



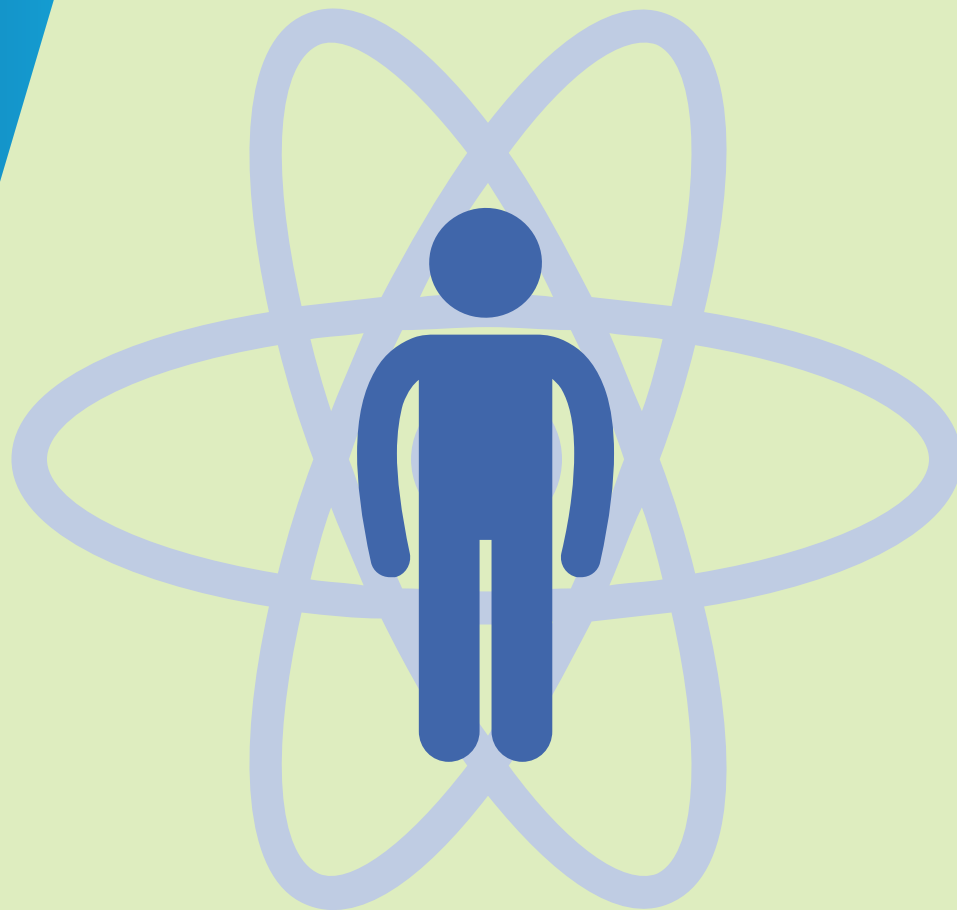
cutting through complexity

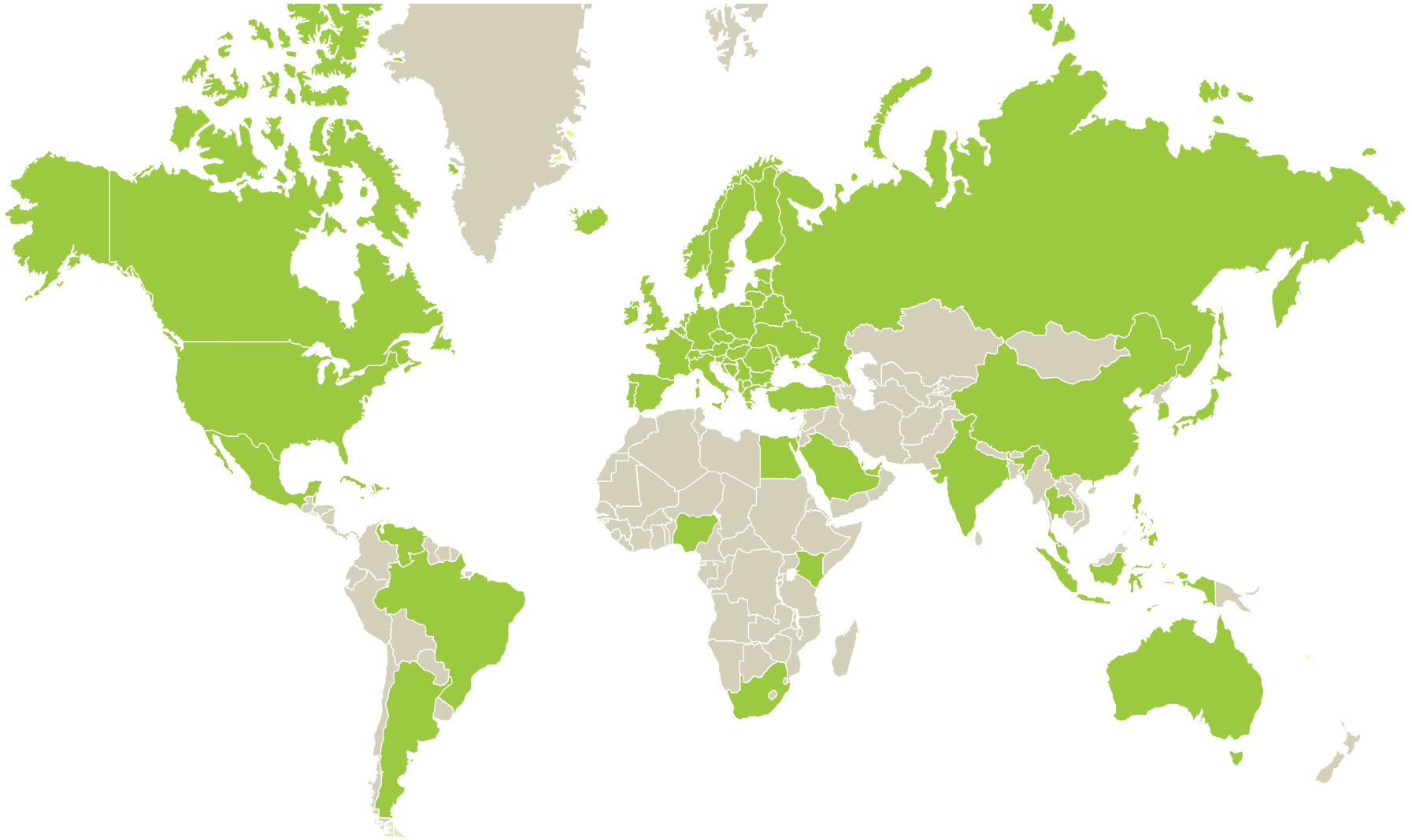
Patients as partners: Renewable energy for healthcare

Dr Mark Britnell
Chairman and Partner
KPMG's Global Health Practice



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Global Conference: 65 senior healthcare leaders from 30 countries



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Mr. Aidan Kehoe
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NHS England

Mr. Tim Kelsey
National Director for patients and information

Global Conference: 65 senior healthcare leaders from 30 countries



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The Investment Fund for Healthcare in Africa

Mr. Onno Schellekens
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Director Medical Services



