HealthTech Overview to
Palomar Pomerado Health
August 15, 2005

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Critical Decisions Ahead

Health system leaders must plan for disruptive technology in a challenging environment

- A bulging pipeline of new technologies
- Consumers excited by the promise of longer lives
- Purchaser expectations for managing new technologies
- Cost and coverage issues
- Safety and quality implications

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Vision and Mission

The Vision

Advancing the use of beneficial technologies to make people healthier

The Mission

To create a trusted source of objective, expert and useful information about the future of healthcare technologies

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Overview

- Molly Coye, M.D. founded HealthTech in 2000 with a group of senior healthcare executives from nationally renown health care systems

- A collaborative Partner-driven organization supported by over 45 health delivery systems and Health Plans

- A non-profit research organization that forecasts the impact of emerging technologies on healthcare delivery

- Trusted source of in-depth, objective, expert and useful information about emerging healthcare technologies

- HealthTech outlines the potential impact of technology on clinical outcomes, financial performance, facility design, and market strategies

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Guiding Principles

Catalyst for Change: Catalyst for change within health delivery systems and health plans to build new capabilities for innovation and technology adoption

Partner-Driven: HealthTech members determine the research agenda and co-design Technology Planning Tools

Objective: HealthTech does not accept funding from developers or vendors of technology

Expert Panels: Broad, comprehensive research across all technologies through an open process with national experts

Quality: Rigorous methodology and broad expertise produce high-quality research

Interactive: Working Groups, website provide opportunities for Partners to learn from our experts and each other

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Partners

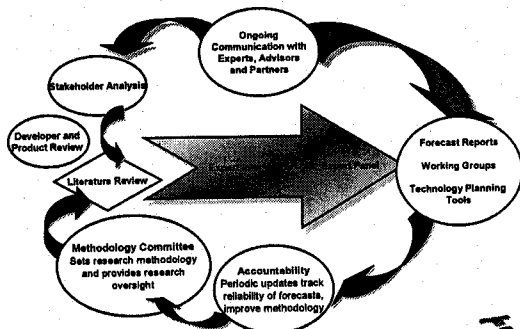|		
Stanford Hospital and Clinics	Bon Secours Health System	Mills-Peninsula Health Services
University HealthSystem Consortium (UHC)	Carolinas HealthCare System	PeaceHealth
Froedtert Hospital	Catholic Healthcare West	Premier, Inc.
Hospital Corporation of America (HCA)	Centers for Medicare and Medicaid Services (CMS) *Federal Liaison*	Providence Health System
Greenville Medical Center	CHRISTUS Health	Sutter Health
Health Alliance of Greater Cincinnati	Parkview Health	VHA Inc.
Blue Shield of California Foundation	Partners HealthCare System	WellPoint Health Networks
Lucile Packard Medical Center	The Queen's Medical Center	Texas Health Resources
Chinese Hospital & Health Plan	Veterans' Health Administration	*New 2005*
Catholic Health Initiatives CHI	Overlake Hospital	**Palomar Pomerado Health**
St. Alphonsus Regional Medical Center	UC Davis Health System	University of Chicago Hospitals and Health System
Rockingham Memorial	Methodist Health System	Memorial Hermann
Salem Hospital	Lumetra	Sandia National Laboratories
El Camino Hospital	Ascension Health	SCAN Health Plan
Banner Health System	CAPH	Trillium Health Centre
	John Muir/Mt. Diablo Health System	Stormont-Vail HealthCare
	Group Health Cooperative	TEKES and SITRA
	Kaiser Permanente	

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Deriving Value

- Based on over 100 forecast points within 2 years of original forecast, HealthTech has a 95% accuracy rate

- CHRISTUS has revamped their strategic planning process to incorporate HealthTech information regarding key technologies - to identify top priorities for the organization

- Kaiser has used the research to generate a hospital template, and tapped unique proposals for facility accommodations for changing technology

- UHC provides Tech Assessment but still looks to HealthTech for forecasting, facility design, and innovation research

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Methodology, Partner Contributors and Experts

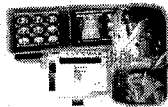Ongoing Communication with Experts, Advisors and Partners

Stakeholder Analysis

Developer and Product Review

Literature Review

Methodology Committee Sets research methodology and provides research oversight

Accountability Periodic updates track reliability of forecasts, improve methodology

Forecast Reports
Working Groups
Technology Planning Tools

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Why HealthTech?

