

SHSMD26 CONNECTIONS

Health Care Marketing, Strategy & Communications

American Hospital Association Conference
September 27-29 ⚓ Baltimore

Scenario Planning 2.0 – Building Resilient Strategies for Healthcare's Next Disruptions

- **Jennifer O'Connor, FACHE**, AVP, Strategic Planning & Growth, MedStar Health
- **Judit Tejada**, Director, Strategic, Market and Consumer Insights, Moffitt Cancer Center
- **Sarah Brownell, FACHE**, SVP, Global Health Market Strategist, CannonDesign





Sarah Brownell, FACHE

SVP, Global Health Market Strategist
CannonDesign

Sarah oversees strategic growth across CannonDesign's Global Health Practice – providing leadership in defining and executing strategic initiatives, leveraging insights on global healthcare trends and bringing rigor in aligning health systems biggest needs with the firms design solutions and strategies. She serves as the bridge between major project developments and the design team, aligning design efforts with key health system priorities such as philanthropy and community engagement.

Sarah has spent the last 20 years in various leadership roles in organizations across the design and construction industry, with the last 15 years of her career focused specifically in Healthcare. She holds an MBA from Queens University in Charlotte, NC and is a Fellow of the American College of Healthcare Executives.



Jennifer O'Connor, FACHE

AVP, Strategic Planning & Growth

MedStar Health

As a member of the MedStar Health's strategic planning team, Jennifer works collaboratively to craft strategic growth plans that position MedStar Health to best serve patients and families across the Baltimore-Washington DC region. That includes multi-year, organization-wide strategic plans, strategic service line growth plans, and ongoing market and partnership assessments to support ambulatory network growth and development.

Prior to joining MedStar Health, Jennifer held numerous leadership roles with Sg2, a national strategic thought partner for health systems across the country, where she launched Sg2University, lead the 30-person research arm, and ran the Strategy and Planning practice. Prior to Sg2, Jennifer spent a decade consulting with surgical specialty groups across the country and worked at the University of Chicago Health System's Venture arm which focused on enabling value-based care efforts including full-risk capitation.

Jennifer received an MS in health systems management from Rush University in Chicago and is a Fellow of the American College of Healthcare Executives.





Judit Tejada

Director, Strategic, Market & Consumer Insights
Moffitt Cancer Center

Judit Tejada, is a Director of Strategic, Consumer and Market Insights for Moffitt Cancer Center in Tampa, Florida. In this role, she is responsible for overseeing a team that proactively identifies and integrates clinical, scientific, consumer and competitive market intelligence to drive enterprise-wide strategic decision making. She consistently anticipates, recognizes, evaluates, and informs leadership of macro forces, health care consumer insights and disruptive forces and assesses impact to overall Brand Strategy. Judit joined Moffitt Cancer Center in November of 2007 and has held various strategy roles including Director of Planning. Before that, she held various roles at Merck & Company. She currently serves as President on the board of the Southeast Society for Healthcare Strategy and Market Development ([SESHSMD](#)) and is Board Chair for the MacDonald Training Center in Tampa ([link](#)). She holds a BS in Chemical Engineering and BA in Mathematics from Columbia University and an MBA from Old Dominion University.

Learning Objectives

- Apply best practices for engaging internal stakeholders in future-focused thinking
- Translate scenario insights into actionable marketing and growth strategies aligned with the organizational vision
- Adapt scenario planning approaches as market conditions, assumption, and priorities evolve

Outline/Agenda

- Evolution of scenario planning approaches and best practices
- Panel perspectives on best practices for engagement and alignment
- Tools and templates for implementing scenario planning methodology
- Q&A

MedStar Health At a Glance

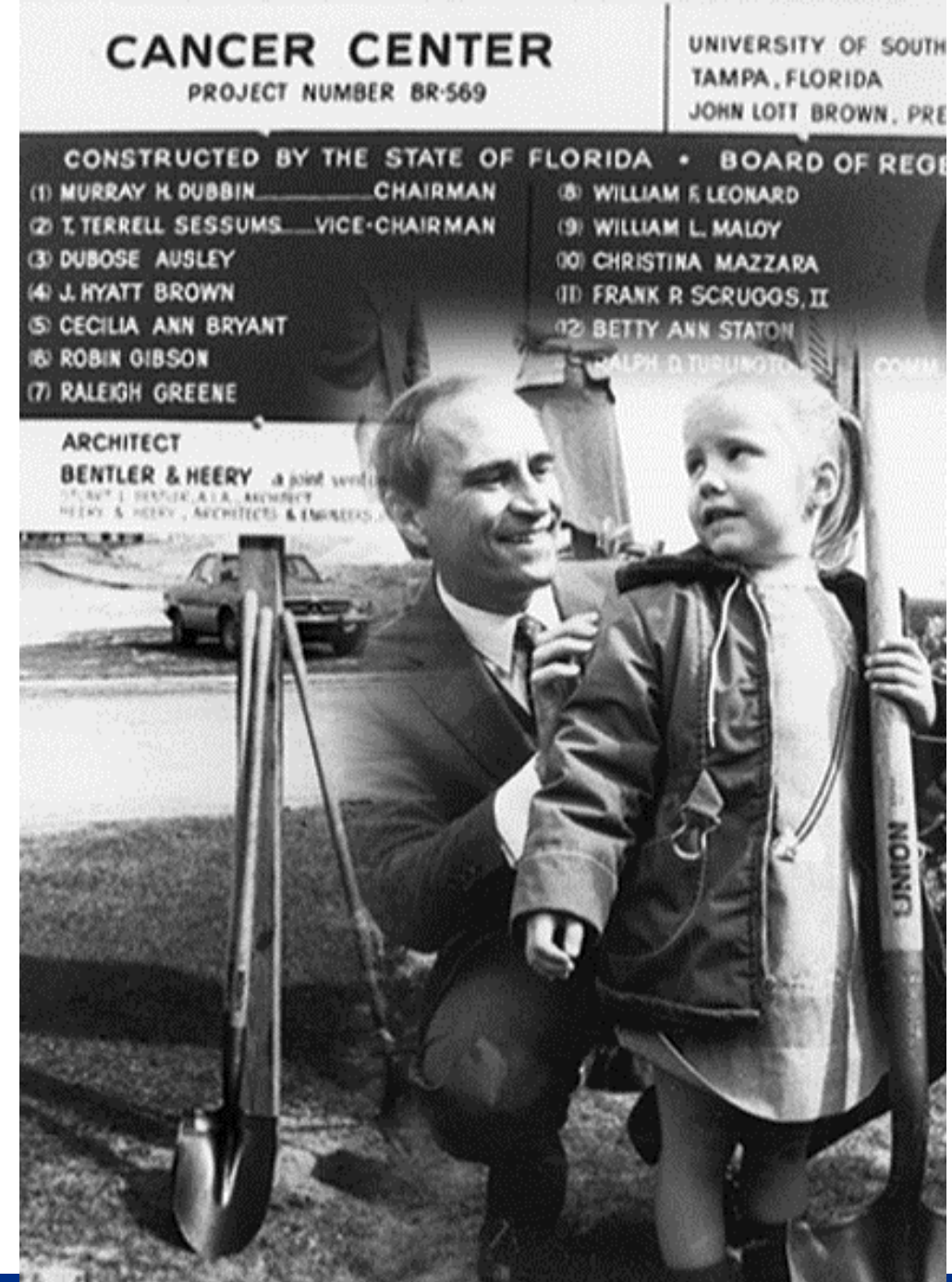
- **10** hospitals and a comprehensive network of outpatient centers and physician offices
- **37,000** Associates
- **10,060** Nurses
- **5,200** Credentialed Physicians
 - **2,700** Employed Physicians
- **1,100** Residents/Fellows
- **149,000** members enrolled in MedStar Family Choice
- Medical Education and Clinical Partnership with **Georgetown University**; top 20 GME program trains over 1,200 residents and fellows annually across 80+ programs

