Developed by the ASHP Section of Pharmacy Practice Managers in collaboration with the ASHP Pharmacy Student Forum

**Agenda**

1) Review trends in healthcare landscape
2) Review the Pharmacy Forecast Report
3) Case study activities
4) Leadership pearls

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**Learning Objectives**

1) Describe health-care imperative changes and impact on pharmacy practice
2) Review the Pharmacy Forecast and its role in strategic planning
3) Discuss the role of the Pharmacy Forecast on student professional development

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**Changing Healthcare Landscape**

- US Healthcare System is the most expensive in the world
- US ranked last compared to other nations:
  - Quality care, Access, Efficiency, Equity, Healthy Lives
- Triple Aim Theory:
  - Health outcome
  - Patient experience
  - Cost
- Affordable Care Act and Bundle Payment
  - Shift from volume to value
  - Shift from acute care to preventative care

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**Changing Healthcare Landscape**

- Increasing US health care spending (GDP ~17.7%)
- Aging population with extended lives
- Rising prevalence of adults with multiple chronic diseases
- Almost half of US population with least one chronic disease
  - ≥ 2 prescription drugs: 25-31%
  - ≥ 5 prescription drugs: 6-11%

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**Changing Healthcare Landscape**

- Shortage of primary care
  - HRSA estimates ~7,000 additional primary care physicians needed in underserved areas
- Egregious drug price increases and shortages
- CMS 'Meaningful Use' requirements in information technology
- Big data analytics

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Number of People with Chronic Conditions

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of People</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>133</td>
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Use of Multiple Prescription Drugs By Age

- ≥ 2 Rx (76%)

Changing Healthcare Landscape

- Workers to Medicare beneficiary ratio dropped from 3.4:1 in 2000 to 2.9:1 in 2010
- Predicted 2:1 by 2030

10 Challenges and Opportunities

- Population health
- Shifting from volume- to value-based reimbursement
- Regulatory demands
- Infection control, especially in light of Ebola
- Demonstrating the value of M&A consumers
- Truly integrating systems
- Over-specialization of the physician workforce and questions over the physician shortage
- Hospital closures
- Reimbursement rate differences
- Data, data everywhere

Opportunities and Impact on Pharmacy Practice

- Population health management
  - Ambulatory clinics
  - Adherence packaging and mail order
  - Specialty Pharmacy
  - Partnerships
- Big data and predictive analytics
- Formulary management to mitigate impact due to drug price increases and shortages
American Society of Health-System Pharmacists (ASHP)

Vision:
• Medication use will be optimal, safe, and effective for all people all of the time.

Mission:
• The mission of pharmacists is to help people achieve optimal health outcomes. ASHP helps its members achieve this mission by advocating and supporting the professional practice of pharmacists in hospitals, health systems, ambulatory clinics, and other settings spanning the full spectrum of medication use. ASHP serves its members as their collective voice on issues related to medication use and public health.

ASHP Research and Education Foundation

Vision:
• As the philanthropic arm of ASHP, our vision is that patient outcomes improve because of the leadership and clinical skills of pharmacists, as vital members of the healthcare team, accountable for safe and effective medication use.

Mission:
• The mission of the ASHP Foundation is to improve the health and well-being of patients through appropriate, safe and effective medication use.

ASHP/ASHPF Collaboration

• 2004 Sara White Scholar-in-Residence
• 2005 AHP Article: Will There be a Leadership Crisis
• 2006 Center for H-S Pharmacy Leadership established in ASHPF
• 2007 Pharmacy Leadership Academy (PLA) established
• 2011 PLA recognized for graduate credit (MS, MHA, MBA)
• 2012 Visiting Leaders Program established
• 2012 Pharmacy Forecast established

Pharmacy Forecast

Purpose:
• To improve the effectiveness of leaders in hospital and health-system pharmacy practice

Overview:
• Predicts developments in eight domains likely to challenge pharmacy leaders in hospitals and health-systems
• Presents more than 40 authoritative, actionable strategic recommendations to pharmacy practice leaders
Pharmacy Forecast
Overview (continued):
• Reports survey results of trend watchers in health-system pharmacy and analyzes predicted trends
• Trend reports from ASHP Research and Education Foundation’s Center for Health-System Pharmacy Leadership
• Supported by the David A. Zilz Leaders for the Future Fund

Pharmacy Forecast
Methodology:
• Appointed Forecast Panel (FP) completes a questionnaire
• Survey asks likelihood of certain trends occurring over next five years
• Experts recruited to write a brief chapter for each domain
• Each chapters presents the survey results, authors assessment of predictions and strategic recommendations

Pharmacy Forecast
4th Edition (NEW)

Student Professional Development
How is this relevant for pharmacy students?
• Understand emerging trends and predicted challenges
• Promote thought provoking discussions and research
• Potential topic for journal clubs, rotational presentations and interview questions (i.e. internship, residency)

Forecast Panelist Questions
Forecast Question #1
More than 90% of health system will have strong financial incentives to keep their patients healthy and not in need of high-cost health care services, particularly inpatient care.

