

Year 2 of Horizon 2030: Key Takeaways and Outlook for Year 3

Summary of 2022 Discussions and Findings

In 2022, Horizon 2030 continued to drive care transformation, leveraging deep-dive research projects and convening efforts to identify experimentation opportunities and launch pilot programs with Leading Health Systems (LHS). In 2023, Horizon 2030 Research and Convening will continue to emphasize innovation and discussion around these topics of interest:

2022 CXO Priority Themes

Workforce

- The future of the healthcare workforce is uncertain; LHS continue to struggle with recruitment and retention of needed roles. Existing roles will have to be adapted to accommodate the healthcare technology of the future.

“Human and machine will have to work synchronously. If someone doesn’t try to solve that way, it will result in a 100% failure rate.” - CEO

Health Equity

- LHS are beginning to realize that core business models and overall analysis and understanding of ROI need to be adjusted in order to account for the unique value brought by growing health equity efforts among their communities.

“This is the decade of health equity and disparity. I find it gratifying - LHS now realize that spending on social care is going to pay more dividends than medical care.” - CPHO

New Business Models

- LHS have a continued interest in researching and understanding alternative payment models to support the care delivery models of the future, including at-home care delivery, digital care delivery, and more.

“Our key focus areas are driving value: making care more affordable, decreasing utilization of services with marginal direct value to patients, etc.” - CFO

Where CXOs Diverged in 2022



Chief Executive Officers

As healthcare becomes increasingly politicized, public narrative is a top priority for CEOs.



Chief Medical Officers

As CMOs consider the future of healthcare, new care models (e.g., precision medicine, HaH) drive the most excitement.



Chief Financial Officers

CFOs are focused on optimizing business models for at-home care delivery and growing ESG efforts.

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Topics to Address in 2023

Year 3 of Horizon 2030 will focus on continuing discussion and diving deeper around the following topics through research, convening, and collaboration:

- How to operationalize and scale an effective HaH program
- How to prepare for the coming precision medicine wave
- Where LHS have alignment in their targets for environmental, social, and governance (ESG) strategies
- How to drive innovation and improvement in clinical trials
- Redefining quality through the eyes of the consumer
- How to attract and retain talent as workforce demographics and expectations evolve

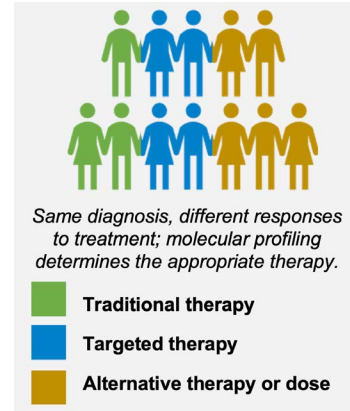
Opportunities for Collaboration Revealed Through Research, Convening

As a result of LHS discussions at 2022 Summits, the below topics arose as areas of interest for potential collaboration across participating LHS. CXOs indicate opportunities to leverage their collective scale and learnings to address these topics, bringing more value working collaboratively than individually. These topics will be of continued focus across Horizon 2030 programming in 2023.

1 LHS collaboration on precision medicine will be key to achieving 2030 scale and widespread, evidence-based implementation.

- LHS interest in precision medicine falls into one of two buckets:
 1. A focus on whole genome sequencing to understand carrier conditions, genetic variants, and more.
 2. A focus on pharmacogenomics and reducing cost of care (e.g., conducting comparative effectiveness research to better identify most effective medications based on genome sequence).

Horizon 2030 Action: Conducting follow up baseline research to understand the LHS precision medicine landscape with the goal of creating a roadmap deliverable to showcase best practices.



2 Horizon 2030 identified a need for guidance and HS-industry partnership on scaling and growing LHS HaH programs.

- LHS anticipate significant growth of their HaH programs in coming years, with some estimating HaH volumes by 2030 will rival that of current inpatient volumes.
- As LHS HaH programs are largely in early phases of development, more direction is needed on how to grow existing programs and build out in-house capabilities in order to achieve their 2030 vision.