FY 2025 data



History of Leadership & Innovation

- Established by the Florida Legislature in **1981**.
- Named after **H. Lee Moffitt**, former Speaker of the Florida House.
- Opened in 1986, quickly earning its **NCI-designation** through innovative, breakthrough research.
- Received our **highest score ever** by the National Cancer Institute in 2021.
- In 2021, we celebrated **35 years** of providing patient care and hope to countless patients and families.



Moffitt's Expanding Footprint



We devote more than 3 million square feet to research and patient care.



We've seen patients from:

67

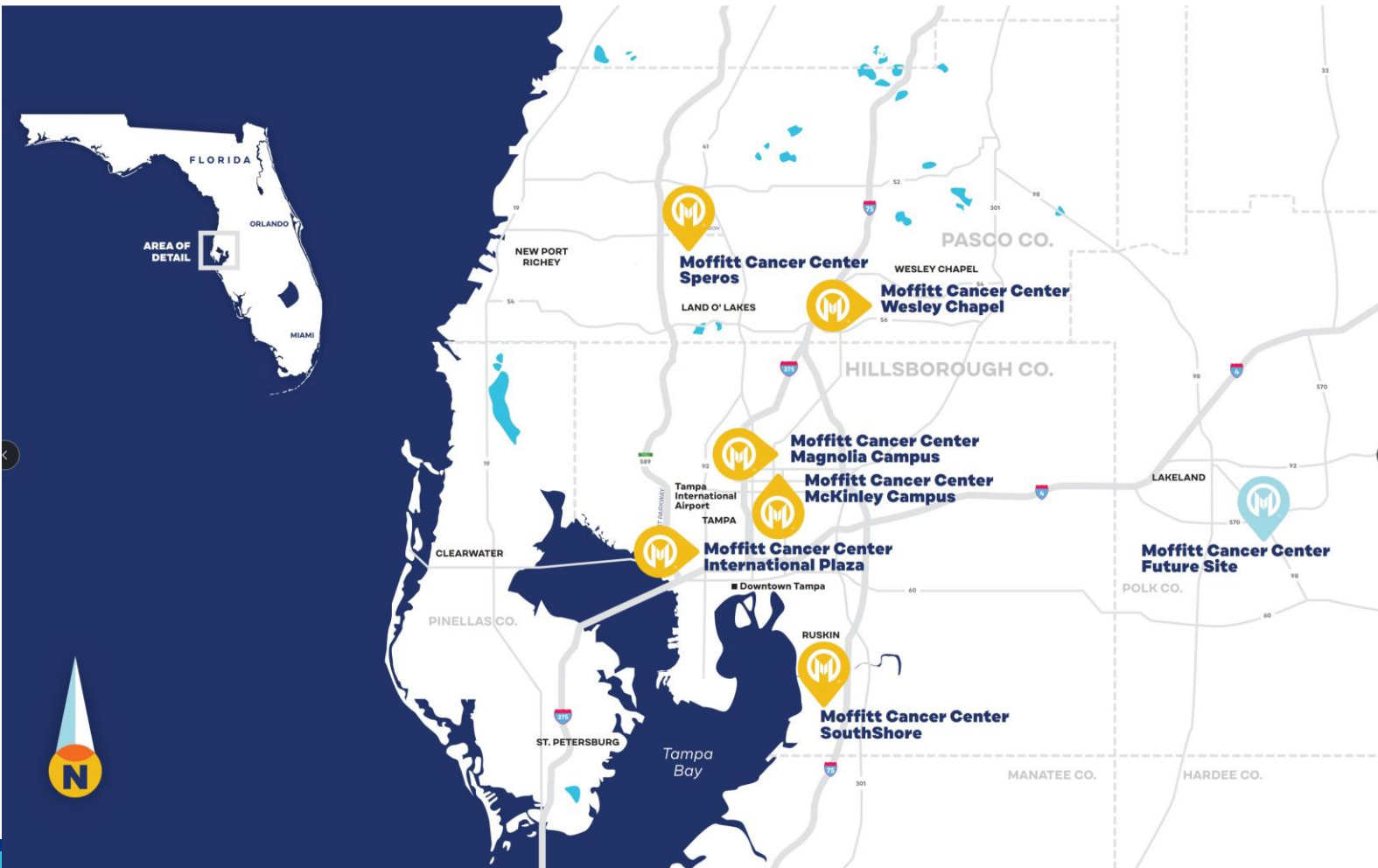
Florida Counties

50

States

130+

Countries



FY2025 Clinical Care

By The Numbers

We are helping patients find the right diagnosis, treatment and support — all in one place

