Pharmacy Forecast 2017:
Trends That Will Shape Your Future

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Disclosures

• The presenter serves on the ASHP Foundation Pharmacy Forecast Advisory Committee, for which she receives an honorarium.
Learning Objectives

• Identify 5 or more components of the external environment that will have major impact on practice over the next 5 years.

• Translate the strategic advice of national authorities to the needs of your practice setting.

• Identify 3 or more ways to apply knowledge of key trends toward improving patient care.
• Project of the ASHP Research and Education Foundation
• Supported by the David A. Zilz Leaders for the Future Fund; grant from Omnicell, Inc.
• New: Published in AJHP
• All editions freely accessible at:
  – www.ashpfoundation.org/pharmacyforecast
Why the Report Was Created

- Improve strategic planning effectiveness
- Value of a nationwide environmental scan
- Difficult for pharmacy departments to look beyond immediate operational challenges
- Important to consider trends outside of pharmacy’s immediate purview
Key Components of the Project

- Identify external developments that might have a major effect on pharmacy practice (Advisory Committee)
- Survey trend-watchers
- Expert analysis of survey results
- Actionable recommendations
Important Features

- New report every year covering new territory
- Practitioners encouraged to consult 3 most recent reports
Forecast Survey

• Eight domains; six questions in each domain
  – Population Health Management
  • Health-System Operations
  – Health Information Technology
  • Therapeutics
  – Managing Medication Costs
  – Regulatory Requirements
  • Pharmacy Work Force
  • Presidential Election

• Likelihood of a development within next five years
• Reference to “geographic region where you work”
Forecast Panel / Trend Watchers

- Nomination by leaders of five ASHP sections
- Recognized experts in an area of pharmacy practice
- Demonstrated ability to think analytically about the future
- 148 persons on Forecast Panel
- Balanced geographic distribution
- “Top of mind” response
- 86% / 84% response rate
“How likely is it that the following will occur by the year 2021 in the geographic region where you work?”
Population Health Management

Improving the Community to Heal the Patient
At least 75% of health systems will have formal, assertive programs aimed at achieving the highest quality at the lowest cost for specific patient populations (e.g., oncology, diabetes, inflammatory and immune disorders) across the continuum of care.

- Very Likely: 43%
- Somewhat Likely: 41%
- Somewhat Unlikely: 14%
- Very Unlikely: 2%
At least 50% of health systems will serve high-risk patients (e.g., those with cancer, congestive heart failure, HIV) through formal programs with community pharmacies (e.g., for adherence coaching, patient monitoring) that they own or are in partnership with.
At least 75% of health systems will have a major campaign aimed at improving the prescribing of opioids.
Strategic Recommendations

- **Leverage pharmacy to achieve optimal medication adherence**
  - Risk stratification
  - Telehealth
  - Collaborative practice in clinics and community pharmacies
  - Refill authorization
  - Compliance packaging
  - Bedside delivery

- **If your organization self-insures its employees for healthcare, utilize to pilot innovative pharmacy services such as disease state management**
Strategic Recommendations

• Ensure your pharmacy enterprise is actively addressing the opioid crisis
  – Opioid stewardship
  – Effective opioid-diversion prevention
  – Support of prescription medication disposal programs
  – Promotion of improved public access to naloxone
Health System Operations

New Frontiers in Practice Change
At least 50% of health systems will implement assertive behavior modification programs for improving the prescribing of antimicrobials for both inpatients and outpatients.

- Very Likely: 45%
- Somewhat Likely: 39%
- Somewhat Unlikely: 14%
- Very Unlikely: 2%
At least 50% of health systems will repurpose one or more acute care facilities to post-acute care facilities.
In at least 25% of health systems, most high-cost chronic care patients will receive some of their ongoing care through telehealth applications.
Strategic Recommendations

• Provide pharmacy input on contingency planning for declining inpatient admissions
  – Observation units
  – Post-acute care facilities

• Become engaged with your health system’s strategy on telehealth
  – Medication management and patient adherence

• Through P&T, actively pursue behavioral modification techniques to improve antimicrobial use
Health Information Technology

Integration, Patient Empowerment and Security
At least 50% of health systems will have significantly reorganized their information technology infrastructure (including electronic health records) to achieve true systemwide integration.
In at least 25% of health systems, health data generated by ambulatory patients (such as from wearable devices) will be integrated into the patient’s electronic health record in real time.
At least 10% of health systems will be the victim of a major cyberattack or unauthorized information system access that seriously compromises patient safety.
Strategic Recommendations

• Pursue system-wide integration of medication-related information technology, using sound project management techniques with focus on safety-related facets of medication use

• Have a voice in health system’s pre-acquisition assessment of devices that would impact medication use and monitoring

• Give priority to reviewing the access security of all pharmacy-managed technology. Test downtime workflow processes for each system
Therapeutics

