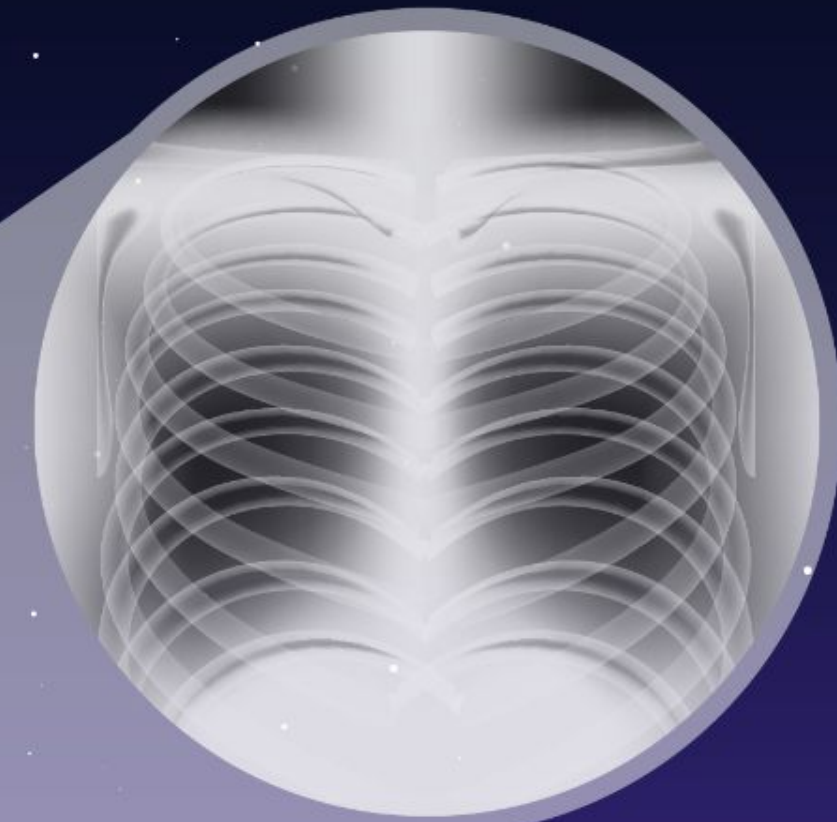
Radiologist Shortages

## CHALLENGES

Burnout & Retention Issues

Mounting Workload

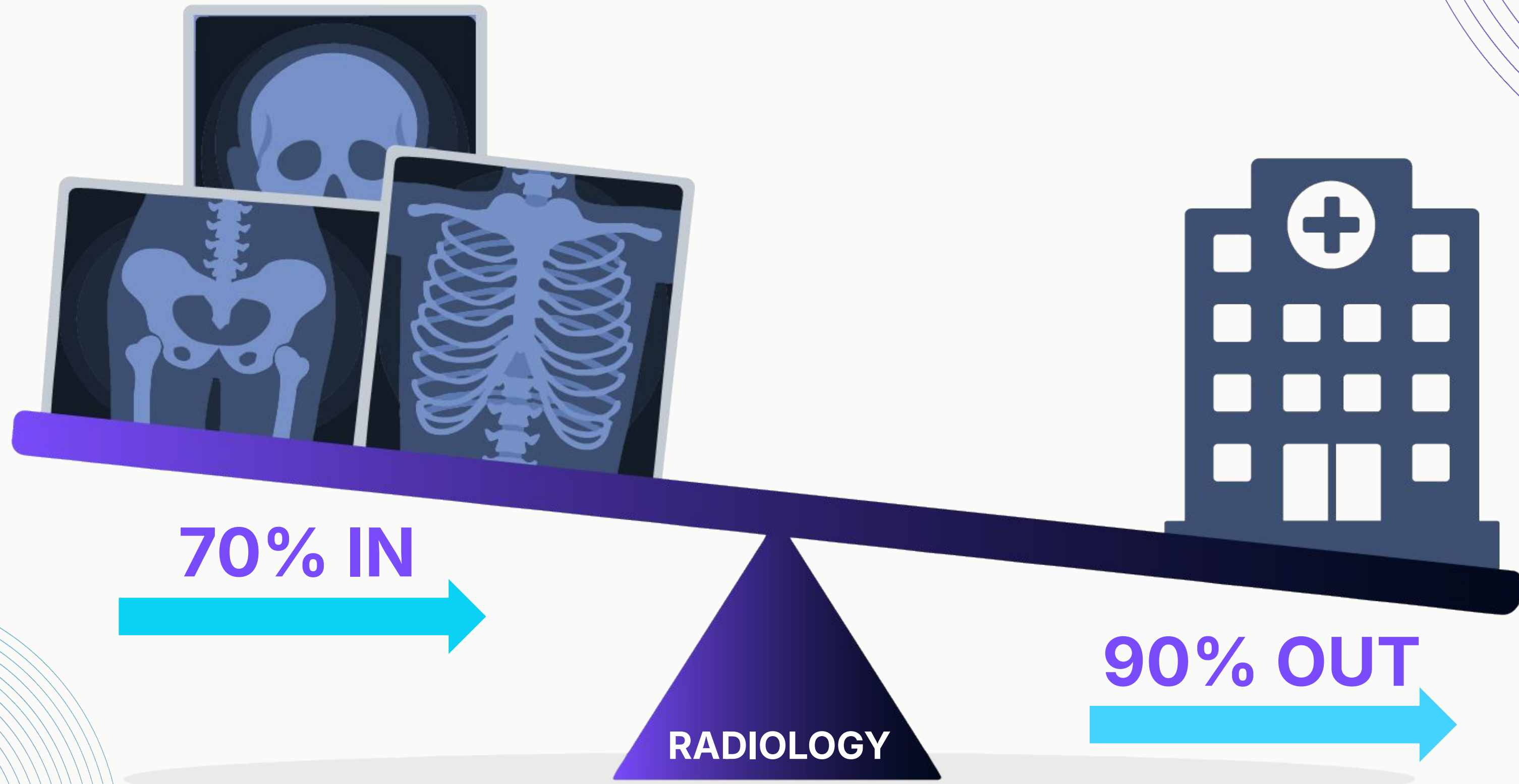
# Radiology Provides Unique Opportunities



