The 2016 American Hospital Association Environmental Scan provides insight and information about market forces that have a high probability of affecting the health care field. It is designed to help hospital and health system leaders better understand the health care landscape and the critical issues and emerging trends their organizations likely will face in the foreseeable future. The 2016 Environmental Scan is compiled from nationally recognized sources with recommendations from select AHA governance committees. Notable this year is the pace of change health care markets are experiencing and is a common theme running throughout the topics presented in the Environmental Scan. Moreover, health care also is a local phenomenon, with the pace of change being relative and varying from market to market.

The scan is produced by Gene J. O’Dell, the AHA’s vice president for strategic planning and performance excellence, with assistance from Donna J. Aspy, planning and operations manager, leadership and business development. Lee Ann Jarousse, H&HN’s senior editor of custom publications, compiled the information.

**CONSUMERS & PATIENTS**

- Effectively managing the care of patients with chronic illnesses is critical to bending the curve of health care spending in the United States. Nearly half of all Americans have at least one chronic illness or more. For those age 65 or older, the figure is 85 percent. People with chronic illnesses cost the health care system $1.5 trillion, or about 75 percent of total health care expenditures. ¹

- Individuals with mental illness are among the highest-need, costliest patients in the U.S. health care system, yet they receive inadequate behavioral health care. Researchers have proposed various models that integrate behavioral health with primary care. These approaches have the capacity to improve patient care and outcomes in terms of both physical and behavioral health. However, the limited availability of behavioral health providers has been a major implementation obstacle. ²

- Depression is the leading cause of disability worldwide, and is a major contributor to the global burden of disease. Serious mental illness costs America $193.2 billion in lost earnings every year. Approximately 60 percent of adults with a mental illness received no mental health services in the previous year. ³

- The health care sector will begin to look and feel like those of other industries, catering to customers who expect one-click service. A true consumer-driven market is slowly taking shape. Patients are leading the way, bearing more of the cost of their own care — and making more care decisions. Patients are no longer satisfied with just meeting with their doctors. Increasingly, they expect to access lab results on their phones soon after leaving the medical center. ⁴

- High-cost patients will be the focus of a U.S. health care industry under pressure to contain costs. Among the most costly patients in America are the dual eligibles — approximately 9.6 million individuals who qualify for both Medicare and Medicaid. In 2010, the Medicare fee-for-service program spent an average of $19,418 on each of these patients, compared with $8,789 on other beneficiaries. ⁴
INSURANCE & COVERAGE

POLITICAL ISSUES

PHYSICIANS

PROVIDER ORGANIZATIONS

QUALITY & PATIENT SAFETY

TRANSFORMING CARE DELIVERY

What the experts have to say …

Larry Margolis, President & CEO, HCA, Nashville, Tenn., and chief medical officer, HCA Healthcare

What is unique about HCA’s strategic planning process?

What are the strategies that HCA employs to ensure that its strategic plan is feasible and helps achieve its goals?

Rick Pollack, President & CEO, American Hospital Association

What is the American Hospital Association's role in guiding hospitals through the strategic planning process?

Gene O’Dell, President & CEO, LHC Care

What role do non-hospital health care organizations play in the strategic planning process?

What are the key takeaways from the healthcare experts’ perspectives on strategic planning?

Larry Pollack

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What are the key takeaways from the healthcare experts’ perspectives on strategic planning?
The Transformation of Health Care: An Interview with Jonathan Perlin, M.D., Chief Medical Officer, HCA Healthcare

By Rick Pollack

The transformation of health care is in full swing today. New models of care are emerging, and health systems are adapting to these challenges. Jonathan Perlin, M.D., chief medical officer at HCA Healthcare, discusses the changing landscape of health care and what it means for clinicians and patients alike.

Q: What do you see as the most critical challenges facing health care today?
A: The most critical challenge is the transformation of care delivery. We’re seeing a shift away from fee-for-service models to value-based payment models, which require a focus on outcomes rather than volume. This shift is driven by the need to improve quality and efficiency, while also reducing costs. Another challenge is the increasing integration of behavioral health and primary care, which requires new partnerships and models of care.