a) Very Likely
b) Somewhat Likely
c) Somewhat Unlikely
d) Very Unlikely
Forecast Question #2
Oral anti-factor Xa inhibitors (i.e., rivaroxaban, apixaban, edoxaban) will replace at least 25% of the current use of warfarin in the long-term management of thrombembolism and coagulation disorders.

a) Very Likely
b) Somewhat Likely
c) Somewhat Unlikely
d) Very Unlikely

Forecast Question #3
At least 25% of health systems will have a formal plan for including pharmacists, along with nurse practitioners or physician assistants (or both), in advanced roles that allow primary care physicians to care for more patients.

a) Very Likely
b) Somewhat Likely
c) Somewhat Unlikely
d) Very Unlikely

Forecast Question #4
The number of ethical dilemmas experienced by health care professionals in health systems and referred to ethics committees for guidance will increase by at least 25%.

a) Very Likely
b) Somewhat Likely
c) Somewhat Unlikely
d) Very Unlikely
1. Healthcare Delivery and Financing
- Increasing cost of health care
- Pay-for-performance and healthcare reform
- Pressure to improve quality while reducing costs


2. Population Health Management
- Improve health status of the population
- Not simply provide sickness care
- Aim to reduce cost of caring for the population


3. Drug Development and Therapeutics
- 41 new pharmaceuticals were approved in 2014
- Breakthrough therapies accounted for 22%
- Novel new drugs has increased every year since 2011

Changing Practices In Response To New Technology

• Standardize and optimize antineoplastic use through technology
• Position pharmacy to lead pharmacogenomics implementation
• Integrate biosimilars and advocate for appropriate use
• Reconfigure warfarin clinics to address novel oral anticoagulants
• Expand the health system’s capacity to manage all specialty medications

4. Pharmaceutical Marketplace

Medication expenditures expected to increase 7-9% across all settings
Manufacturers positioned to control:
• Supply of raw materials
• Distribution of high-cost medications
• Price of generics

5. Data and Technology

• Continuing to expand implementation of the electronic health record (EHR)
• Centers for Medicare & Medicaid Services (CMS) meaningful use
  – Stage 2= 2015
  – Stage 3= 2018

Supporting Quality Improvement

Define and implement pharmacy-specific performance indicators
Integrate within the EHR real-time data from healthcare devices
Collaborate with other health systems to facilitate protocol for clinical and operational activities
Public advantage for unanticipated benefits by operation in design

6. Pharmacy Work Force

Aim to lower costs and improve patient outcomes
Optimize pharmacy work force in new models of care
Market Forces Stimulate Change In Pharmacy Practice Models

- Develop pharmacist privileging process to achieve health-system goals
- Maximize leveraging of all staff members (residents, technicians, students)
- Focus on staff development to meet future plans of department
- Advocate for provider status
- Acknowledge pharmacy technicians as essential members of the team
- Strategize to ensure adequate supply of PTCB-certified technicians

7. Patient Empowerment

- Shared decision-making & managing own healthcare
- Facilitated by:
  - Federal Policy
  - Improving health outcomes
  - Providing cost-effective care
  - Patient health literacy

FROM PATERNALISM TO SHARED DECISION-MAKING

- Develop technology to facilitate medication-use empowerment
- Increase involvement where medication adherence is linked to outcomes
- Consider patient representation on clinical policy committees
- Assess success of pharmacy patient empowerment programs
- Develop patient assistance programs to lower cost of medications

8. Ethics

- Consolidation of payers and provider organizations
- Growing weight of business in healthcare
- Population health vs. Individual health
- Rising cost of medications

CHALLENGES TO PROFESSIONALISM IN HEALTHCARE

- Designate pharmacists to represent pharmacy on ethical issues
- Advocate for ethically sound policy for rationing medications
- Discuss pricing of medications that is out of line with patient benefit
- Collaborate with other professions to review ethical principles & professional autonomy

Role of PHARMACY FORECAST

- Strategic Planning
- C-Suite Education
Role of Pharmacy Forecast:

- Preparing the Next Generation of Pharmacists
  - School of Pharmacy
  - Resident & Student Learning
  - Leadership Courses

Case Study

Forecast Panelist Responses

Forecast Response #1

- More than 90% of health systems will have strong financial incentives to keep their patients healthy and not in need of high-cost health care services, particularly inpatient care.

Forecast Response #2

- Oral anti-factor Xa inhibitors (e.g., rivaroxaban, apixaban, edoxaban) will replace at least 25% of the current use of warfarin in the long-term management of anticoagulation disorders.

Forecast Response #3

- At least 25% of health systems will have a formal plan for including pharmacists, along with nurse practitioners or physician assistants (or both), in advanced roles that allow primary care physicians to care for more patients.
Forecast Response #4

The number of ethical dilemmas experienced by health care professionals in health systems and referred to ethics committees for guidance will increase by at least 25%.

