INSIDE THE

Top of Mind
2019
SUMMIT

A report from the Center for Connected Medicine
and The Health Management Academy

Center for
Connected
Medicine

The Academy
The Health Management Academy

About the Summit

The Center for Connected Medicine (CCM) hosted the Top of Mind 2019 Summit on Dec. 5-7, 2018, at the CCM in Pittsburgh, Pa. For the second year in a row, the Summit convened top leaders and innovators in health care and health information technology (IT) to identify key trends facing the industry, discuss solutions for moving health care forward, and provide opportunities for collaboration and learning among senior health care provider and industry executives.

The Summit agenda was informed by the Top of Mind for Top Health Systems 2019 research project, which identified and explored the top three trends in health IT for 2019:

Cybersecurity

Telehealth

Interoperability

Conducted in partnership with The Health Management Academy, the research included quantitative and qualitative surveys of 44 C-suite executives at 38 of the largest health systems in the United States.

CYBERSECURITY

TELEHEALTH

INTEROPERABILITY

Pamela Peele

Emcee and Keynote Speakers

Pamela Peele, PhD, Chief Analytics Officer, UPMC Insurance Services Division and UPMC Enterprises, emceed the event, which included more than 30 speakers over three days.

KEYNOTE SPEAKERS:

Don Rucker, MD
National Coordinator for Health Information Technology (ONC), Department of Health and Human Services

Vivian Lee, MD, PhD, MBA
President, Health Platforms, Verily

Don Rucker

The Top of Mind 2019 Summit, an exclusive, invite-only event, attracted attendance from more than 100 people representing 60 organizations, including Banner Health, Boston Children's, Duke, Department of Health and Human Services, Johns Hopkins University and Health System, Microsoft, Ochsner Health System, Ohio Health, Rush University Medical Center, and St. Luke's University Health Network.

Vivian Lee

Find video interviews of Dr. Rucker and Dr. Lee from the Top of Mind 2019 Summit on the CCM website.

Top of Mind **2019** Summit

Key Themes

Throughout the Summit, several overarching themes emerged from the various speakers and panel presentations. Three top themes were heard again and again — an emphasis on strengthening foundational health IT elements to leverage more advanced solutions, focusing on consumerism and engagement, and the importance of partnerships. These themes are discussed on the following page.

Strengthening HIT Foundations

As health care continues to evolve and providers are looking to implement more advanced technologies, such as artificial intelligence and predictive analytics, and new models of care delivery, such as telehealth and precision medicine, a key component of success is ensuring a robust health IT infrastructure that confirms the secure storage, management, and sharing of data.

Investment in cybersecurity is critical for providers to protect the vast amounts of sensitive patient data and maintain consumer trust. However, health systems must balance the need for security with improved interoperability and access to data. To improve care and implement advanced solutions, providers must be able to share and leverage the data in a secure manner.

Speakers throughout the Summit emphasized that while health care organizations should look toward the future and focus on modernization and innovation, organizations must also prioritize core IT and business processes that will enable long term security and success.

A Focus on Consumerism

Many speakers and panels emphasized that technology and innovation should be used to improve the patient and consumer experience. Provider and industry organizations cannot forget the patient as they aim for success. As health care evolves, consumers will demand care to be delivered differently — in a more convenient and affordable manner.

Health care organizations, and particularly health systems, must rethink and redesign care delivery to align with changing consumer expectations. Additionally, speakers emphasized greater involvement of the consumer to improve long-term engagement and, ultimately, provider success. Health care as an industry must evolve from a provider-centric, transactional model to a truly consumer facing industry.

Leveraging Partnerships for Success

A recurring theme during the Summit was the importance of leveraging partnerships to implement and scale solutions and innovation successfully. Provider organizations especially should prioritize developing their core business, including clinical care and physician networks, and utilize external expert organizations to implement technology solutions or other innovations more quickly and effectively.

Key elements of successful partnerships include aligned incentives, transparency, clearly defined metrics of success, and trust between the organizations. Speakers emphasized that collaboration can help organizations think more creatively and develop solutions and new approaches to care delivery that could not happen at an individual organization.

Presentation Highlights

The Top of Mind 2019 Summit featured many prominent speakers who provided expert insights into challenges and opportunities within the health IT space, as well as the broader health care landscape. They discussed how technology can be leveraged to improve quality, affordability, and delivery of care nationally. The following pages present summaries of several impactful sessions.

Top of Mind 2019 Research Panel Discussion

A panel discussion was held on the Summit's opening night to discuss health system executives' reactions to findings of the Top of Mind for Top Health Systems 2019 survey findings. The three-part discussion focused on data and perspectives around the impact of cybersecurity, telehealth, and interoperability on their organizations' strategies and priorities.

Michael Kramer

Chris Carmody

Sherri Hess

PANELISTS:

Chris Carmody, Senior Vice President, Information Services Division, UPMC

Sherri Hess, Chief Nursing Information Officer, Banner Health

Michael Kramer, MD, MBA, Chief Medical Information Officer, OhioHealth

Moderated by **Gary E. Bisbee Jr., PhD**, Co-founder and Executive Chairman, The Health Management Academy

Top of Mind 2019 Research Panel

The panel discussion echoed similar themes as the Top of Mind research, with executives citing challenges and opportunities their organizations are facing around cybersecurity, telehealth and interoperability. As health systems invest more toward improving technology, executives are working to determine how to be smarter when it comes to spending their dollars, particularly around cybersecurity.