713,757

Outpatient & Screening Visits

102,765

Unique Patients Seen

31,403

New Patients

14,752

Surgical Cases



CannonDesign - a legacy of impact

In the last five years...

75 million

Opened doors to 75 million sf of new healthcare space.

\$22 billion

Completed \$22 billion in healthcare construction.

In the last ten years...

27 million

Opened doors to 27 million sf of new cancer space.

#1

Most Innovative Company
in North America
Fast Company, 2024

#1

Top Green Healthcare
Design Firm
Engineering News-Record, 2024

#4

Healthcare Design
Interior Design, Giants, 2024

We've worked with **17** of the 20 '*best hospitals*' named to U.S. News and World Report's 2024-2025 Honor Roll.



A different kind of design firm



Blue Cottage

*Strategy, experience
and operations
consulting*



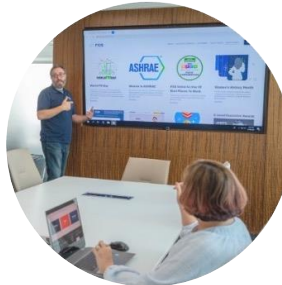
Yellow Brick

*Building transition and
activation consulting*



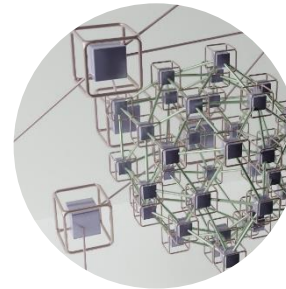
Cityfi

*Civic and mobility
innovation consulting*



Facility Optimization Solutions

*Facility management and job
order contracting software*



The Clariant Group

*Smart building
consulting*



Yazdani Studio

*Design laboratory with
a distinctive process
for innovation*



Ennead

*A distinct studio working
as an integrated design
collective*

CANNONDESIGN

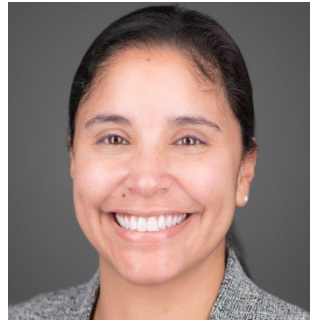
Three Key Take-Aways

- Gain insights into how healthcare organizations can integrate scenario planning into the annual planning process to inform resource allocation and priority setting as conditions change.
- Learn strategies for applying scenario planning across an organization to foster a culture of creative thinking and problem solving.
- Empower attendees to build strategies that are more durable, actionable, and responsive to ongoing disruption.

Panel Discussion



Jennifer O'Connor, FACHE
AVP, Strategic Planning & Growth
MedStar Health



Judit Tejada
Director, Strategic, Market and
Consumer Insights
Moffitt Cancer Center



Sarah Brownell, FACHE
SVP, Global Health
Market Strategist
CannonDesign



Headwinds



Policy & Regulations

New Payment Models



Competition

Disruptors
Technology
New Entrants

Agile

Proactive



Workforce

Labor Shortages
Unionization
Burnout



Financially Driven

Economy
Payer Pressures
Supply Chain Inflation

SHSMD

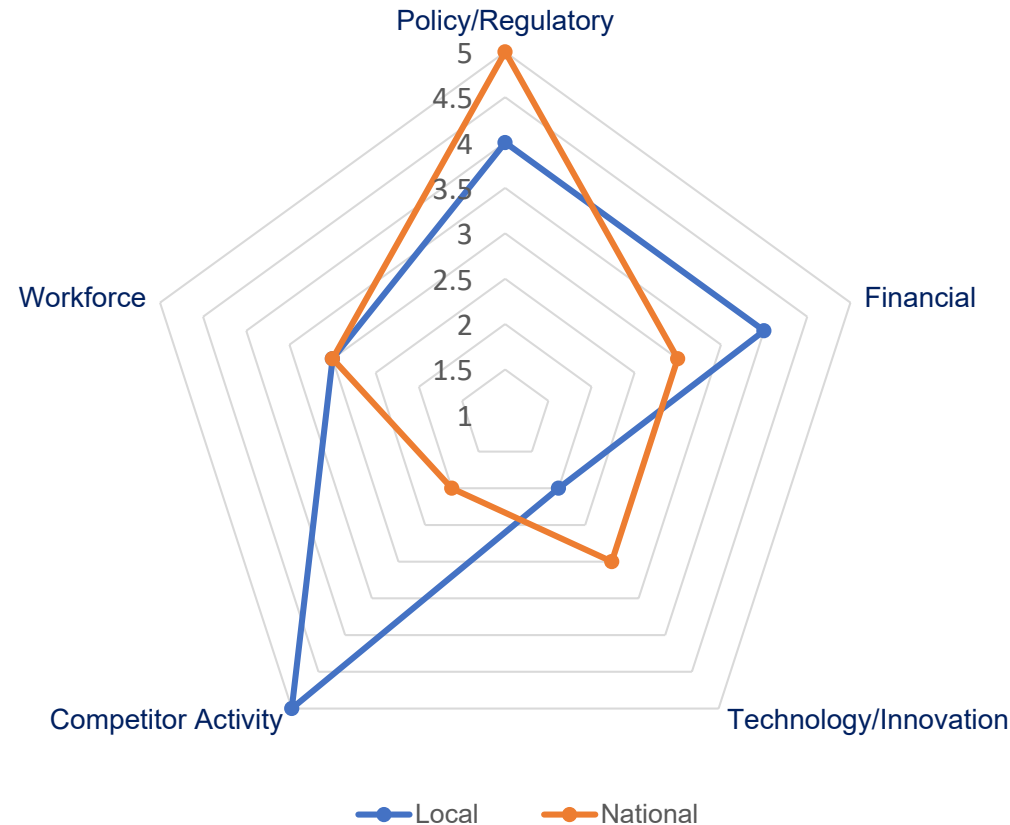
Society for Health Care
Strategy & Market
Development™

