What did we *miss*?
What was the most *striking insight*?

Tell us!
Tweet at **#AskCOACH**

ASSOCIATION CANADIENNE
D'INFORMATIQUE DE LA SANTÉ

COACH

CANADA'S HEALTH
INFORMATICS ASSOCIATION

2016 National Digital Health Leadership Survey

Key Insights & Emerging Trends

Mark Casselman, *CEO, COACH*

Carina Andreatta, *Coordinator, Special Projects, COACH*

Taking Health Informatics Mainstream

ASSOCIATION CANADIENNE
D'INFORMATIQUE DE LA SANTÉ

COACH™

CANADA'S HEALTH
INFORMATICS ASSOCIATION

Today's Objectives

- Introduce COACH National Digital Health Leadership Survey:
    - Purpose and objectives
    - Methodology and approach
    - About the participants

- Discuss key insights, early observations, and emerging trends

- Capture your feedback and thoughts on areas of interest, topics for additional analysis, and systemic challenges & opportunities

The first COACH National Digital Health Leadership Survey set out to capture key insights from leaders across Canada

Survey Objective

- provide a "snapshot" of experiences and opinions of Health Informatics leaders working in Canadian healthcare provider organizations

Key Findings

- Many formal health IM/IT leadership roles exist across Canada
- Clear governance, collaboration, sharing and partnerships are essential for successful IM/IT implementations
- IM/IT is expensive and demonstrating value is a challenge
- Organizational strategy is impacted by fiscal environment, chronic disease and patient engagement
- Information sharing is a priority for most digital health leaders
- Health system transformation is possible and has begun

COACH
CANADA'S HEALTH
INFORMATICS ASSOCIATION

Insights from Digital Health Leaders were collected through a quantitative survey methodology

Design
- 27 questions
- Multiple choice and free text

Online Survey
- Developed by COACH Staff / external stakeholders

Data Request
- 600 senior level leaders via email

Analysis
- iSurvey / Excel
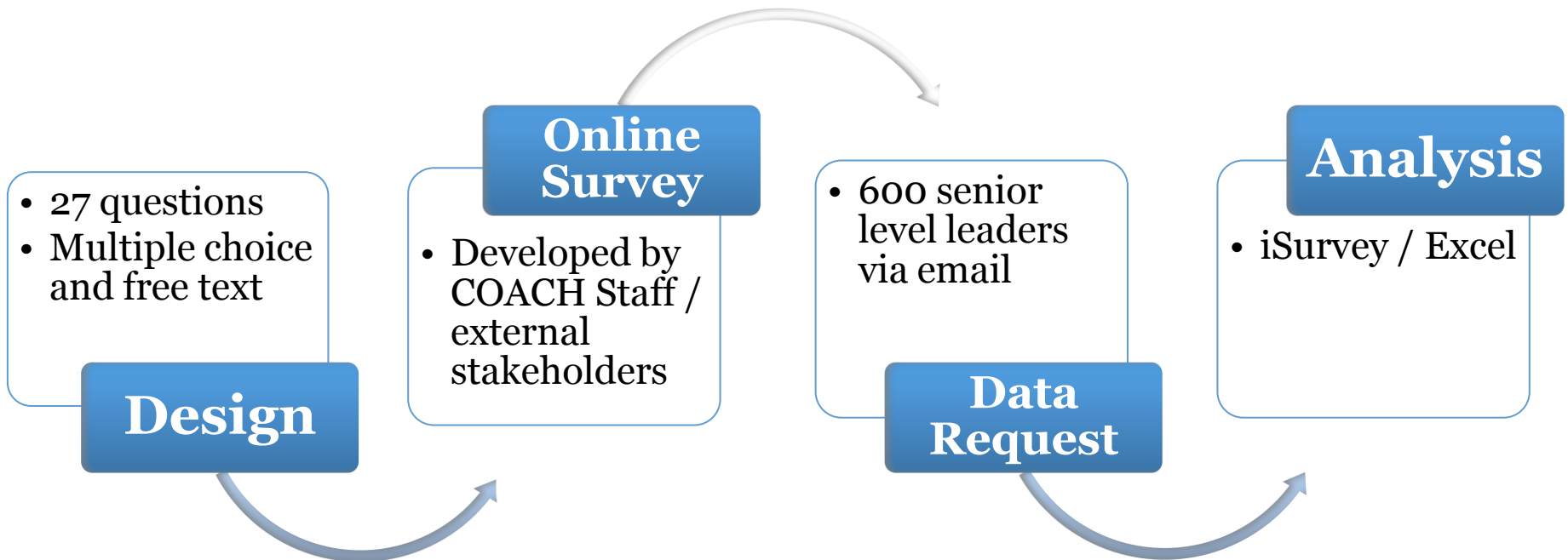
About the participants

Majority of respondents (59%) were **large scale health care organizations**, serving over 500,000 patients/clients.