Special Acknowledgment to:

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PGY2-Health System Pharmacy Administration Resident  
University of Virginia Health System  
Section of Pharmacy Practice Managers' Advisory Group on Innovation Management  

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Role of PHARMACY FORECAST

Take Home Message

- Landscape of pharmacy is changing
- Position pharmacy departments to keep pace with healthcare changes
- Prepare next generation of pharmacists to expect change in healthcare
- Equip next generation of pharmacists to manage change in healthcare

THANK YOU!
Pharmacy Forecast Student Workshop

Goal of the Program:

The primary goal of the program is to promote student awareness of emerging trends in healthcare and opportunities within pharmacy practice.

Program Format:

This program will be conducted as a 2.5-hour session, and we would like to encourage all pharmacy student attendees to participate. The program uses several methods of teaching, including didactic lecture, case-based workshop, and an interactive voting session. The first half of the program will be didactic, covering emerging healthcare trends, impact on pharmacy practice; and an overview of ASHP, the ASHP Research and Education Foundation, and the Pharmacy Forecast. The second half of the program will be a workshop with small-group breakout sessions, whereby students will review one of three cases with facilitated discussion and a large group summary presentation on each topic discussed. The cases will cover a Pharmacy Forecast theme such as 1) Population Health Management, 2) Data and Technology, or 3) Pharmacy Workforce. In addition, an interactive student voting session will be conducted during the didactic lecture portion of the program, and results will be shared at the end of the workshop to compare the students’ votes to the responses of the Forecast panelists. Please refer to the Pharmacy Forecast Student Leadership Development Facilitator’s Handbook for additional details regarding the program format.

Program Description for Marketing Purposes:

Calling all future clinicians and leaders in the profession of pharmacy! This interactive session will expose you to emerging healthcare trends and enhance your understanding of the opportunities within pharmacy practice. The topics covered may serve as potential topics for journal clubs, rotational presentations, and interview questions with potential employers (i.e., internship, residency).

Learning Objectives:

- Describe healthcare imperative changes and impact on pharmacy practice.
- Review the Pharmacy Forecast and its role in strategic planning.
- Discuss the role of the Pharmacy Forecast in student professional development.
Population Health Management

A health system consisting of 15 hospitals with over 50 clinics and 20 retail pharmacies was engaged by a large pharmacy chain. The chain drugstore is seeking to partner with the health system to share data across the electronic health record (EHR). The bilateral prescription data-sharing capability with outside pharmacies offers the potential to improve safety, decrease unnecessary phone calls, and allow caregivers to view medication histories generated by third-party payers. The ultimate goal is to contribute to the management of population health, control cost, and improve quality.

General case questions:

1. If you were the pharmacy leader, understanding the preparedness of today’s workforce and pharmacy graduates, what opportunities do you see for a pharmacist in the role of population health management?
2. As the pharmacy leader, how would you determine which population to target? How will you operationalize your plan to allow pharmacists to impact population health?
3. What barriers do you anticipate pharmacists will face when trying to pursue a larger role in population health management than is currently practiced?
4. As a future pharmacist, how do you envision yourself to be more engaged in population health management?
Data and Technology

A large health system underwent the implementation of the EHRs to meet meaningful use requirements set by the Centers for Medicare & Medicaid Services (CMS). Other health systems across the United States have also adopted the EHRs to meet CMS requirements. The growth of EHRs will increase the quantity of clinical data (aka big data) available electronically, which presents the opportunity to analyze the data to make meaningful decisions. A data analytics organization engaged your health system, offering the ability to unlock the power of big data to allow you to control healthcare costs and improve quality of care.

General case questions:

1. How do you envision that big data combined with technology will enable healthcare professionals to best take care of patients in the future?
2. As a pharmacy leader, what opportunities do you envision for pharmacy practice with the advent of big data and technology?
3. What unintended consequences do you anticipate will be created by design and use related to EHRs across multiple settings?
4. As a pharmacist, what role do you envision big data, combined with healthcare devices, will play in the evolution of your future practice?

Pharmacy Workforce

Literature published suggests that the supply of pharmacists may exceed demand based on current pharmacy practices. In contrast, publication data also suggest that the demand of primary care exceeds the supply of primary care providers. To add to the scenario, healthcare payers have shifted the focus of reimbursement models from volume to value. Healthcare organizations are responding to payment reforms by redirecting their resources and capabilities toward population health management to improve access to quality care, while controlling cost. These factors create new opportunities for the pharmacy workforce.

General case questions:

1. What are your opinions about the factors influencing the pharmacy workforce, and how should student’s best prepare?
2. Where do you feel there are opportunities for pharmacists to expand their role to better align demand with the supply of pharmacists?
3. What are your thoughts related to pharmacists obtaining provider status and collaborative agreements?
4. What do you foresee are critical steps for new pharmacists to ensure that they are competent and capable practitioners as they seek employment in new patient care opportunities?
5. There remains to be a shortage of students receiving residency training. As pharmacy leaders, how should we evaluate pharmacists’ credentials as we hire them to practice in these advanced roles?

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