Proposal: Always on scanning via “Disruption Index” to identify need for deep dives, scenario planning

Prototype: Accelerate MedStar 2028 Disruption Index

Considerations:

- **National** – impacts the industry as a whole; will need to determine relevance/impact locally (e.g. site neutral payment)
- **Local** – unique to our market; will need to determine impact on health care/MSH (e.g. State budget cuts)



Factors:

- **Policy** – AHEAD model, CON changes
- **Financial** – notable margin pressures (supply chain, tariffs)
- **Technology** – AI, gene therapy, new care models
- **Competitor Activity** – local ASC acquisition
- **Workforce** – shortages, union activity

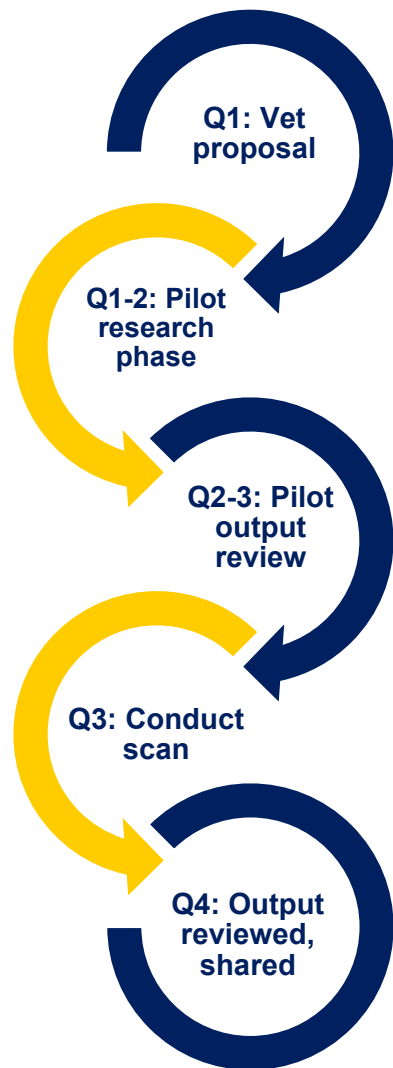
Scenario planning in action: Evolution of Maryland's global budget payment system

Objective: Anticipate how Maryland's transition to the AHEAD model might reshape the market and influence strategic choices and opportunities.

Example: **Scale** – *Under the new model will greater scale create a strategic advantage? If so, what does that look like and where to focus?*

Question #1 	Scenario Planning 	Output 
Geographic reach: How might a new model/desire for scale change our current ambulatory strategic plan?	• Would target geographies expand? • Would service mix change? • Would some projects accelerate or decelerate?	Alternate version of ambulatory network roadmap
Partnership landscape: How might a new model/desire for scale impact our approach to partnership?	• Strategic importance of existing partnerships • Potential new partnerships	Prioritized list of key conversations
M&A: What if select hospitals are financially or operationally challenged under new model? Could that create potential acquisition or partnership opportunities?	• Which hospitals might be advantaged or disadvantaged? • Who else might be interested (in- and out- of market)? • How does that hospital/geography fit with our network/strategy/mission?	Attractiveness scorecards

The 12-month journey to develop the Disruption Index



Key Activity	Lessons Learned
Review proposed model with stakeholders	Model well received; anchored in recently completed environmental scan
Conduct scan: Entire team engaged in initial research effort	- Opportunity for analysts (several new) to build knowledge of industry/market - Project “office hours” and slide templates helped confirm relevance and summarize research findings
Review initial output with stakeholders	Streamlined considerations (national vs local not necessary) and fine-tuned scoring methodology to ensure proper focus for executives/board
With model approved, initiated next bi-annual scan	Staffed with a subset of the team thanks to leveraging MedStar GPT.
Disruption Index becomes part of organization’s strategic execution cycle	- Incorporated into annual operating plan summaries and Board updates - Supports “systemness” via coordination with other teams (Legal, Managed Care, Health Plan, Innovation)