Q: How is HCA Healthcare adapting to these changes?
A: HCA Healthcare is adapting by investing in technology, data analytics, and innovative care models. We’ve developed a platform called HCAi, which uses machine learning to identify patients at risk for readmission and provides targeted interventions to reduce these events. We’re also expanding our TeleHealth program, which offers virtual care for patients in their homes, to improve access and quality of care.

Q: What do you think the future of health care will look like?
A: The future of health care will continue to be driven by technology and data. We’ll see more personalized medicine, with a focus on genomics and precision medicine. There will be greater emphasis on prevention and wellness, and a shift towards integrated care models. Health care will become more consumer-driven, with patients taking a more active role in their care and having more control over their health outcomes.

Q: What advice do you have for other health care organizations looking to adapt to these changes?
A: My advice is to be proactive and embrace change. It’s important to invest in technology and data, and to develop partnerships with other organizations to share resources and expertise. It’s also important to involve clinicians in the decision-making process and to foster a culture of innovation and collaboration. The future of health care is uncertain, but by being proactive and adaptable, we can ensure that we’re positioned for success.

Jonathan Perlin, M.D., is chief medical officer at HCA Healthcare. He is dedicated to improving patient care and outcomes through innovative and evidence-based approaches to care delivery and quality improvement.

For more information on how HCA Healthcare is transforming care delivery, visit hcahealthcare.com.

HCA Healthcare is a leading provider of hospital and healthcare services, with hospitals in more than 20 states and the District of Columbia. The company is committed to improving the health of our communities and providing exceptional care to our patients.

About Rick Pollack
Rick Pollack is president and chief executive officer of the American Hospital Association. He is a strong advocate for community health and is committed to improving the health of our communities.

For more information on the AHA, visit ahainfo.org.

What the experts have to say

What are the most urgent and emerging issues facing health care today?

What can we learn from the experience of other countries?

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**INSURANCE & COVERAGE**

Over the past few years, forces have been aligning to make offering a health plan look increasingly attractive to health systems. 13 percent of all U.S. health systems offer health plans — private or corporate health insurance — to their employees.

100,000 health systems in the United States employ 10 million full-time workers. A little over 40,000 offer health plans, providing coverage for 6.7 million workers. That’s about 17 percent. The percentages are higher in some states than others, in cities than in rural areas. But they are far lower than the national percentages.

Some 20 percent of the poor are insured because they work for an employer that offers coverage. About 70 percent who are poor lack insurance; 10 percent have Medicaid. Do you think that’s an accident? No. It’s not. That’s a public policy. One of our country’s predominant political parties, the Republicans, is absolutely opposed to expanding Medicaid, the 1965 federal program that provided health coverage for the poor.

The Republican Party, despite its claims about the advantages of a free market, has no intention of expanding Medicaid. And since the Democrats have no stomach for it, we are now left to pray that a Republican administration would have the guts to do what is right. The blues in the White House, however, have no interest in doing that.

**PHYSICIANS**

The transformation of health care toward more integrated and coordinated care remains the most pressing issue in the physician world. For those who view physicians as the primary care providers for all Americans, universal insurance coverage means little if care is fragmented. For those who view physicians in new roles, including their participation in physician organization and accountable care organizations, the need to rethink and engage the leaders of these medical enterprises is imperative. Physicians are needed to improve the efficiency, effectiveness, and coordination of care, and to help ensure that all care is of high quality.

Physicians, nurses and other caregivers often do not know which care is safe and appropriate for their patients. And they often lack the information they need to provide the best care. They are isolated pockets of extreme need in rural U.S. communities where conditions are ripe for more-for-less innovation. The Obama administration pledges to channel patients to a select few providers. Walmart, for example, is channeling patients to a select few providers. The health care industry is moving toward more integrated and coordinated care.

