



ATRIOTM
HEALTH PLANS

2024 *Benefit Company*



Annual Report

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OUR MISSION

ATRIO Health Plans fosters a culture of compassion, capability, and customer service. Our mission is to deliver high quality health insurance at a reasonable price, leverage the talents of our people, and foster deeper community connections.



**STRAIGHT-UP
LOCAL MEDICARE**



LEADERSHIP



Gregg Kimmer

CEO

At **ATRIO**, we recognize that we have a responsibility to our employees, members, and the communities we serve. We see this as a privilege, and we are proud to serve the most deserving population in America. Additionally, we are proud to be an active participant in Oregon and look forward to growing that community involvement moving forward.

The success of **ATRIO** relies upon our dedication to our communities, members and provider partners. One thing I've asked of our incredibly talented team is to understand the core reason we are here; we have to be obsessed with serving our members. My commitment is to never stop at this. **ATRIO Health Plans** was established by Oregon Physicians in 2004 and has since grown to serve thousands of members in Oregon and other new markets as we continue to expand. As we expand, we will focus on continuing the importance of being local to best serve people!

My thanks to our board, stakeholders, members, and amazing employees for allowing us to contribute in such meaningful ways.



Jeff Fox

Vice-Chairman

A Benefit Company is a designation by the state that a corporation is equally concerned with their impact on society and the environment as they are with their bottom line. We view our Benefit Company status as an opportunity for a continued positive impact on the communities we serve.

2024 BOARD OF DIRECTORS

Dr. Vance Vanier

Chairman
Chicago Pacific Founders

Jeff Fox

Vice-Chairman
ATRIO Health Plans

Brian McCarthy

Chicago Pacific Founders

Etienne Deffarges

Chicago Pacific Founders

Dr. Lloyd Minor

Public Member

Helena Lankton

Public Member

Peter Ricoy

Public Member

Grant Kennon

Cascade Comprehensive Care

Our Employees

Our greatest asset is our employees. The majority of our **ATRIO Health Plans** employee base live and/or work in Oregon, in addition to our remote employees across the nation. Our community-based philosophy of establishing local offices in the communities we serve allows us to provide a highly personalized level of customer service. We offer the chance to work in a rewarding, team-oriented environment and are committed to providing our employees and their families with competitive pay and benefits, as well as ongoing professional development training opportunities to help our employees acquire or strengthen the skills needed to excel in their careers.

We value talent, experience, and a strong work ethic, but also place a premium on individuality, creative thinking, and a strong sense of community.

We are part of
the communities
we serve



WHO IS ATRIO HEALTH PLANS? ———

***ATRIO Health Plans** was established by Oregon physicians in 2004. Since then, **ATRIO** has grown to serve thousands of members in Oregon (Clackamas, Douglas, Josephine, Jackson, Klamath, Lane, Marion, Multnomah, Polk, Washington, and Yamhill counties) and Nevada (Carson City, Churchill, Douglas, Lyon, Storey, and Washoe counties). We offer Medicare Advantage Plans, Medicare Advantage Prescription Drug Plans, and Special Needs Plans. We are proud to have achieved our membership growth through financially sound underwriting practices that result in competitively priced plans with comprehensive coverage.*

ATRIO Health Plans provides a general public benefit, including making Medicare Advantage health insurance coverage available to qualifying members of the communities that it serves (i.e., persons age 65 and older, persons with certain disabilities, and persons of all ages with kidney failure requiring dialysis or a kidney transplant).

Our company works closely with local healthcare providers to improve the well-being and health outcomes for our members. We are part of the communities we serve and are committed to delivering

a responsible and sustainable approach to achieving member satisfaction, cost savings, and long-term market growth.

ATRIO Health Plans is a registered Oregon Benefit Company, established pursuant to ORS 60.750 - ORS 60.770. A Benefit Company is a corporate status for companies that strive to make a positive impact on society and the environment, in addition to earning a profit. The Oregon statute gives clarity to the managers of a company that their fiduciary duty includes creation of a public benefit and consideration of non-financial interests.