Uncertainty into clarity, shadows into stories,  
pixels into proof.

Struggle to break and find balance through  
under relentless demand.

# Turning Radiology Into the Fulcrum of Care

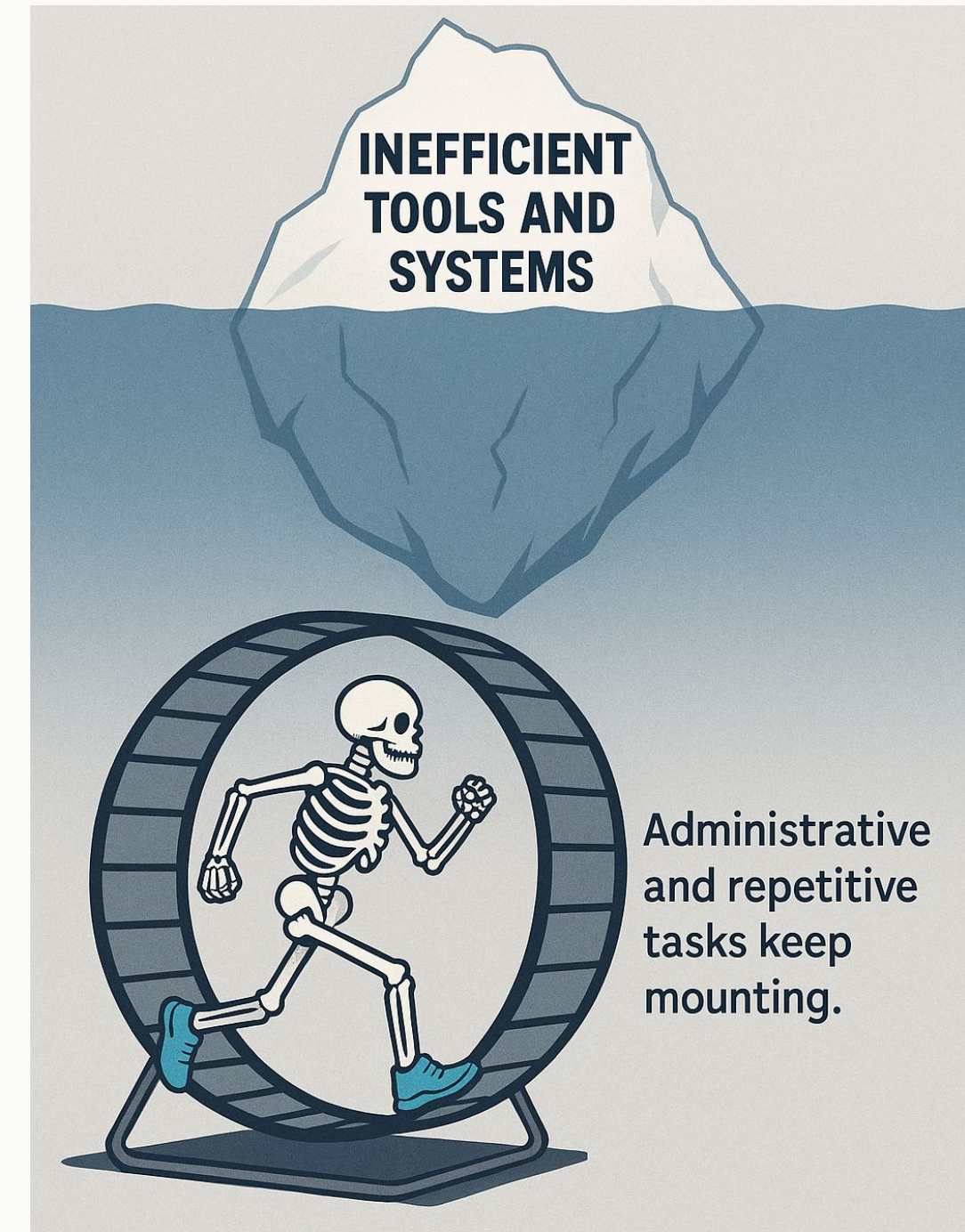
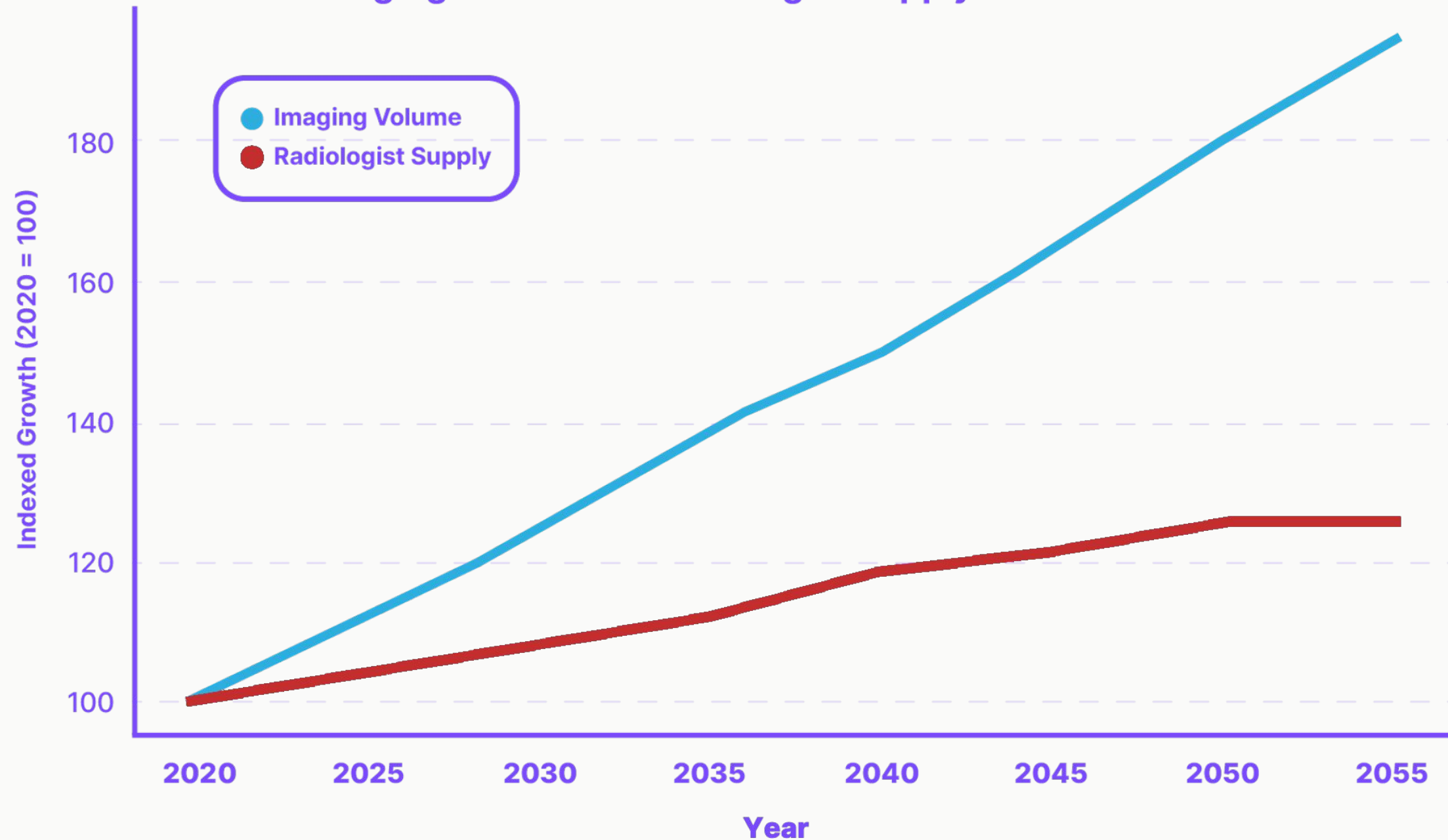


