

Redefining the H Survey



- Online survey
- Conducted February 27 to March 11, 2014
- 23 questions about...
 - The national environment
 - Your market
 - Your organization
- Responses from organization's c-suite and Board Chair

Responses by Region	
Total	649
Region 1	57
Region 2	61
Region 3	62
Region 4	54
Region 5	92
Region 6	112
Region 7	77
Region 8	57
Region 9	77

In 5 years, overall forecast...

NATIONALLY...

- More hospitals in health systems
- More physician affiliation with hospitals
- More providers owning health plans
- More value based payments
- More fixed/capitated payments

YOUR MARKET & ORGANIZATION...

- Decreasing total revenue
- Increasing outpatient revenue
- Split view on costs increasing or decreasing
- Providing more primary care, urgent, and health and wellness services; less so in nursing home, home health and social/human services
- Same or fewer inpatient beds
- Half planning to repurpose inpatient beds or inpatient space to outpatient/ambulatory, rehab, observation, psych, hospice
- Most patients will have primarily electronic healthcare interactions
- More retail clinic visits through mostly independent clinics
- Significantly fewer use of medical resources
- Implementing multidisciplinary teams
- Conducting telephonic outreach of discharged patients
- Half are implementing predictive analytics to identify high risk patients in some areas
- Primary talent gaps are population health management, data analytics, change management and non traditional health partnerships
- Many organizations are seeking Partner or Experiment path, but varies by hospital type



Summary-National Environment

Perceptions of the NATIONAL ENVIRONMENT IN 5 YEARS

1. Significant increase in hospitals becoming part of health systems from 60% to 76%
2. Significant increase in physician affiliation from 60% to 60-80% or more
3. Significant increase in providers owning health plans from 10-20% to 20-40%
4. Significant increase in value based payments from less than 10% to 20-40%
5. Significant increase in fixed/capitated payments from less than 10% to 20-40%



Discussion Questions

1. What are the major strategic assumptions driving your strategic plan?
2. How is your organization “redefining the H” based on, or in response to these assumptions?
3. How can AHA assist the field in its transformation?