LINES OF BUSINESS & SERVICE AREA

ATRIO

Freedom Medicare
Advantage Plan

ATRIO

Choice Rx Medicare
Advantage Prescription
Drug Plan

ATRIO

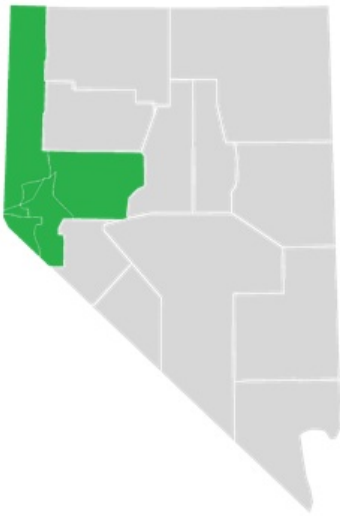
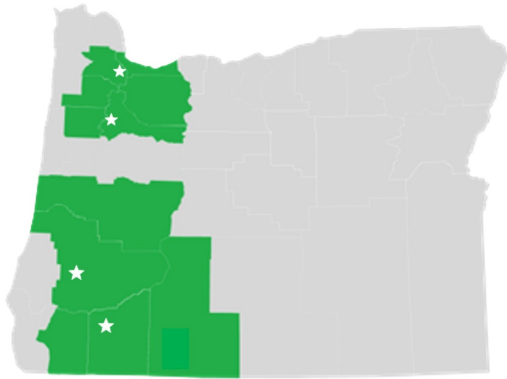
Select Rx Medicare
Advantage Prescription
Drug Plan

ATRIO

Prime Rx Medicare
Advantage Prescription
Drug Plan

ATRIO

Special Needs Plans



SERVICE AREA & MEMBERSHIP

ATRIO Health Plans currently serves Clackamas, Douglas, Jackson, Josephine, Klamath, Lane, Marion, Multnomah, Polk, Washington and Yamhill counties in Oregon, as well as Carson City, Churchill, Douglas, Lyon, Storey and Washoe counties in Nevada.

Not all lines of business are available in every county. The stars on the maps indicate our local office locations to serve our members.

COMMUNITY ENGAGEMENT



Wish Granted! This young girl's wish was granted to meet the Seattle Seahawks.

*Being better together begins with being involved in our communities. **ATRIO Health Plans** supports a variety of projects and charitable causes and has chosen to spotlight a worthy cause that embodies who we are as an organization.*

Make-a-Wish Oregon

For children diagnosed with critical illnesses, a wish come true can be a crucial turning point in their lives. A wish can be that spark that helps these children believe that anything is possible and gives them the strength to fight harder against their illnesses. This impact is why Make-A-Wish employees, board, and volunteers are driven to make every one of these wishes come true. Many of our employees support Make-A-Wish Oregon and we also employ a “wish granter” who volunteers to provide initial wish visits for children, ongoing updates for families, as well as wish-granting parties and send-offs. In 2024, the annual Wish Ball raised over \$825,000 to help grant wishes for kids with critical illnesses in Oregon and southwestern Washington.

Clockwise, from top left: A wish to meet Microsoft VR programmers is granted; volunteers participate in a room makeover; a young man learns that his wish to visit Universal Studios will come true.



SUPPORTING OUR EMPLOYEES

ATRIO Matching Gifts Program

The **ATRIO** Matching Gifts Program was created to support the generosity and encourage further involvement of employees within the communities we serve. ATRIO provides matching funds for any non-profit organization by matching dollar-for-dollar donations made by eligible employees. In 2024, 23 employees donated \$42,615.50 to charitable causes in their community.

*When matched, **ATRIO** and its employees together contributed \$55,656 to support local organizations.*

ATRIO PTO to Volunteer in the Community

ATRIO provides up to 16 hours of paid time off (PTO) to serve in our communities. In 2024, 13 employees donated 23 days/184 hours (volunteer PTO hours) to charitable causes in their community which is a 50% increase in volunteer hours over the previous year. In addition, 2 employees donated 78 hours of their own time to causes in their communities.

Employee Involvement

While committed to earning our members' loyalty through dedication, quality, and service excellence, we understand the importance of re-investing our resources back into the communities we serve. **ATRIO** Health Plans' employees will continue to support projects in 2025 through the Matching Gifts and Volunteer PTO programs in an effort to help sustain the growth, health, and viability of these community-based activities.

OUR VOLUNTEERS



Employee and ATRIO Contributions

3000 Club – Market on the Move

Rescues produce, dry, canned or packaged goods to share with people in need of nutritional produce.

Catholic Charities of New York

Seeks to uphold the dignity of each person as made in the image of God by serving the basic needs of the poor, troubled, frail and oppressed of all religions.

Charlotte Symphony Orchestra

Uplifts, entertains, and educates the diverse communities.

Cycle for Survival – Memorial Sloan Kettering

Cycle for Survival is the movement to beat rare cancers. We are proud to be part of Memorial Sloan Kettering Cancer Center. 100% of every dollar supports pioneering research and lifesaving clinical trials within six months after the close of fundraising each year.

Discovery School Parent Teacher Organization

A dedicated group of parents, teachers, and administrators, working to provide resources and programs to all families and to strengthen the school community.

Douglas Education Service District

Assists school districts and the Dept. of Education in achieving Oregon's educational goals by providing equitable, cost-effective and locally responsive educational services at a regional level. Partner Sports Camp pairs campers with disabilities to those without disabilities, giving each an opportunity to understand the daily challenge each faces.

Douglas Recreation Association

Provides a variety of recreational & sports activities for area youth.

Fraternal Order of Eagles

Unites fraternally in the spirit of liberty, truth, justice and equality to make human life more desirable by lessening its ills and promoting peace, prosperity, gladness and hope.