**Critical. Constrained. Colliding.**



# The Demands On Radiology Are Growing

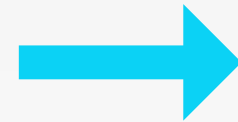
Imaging Demand vs Radiologist Supply (2020-2055)



# Radiologists are Leaving as Demand Surges

"Attrition is shrinking the radiology workforce just as aging populations drive imaging needs to unprecedented levels."

Radiologists leaving  
at **50% higher rate**  
since 2020



**3,116** more  
radiologists **by 2055**  
if attrition stabilizes.



+51.5%



75-84

+149.6%



85-94

+282.1%



95+

Population growth in older age groups by 2055



# Critical Care Pathways



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# This job has become the ultimate case study for why AI won't replace human workers

UPDATED FEB 9, 2026

By [Lisa Eadicicco](#)



# It's Not Getting Easier

**Radiology practice reportedly shuts after cyberattack, selling its property to local hospital system**

*Marty Stempniak | July 01, 2025 | Radiology Business | Practice Management*



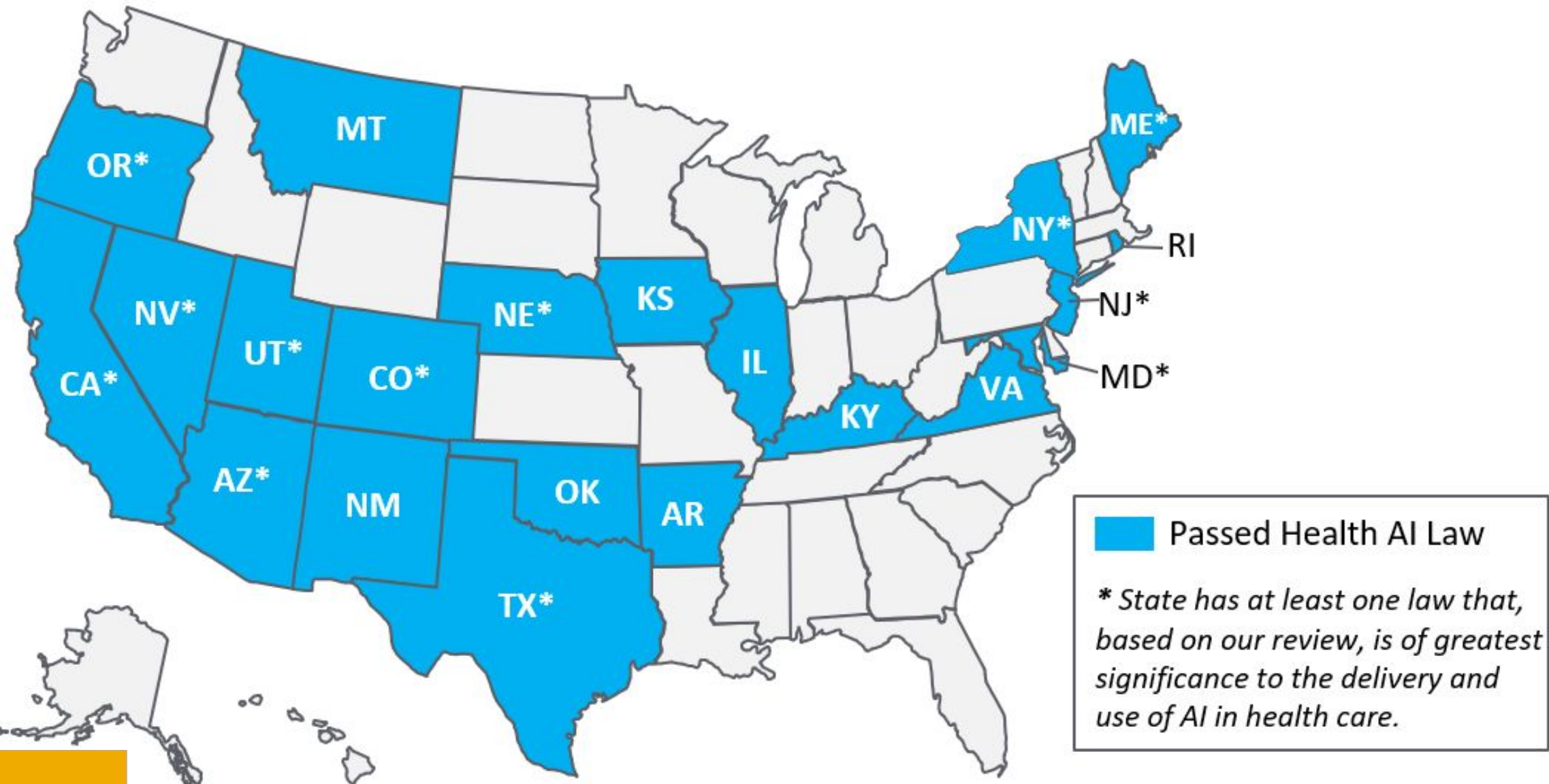


# State AI Regulation

## ALL PASSED AND SIGNED BILLS: State Health AI Legislative Activity

### Health AI Landscape: Current State

Health AI Laws Passed as of June 30, 2025



Courtesy: **manatt**

Note: This map does not include bills we categorize as "Other: State Activity Laws," which generally create councils or task forces to study AI or are related to narrow state activities.



# The Service in SAAS Shouldn't Solely Refer to a Maintenance Contract

**Cloud-Native**

**Tier 0 High Availability Architecture**

**Pro-Active Support**

**Post-Market Surveillance**

**Transparency Reports**

**Customer Success**

**Change Management**

**AI-Native**



# Ensuring the Scalability and Reliability of AI Partners



# AI Hype vs Reality

“We should stop training radiologists now. It’s just completely obvious that within five years, deep learning is going to do better than radiologists.”

-Geoff Hinton, 2016

“I mean, will we still need humans?” Fallon asked, to which Gates replied, “Not for most things.”

-Bill Gates

Endoscopist deskilling risk after exposure to artificial intelligence in colonoscopy: A Multicentre, Observational Study Lancet.

Despite \$30–40 billion in enterprise investment into GenAI, this report uncovers a surprising result in that 95% of organizations are getting zero return.



# 5 Step AI Framework

## Assess

Understand current state and context.

## Define

Clarify the problem and success metrics.

## Select

Choose the right partner.

## Execute

Implement with precision.