Horizon 2030 Action: Developing a series of case examples highlighting LHS HaH programs and identifying best practices for launching, optimizing, and scaling HaH.

"We believe that [hospital-at-home] will grow to rival the volume of at least one of our hospitals, if not all of them over time."

- Chief Clinical Officer

3 Significant interest around ESG reveals opportunities for further exploration of the topic; collaboration could allow for standardization of best practices.

- Most LHS are in early stages of assessing and addressing impact and responsibility; few are aware of their current emissions, and therefore are unable to comment on strategies to reduce emissions.
- There is curiosity around how industry collaboration can address ESG goals, and an interest in the development of a framework (checklists, metrics, etc.) to align LHS to ESG expectations.

Horizon 2030 Action: Incorporating ESG topics into future research and convening, with the potential for new partnerships.

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Catalyzing the Future of Healthcare

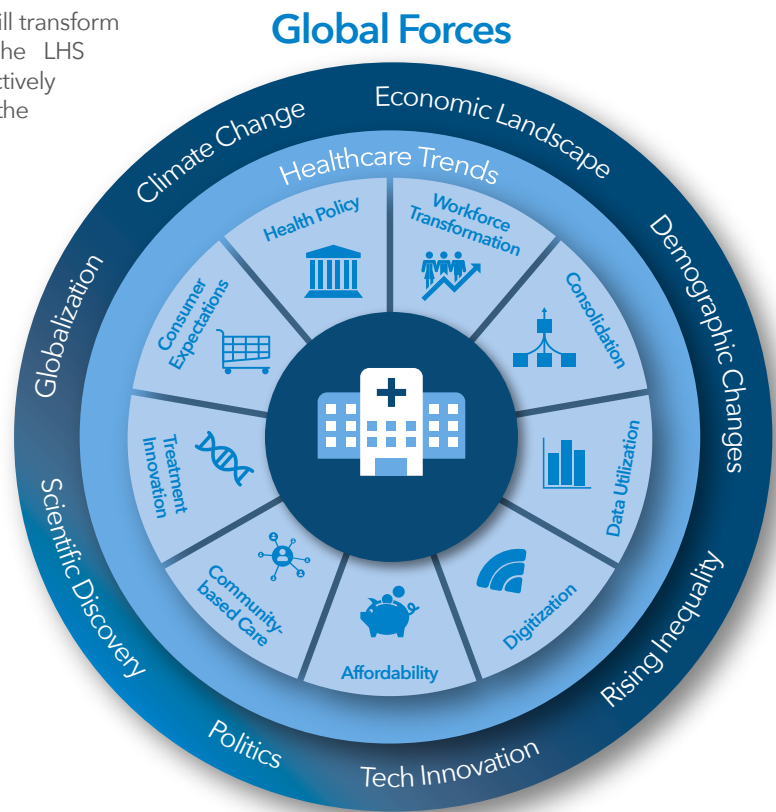
Forces Shaping an Evolving Industry

As provider health systems look toward the next decade, much of the trajectory of healthcare will be defined by broader **global forces** that will shape the way we work and live. These global forces, either independently or collectively, will influence healthcare and the next decade of innovation that will shape the industry.

Driven by global forces, the more localized **healthcare trends** will transform the industry over the next decade and require a reshaping of the LHS business model. All of these global and local influences will collectively play a role in defining the sustainability and relevance of LHS in the coming decade.

How LHS respond to these changes will dictate their long-term success by 2030 and beyond.

LHS will move toward new business models that account for the growing risk and capitalize on the opportunities of the shifting market. The next decade will give rise to new archetypes of LHS, and each organization will have to determine which model(s) work best for their system and communities.



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Horizon 2030 is a program developed in partnership between The Academy and Pfizer, designed to support the largest and most innovative health systems in creating a roadmap for the future of care delivery. To support these efforts, The Academy conducts research to understand the likely impact of key global and industry trends on LHS, understand how executives are redefining their strategies in response, and highlight successful strategies and frameworks that LHS can apply to support business model transformation.

The Academy extends its appreciation to Pfizer for the financial support for this work.

