• Preeminent organization for health care strategists; a professional membership group of the American Hospital Association.

• Prepares the field for the evolving landscape, helping members drive change and shape the future of health care.

• Offers micro-credentials in key skills pertaining to the future role of the health care strategist.

• Provides a best-in-class annual conference for marketers, strategic planners, business developers and communicators.

• Connects thousands of strategists to identify solutions, expand thinking and engage in peer networking.
• International professional society of more than 40,000 health care executives who lead hospitals, health systems and other health care organizations.

• Offers the prestigious FACHE® credential signifying board certification in health care management.

• Foremost provider of education, research and publications on health care management and leadership.

• Fulfilling the vision of being the preeminent professional society for leaders dedicated to improving health.
Futurescan 2022-2027 Health Care Trends & Implications
Featuring Ian Morrison, PhD

- Consumerism and Innovation Beyond the Walls of the Hospital
  Michael Dowling, President & CEO, Northwell Health
- Supporting the Healthcare Workforce
  Catherine A. Jacobson, President & CEO, Froedtert Health
- New Competitors Challenge Health Systems Strategy
  Kenneth Kaufman, Managing Director and Chair, Kaufman Hall
- Focus on Diversity and Inclusion
  Juana S. Slade, Chief Diversity Officer and Director, Language Services, AnMed Health
- The Future of Provider Reimbursement
  David Blumenthal, MD, President, The Commonwealth Fund
- Virtual Health Strategies
  Randy D. Oostra, DM, FACHE, President & CEO, ProMedica
- The Growing Importance of Behavioral Health in the COVID and Post COVID Landscape
  Harsh K. Trivedi, MD, President & CEO, Sheppard Pratt
- How COVID-19 Has Changed Hospital and Health System Emergency Preparedness
  Gregory R. Ciottone, MD, Emergency Physician and President, World Association for Disaster and Emergency Medicine
How To Use Futurescan

- Strategic planning.
- Senior executive updates.
- Board education.
- Medical staff briefings.
- Staff training.
- Use in conjunction with AHA’s Environmental Scan. [aha.org/environmentalscan](aha.org/environmentalscan)
- Watch Transformation Talks videos for more insights [aha.org/transformation-talks](aha.org/transformation-talks)

Join SHSMD today! ([shsmd.org](http://shsmd.org))

Purchase Futurescan 2022 ([here](http://example.com))
Health Systems Have a Lot on Their Plate: *Omicron makes it even more difficult.*

- Health systems are spent
- Vaccine mandates, pandemic surges, governors, strikes and the terror of frontline care.
- Covid costs: PPE, LOS much longer, and elective shutdowns.
- Acuity up because of postponed care, sicker patients.
- Workforce shortages
  - Doctors retiring or taking sabbaticals.
  - Traveler RNs cost $200-$300 per hour.
  - Subsidies to employed doctors $250K.
- Supply costs way up for PPE etc. and supply chain challenges.
- Payer Mix Impairment as Medicare, Medicaid, and Exchanges grow.
- Responding to Big Tech, Big Retail and Digital Disruptors.
- Looking to commercial for margin (increasingly self-insured).
- Revenue Cycle Management and Administrative Complexity.
- Increasing policy hostility e.g. anti-trust, transparency, prices and surprise bills.
- Lots of big name CEO retirements.
- Omicron may be the last straw: 2022 will be like 2020 without the CARES Act.
Futurescan 2022-2027: Health Care Trends & Implications

The COVID pandemic has created massive changes in the health care system:

- Profound shift to digital health solutions
- Increased awareness of inequity in health care
- Exposure of weaknesses in health care financing models
- Massive pressure on the health care workforce
- Need to integrate physical and mental health more effectively
- Imperative for improved emergency preparedness