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Geisinger Health System

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NSW Ministry of Health

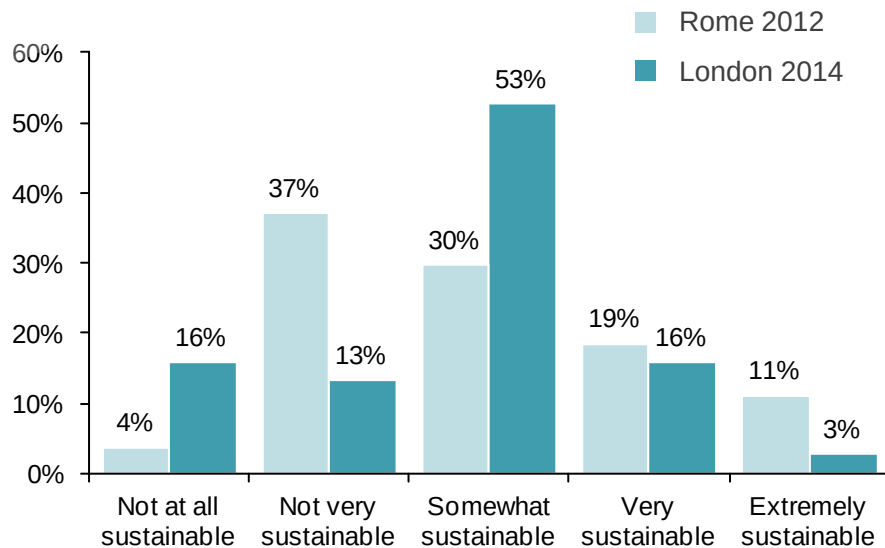
Mr. Ken Whelan
Deputy Director General

#1 Organisations and health systems are not aligned for sustainable transformation

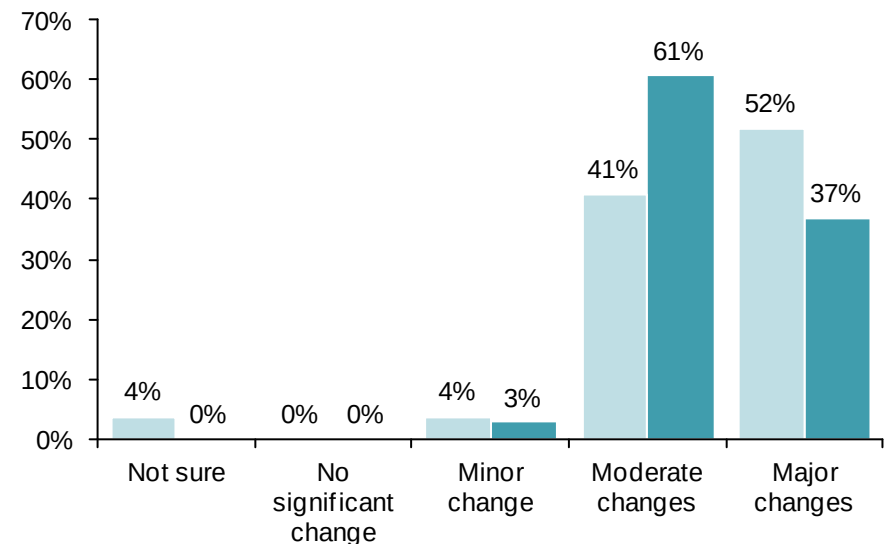
72% think existing hospital business models are sustainable but 98% expect moderate or major change to their health systems

Do they believe change starts with someone else?

“The current business models operated by hospitals in my system are...”



How much change do you expect in the shape of the provider system and their business models in the next 5 years?

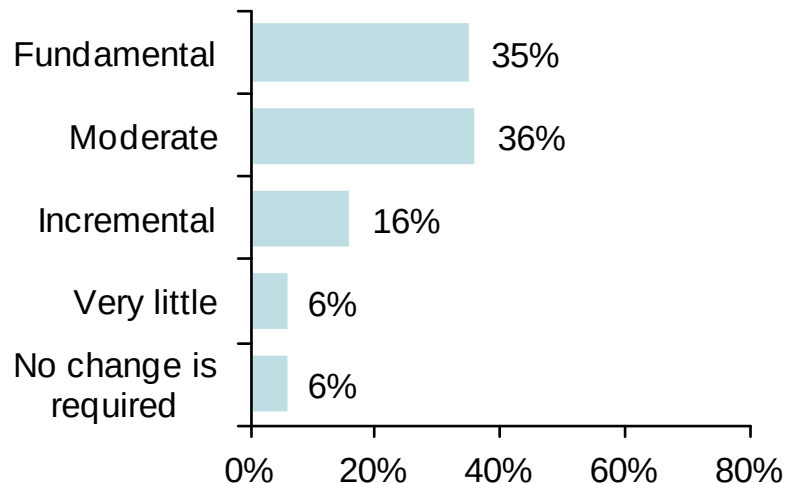


#1 Organisations and health systems are not aligned for sustainable transformation

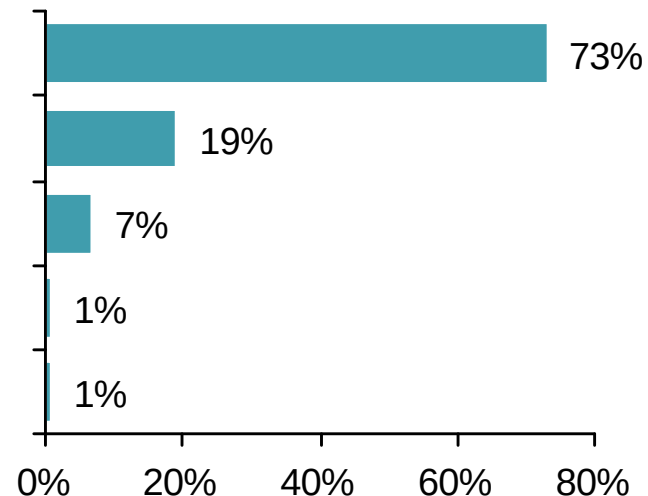
Our crowd sourcing community revealed a major disconnect between their organisation and health system

Twice as many thought the wider system required fundamental change

What is the scale of change required in your organisation?



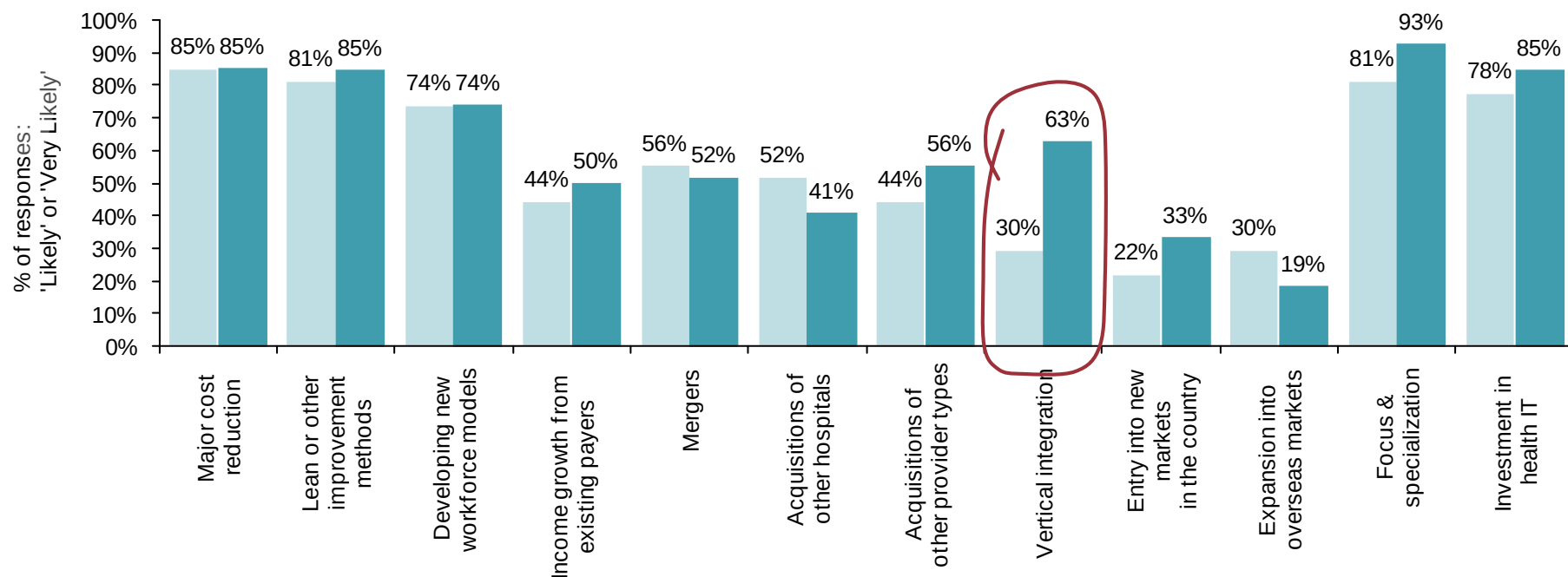
What is the scale of change required in the healthcare sector in your country?