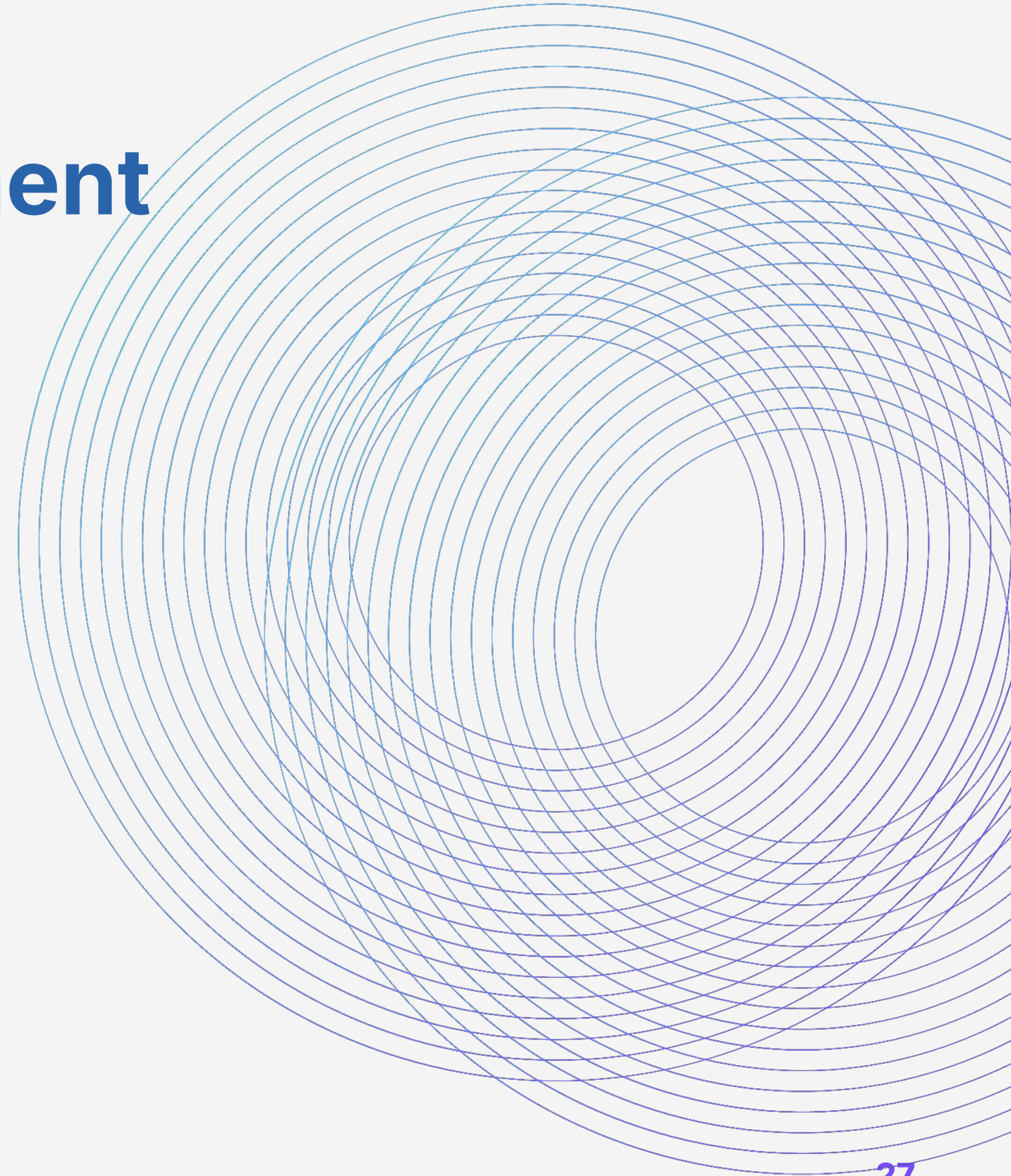
## Monitor

Track and optimize performance in real time.



# Change Requires Management (aka Change Management)

**Adopting AI** isn't about just doing what you did before all over again. It's about looking at what you've been doing and identifying what you can change with this new technology.





## 2 THE WRONG SIDE OF THE GENAI DIVIDE 05% ADOPTION

### 5.2 THE WINNING PLAYBOOK FOR CROSSING THE DIVIDE

**Takeaway:** Startups that successfully cross the GenAI Divide land small, visible wins in narrow workflows, then expand. Tools with low setup burden and fast time-to-value outperform heavy enterprise builds. Channel referrals and peer trust are key growth levers for bridging the divide.

The most successful startups addressed both the desire for learning systems and the skepticism around new tools by executing two strategies:

transformation.



# 5 Step AI Framework

## Assess

Understand current state and context.

Separate AI (data) from workflow (applied data); identify operational realities; benchmark performance today.

## Define

Clarify the problem and success metrics.

Target measurable, high-impact issues; scope clearly; establish KPIs upfront.

## Select

Choose the right partner.

Require deep AI expertise + workflow mastery; verify real-world applications; ensure cultural and operational fit.

## Execute

Implement with precision.

Treat as change management; phase deployment; train stakeholders; manage adoption risk.

## Monitor

Track and optimize performance in real time.

Require in-situ monitoring; validate against KPIs; iterate and recalibrate continuously.