Majority of respondents were from **RHAs/LHINs** (22%), **acute care hospitals** (20%) and **e-Health agencies** (18%).

N=79*

British Columbia 14

Alberta 8

Saskatchewan 3

Manitoba 5

Ontario 38

Quebec 2

Newfoundland & Labrador 3
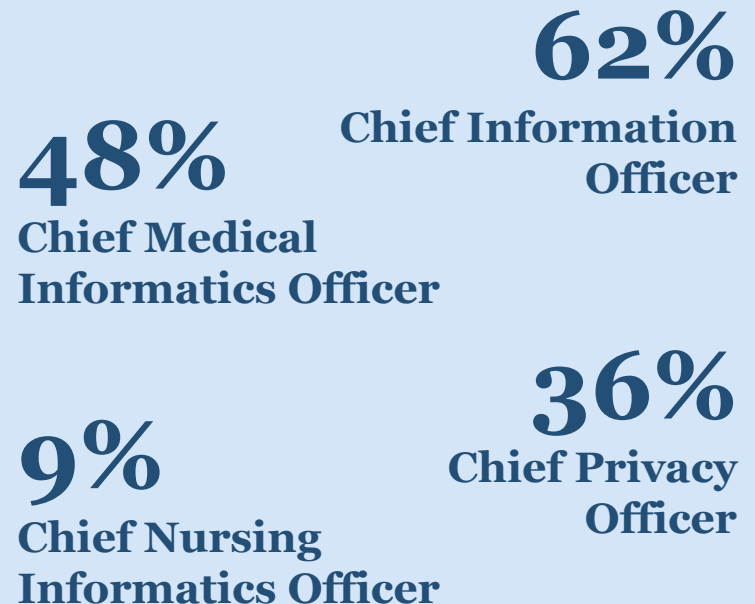
New Brunswick 3

Nova Scotia 3

Note: PEI, Nunavut, Northwest Territories and Yukon Territory were not captured. However, national organizations that provide services in these jurisdictions were

COACH™
CANADA'S HEALTH INFORMATICS ASSOCIATION

Digital Health Leadership is a Shared Responsibility

- CMIO and CIOs, exist at majority of health care organizations.

- Respondents told us in free text, *"clinical leadership is essential, however more opportunities for sharing and collaboration are needed for success in IT/IM implementations."*

- How are CMIOs working with CIOs? Are these roles creating points of convergence; or generating silos and costly duplication in governance?

Respondents identified health IM/IT leadership roles in their organizations:

62%
Chief Information Officer

48%
Chief Medical Informatics Officer

36%
Chief Privacy Officer

9%
Chief Nursing Informatics Officer

N=69

Question #9 What IM/IT leadership roles exist at your organization? Check all that apply

ASSOCIATION CANADIENNE
D'INFORMATIQUE DE LA SANTÉ

COACH™

CANADA'S HEALTH
INFORMATICS ASSOCIATION

Taking Health Informatics Mainstream

Governance and leadership at the Board level must be in place to drive business strategy enabled by IM/IT

We asked leaders, is there a Board Level IT Committee at your Organization?

62% **No**

38% **Yes**

N=68

- CIOs and their staffs cannot set priorities by themselves. Senior executives and the clinical staff need to be involved (HIMSS 2012)

- Clear governance can be achieved by aligning IM/IT strategy and investments with the clinical and business requirements of health care system and jurisdiction.