HMS School for Children with Cerebral Palsy

Provides a summer program for local children, featuring arts & crafts, game time, teaching time and nourishment for kids.

Junior Achievement USA

Creates an unmatched experience where 4th through 6th grade students are able to interact within a simulated economy and take on the challenge of managing organizations.

Liberty House

A child abuse assessment center serving Marion and Polk counties - the only place providing special assessment services in a safe, comfortable, child-friendly environment.

Leukemia & Lymphoma Society

Works to cure Leukemia, Lymphoma, Hodgkin's disease and myeloma, and improve the quality of life of patients' and their families.

Make a Wish Oregon

Creates life-changing wishes for children with critical illnesses.

Medford Pear Blossom Festival

Provides a variety of recreational & sports activities for area youth.

Employee and ATRIO Contributions

Morehouse College Class of 1984 Scholarship Crowdfunding

Raises money for scholarships to develop African/American men dedicated to service.

Nashville Rescue Mission

Provides hope for today, hope for tomorrow, and hope for eternity to those who are hungry, hurting, and experiencing homelessness.

Oregon Adaptive Sports

Envisions a day when everyone has the benefits of outdoor recreation, regardless of ability. OAS sees Central Oregon as a year-round destination for adaptive sports with OAS as the leader in providing state-of-the-art equipment, professional instruction, staff and dedicated volunteers, resulting in top quality experiences for our participants.

Pi Kappa Alpha Foundation

Promotes the educational and scholastic achievements of members and other students across North America.

PTO of Discovery School

Carries out activities that support, promote and enhance the educational experience of Discovery School students by fostering relationships among the school, parents, teachers, and community.

Saving Grace Pet Adoption

Provides temporary refuge, basic veterinary care and a pathway home for companion animals who are homeless in Douglas County so that we may create a more humane community.

Southern Oregon Timberwolves

Teaches and promotes the games of baseball and softball in an environment that fosters competition and individual development on and off the field, helps to build character and determination, and instills the importance of being part of a team.

St. Jude Children's Research Hospital

Advances cures and the means of prevention for pediatric catastrophic diseases through research and treatment.

St. Vincent de Paul

Harnesses the power of our community to feed, clothe, house, and heal all who are in need - whether in body or in spirit.

Temple Beth Shalom

Dedicated to being a vibrant, diverse, and inclusive center for Jewish life in Salem, Oregon, and its surrounding areas.

Ville de Marie

The mission of Ville de Marie is to pursue excellence in education.

Wildlife Safari

Provides the highest quality interaction with wildlife to inspire lifelong commitments to conservation, education, and the preservation of native and exotic species.

YWCA Princeton's Breast Cancer Resource Center

Dedicated to providing support and information to women and their families affected by breast cancer, and to increasing understanding of the disease in the community.

2025 BENEFIT COMPANY GOALS

ATRIO staff have been working on policies and procedures to facilitate our benefit company and mission promise. Our 2025 budget includes continuing investments in the communities we serve, including:

Charitable contribution matching for staff to local non-profits in our communities

ATRIO will contribute matching funds, ranging up to \$1,500 per calendar year, and up to 3 charitable organizations for employees who contribute to charities in the communities we serve.

Paid time off to volunteer at local charity events

ATRIO instituted a policy allowing staff an additional 2 days of paid time off (PTO) when the day is used to support local charities in the communities we serve.

ATRIO's goal for 2025 is to contribute 270 volunteer hours in the community, which is an increase of 50% from 2024.

Local contributions to projects and programs impacting Medicare-eligible members

Special consideration of worthy charitable investments will be given to those projects impacting the Medicare-aged population and our Special Needs member population. **ATRIO** is committed to serving these segments of the market as a Medicare Advantage Health Plan in 2025.



**STRAIGHT-UP
LOCAL MEDICARE**

CONTACT INFORMATION

ATRIO Health Plans has offices in Salem (Corporate headquarters), Roseburg, Medford and Tigard in Oregon.

Walk-in office hours

Monday – Friday, from 8 a.m. to 5 p.m.

Member Services Call Center

1-877-672-8620 (TTY 711)

Hours are from 8 a.m. to 8 p.m. local time, seven days a week from October 1 – March 31.

From April 1 – September 30, hours are from 8 a.m. to 5 p.m. local time, Monday – Friday.

Online

atriohp.com (click "Contact Us" on the homepage)

OREGON

Douglas County

2270 NW Aviation Drive, Suite 3
Roseburg, OR 97470

Jackson & Josephine Counties

810 O'Hare Parkway, Suite B
Medford, OR 97504

Marion & Polk Counties

550 Hawthorne Avenue SE, Suite 140
Salem, OR 97301

Tigard

13190 SW 68th Parkway, Suite 100
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1-877-672-8620 (TTY 711)