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of healthcare leaders plan to retire within the next ten years

70% 66%

of organizations have not initiated succession plans in place

CEO Turnover is on the rise.
The rate has increased from 14% to 18% and the effects of this turnover are far-reaching. In a B.E. Smith executive survey respondents indicated which candidates are likely to leave after COO departure.

CEO CFO CDO CNO

% 46 35 14 29

of B.E. Smith COO placements are completed on the first panel of candidates.

100%

interim leaders are highly satisfied with B.E. Smith.

94%

B.E. Smith’s team is comprised of the top 20 healthcare recruiters and consultants. With more than 20 years of industry experience, these industry leaders are uniquely qualified to find the right leaders for your organization.

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The Source for Healthcare Leaders

industry leaders are uniquely qualified to find the right leaders for consultants. With more than 20 years of healthcare experience, these professionals are uniquely equipped to find the right leaders for

COO CFO CDO CNO

% 79 70 36 29

Our research suggests that technology-enabled care delivery is a key to the future of health care. Video consultations are projected to grow from 5.7 million in 2014 to 33 million by 2020. Technology-enabled care delivery is increasingly becoming a reality, and an increasing number of patients are comfortable with the use of video consultations.

Technology-enabled care delivery includes a wide range of services, such as video consultations, telemedicine, and remote patient monitoring. These services have the potential to improve patient outcomes, reduce costs, and increase access to care. However, there are also concerns about the quality and safety of technology-enabled care delivery, and it is important to ensure that these services are properly regulated and monitored.

The Benefits of Technology-Enabled Care Delivery

- Improves Patient Outcomes: Technology-enabled care delivery has the potential to improve patient outcomes by providing more timely and accurate care. For example, patients with chronic conditions may benefit from remote monitoring, which can help to detect changes in their condition early and prevent hospitalizations.
- Reduces Costs: Technology-enabled care delivery can also help to reduce costs by reducing the need for in-person visits and hospitalizations. For example, telemedicine consultations can often be more cost-effective than in-person visits.
- Increases Access to Care: Technology-enabled care delivery can help to increase access to care by allowing patients to receive care regardless of their location. For example, patients in remote or underserved areas may benefit from telemedicine consultations.

The Challenges of Technology-Enabled Care Delivery

- Quality and Safety: One of the biggest concerns about technology-enabled care delivery is quality and safety. It is important to ensure that these services are properly regulated and monitored to ensure that patients receive safe and effective care.
- Technical Issues: Technology-enabled care delivery relies on reliable technology, and technical issues can negatively impact patient outcomes. For example, patients may be unable to access care if there are technical issues with the video consultation system.
- Patient Satisfaction: Patients may have concerns about the quality of care they receive through technology-enabled care delivery. It is important to ensure that patients are comfortable with these services and that they receive the same level of care as they would receive in-person.

Conclusion:

Technology-enabled care delivery has the potential to improve patient outcomes, reduce costs, and increase access to care. However, it is important to ensure that these services are properly regulated and monitored to ensure that patients receive safe and effective care. With careful planning and execution, technology-enabled care delivery can help to improve the quality and efficiency of health care.

B.E. Smith Economist Survey: Technology-Enabled Care Delivery

The B.E. Smith Economist Survey is a comprehensive study that provides insights into the state of the healthcare industry. The survey is conducted annually and provides data that can be used to inform decisions about hiring, compensation, and other aspects of the healthcare industry.

The survey includes questions about technology-enabled care delivery and other topics of interest to healthcare leaders. The survey results are used to inform decisions about hiring, compensation, and other aspects of the healthcare industry.

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Healthcare Leaders

**The Source for Healthcare Leaders**

**ECONOMY & FINANCE**

- Health care continues to be the most expensive sector of the U.S. economy. In 2014, health care spending rose to $3.3 trillion, or 17.2% of the GDP.
- The Affordable Care Act (ACA) has had a significant impact on the health care industry. The ACA has led to an increase in the number of Americans with health insurance, which has resulted in a decrease in uncompensated care. However, it has also led to an increase in the cost of health care due to rising premiums.