# U.S. Dept. of Labor AI Literacy Framework

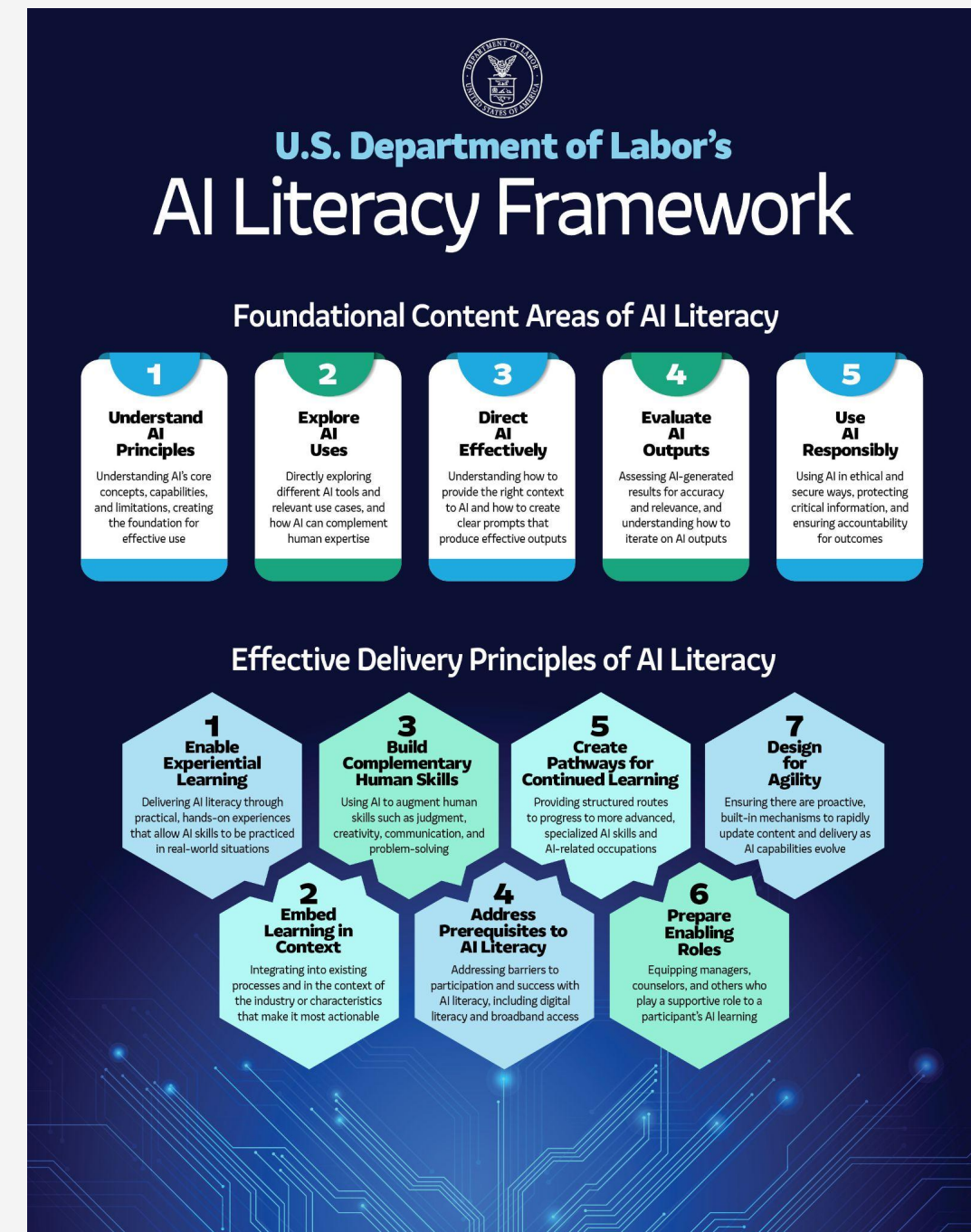
**Purpose:** Establish a national foundation to guide AI literacy across workforce and education systems.

**Designed For:** Flexible adoption across industries, job roles, education levels and workforce contexts.

## What It Includes:

- 5 Foundational Content Areas outlining core AI knowledge and competencies
- 7 Delivery Principles guiding effective program design and implementation

**Goal:** Equip American workers and students with the skills needed to thrive in an AI-driven economy.





# U.S. Dept. of Labor AI Literacy Framework

## Foundational Content Areas of AI Literacy

1