#1 Organisations and health systems are not aligned for sustainable transformation

While most strategic effort is focused on transactional – not transformative – changes, integration is much more prominent.

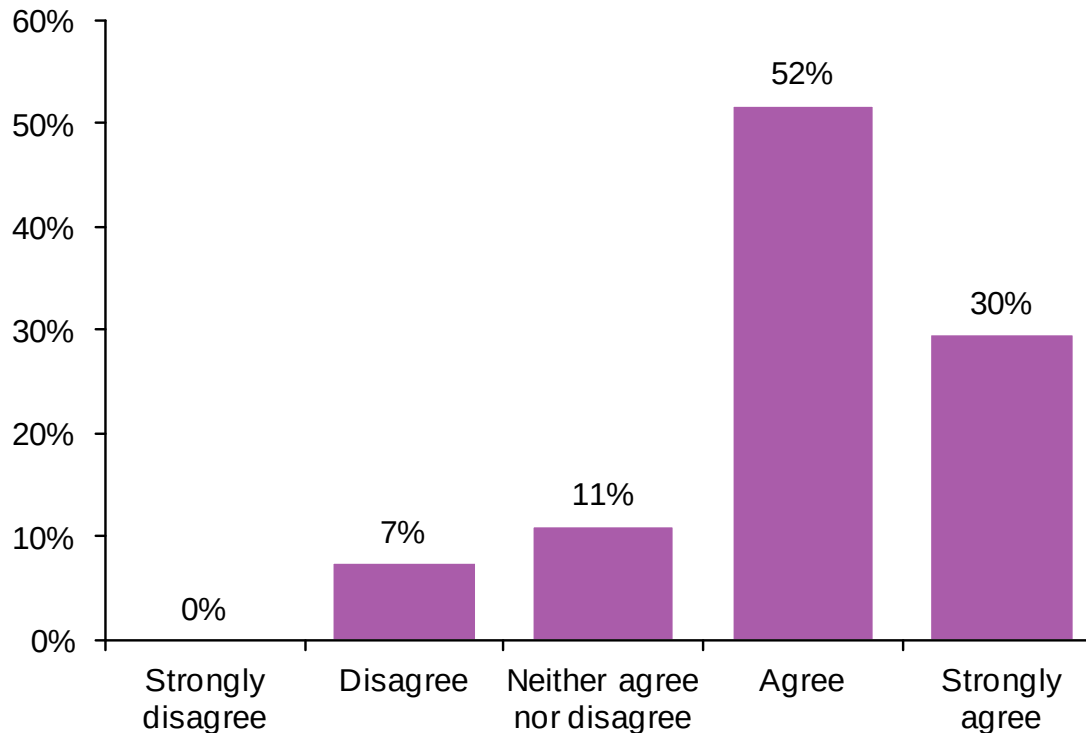
Which strategies are providers likely to adopt to respond to these changes?



#2 People believe that integration is critical for improved health system sustainability

82% of global respondents believed their health system will become more integrated over the next 5 years

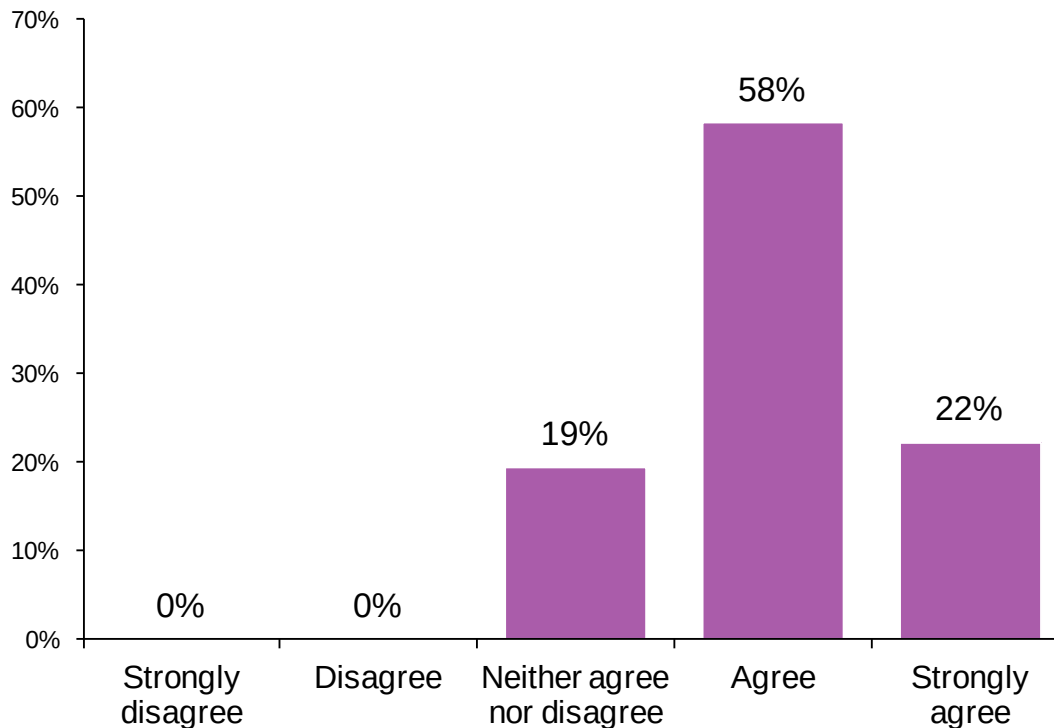
"My health system is planning to redesign care within the next 5 years to create more integrated delivery"



#2 People believe that integration is critical for improved health system sustainability

80% of global respondents agreed that fragmented care hampered clinical effectiveness and operational efficiency

"Fragmented patient pathways – within my organisation and across my health system – compromise clinical effectiveness and operational efficiency"