Changing Practices to Meet New Demands
For at least 10% of patients, clinicians will use a combination of genomic information, lifestyle/environmental history, and information collected from medical devices (e.g., wearable or mobile applications) to individualize treatment plans.
At least 75% of health systems will develop disease-specific treatment algorithms to manage the use of specialty medications across the patient’s continuum of care.
At least 25% of specialty medications will be approved for marketing based on limited evidence (e.g., clinical trials with small sample sizes, narrowly defined target populations, preliminary clinical findings).
Strategic Recommendations

• Evaluate your health system’s opportunities to incorporate precision medicine approaches in patient care
  – Improved selection, dosing, patient outcomes
• Guide the P&T committee’s assessment of new products that were approved with limited clinical evidence
• Create an interdisciplinary task force to review payer treatment pathways
  – Versus current evidenced-based practice
  – Pathway adherence
  – Patient outcomes
  – Pursuing modifications to pathway as needed
Managing Medication Costs

Focusing on value
At least 50% of health systems will apply the concept of “incremental value” in formulary decisions and clinical guidelines through assessment of pharmacoeconomic data (i.e., cost per quality-adjusted life-years and incremental cost-effectiveness ratios).
At least 25% of health systems will have risk-sharing agreements with biopharmaceutical manufacturers that call for price discounts if a product’s performance fails to meet specified targets.
At least two major pharmacy benefit management companies will reimburse expensive new medications only up to the limit of their own (not the manufacturer’s) value-based pricing calculations.
At least 25% of health systems will be able to document that their formal programs for managing patients receiving specialty medications significantly improve patients’ disease-related outcomes.
Strategic Recommendations

• Integrate value into formulary decision-making process by including
  – Number needed to treat to achieve outcome
  – Cost per quality-adjusted life-year
  – Cost per year of life gained
  – Incremental cost-effective ratio

• Actively manage specialty medications in your health system
  – Treatment algorithms/outcome measures
  – Risk-sharing contracting based on achievement of measurable clinical outcomes

• Engage patients in treatment decisions by providing them information about cost and outcomes
Regulatory Requirements

Proliferation of Complex Demands
The amount of time that health-system pharmacy personnel devote to regulatory compliance will increase by at least 25%.
At least 25% of health systems will have at least one pharmacist position devoted to appropriate control and use of pain medications, especially opioids.
At least 75% of health systems will have at least one pharmacist position devoted to antimicrobial stewardship for both inpatients and outpatients.
Strategic Recommendations

• Articulate the pharmacy regulatory requirements that must be accommodated in organization’s comprehensive compliance infrastructure

• Develop or recruit pharmacists with expertise in pain management and infectious diseases to meet regulatory demands

• Develop real-time reporting/alerting tools to monitor and support regulatory compliance
Pharmacy Work Force

Shifts in Roles, Responsibilities and Training
At least 50% of health systems will have a formal plan for achieving an appropriate balance between (a) applying valid teaching methods in advanced pharmacy practice experience (APPE) education and (b) the productivity of Pharm.D. students on APPE rotations.
At least 50% of health systems will have formal career ladders for pharmacy technicians.

- Very Likely: 30%
- Somewhat Likely: 39%
- Somewhat Unlikely: 25%
- Very Unlikely: 5%
In at least 50% of health systems, specialized pharmacy technicians will assist pharmacists in providing patient care (e.g., by conducting medication reconciliation, taking medication histories, extracting data from health records).

- Very Likely: 45%
- Somewhat Likely: 41%
- Somewhat Unlikely: 14%
- Very Unlikely: 1%
Strategic Recommendations

• Identify the specific clinical knowledge, skills and abilities that will be required of your pharmacist staff within the next several years. Formulate a development and recruitment plan to meet needs
• Give strategic priority to professionalizing the pharmacy technician staff
• Actively pursue opportunities to support expanded accreditation pharmacy technician education and training in your region
Presidential Election
The new president will propose to Congress an extensive revision or replacement of the Patient Protection and Affordable Care Act.
The new president will actively support federal provider status for pharmacists.

- Very Likely: 3%
- Somewhat Likely: 35%
- Somewhat Unlikely: 42%
- Very Unlikely: 20%
The new president will seek congressional approval of a federal mechanism to influence the pricing of new pharmaceuticals, drawing on the experience of countries such as the United Kingdom, Canada, and Australia.
The new president will propose legislation that allows the importation of quality-assured pharmaceuticals as a means of increasing price competition.

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Strategic Recommendations

• Assume that healthcare reform will be an ongoing priority and that health systems will continuously pursue improved patient outcomes and reduced costs

• Cultivate relationships with your elected officials at the state and federal level. Ensure those representatives have a basic understanding of contemporary pharmacy practice

• Work with state and federal elected representatives on pharmaceutical pricing
Potential Domains

- Therapeutic Innovation
- Data, Analytics and Technology
- Business of Pharmacy
- Pharmacy and Health System Leadership
- Advanced Pharmacy Technician Roles
- Population Health Management
- Public Health Management
- Coping with Uncertainty and Chaos
Key Takeaways

• Open access: www.ashpfoundation.org/pharmacyforecast or www.ajhp.org (January 15, 2017 issue)
• Use this unique resource to energize your strategic planning
• Share the report with others, including executive leaders
• Provide feedback
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• Thank you for your interest