To spend smarter, executives discussed prioritizing employee education, risk management, and partnering with other value-adding organizations

to create a more secure system. Additionally, executives noted the innate tension between the organizations' need for cybersecurity and the goal of greater interoperability and data sharing. Health systems are aiming to improve interoperability and leverage data to improve efficiency, affordability, and outcomes, however must also ensure data security.

Looking toward the future, health systems are implementing telehealth services to meet consumer demand, increase access to services, and improve consumer loyalty through

creating "stickiness" with their organizations. However, reimbursement and workflow redesign are barriers to broader adoption. Additionally, as health systems implement telehealth services executives are considering how to manage and leverage additional incoming data through cybersecurity and interoperability efforts.
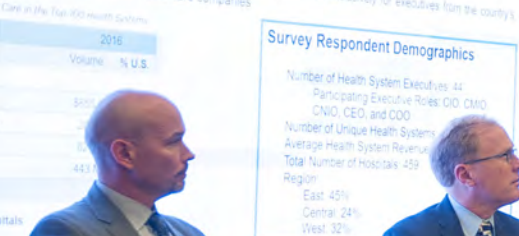
Gary E. Bisbee Jr.

The Impact of Consumerism on Health Care

In this panel discussion, executives discussed consumerism in health care and how providers must rethink their approach to care delivery and innovation to become more consumer-centric. Recognizing the threat of a changing health care environment for health systems, panelists discussed a need for providers to shift the current mindset focused on billing and reimbursement and focus instead on enhancing clinical care through technology, innovation, and digitization.

Rob DeMichiei

Aimee Quirk

PANELISTS:

Rob DeMichiei, Executive Vice President and Chief Financial Officer, UPMC

Mike McSherry, CEO, Xealth

Aimee Quirk, CEO, innovationOchsner, Ochsner Health

Mike McSherry

The Impact of Consumerism on Health Care

Health systems should aim to design care in a way that is integrated and convenient for consumers or risk losing out to organizations, such as insurers and technology companies, who are expanding into the health care delivery space and place a greater emphasis on placing consumers at the center of care. Panelists emphasized how health systems must leverage their core competency of clinical care and look to partner with other organizations to build the technology, tools, and infrastructure to enable care delivery.

Improving Health Care, At Scale

In her keynote address, Vivian Lee, MD, PhD — President of Health Platforms at Verily and former CEO of University of Utah Health Care — highlighted the importance of understanding health care costs in the movement toward value-based care. She also provided an example of effective cost control efforts at the University of Utah Health Care.

Reflecting on the overwhelming uncertainty around the cost of care at an individual physician level, Dr. Lee discussed University of Utah's use of electronic health record (EHR) data to determine the cost of care and identify opportunities for savings. By connecting cost data to quality scorecards — designed leveraging Centers for Medicare & Medicaid Services' metrics and physician input — the University of Utah was able to move more substantially into value-based care and significantly improve margins.

Dr. Lee emphasized that the health care industry is ripe for disruption and the question now is who will be the disruptor. Providers must be proactive and work to manage costs, move towards value, and prioritize consumer centricity to continue to be successful.

Vivian Lee, President, Health Platforms, Verily

Vivian Lee

Driving Toward Innovation

In the final panel discussion of the Summit, executives discussed how various industry stakeholders can collaborate on innovation and the importance of leveraging strong partnerships.

Aenor Sawyer

PANELISTS:

Mike Biselli, President, CatalystHTI

Karl Bream, Vice President and Head of the Internet of Things Strategy, Nokia

Aaron Crowell, Global General Manager, UBER Health

Aenor Sawyer, MD, Director, UCSF Skeletal Health Services, Health Innovation & Technology in Ortho

Moderated by **Rasu Shrestha, MD, MBA**, Chief Strategy Officer and Executive Vice President, Atrium Health


Aaron Crowell

Karl Bream

Driving Toward Innovation

With increased investment in health care innovation, particularly around digital health investment, health care organizations must look for elegant, simple, and meaningful solutions that empower patients and consumers. Additionally, organizations should widen the scope and look to nontraditional areas of innovation, such as logistics and transportation. They also should prioritize partnerships with various stakeholders, including prominent technology companies and other health systems for front line innovation.