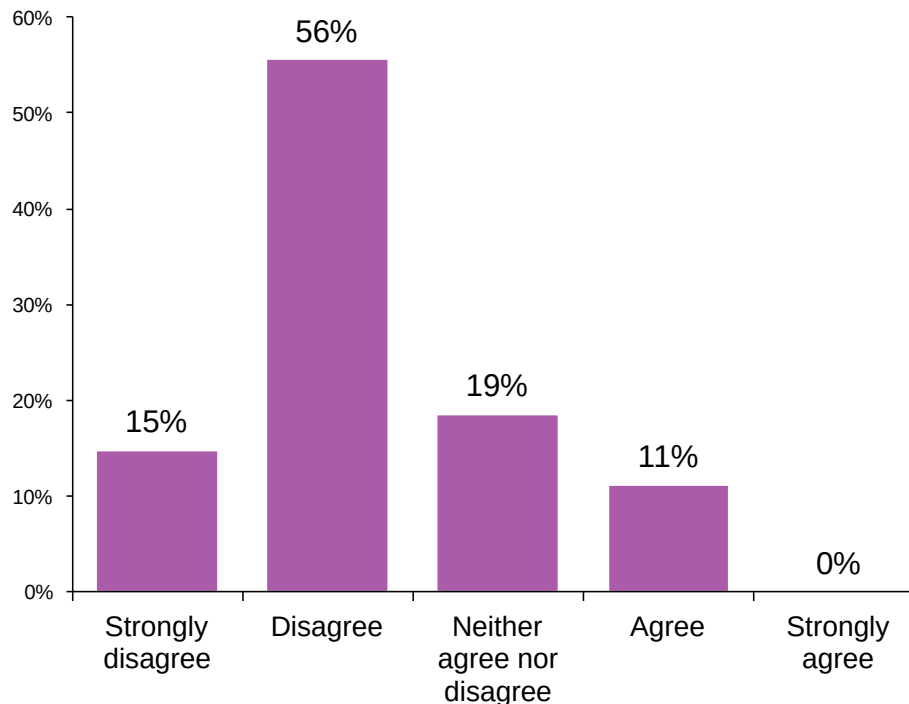


Sources: KPMG Global Healthcare Conference 2014, pre-conference survey

#2 People believe that integration is critical for improved health system sustainability

71% of global respondents believed that greater primary and secondary care integration was beneficial

"Bringing primary and secondary care together into the same organisation does not create sufficient additional value to justify the difficulty of doing so"

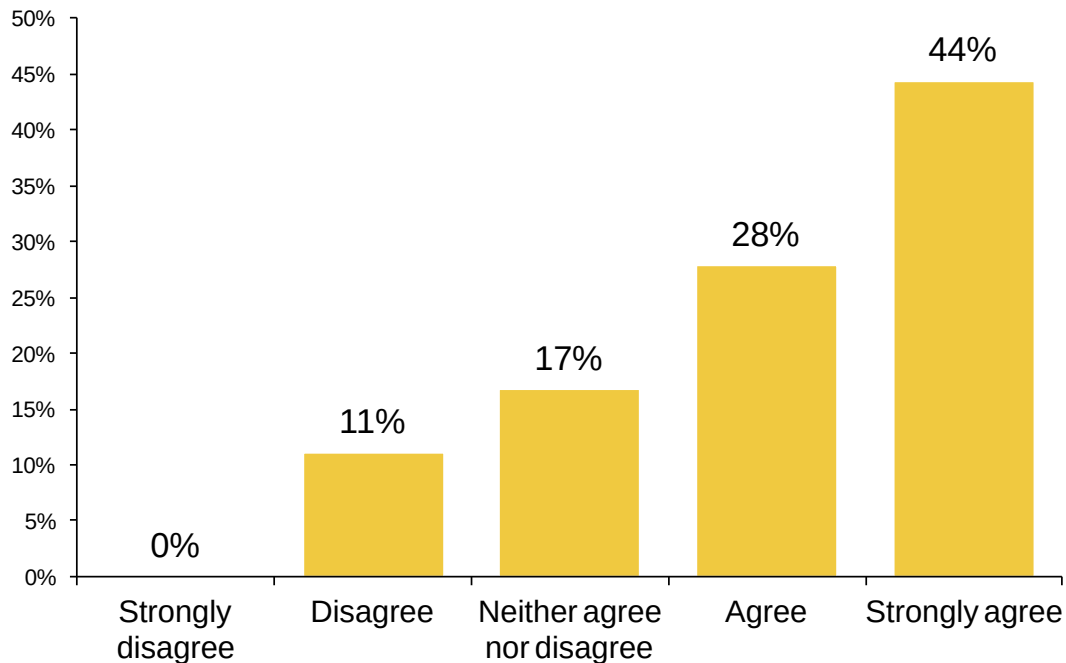


Sources: KPMG Global Healthcare Conference 2014, pre-conference survey

#3 *Patients, when empowered, will create more value*

72% of global leaders believe empowered patients create better value care

"With the right support and empowerment patients actively managing their own care creates better value care"

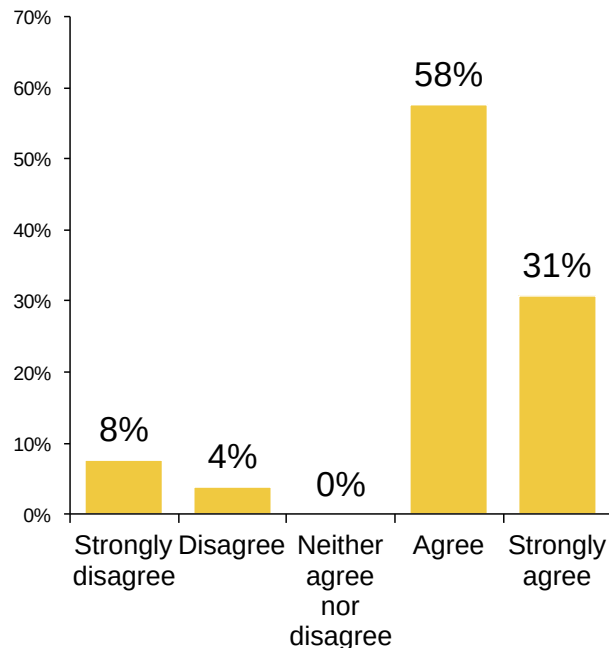


Sources: KPMG Global Healthcare Conference 2014, pre-conference survey

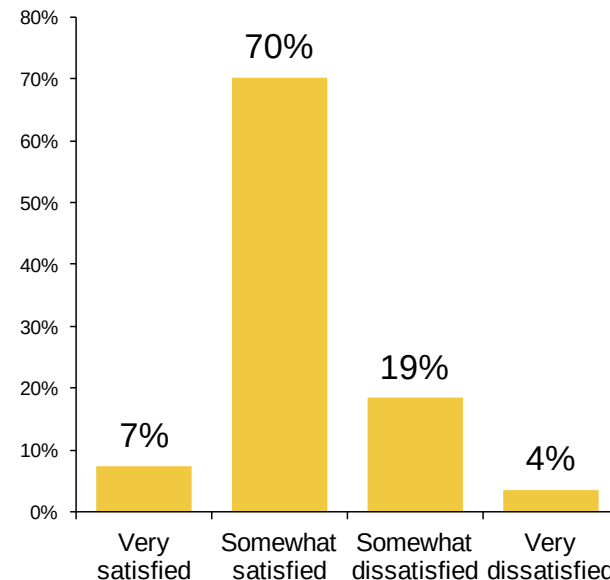
#3 Patients, when empowered, will create more value

However, 89% of leaders believe their health systems are designed around organisations' – not patients' – priorities and they are not very satisfied they are meeting patients' needs

“The delivery of healthcare is currently structured more according to organisational structures and boundaries than the needs of the patient”



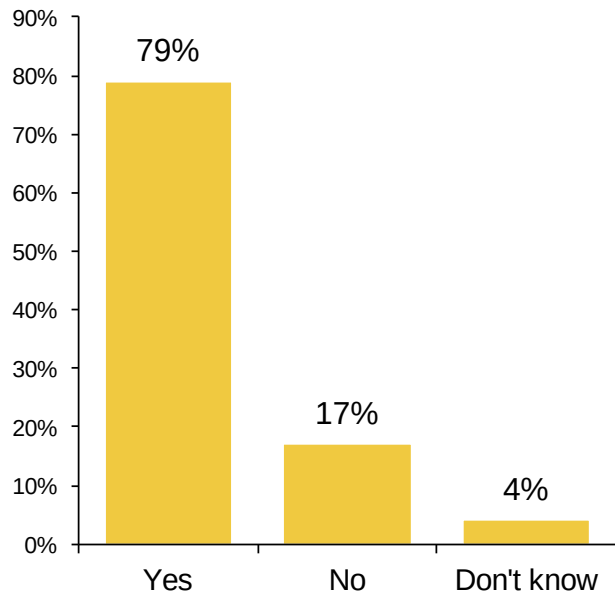
How satisfied are you that your organisation is truly meeting the aspirations of your patients?