**WORKFORCE**

- The number of health care jobs is expected to grow significantly over the next decade. By 2024, it is projected that there will be over 2 million new jobs in health care.
- The demand for health care professionals is expected to increase due to an aging population and an increased focus on preventive care.

**INFO TECH & eHEALTH**

- The health care industry is embracing technology in order to improve patient care, efficiency, and reimbursement. Wearable devices, telemedicine, and artificial intelligence are among the technologies being utilized.
- However, there are also challenges related to technology adoption, security, and interoperability.

**SCIENCE & TECHNOLOGY**

- Big data is being used in health care to improve patient outcomes and reduce costs. For example, predictive analytics can help identify patients at risk for readmission or hospitalization.
- The integration of health care and technology is also being leveraged to improve communication and coordination among care providers.

**INTERIM LEADERSHIP | EXECUTIVE SEARCH | ADVISORY SERVICES**

- B. E. Smith is a leader in health care recruitment, with a focus on providing high-quality executive placements.
- The company has a team of experienced healthcare recruiters who have a deep understanding of the industry and are able to identify the best candidates for client organizations.
- B. E. Smith has a strong track record of success, with a 90% rate of placements leading to client organizations.

From the C-suite to the surgical suite, B. E. Smith can assist hospitals in recruiting healthcare executives.

- CEO Turnover is on the rise. The rate has increased from 18% to 22% over the past five years.
- This trend is likely to continue due to the increased focus on value-based care and the need for strategic leadership.

**JOIN THE B. E. SMITH TEAM TODAY!**

- B. E. Smith is seeking candidates with a proven track record in the health care industry.
- Opportunities are available in various specialties and at all levels within the organization.
- For more information on current openings and to apply, please visit the B. E. Smith website.
in high-deductible plans with a savings option has increased 23 percent, respectively, from 2006 to 2022, whereas enrollment in especially if it includes a narrow network.

A key challenge is ensuring that the provider-led plan could afford them, more than Medicare and Medicaid enrollments will grow 9 percent are considering using a defined contribution method. Thirteen percent of large firms offering a health plan look increasingly attractive to health systems. Because 60 percent of consumers who are spending their own money.

■ Physicians anticipate that High-performing organizations are increasingly talking less than 50 percent of the time during the patient's visit. While increasing the number of primary care physicians has been

■ The American Hospital Association argues that Medicare and Medicaid states as its general position that Medicare

■ The Obama administration pledges to

■ The Institute of Medicine estimates that unnecessary or used inappropriately. Most physicians are enthusiastic about

■ Marketing & Communications, Chicago. And, finally, strategic planning cannot be done simply in the CEO's office. It must be an

What are the keys to a successful strategic planning process for hospitals and health systems?

• You must implement and then measure the results.
• Be prepared to disrupt yourself before someone does it to you.
• Ultimately, strategy is a framework around which to improvise.
• Some of the keys to a successful strategic planning process are as follows:

What are the new trends and key findings of the 2016 Environmental Scan?

• HCA’s planning process is unique, in part, due to HCA’s size and scale. Given that HCA

• What are the new trends and key findings of the 2016 Environmental Scan?

• What are the keys to a successful strategic planning process for hospitals and health systems?

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RESOURCES


33. Spending Brief, “Health Sector Economic Indicators,” Center for Sustainable Health Spending, Altarum Institute, Feb. 12, 2015.


From the C-suite to the surgical suite, B. E. Smith can provide the Source for industry leaders uniquely qualified to find the right leaders for the next ten years. Executives are likely to leave after a CEO departure: 57% of respondents indicated which reason as the primary reason for exiting their current role. B. E. Smith executive survey, 2014. From the C-suite to the surgical suite, B. E. Smith can provide the Source for industry leaders uniquely qualified to find the right leaders for the next ten years. Executives are likely to leave after a CEO departure: 57% of respondents indicated which reason as the primary reason for exiting their current role. B. E. Smith executive survey, 2014.