Strategy Driving The Planning Continuum

STRATEGIC PLANNING ELEMENTS



5-year cadence with annual update



Resource allocation and consensus



Stable environment and longer cycles



Rapid changes and regular updates

TRIGGER EVENTS



Leadership transition



Market/competitor dynamics



Joint ventures, mergers & acquisitions, partnerships

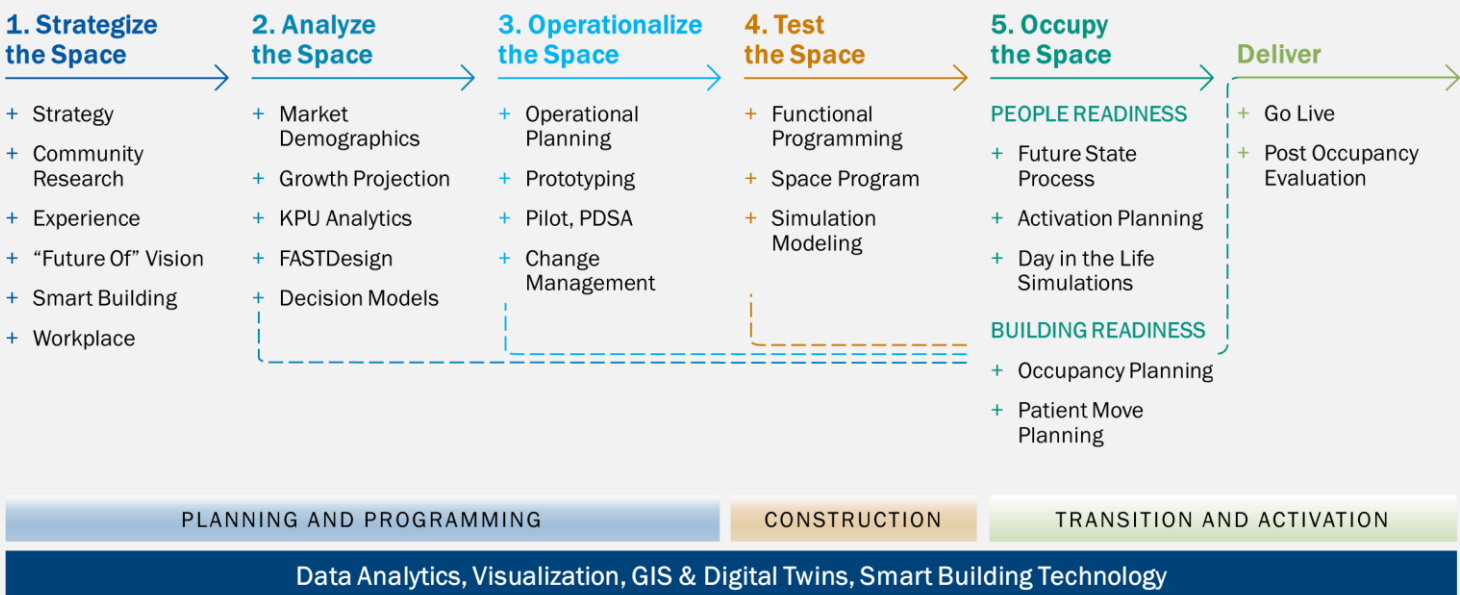


Financial stress



Disruptive innovation/unanticipated landscape changes

STRATEGIC PLANNING SETS THE STAGE FOR THE PLANNING CONTINUUM AND SUITE OF SERVICES OFFERED BY OUR TEAM



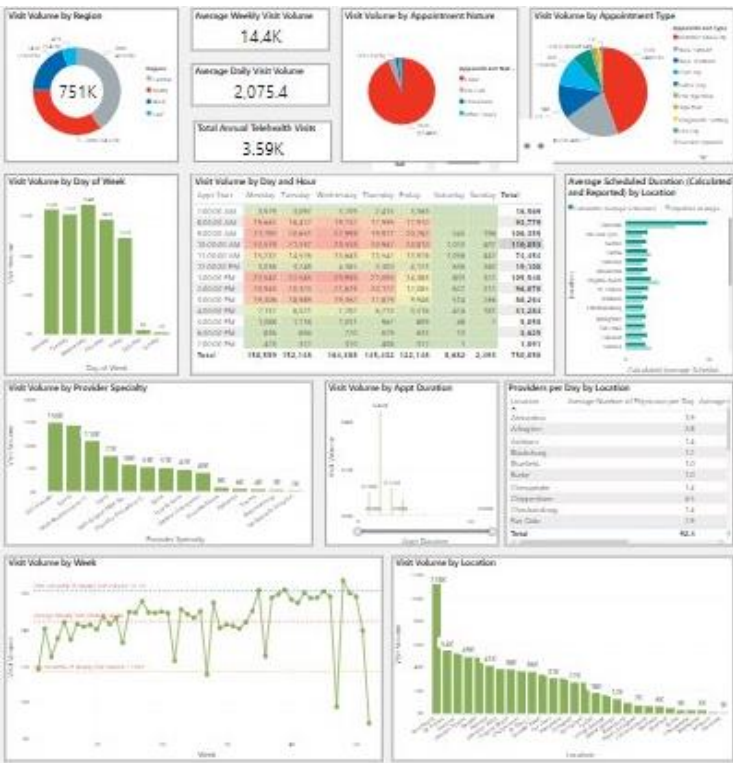
Society for Health Care
Strategy & Market
Development™

Prioritize most impactful opportunities

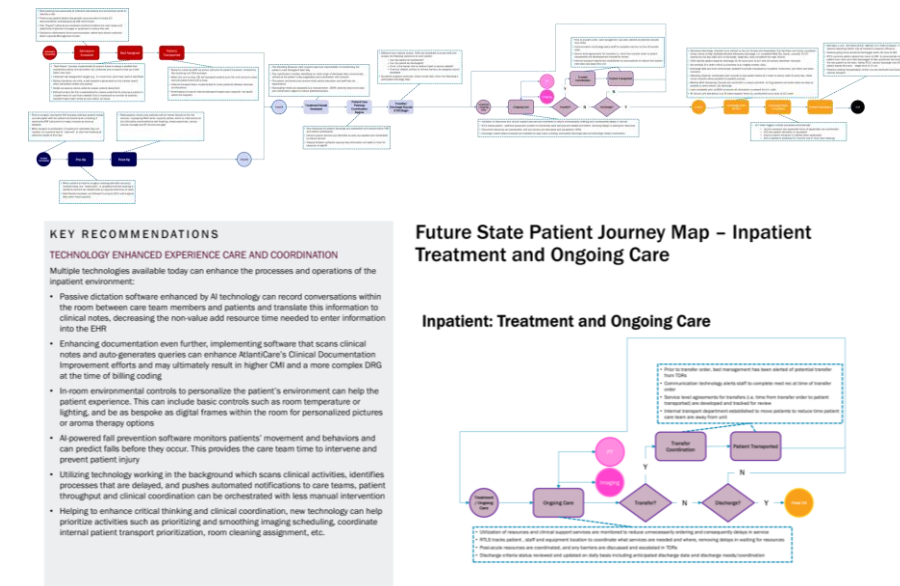
Identify Your *Critical* Metric(s) of Opportunity