- Health informatics must be clearly positioned and articulated from the top-down as part of the solution of rising costs, expectations and demands

Investing…. in IM/IT is expensive & demonstrating value is a challenge

% of Overall Capital Spent Specifically on IM/IT

Category	Value
11%+	37%
6-10%	12%
3-5%	35%
0-2%	17%

■ % of Overall Capital Spent Specifically on IM/IT
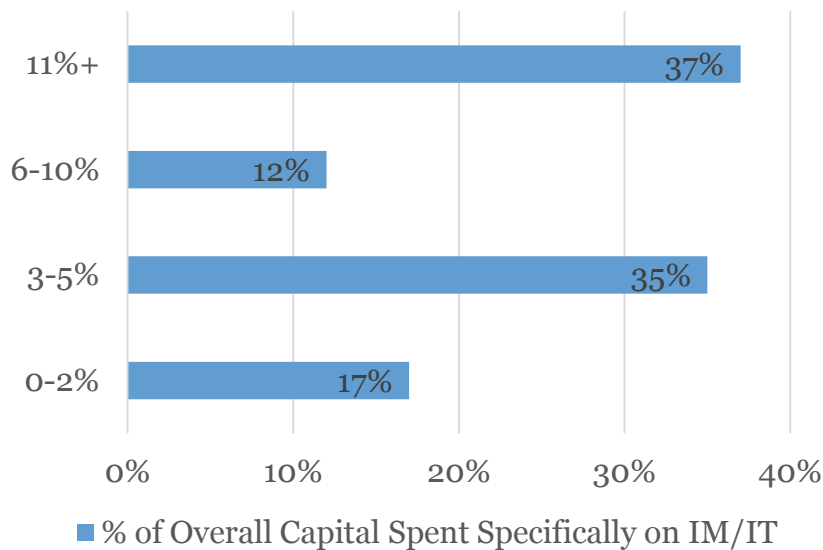
Respondents additionally included:

- Increasing pressure to demonstrate clinical value for $ invested

- ROI is not always a financial return.

- Hard to measure ROI that is improved quality, safety, patient experience and improved outcomes

Challenging because

- Ensuring IM/IT investments provide the required value is the only way to ensure it becomes an enduring strategic asset.

Question #20 What percentage of overall capital spent by the organization is specifically related to IM/IT?

Respondents identified the top three challenges their organization will face over the next 2-3 years

What we heard from respondents...

71% **Budget**

"Budget for IM/IT is hard to justify – ROI measurement challenges"

44% **Governance**

"Governance for HI - must be clearly positioned as part of the solution to rising costs, expectation and demands"

37% **Change Management**

"Change Management - directly related to successful implementation of IM/IT, must minimize disruption to workflow, and culture, and achieve buy-in"

N=63

Question #15 What are the top three challenges you face in the next 2-3 years?

ASSOCIATION CANADIENNE
L'INFORMATIQUE DE LA SANTÉ

COACH

CANADA'S HEALTH
INFORMATICS ASSOCIATION

Taking Health Informatics Mainstream

Increasingly, healthcare organizations are focused on delivering care beyond their walls...

74% — Regional Partnerships (intra-provincial / territorial)

38% — Cross Sector Partnerships

9% — International Partnerships

Leaders told us partnerships will help...

- *Track the patient across the care continuum*
- *Contain costs through standardization*
- *Avoid duplication through connected care*

What does this mean to HI professionals?

- Roles are changing quickly
- Settings are more varied and challenging
- Collaborative platforms necessitate new skills
- Change management is more complex

Question #10 What are the three most important partnerships you are pursuing in the coming year?

ASSOCIATION CANADIENNE D'INFORMATIQUE DE LA SANTÉ

COACH™

CANADA'S HEALTH INFORMATICS ASSOCIATION

...which may require a series of fundamental shifts in thinking at the strategic and operational level