### Understand AI Principles

Understanding AI's core concepts, capabilities, and limitations, creating the foundation for effective use

2

### Explore AI Uses

Directly exploring different AI tools and relevant use cases, and how AI can complement human expertise

3

### Direct AI Effectively

Understanding how to provide the right context to AI and how to create clear prompts that produce effective outputs

4

### Evaluate AI Outputs

Assessing AI-generated results for accuracy and relevance, and understanding how to iterate on AI outputs

5

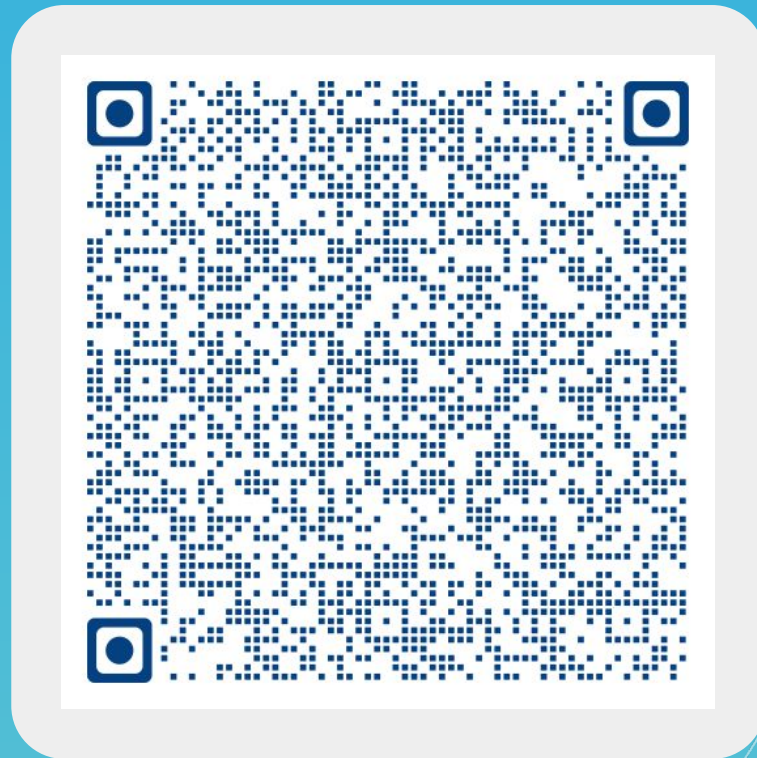
### Use AI Responsibly

Using AI in ethical and secure ways, protecting critical information, and ensuring accountability for outcomes