Focus on Greatest Impact Areas

Future Deep Dives for Right-Sizing Space

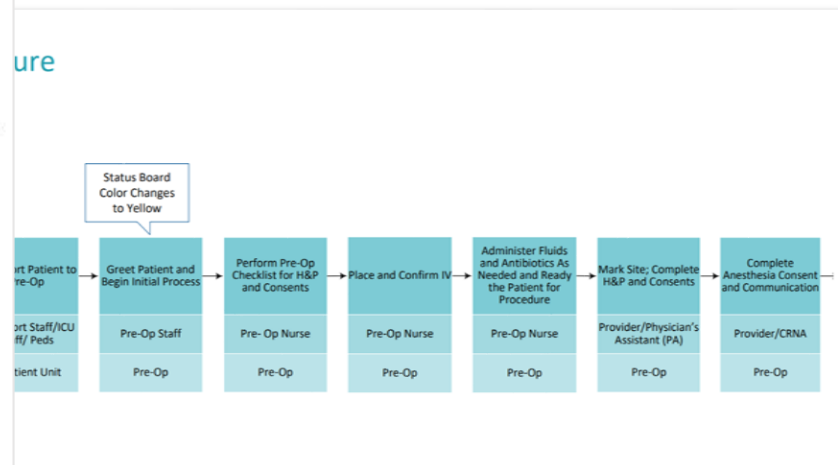
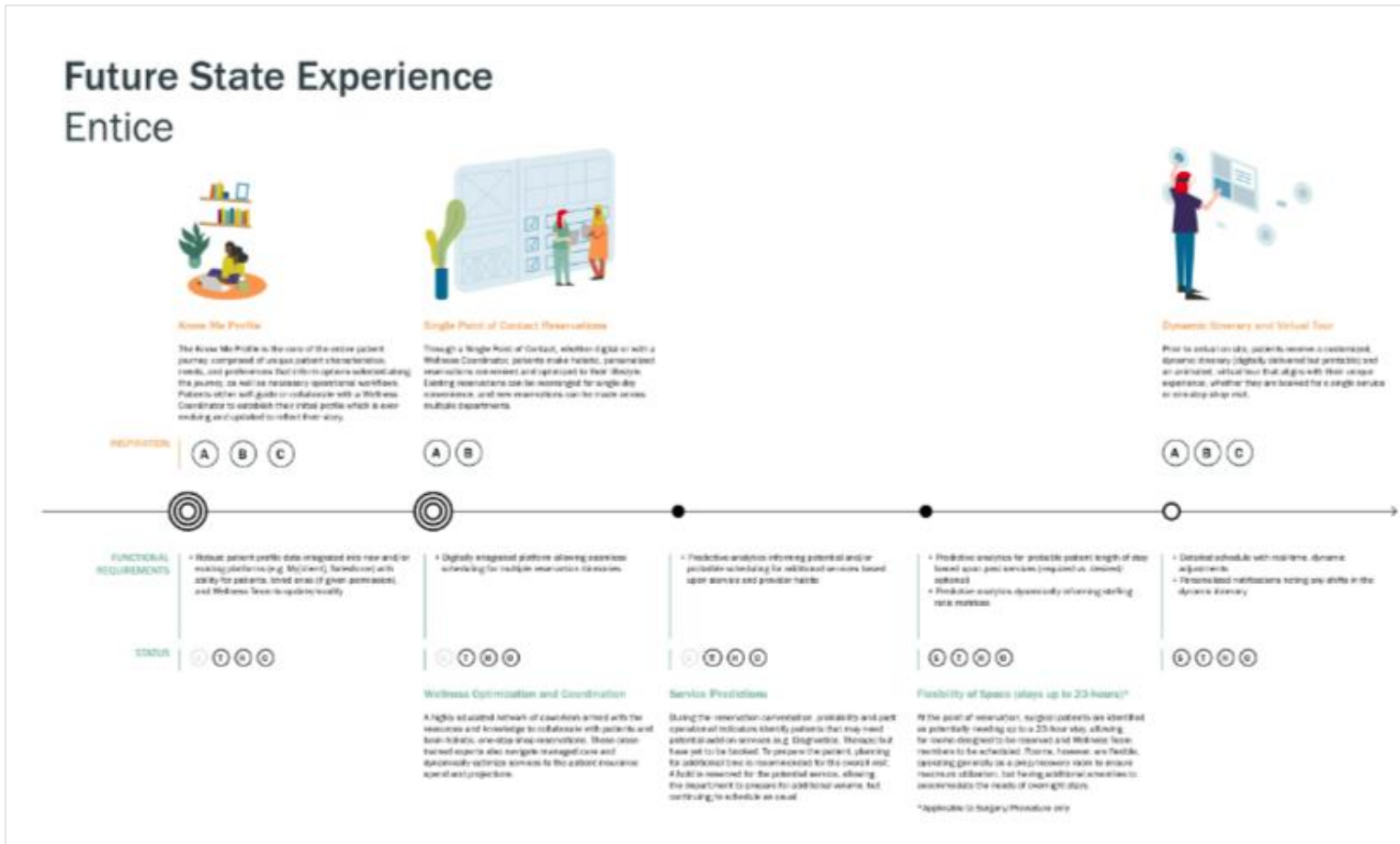