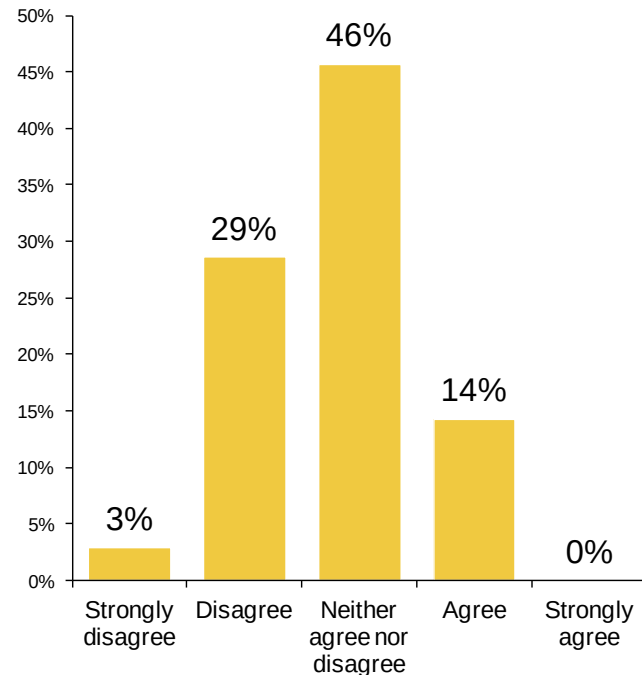
#3 Patients, when empowered, will create more value

79% of our crowd sourcing community believed patient experience indicators are being more widely used; only 14% of global leaders thought their patients were becoming 'active'

Is patient experience a key performance indicator for your organisation?



"In my organisation patients actively participate in managing their own care"



#4 There is some distance between what patients want and what they get

Unique global insights from patient support and advocacy groups, representing millions of patients across 6 countries

Federação Brasileira de Instituições Filantrópicas de Apoio à Saúde da Mama



**ABRA
SUS**

ABCD: Associação Brasileira de Colite Ulcerativa e Doença de Crohn

Canadian Cancer Survivor Network



Canadian Breast Cancer Network / Réseau Canadien du Cancer du Sein

Canadian Diabetes Association

healthexperiences.ca

American Cancer Society



Childbirth connection

Crohn's & Colitis Foundation of America

Families USA

Hong Kong

Breast Cancer Foundation

Diabetes Hong Kong



Hong Kong Alliance of Patients' Organizations

National Childbirth Trust

Macmillan Cancer Support



National Voices

Dutch Patients & Consumers Organisation



Nederlandse Diabetes Vereniging

European Patients Forum

Crohn en Colitis Ulcerosa Vereniging Nederland

#4 *There is some distance between what patients want and what they get*

Our global research suggests 5 dominant themes:

1

“See me – and support me – as a person, not a condition or an intervention site”

2

Patients want to be informed partners in care

3

Fragmented care is harmful and wasteful care. Patients can feel “abandoned” (especially after discharge)

4

Patients want to be empowered partners in care

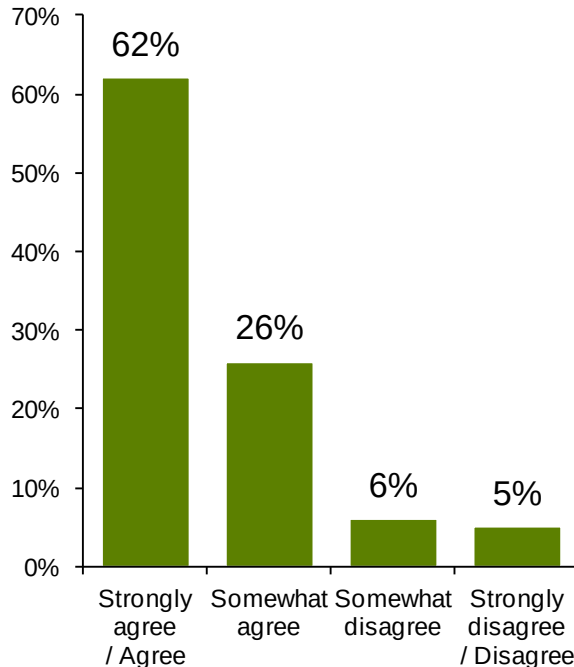
5

In some countries securing responsive access to care is a fundamental priority

#4 *There is some distance between what patients want and what they get*

While our crowd sourcing community overwhelmingly believed that patient experience is now a key performance indicator, more needs to be done on activation and empowerment

"Measurements of patient experience impact on how my organisation delivers care"



Are patient experience measures used in the performance appraisal of clinical staff and managers within your organisation?



Sources: KPMG What Works Healthcare Insights global crowd sourcing community

#5 What Works. There is an evidence base for patients creating value

Many studies show that 'activated' patients have better health outcomes at lower costs.

Patients with lower activation scores cost 8% to 21% more.

2010 patient activation level	Predicted per capita billed costs (\$)	Ratio of predicted costs relative to level 4 Patient Activation Measure (PAM)
Level 1 (lowest)	966	1.21
Level 2	840	1.05
Level 3	783	0.97
Level 4 (highest)	799	1.00

www.kpmg.com/whatworks

Source: Hibbard J H, Greene J, Overton V (2013) 'Patients with lower activation associated with higher costs; delivery systems should know their patients' "scores".' Health Affairs, 32, no (2013): 216-22. (Quoted in KPMG, 'Creating new value with patients, carers and communities')



KPMG GLOBAL HEALTHCARE

**Creating new value
with patients, carers
and communities**

Conference edition

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kpmg.com/healthcare

#5 There is an evidence base for patients creating value

We have developed a 9-point maturity matrix to help assess progress:

Are there measurement systems to support this?