EXECUTIVE SEARCH | ADVISORY SERVICES

INTERIM LEADERSHIP | EXECUTIVE SEARCH | ADVISORY SERVICES

■ More than 1,000 independent ultrasound technologists employed, nationwide. • Most will have earned ASQ, ASRT, or ARRT certifications. •搏onuments the number of applications for certification. • Annual examination and re-certification process to maintain professional status. • More than 1,000 independent ultrasound technologists employed, nationwide. • Most will have earned ASQ, ASRT, or ARRT certifications. •搏onuments the number of applications for certification. • Annual examination and re-certification process to maintain professional status.

■ Technology-enabled care delivery upends health care markets with supply and demand that are out of balance. Hospitals will need to transfer patients more often and provide care in the community to reduce costs. The rise in reimbursement for telemedicine services will continue to provide a major opportunity for telehealth providers in addition to the savings in personnel and travel costs.

■ Great opportunities for future leaders emerge when the supply of providers is out of balance. • The pocket for future leaders emerges when the supply of providers is out of balance. • The pocket for future leaders emerges when the supply of providers is out of balance.

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■ CHG Healthcare is growing at a rapid pace in both telehealth and at-home monitoring. Executive delivers on the promise to drive the success of the telehealth practice. • CHG Healthcare is growing at a rapid pace in both telehealth and at-home monitoring. Executive delivers on the promise to drive the success of the telehealth practice. • CHG Healthcare is growing at a rapid pace in both telehealth and at-home monitoring. Executive delivers on the promise to drive the success of the telehealth practice.

■ Video consultations can provide significant cost savings. • Video consultations can provide significant cost savings. • Video consultations can provide significant cost savings.

■ Digital health technologies are rapidly proliferating. There are many examples of how digital health technologies can improve the way health care is delivered, from improving health care communication and coordination, and reducing the need for hospital stay, to providing continuous monitoring for patients suffering from chronic diseases.

B. E. Smith’s team is comprised of the top 20 healthcare recruiters and consultants. With more than 20 years of healthcare expertise, these industry leaders are uniquely qualified to find the right leaders for your organization.

From the C-suite to the surgical suite, B. E. Smith can assist in recruiting healthcare executives.

Executive Survey:

■ 70% of healthcare leaders plan to retire within the next ten years

■ 66% of organisations have no succession plan in place

■ 100% of C-level leaders are highly satisfied with B. E. Smith

CEO Succession Survey

ECONOMY & FINANCE

■ Health care continues to be a top priority for the Federal Government. More than $2 trillion will be spent on health care in 2015, up from $1.7 trillion in 2010. The growth in spending raises concerns about the need to contain costs and improve the quality of care.

■ Technology-enabled care delivery upends health care markets with supply and demand that are out of balance. Hospitals will need to transfer patients more often and provide care in the community to reduce costs. The rise in reimbursement for telemedicine services will continue to provide a major opportunity for telehealth providers in addition to the savings in personnel and travel costs. RE: big bang in a booming sector. Only 1% of respondents expect the current executive search market to recover to near normal levels within the next 12 months. • The rise in reimbursement for telemedicine services will continue to provide a major opportunity for telehealth providers in addition to the savings in personnel and travel costs. RE: big bang in a booming sector. Only 1% of respondents expect the current executive search market to recover to near normal levels within the next 12 months.

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From the C-suite to the surgical suite, B. E. Smith can be your organization’s consultants. With more than 20 years of healthcare experience, these B. E. Smith’s team is comprised of the top healthcare recruiters and advisors.

If there is a need for a change in leadership, B. E. Smith is ready to offer the right solution. As the number of CEOs planning to retire within the next ten years increases, replacements are needed. B. E. Smith works with organizations to find the right leaders for the future.

...from the C-suite to the surgical suite, B. E. Smith can help organizations find the right leaders for the future.
50% reduction in readmissions

That's what our interim chief nursing officer accomplished at one hospital in just 10 months.

Find out how at BESmith.com/ProvenLeaders.