Service Line	2022	2023	2024	Three-Year Trend
Gastroenterology	1.44	1.36	1.31	
Medicine	1.45	1.43	1.29	
Cardiology	1.30	1.38	1.28	
Orthopedics	1.13	1.25	1.27	
General Surgery	1.46	1.48	1.26	
Psych	1.29	1.32	1.25	
Neurosurgery	1.34	1.16	1.22	
Cardiac Surgery	1.33	1.45	1.16	
OB/GYN	1.09	1.14	1.13	
Neonatology	1.03	1.24	1.07	
Thoracic Surgery	1.40	0.86	0.93	
Average	1.32	1.34	1.22	

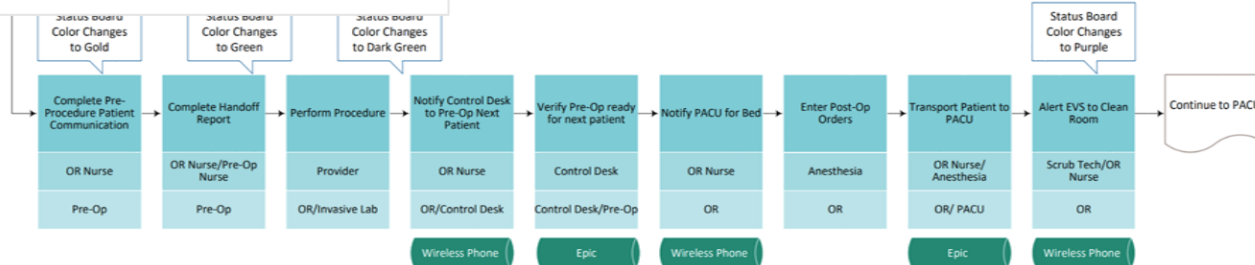


Mapping Opportunity to Foster Alignment

← Journey Mapping Experiences



→ Operational Process Maps



Defining Impactful Evaluation Metrics



**Alignment
with Strategy**



**Oncology-Focused
Care Environment**



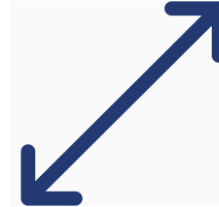
**Speed
To Market**



**Operational
Efficiency/
Simplicity**



**Research
Integration**



Flexibility



**Transit
Score
(Access)**



**Site Access
to Highway**



**Lot
Capacity**



**Drive
Time**



**Oncology
Payer Mix**



**Site
Control**



**Patient and
Visitor Experience**

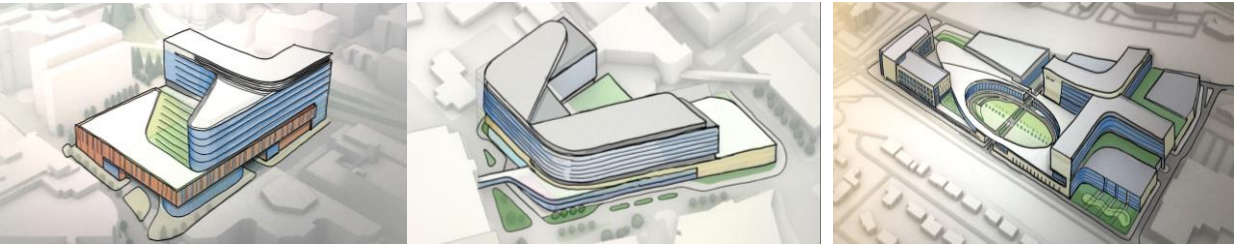


**Ease of
Development**



**Brand
Visibility**

Choosing by Advantage



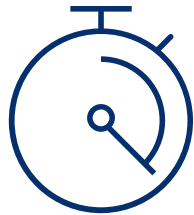
Metric	Weight/100	Scenario 1	Scenario 2	Scenario 3
Alignment With Strategy	18			
Patient & Visitor Experience	16			
Operational Efficiency/Simplicity	14			
Research Integration	12			
Future Flexibility/Expandability	11			
Site Control	8			
Brand Visibility	8			
Transit Score (Access)	7			
Site Access to Highway	6			
Quality Score		75	69	61
Total Project Cost (divide by)		\$1.14B	\$1.09B	\$1.2B
Value= Quality per Dollar		65.8	63.9	48.8

How Disruption Comes to Healthcare



ERNEST HEMINGWAY, *THE SUN ALSO RISES*

“How did you go bankrupt?”



ERNEST HEMINGWAY, *THE SUN ALSO RISES*

“Two ways...
Gradually and then
suddenly.”



The Importance of Scenario Planning – An Approach



Recognize uncertainties, indicators, scenarios, and the actions they prompt as they unfold

WHY

Scenario Planning is a gap, particularly in healthcare. *“The future ain’t what it used to be.”*