5 Patient experience and outcome data embedded in all performance management & governance

4 Patient experience and outcome data embedded in performance management of medical staff

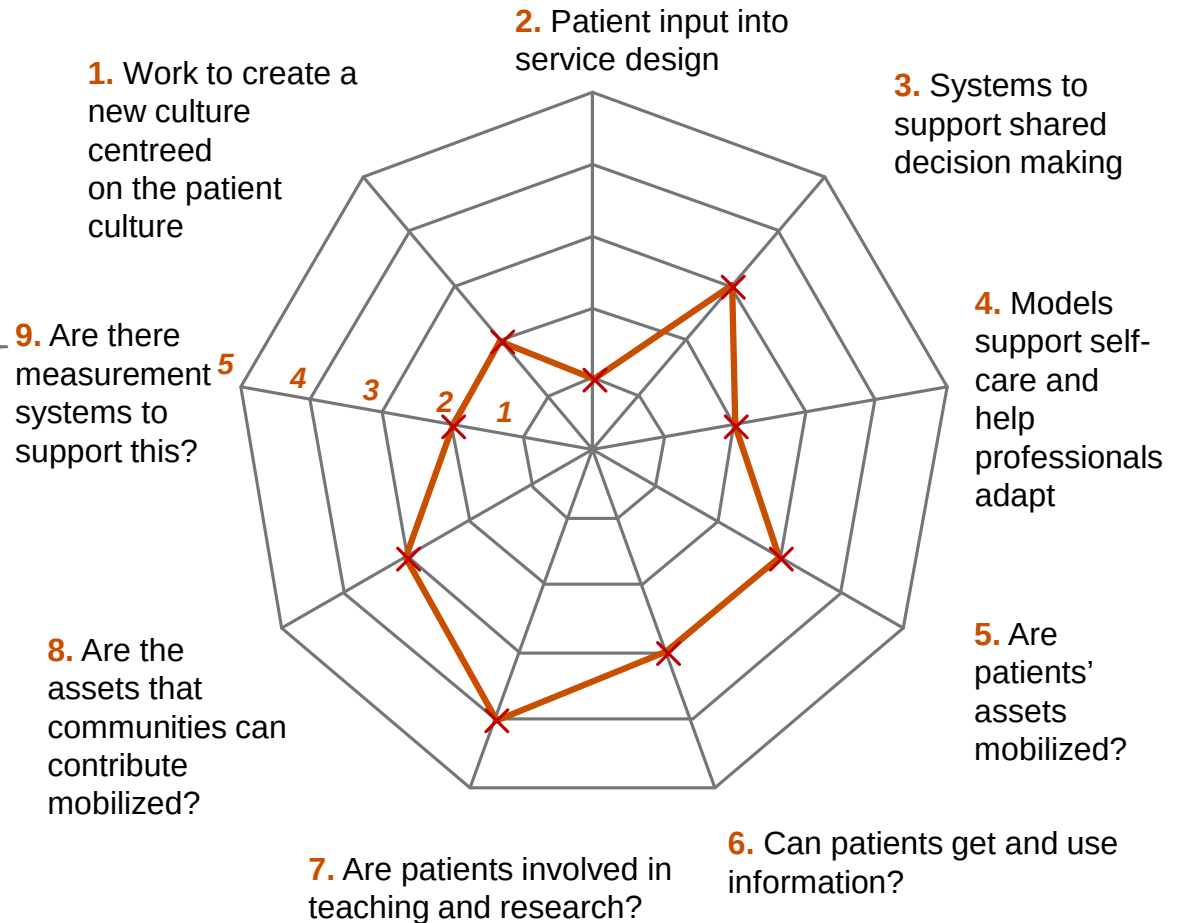
3 Real time collection data used at front line for improvement

2 Systematic collection of data reported to boards

1 Recognition that the collection of data on patient experience and outcomes will provide a basis for understanding progress and analysis

0 No data on patient experience or outcome data collected

maturity level ↑



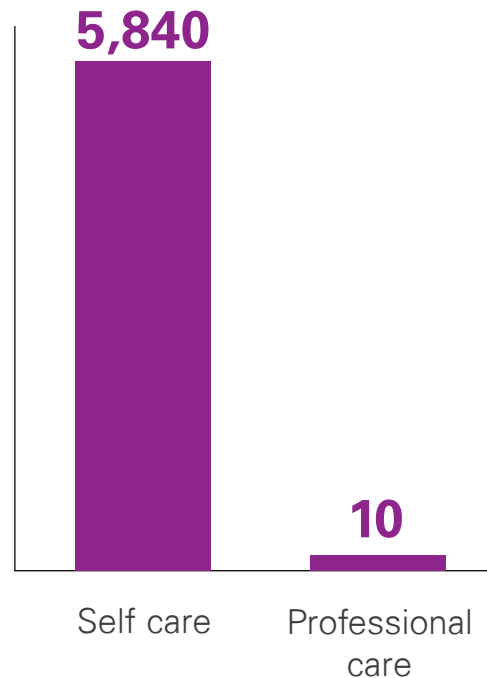
#5 *There is an evidence base for patients creating value*



#5 *There is an evidence base for patients creating value*

In summary, there is only so much more value we can get by continuing to focus on this

Person-hours spent managing a chronic condition per year



So, how can it be done?



#1 New partners

Telco's are moving into the healthcare sector, and have much to teach about consumer-centricity



aim to go from \$40m turnover in 2014

to

\$1 bn

in 2020

Telstra is Australia's largest telecoms provider,
and has big ambitions for healthcare

Made 15 eHealth acquisitions worth
AUS\$250 million over past two years

Investments into telemonitoring, e-bookings,
mobile prescribing and digital consultations

#1 New partners

Telstra have identified six key challenges they aim to help health systems with:



Improve productivity



Safer, more efficient pharmacies



Integrated information systems



Coordinated care to reduce admissions



Increase specialist access



Consumer self-service

The secret is none of the solutions needed are that revolutionary – it's putting them together and selling an ecosystem that is transformative

#2 New disruptors

If healthcare organizations don't empower patients soon, they will do it for themselves

Start-ups touted as 'Uber for healthcare'

Doctor to your phone:



Doctor to your door:



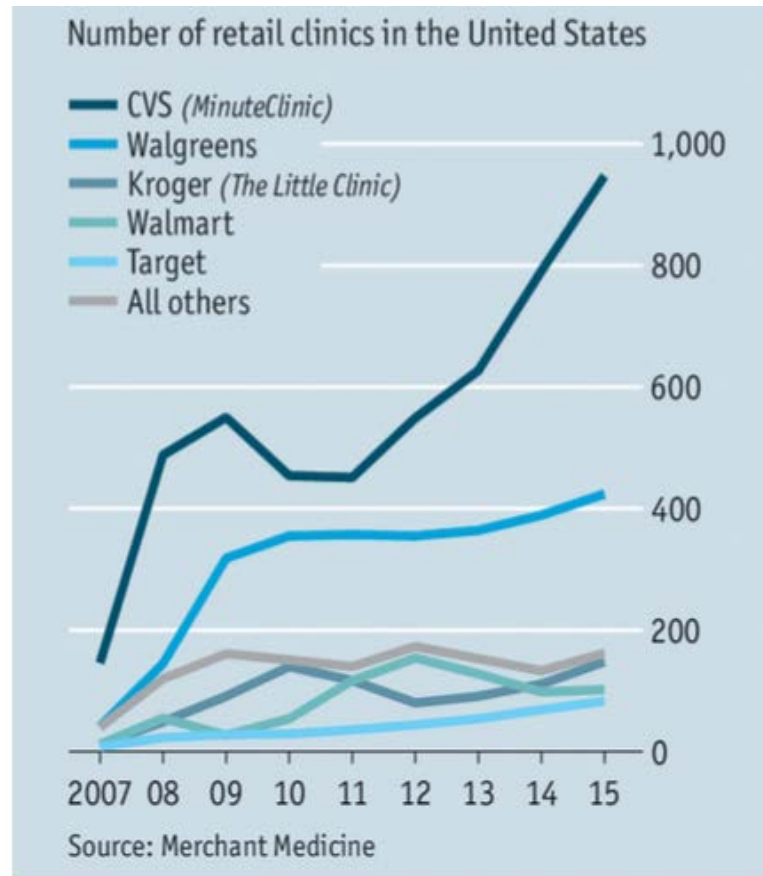
#2 New disruptors

We can't even imagine the impact non-health players may have in the next decade if they work together



#2 New disruptors

Retail pharmacy in the US is gaining in scale and reach



#3 Make wellness pay

Discovery Vitality in South Africa is turning the role of the payer on its head

Rewards members for lifestyle choices with food and entertainment discounts

Tracks patient satisfaction and pays bonuses direct to care staff



#4 Predict and target

There are many effective strategies to empower patients – but they're only cost-effective if you know who to target



As an HMO with comprehensive EMRs since 2000, they have the ability to segment their population, and the power act on the data

Use predictive risk models across the care continuum. e.g. patients at risk of readmissions are called at home after discharge to check the right follow up is taking place.