Panelists emphasized health care organizations must focus on solutions that make health care more convenient, prioritize the consumer experience, and create formal processes to streamline and integrate solutions for success.
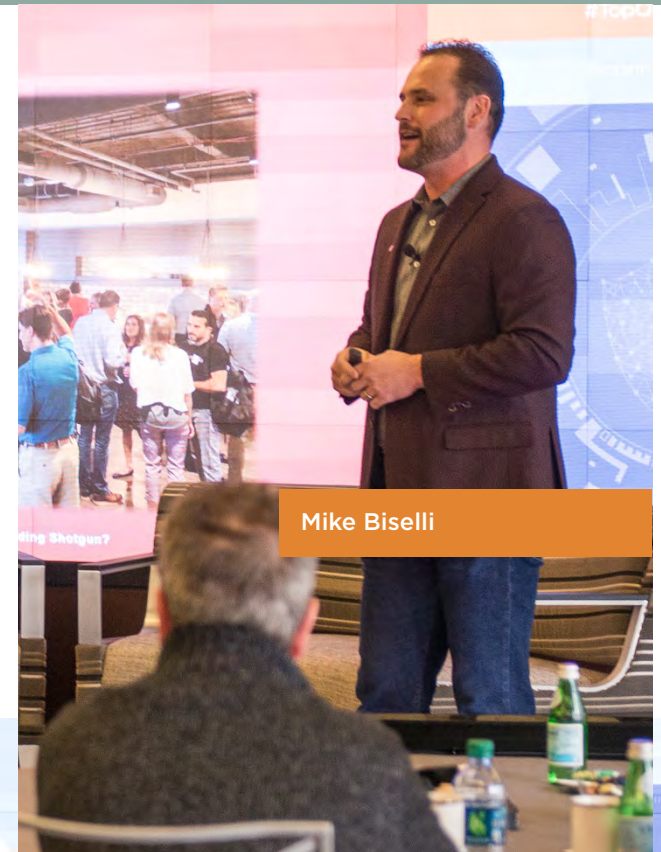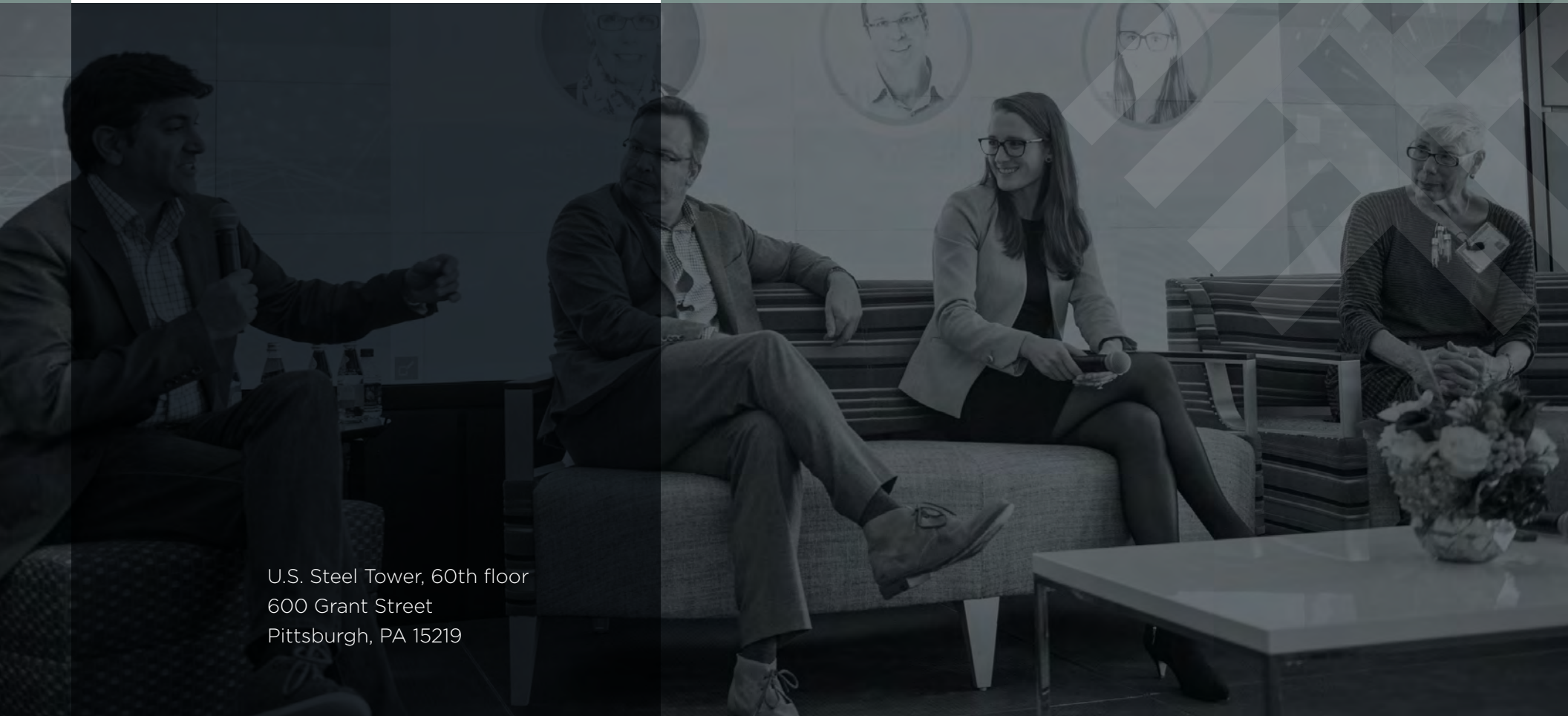

Mike Biselli

Center for Connected Medicine

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