Research Reports
- Technology Forecasting
- High Impact Technologies
- Clinical Focus
- IT Briefing Papers

Planning Tools
- Web-based Modeling and Forecasting Tools

Working Groups
- Healthcare Facilities of the Future
- IT Working Group sessions on IT technologies and strategies
- Health Plan Debriefs on key coverage and reimbursement topics
- Workforce Productivity
- Technology Innovation and Adoption

Networking
- Expert advice and support from internal and external resources
- Presentation materials and tools ready for competency-building

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Technology Forecast Reports™

HealthTech research is based on broad, comprehensive expertise from national leaders across all technologies

Medical Devices
- Drug Delivery Systems
- Sensors for Monitoring
- Organ Assistance and Substitution
- Minimally Invasive Surgery
- Imaging, PACs and CAD
- Robotics in Healthcare
- Tissue and Fluid Bioengineering

Information Technology
- Point of Care: Mobile Computing
- Networking, Security and Wireless
- Remote Patient Management

Pharmaceuticals
- Antimicrobial Agents
- Cancer and Cardiovascular Pharmaceuticals
- Neuropharmaceuticals

Biotechnology
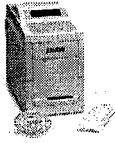- Stem Cells
- Gene Therapy and Testing

Recent Topics:
- *Drug Delivery Systems*
- *Medical Imaging*
- *PACS - Picture Archiving and Communications Systems*

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Focused Technology Reports

- **High Impact Technology Report – requires action**
  - Trends, market entry timeline, competing products
  - Clinical care, quality, workforce,
  - Cost and reimbursement impact
    - **Recent Reports:**
      - RFID – Radio Frequency Identification
      - Drug-Eluting Stents
      - Surgical Robotics
- **Clinical Focus or Service Line Reports**
  - Technology Inventories
  - Timeline Forecasts
  - Reimbursement and Coverage Considerations
    - **Recent Reports:**
      - Obesity Management
      - Oncology

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HealthTech Alerts

HealthTech ALERT

- **Bi-weekly emails highlight key topics for executive attention**
  - Key Findings
  - Strategic Implications
  - Key staff for follow-up
- **Link to short summaries (Report Briefs)**
- **Customized by interest**
- **Recent topics:**
  - Workforce Productivity in Med Surg/ICU
  - Drug Eluting Stents
  - Emerging Cancer Care Trends and Technologies
  - QuickTech Survey on Cardiovascular - Partner Results

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4

On-line Suite of Tools

- **Facility Planning Tool**
  - Key design principles for each area of hospital construction

- **Top Ten Technology-Driven Trends**
  - Summarize key trends
  - Stakeholder analyses
- **Technology Timelines**
  - Timelines for technology market impact by clinical condition
- **Market Impact Model**
  - Model impact of specific technologies
  - Inpatient and outpatient utilization
  - Data for local, regional, national markets
- **Developer Database**
  - Lists all companies developing technology
  - Product, status and contact information

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Strategic Implications

Use HealthTech For:

- Strategic planning
  - Clinical service lines
  - Business development
- Facilities planning
- Clinical programs and quality
- Capital planning
- Decision making regarding IT infrastructure
- Process re-engineering efforts

Best Practices:

- Offensive planning
- Checking against Capital Planning requests
- Defensive planning
- Quality improvement – how to make patient care significantly better
- Seeking transformative IT and clinical technologies
- Changing the organization and healthcare itself

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2005-2006 Developments

Technology Planning Support → Innovation, Decision Support → Adoption, Implementation Support

- **Technology Surveys**
  - ✓ Current adoption patterns
  - Critical factors
- **High Value Technologies Report**
  - Identify beneficial, high value technologies
  - Identify strategic issues
- **Capacity Assessment Tool**
  - Support individual Partners' assessments

- **Expert Panel:**
  - ✓ Innovation and Adoption
  - Forecast Report
  - Working Sessions
- **Cost Structure Analysis**
  - Framework for analysis
  - Key issues for each technology
- **Modeling and Simulation**
  - Build integrated forecasts

- **Case studies**
  - Partner approaches to technology planning and adoption
- **Innovation Networks**
  - Technology-specific learning networks of Partners
  - HealthTech staff provide support for networks

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Actions for Success

- Develop a Deliberate Plan
  - Introduce HealthTech within the organization
  - Identify HealthTech users
  - Load users to HealthTech web site
  - Conduct on-site web tours

- Identify Dedicated Staff to Support the Partnership
  - Champions in key areas
  - Make HealthTech a routine part of your strategic planning cycle

- Send Key Users to Expert Panels and Working Sessions
  - September 14-15, 2005   Innovation and Adoption
  - September 22, 2005   The Future of Geriatric Services

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