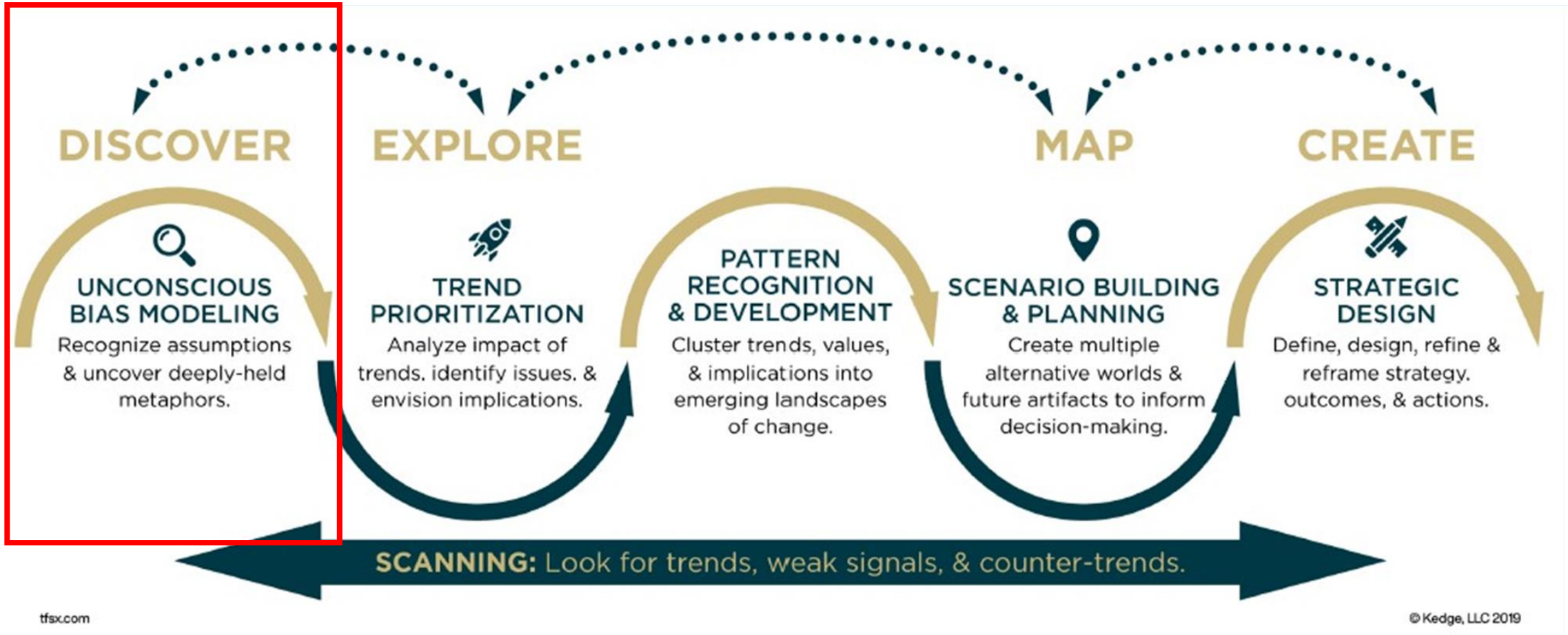
WHAT

- Reviewing environment, developing & prioritizing scenarios
- Assessing the different paths depending on probabilities & sensitivities
- Action planning and risk mitigation

HOW

Q3-Q4: Inventory scenarios & themes, assess impact and probability, set mitigation and initial approach....most importantly, **action plan in operational readiness sessions.**

A Sample Framework

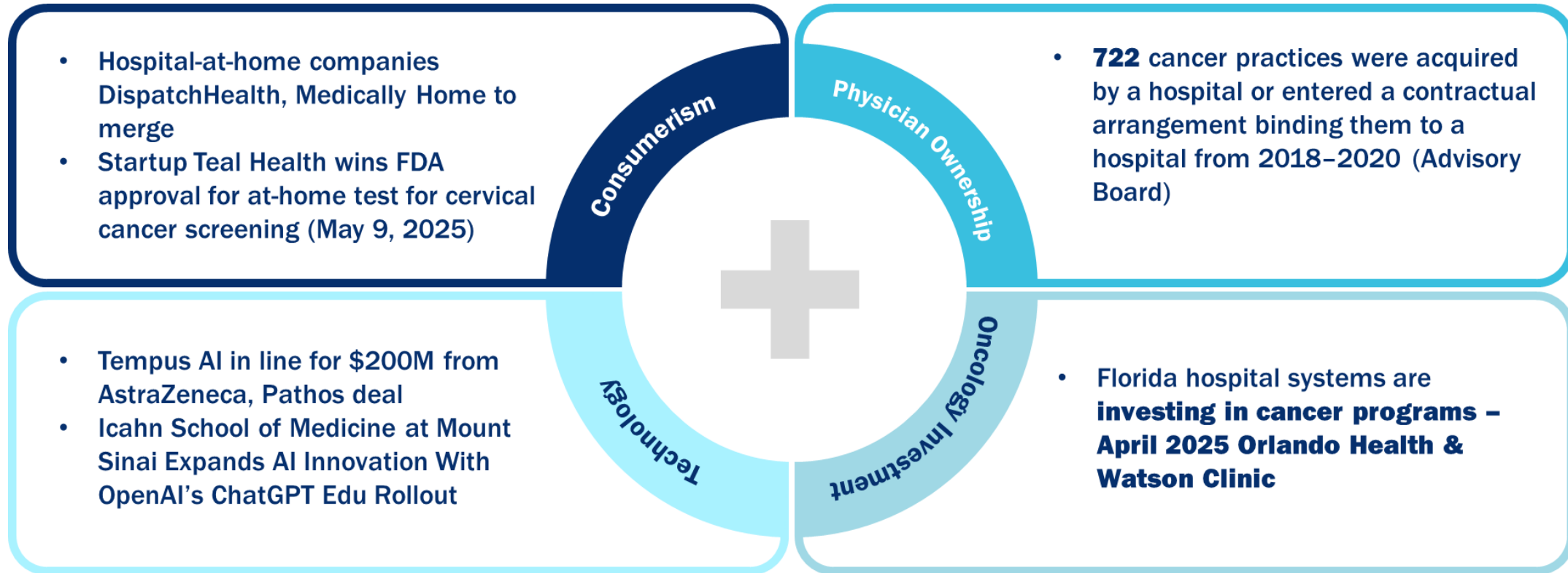


Explore

- Where do you find the future?
- What are your go-to channels?
- What sources fill your news feed?
- Do you scan for trends across STEEP [Social, Technological, Economic, Environmental, and Political] channels of information?



Continued Headwinds for the Healthcare Industry



Additional Signals & News

- NIH funding potential cuts
- TGH confirms a hiring freeze
- US GDP has first negative quarter since 2022
- Volatility/Headwinds: Tariffs & Regulatory

An example

What are your disruptors?

**What are the headwinds
from your point of view
and/or in your area?**

Thank you!



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Questions?

- Please be sure to complete the session evaluation on the mobile app!