Technologically savvy – 57% of paediatric consultations now via video through smartphones

#5 Support caregivers

Narayana have found how training carers as health workers can deliver better health at lower cost

Care Companion scheme trains carers on the ward while family members recover from surgery

Patients can be released home earlier and carers better understand how to help their recovery

The scheme producing high satisfaction and lower readmissions.

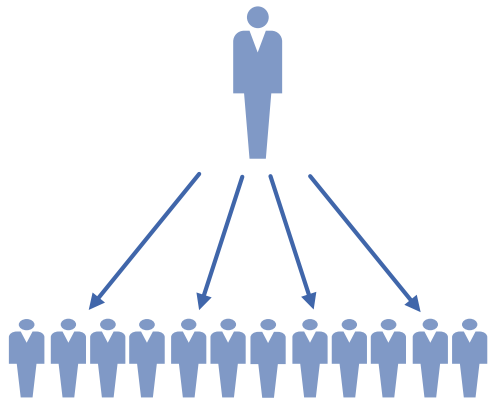
“Essentially, we’re taking the most passionate, most trustworthy person, and educating them by doing”

Dr Devi Shetty

80% of long term care in Canada is by unpaid carers

#5 Support caregivers

This is just the start of India's journey to improving access and empowerment



Small number of healthcare professionals highly leveraged using voice and video

Micro-insurers, telcos and healthcare providers coming together to 'leapfrog' traditional systems

Aim is reliable, convenient care provided profitably at scale

#6 Empowerment at the end of life

Why is empowerment at the end of life so important?

Look at this survey of 300+ Canadian doctors and nurses...

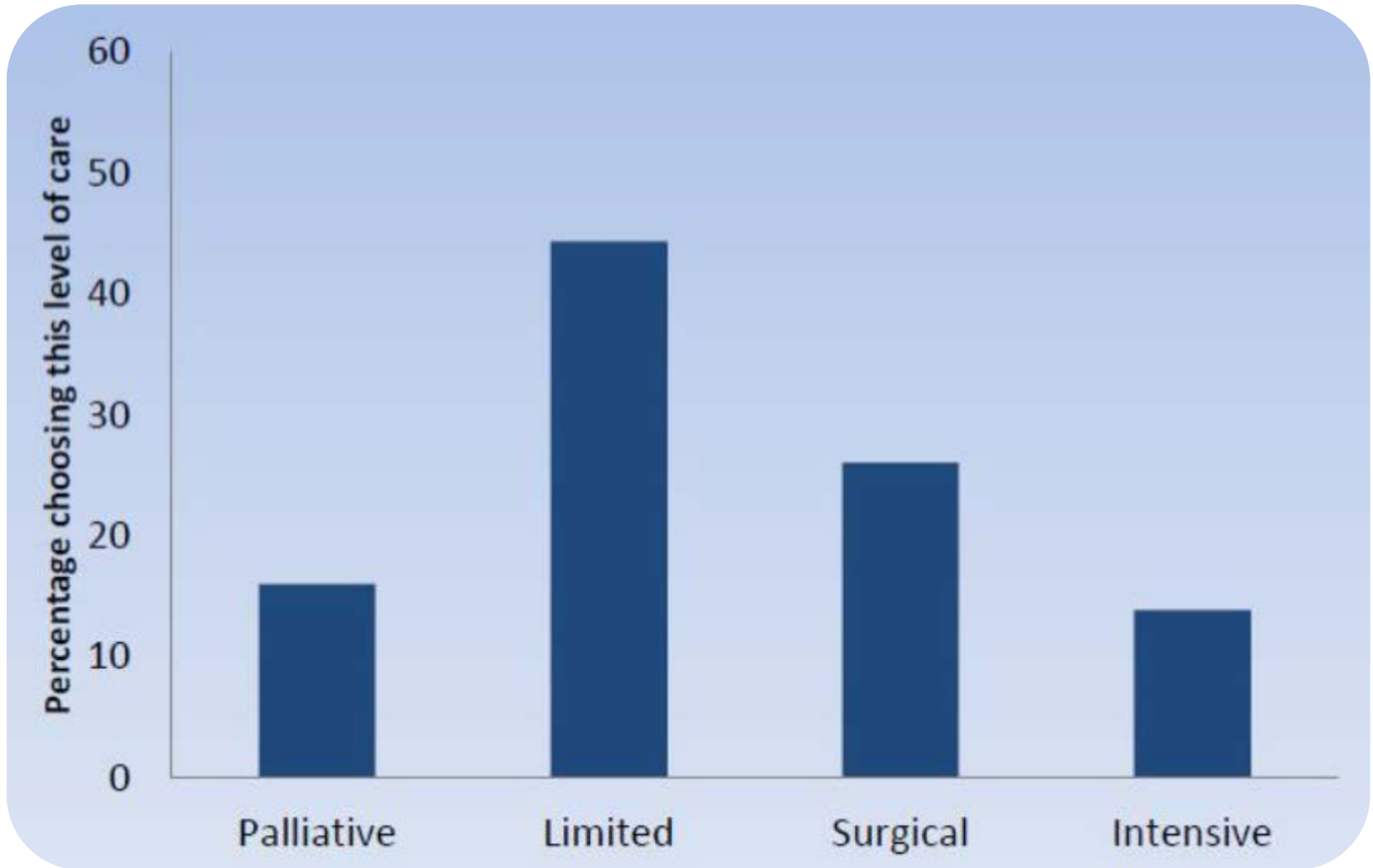
Mrs Murphy

- 84yrs old
- Living in a nursing home
- Has Alzheimer's Disease for 7yrs
- Unable to recognise children, sometimes recognises wife
- Needs assistance with mobilising
- Incontinent

Mr Murphy is having episodes of hematemesis and is hypotensive. Unless treated she will most likely die. Her family are not available and there is no advance directive. **What would you do?**