Emerging Technology

Strategic Planning

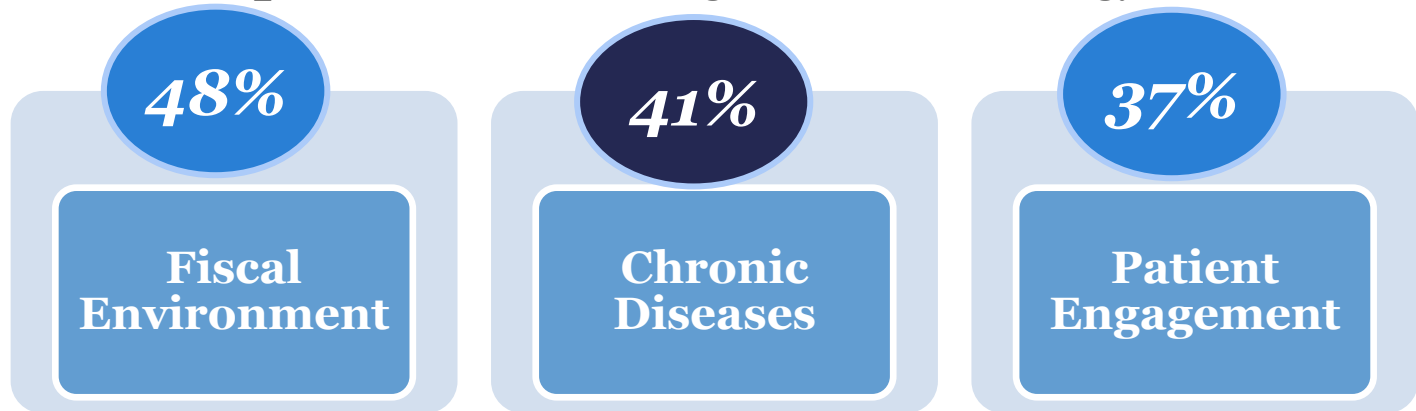*Budget*

Change Management

Governance

Capital Costs

Long Term Priorities

Resources

Respondents told us fiscal environment is the most important current driver impacting their organizational strategy...

The **top three** drivers of organizational strategy are:

48%

Fiscal Environment

- Time to value of investments needs to improve

41%

Chronic Diseases

- In Canada, Chronic diseases account for 67% of total direct costs in health care (NurseOne, 2016).

37%

Patient Engagement

- Including patients as a member of the team on continuum of care is essential

Question #13 What are the larger HI themes within the healthcare industry that are of critical importance impacting and/or driving your organizational strategy? Please rank in order of importance

ASSOCIATION CANADIENNE
D'INFORMATIQUE DE LA SANTÉ

COACH

CANADA'S HEALTH
INFORMATICS ASSOCIATION

Digital Health Leaders are Prioritizing Information Sharing to Improve Quality of Care

The top strategic priorities for next planning cycle are:

50% Quality

33% Information Sharing

33% Health Outcomes

N=63

Respondents also told us leaders should be focusing on:

- *Supporting patients and families* via development of tools to inform, connect, manage, & improve experience.

- *Leveraging information from current systems* to provide business intelligence for overall management of care system

- *Connected care systems and/or interoperability of systems* where shared information leads to better care

Question #14 What themes are a part of your HI strategic priorities for the next planning cycle? Please rank in order of importance

Health System Transformation _is_ possible through collaboration at the technology and process level…

Respondents told us what the digital health community needs to do:

- Support small rural hospitals to move up EMRAM scale.

- Utilize mobile & telehealth technologies which has been shown to reduce direct and indirect costs

- Leverage data from community physician EMRs as Quality Indicators

- Automate core process (e.g. medication, documentation)

Respondents ranked their priorities for the next 3-5 years, the top three most important are:

65%
EMR/EHR Integration Across the Continuum

56%
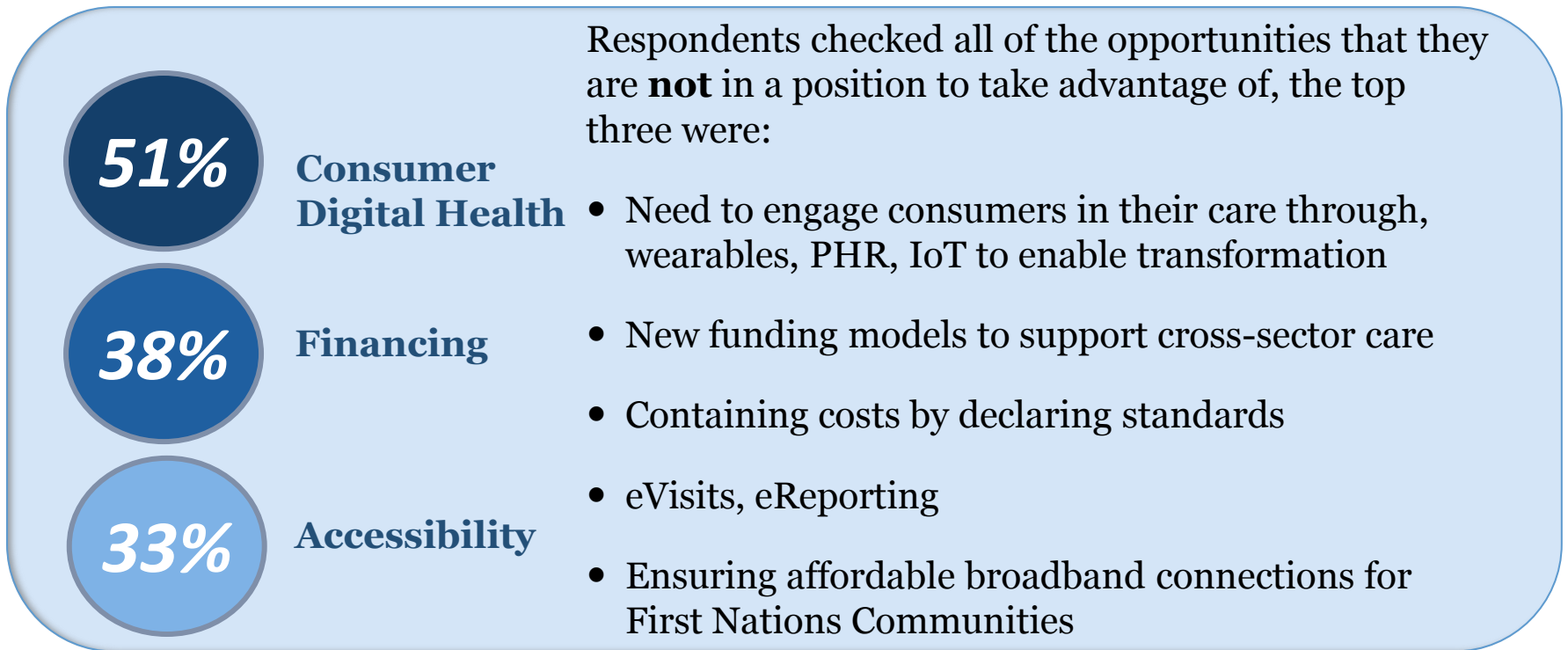**Supporting New Models of Care**

54%
Leveraging Data to Improve Quality

N=63

Question #16 What are your top three priorities for the next 3-5 years?

And, through engaging consumers in their care – an untapped opportunity for innovative service delivery

51% **Consumer Digital Health**

38% **Financing**

33% **Accessibility**

Respondents checked all of the opportunities that they are **not** in a position to take advantage of, the top three were:

- Need to engage consumers in their care through, wearables, PHR, IoT to enable transformation

- New funding models to support cross-sector care

- Containing costs by declaring standards

- eVisits, eReporting

- Ensuring affordable broadband connections for First Nations Communities

N=63

Question #17 What opportunities are available that you are not in a position to take advantage of? Select all that apply

ASSOCIATION CANADIENNE
D'INFORMATIQUE DE LA SANTÉ

COACH™

CANADA'S HEALTH
INFORMATICS ASSOCIATION

Taking Health Informatics Mainstream

The shift is underway. Healthcare organizations *are* utilizing emerging tech within day-to-day operations.

