

## American Healthcare Forecast: Cloudy With A Chance of Innovation



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The National Healthcare Innovation Summit began in Boston on May 14 with a keynote speech by author and consultant Ian Morrison. A specialist in the future of healthcare and its changing business environment, Morrison foresees some storms ahead for American hospital administrators and the people they serve.

### The Triple Aim

Innovation is not only necessary in the field of healthcare, it has become an urgent focus in the pursuit of what has been referred to as the Triple Aim: care, health and cost. Short term activity will involve plenty of planning, which will upset some established practices and practitioners. By 2018, Morrison predicts, serious change will be underway.

The futurist specified some neglected areas, which stand to benefit from innovation: clinical integration, managing the migration of business models, healthcare IT and constructing a culture of accountability and quality. He also noted that the country is gradually learning to live on Medicare, which reduces expenses by 10 to 20 percent.

As explained by Wendy Everett, one of the event co-chairs and the CEO of the Network for Excellence in Health Innovation (NEHI), "We focus on those innovations which have demonstrated value," being mindful of the Triple Aim. Molly Coye, MD co-chaired the event; she is the chief innovation officer at UCLA.

### Informed Citizenry Will Force Innovation

Morrison has moved around the country speaking with administrators and consumers alike, and has observed a changing landscape of healthcare management. With employers less likely to be the purchaser of their workers' health insurance, more citizens are informing themselves about health and their choices for care.

This is almost certainly a positive development, but from the perspective of healthcare providers it means meeting the needs of a very vocal group of clients who will demand innovation both in medical care and technology. "By 2025 a full 20 percent of the population will be over 65...They will be cranky, selfish, self-indulgent baby boomers like me," Morrison writes on his website. "We want it all".

At the summit, Morrison told the audience that two competing visions must be reconciled in order to have a clear picture of the future of US healthcare. One focuses on disciplining providers based on a market of consumers armed with high deductible plans. The other imagines accountable care organisations (ACO), which encourages rationalisation.

### Anatomy versus Physiology

Another trend that will affect innovation is the consolidation of hospitals into a limited number of large systems. The expectation is that there will be a few hundred regional organisations nationwide which gain strength from their numbers. It remains to be seen whether their size will hinder or help innovation.

"We have the anatomy of an accountable care organisation but none of the physiology," according to Morrison. However, he believes the consolidated healthcare systems will take the necessary risks to meet consumer need for innovative solutions.

The National Healthcare Innovation Summit is organised by the Healthcare Information and Management Systems Society.

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