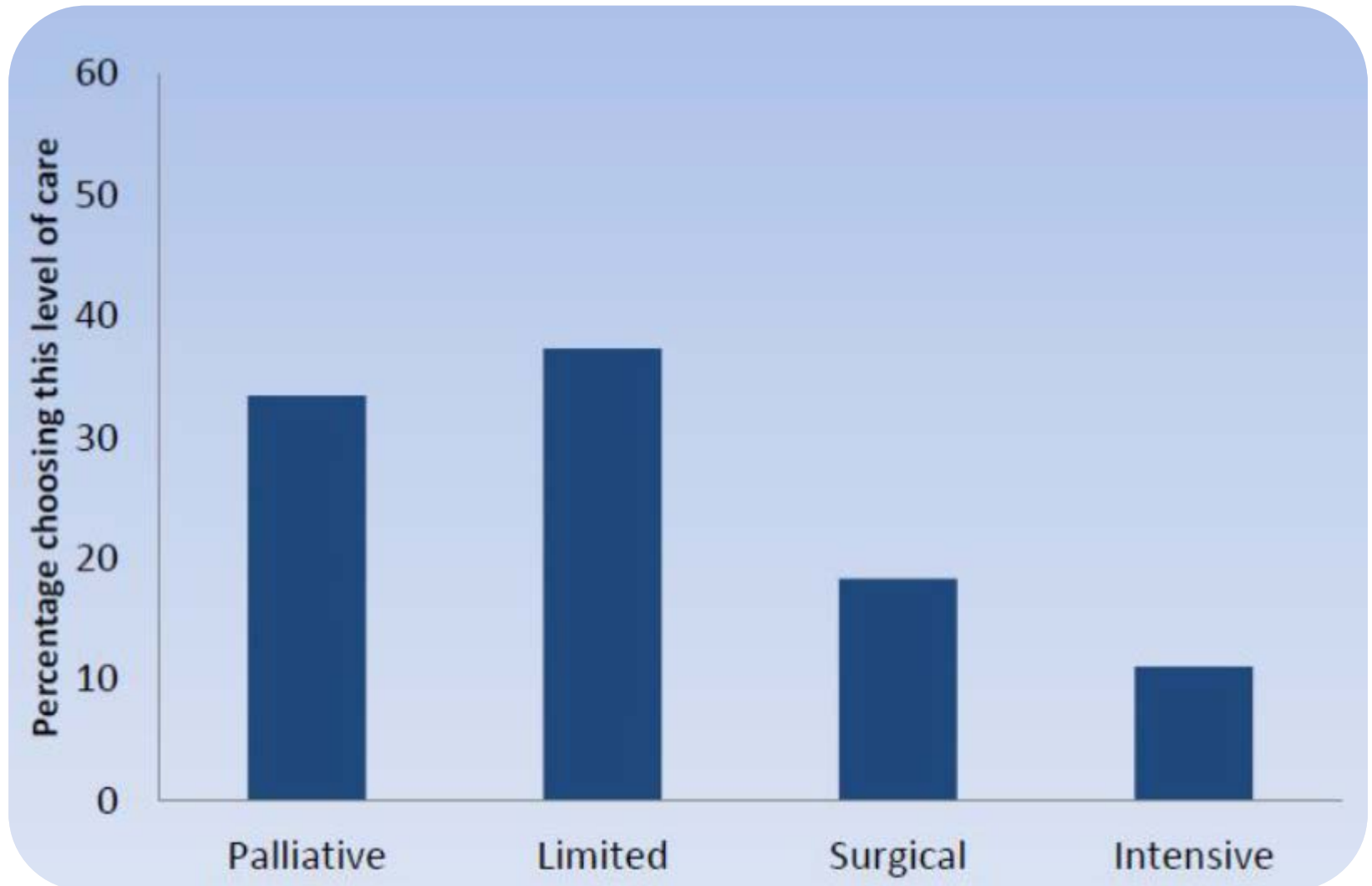
#6 Empowerment at the end of life

If it was their patient...



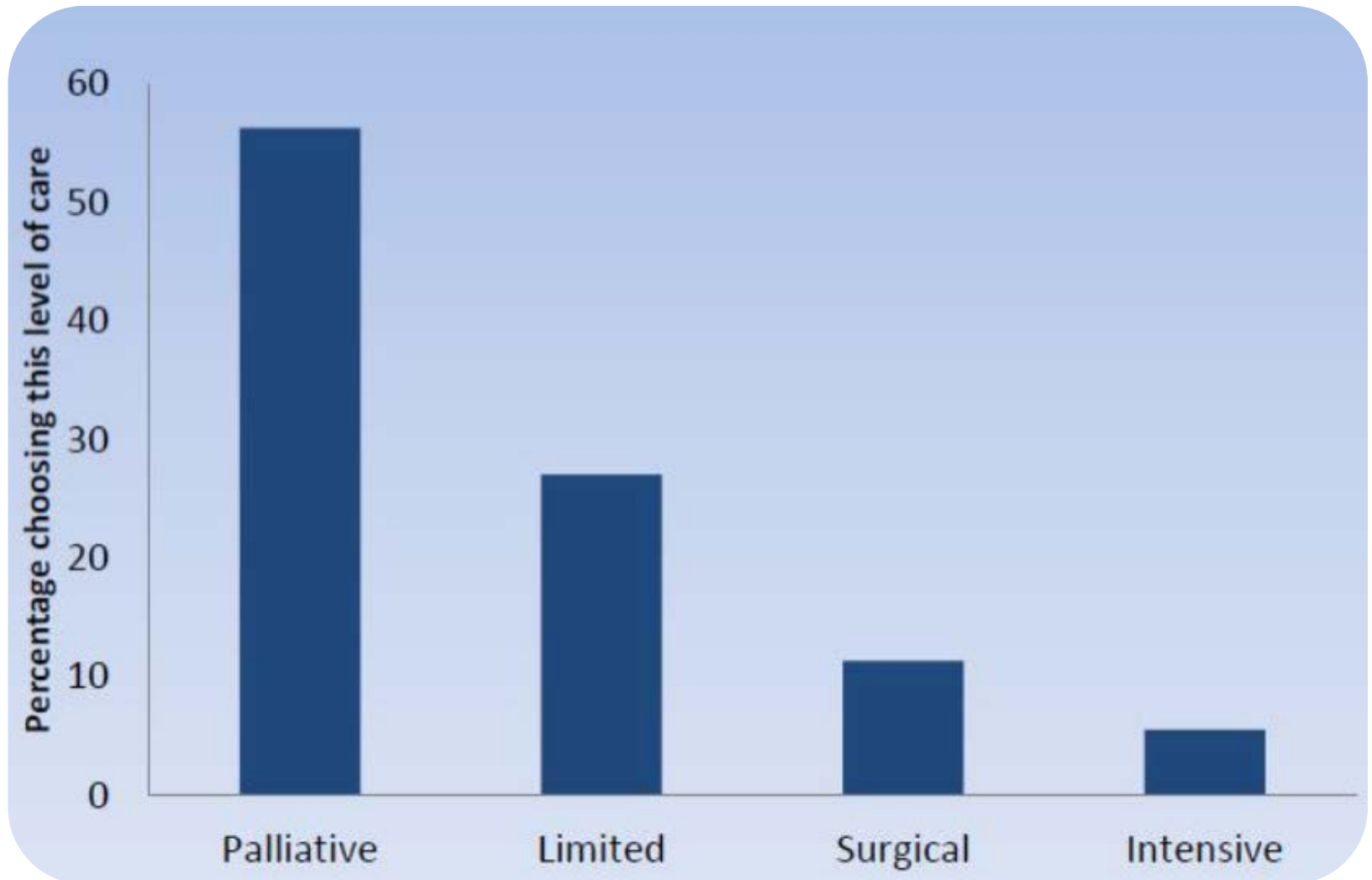
#6 Empowerment at the end of life

If it was their father...



#6 Empowerment at the end of life

If it was themselves...



#6 Empowerment at the end of life

The UK has strong systems to promote dignity and shared decisions about death



UK the 2010 and 2015 world #1

Strong hospice networks linked closely to NHS

A clear business and quality case
for helping people to die out of hospital

Attempts to systematize best practice
have proved highly controversial, however

Lessons for Canada

Privacy and data laws are not an excuse. There is always a solution.

Reforming payment systems is worth the slog.

We have tried integrating around organizations. Now let's integrate around the patient.

Stay locally led. Why move at the pace of the slowest?

Out Now