Futurescan 2022 draws on the expertise of 8 SMEs to synthesize key trends that will shape health care in a post-pandemic world.
Consumerism and Innovation
Beyond the Walls of the Hospital
Michael Dowling, President & CEO, Northwell Health
Care Transformation
Michael Dowling, President & CEO, Northwell Health

The rise of consumerism is the most transformative overarching trend Post-COVID. Others include:

- Technology’s role in care transformation
- Pricing transparency
- Systemness
- Innovation in care delivery

Say by 2027, 91% of health care executives said their organization is already engaged or likely to engage in digital consumer strategy investments.
Care Transformation
Michael Dowling, President & CEO, Northwell Health

Dowling advises:
• Focus on consumerism and the customer experience
• To invest in technology infrastructure
• Advocate for easing regulatory burdens
• Focus on care outside the hospital walls
Supporting the Health Care Workforce
Catherine A. Jacobson, President & CEO, Froedtert Health
Workforce

Catherine A. Jacobson, President & CEO, Froedtert Health

The COVID pandemic amplified workforce trends that were already of concern:

- Burnout among clinicians
- Shifts in workflow and workforce requirements
- New technology that requires different types of care delivery
- Inequities and bias in the workplace
Workforce
Catherine A. Jacobson, President & CEO, Froedtert Health

Jacobson recommends:
• Facilitate mental well-being
• Foster leadership development
• Re-engineer the workforce
• Erase racial bias and inequities
New Competitors Challenge Health Systems Strategy

Kenneth Kaufman, Managing Director and Chair, Kaufman Hall
Strategy
Kenneth Kaufman, Managing Director and Chair, Kaufman Hall

Fundamental question: To what extent will the business model and nature of competition in health care be based more on technology and less on face-to-face care delivery?

Key Challenges:
- The approach to telehealth and digital health care capabilities and delivery
- How services are organized and presented to consumers
Strategy
Kenneth Kaufman, Managing Director and Chair, Kaufman Hall

Competition now being driven by:
  • Tech companies encroaching on the space of traditional providers.
  • The need for greater digital sophistication in traditional health systems

Kaufman advises:

*Competitive strategy must be informed by a new thought process shaped to confront an economic and competitive environment that, accelerated by the pandemic, is in the process of changing forever.*
Focus on Diversity and Inclusion
Juana S. Slade, Chief Diversity Officer and Director, Language Services, AnMed Health
Health Equity
Juana S. Slade, Chief Diversity Officer and Director, Language Services, AnMed Health

2020 was a pivotal year for re-examining:
• Social injustice – George Floyd
• Racial bias – Hiring and personnel practices
• Diversity and inclusion
• Health inequities – COVID mortality; Social Determinants of Health

Social Determinants of Health
Health Equity
Juana S. Slade, Chief Diversity Officer and Director, Language Services, AnMed Health

Slade advises:
• Develop a diverse organization that reflects the community
• Foster cultural competence that meets the needs of ethnic and cultural minorities
• Influence and invest in the community

INSIGHTS FROM HEALTH CARE EXECUTIVES IN FUTURESCAN SURVEY

35% said their hospital or health system already has multiple partnerships and collaborations in place to increase the diversity of its workforce, and another 33% said it is very likely that by 2027, they will have such partnerships
The Future of Provider Reimbursement
David Blumenthal, MD, President, The Commonwealth Fund
Finance
David Blumenthal, MD, President, The Commonwealth Fund

How will the COVID pandemic affect provider reimbursement?

Public Insurers
- Measures to make health care more accessible via Medicaid expansion and health insurance marketplace
- Greater emphasis on value-based care and reduced health inequities
Mandates on price transparency may result in increased pressure for providers to lower costs and insurers to redirect care.

Continued movement toward prospective payment models and value-based contracts.

How will the COVID pandemic affect provider reimbursement?

Commercial Insurers:

- Mandates on price transparency may result in increased pressure for providers to lower costs and insurers to redirect care.
- Continued movement toward prospective payment models and value-based contracts.