74%
Data Analytics

46%
Cloud Computing

26%
Internet of Things

24%
Home Health Monitoring

18%
Consumer Digital Health

Manitoba Primary Care Research Network: rich data repository

University Health Network-SickKids: Cloud Computing

Mount Sinai Hospital: Google Analytics for chronic disease patients

Nova Scotia Department of Health and Wellness: RelayHealth PHR

Mackenzie Health : IoT

Island Health: Home Health Monitoring

Alberta

Manitoba

Newfoundland & Labrador

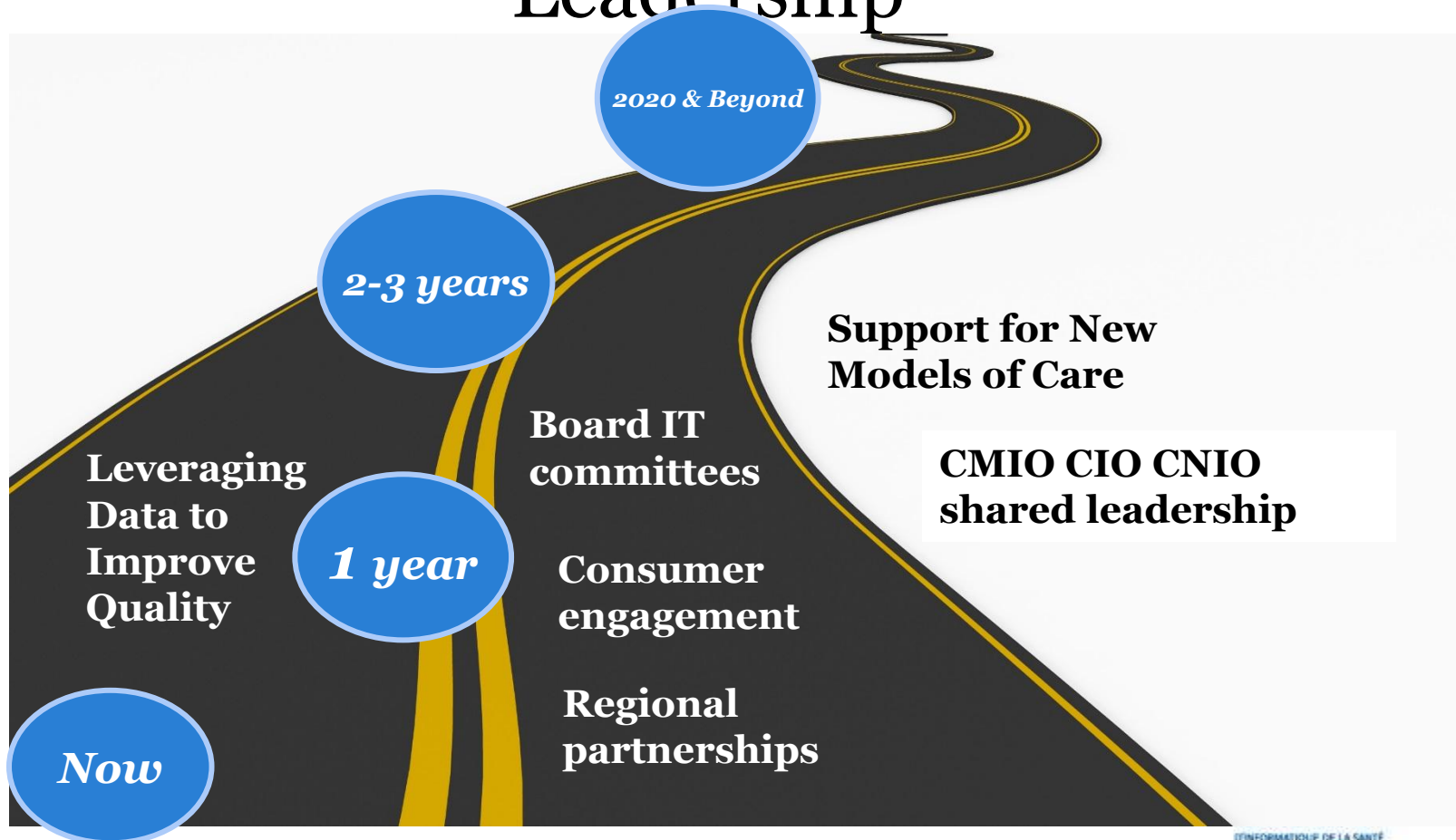*British Columbia*

Saskatchewan

Quebec

Ontario

New Brunswick

Nova Scotia

Question #25 Are you using emerging technology for your day-to-day operations? Check all that apply

A Roadmap for Digital Health Leadership

2020 & Beyond

2-3 years

1 year

Now

Leveraging Data to Improve Quality

Board IT committees

Consumer engagement

Regional partnerships

Support for New Models of Care

CMIO CIO CNIO shared leadership

COACH
CANADA'S HEALTH INFORMATICS ASSOCIATION
L'INFORMATIQUE DE LA SANTÉ

Coming to COACH Members in the Fall...

The first iteration of the National Digital Health Leadership Report will be released in the Fall of 2016

All COACH Members will receive access to the National Digital Health Leadership Report

Not a member? Register today!

Stop by the COACH Booth #617

OR

Contact Amanda Cooper, acooper@coachorg.com

Thank you!

@COACH_HI

What did we _miss?_
What was the most _striking insight_?

Tell us!
Tweet at **#AskCOACH**

References

- http://www.himss.org/News/NewsDetail.aspx?ItemNumber=3176

- http://www.beckershospitalreview.com/healthcare-information-technology/the-future-of-the-healthcare-cio-expanding-roles-relationships-and-opportunities.html

- https://www.nurseone.ca/en/knowledge-features/chronic-disease

ASSOCIATION CANADIENNE
D'INFORMATIQUE DE LA SANTÉ

COACH
CANADA'S HEALTH
INFORMATICS ASSOCIATION