# U.S. Dept. of Labor AI Literacy Framework





# Thank You!



**Demetri Giannikopoulos**  
Chief Innovation Officer at Rad AI





See you at  
The Leadership Institute  
Spring Roundtable

Chicago • May 20 - 22, 2026



**Amy Belt Raimundo**  
Kaiser Permanente

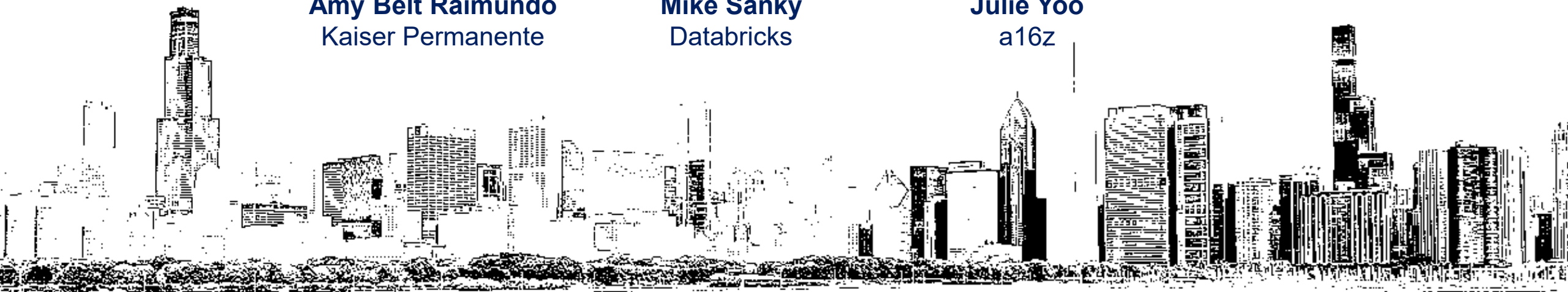


**Mike Sanky**  
Databricks



**Julie Yoo**  
a16z

More  
speakers to be  
announced!





# The Leadership Institute

## Winter Roundtable

February 18 - 20, 2026

The Ritz-Carlton, San Francisco, CA

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*Leading through Headwinds:  
Applying Responsible Innovation in Healthcare*

*WIFI Access:*

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# *The Evolving 2026 and Beyond Landscape for Health System Resilience and Transformation*



**Neil Rao**  
Senior Partner,  
McKinsey & Co



Winter Roundtable: February 18 - 20, 2026



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Senior Partner,  
McKinsey & Co



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# *A Holistic Clinical Operating System for Health System Transformation*



**Jonathan Gleason, MD**  
EVP, Chief Clinical  
Officer, Prisma Health

**Mark O'Halla**  
President and CEO,  
Prisma Health



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# *Redesigning Healthcare: Offering Employers Direct Primary Care*



**Clay Johnston, MD, PhD**  
Co-Founder and CMO,  
Harbor Health

**Todd Smith, MD**  
EVP, Chief Physician  
Executive, Sutter Health



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# *Transforming CMS in the AI Era*



**Roxanna Gapstur, PhD**  
President and CEO,  
WellSpan Health

**Jacob Shiff**  
Chief AI and Technology  
Officer, CMS Innovation  
Center



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# *New Business Models Shaping the Biomedical Frontier*



**Morgan Cheatham, MD**  
Partner and Head of  
Healthcare and Life  
Sciences, Breyer Capital



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*Leading through Headwinds:  
Applying Responsible Innovation in Healthcare*

# *Unlocking the Last Mile of Medical Superintelligence*



**Andy Mueller, MD**  
President and CEO,  
MaineHealth

**Hosain Rahman**  
Founder and CEO,  
all.health



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# *Unlocking the Last Mile of Medical Superintelligence*



**Hosain Rahman**  
Founder and CEO,  
all.health



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# *Modernizing Health and Human Service: Innovation, Outcomes, and Trust*



**Sebastian Caliri, MD**  
Partner, 8VC

**Jim O'Neill**  
Deputy Secretary, US  
Department of Health and  
Human Services



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