Projected Medicare Spending

Source: Commonwealth Fund (2020).
Virtual Health
Randy D. Oostra, DM, FACHE, President & CEO, ProMedica

Virtual health is expanding far beyond telehealth and is being driven by consumer demand and nontraditional competition (Amazon, Google, CVS and Walmart)

Health care leaders need to weigh:
• Capital investments in bricks and mortar
• Impact on providers
• Impact on social determinants of health

“Telemedicine may be the most prevalent form of virtual health but will soon be far from the only one.”
Virtual Health
Randy D. Oostra, DM, FACHE, President & CEO, ProMedica

Oostra suggests health care executives:
• View patients as consumers
• Consider how to deliver current services in nontraditional ways
• Evaluate the costs
• Look for collaborators

Nearly 60% agree that clinician sharing will either be likely or very likely via telehealth by 2027.
The Growing Importance of Behavioral Health in the COVID and Post COVID Landscape

Harsh K. Trivedi, MD, President & CEO, Sheppard Pratt
**Behavioral Health**

Harsh K. Trivedi, MD, President & CEO, Sheppard Pratt

Behavioral health services have been unprofitable service lines for many years, yet the need has never been greater

- Many psychiatric beds were converted during the pandemic
- Boarding patients in the ER has been a growing problem
- Impending shortage of qualified professionals
- Families have lost insurance coverage or employment
- People of color have been hit especially hard

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### Percentage of U.S. Population Reporting No Treatment Received

<table>
<thead>
<tr>
<th>Demographic</th>
<th>Any mental illness</th>
<th>Serious mental illness</th>
<th>Major depressive episode</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blacks</td>
<td>69%</td>
<td>42%</td>
<td>65%</td>
</tr>
<tr>
<td>Hispanics</td>
<td>67%</td>
<td>44%</td>
<td>62%</td>
</tr>
<tr>
<td>Overall</td>
<td>57%</td>
<td>36%</td>
<td>59%</td>
</tr>
</tbody>
</table>

Source: SAMHSA (2020a)
Behavioral Health
Harsh K. Trivedi, MD, President & CEO, Sheppard Pratt

Trivedi recommends:

- Develop the infrastructure
- Create linkages
- Embrace telehealth
How COVID-19 Has Changed Hospital and Health System Emergency Preparedness

Gregory R. Ciottoone, MD, Emergency Physician and President, World Association for Disaster and Emergency Medicine
Emergency Preparedness
Gregory R. Ciottone, MD, Emergency Physician and President, World Association for Disaster and Emergency Medicine

- The pandemic has also underscored that we need to pay more attention to emergency preparedness
- Hospitals need to be continually engaged in mitigating, preparing for and responding to the next complex disaster

“Future emergency preparedness will require a more prominent role not just in health care but in public health and society overall.”
Emergency Preparedness
Gregory R. Ciottone, MD, Emergency Physician and President, World Association for Disaster and Emergency Medicine

Ciottone advises:
- Teach crisis leadership skills
- All departments understand their role in a disaster
- Build relationships with other first responders in the community
- Closely link to public health for communication and interagency cooperation
- Consider the psychological toll of disasters on workforce

56% said by 2027, their ability to triple ICU bed surge capacity within one week will be likely, very likely or already happening.

When asked about PPE, more than half (52%) of respondents reported that they already had a one-month stockpile, and an additional 28% of respondents stated that this would very likely be the case by 2027.
Conclusion

The pandemic has wreaked havoc on health care but also spurred leaders to respond creatively.

*Futurescan 2022* provides expert-based perspectives informed by the SHSMD Futurescan survey of the field to light the way ahead.
The Emerging Health Care System Post-COVID

Key Themes:

• Digital health
• Workforce resilience
• Address encroaching competition
• Foster diversity and inclusion
• Integrate behavioral health into the care continuum
• Respond creatively to the next health care crisis
Thank you for participating!
Questions & Answers
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