HEALTH SYSTEM LEADERS WORKING TOWARDS 
HIGH VALUE CARE THROUGH INTEGRATION OF CARE AND RESEARCH

An Institute of Medicine Workshop
Sponsored by the Patient Centered Outcomes Research Institute

A LEARNING HEALTH SYSTEM ACTIVITY
IOM ROUNDTABLE ON VALUE & SCIENCE-DRIVEN HEALTH CARE

APRIL 23-24, 2014
KECK CENTER
500 FIFTH ST, NW
WASHINGTON, DC

<table>
<thead>
<tr>
<th>Meeting goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Broaden and deepen health systems’ <strong>leadership awareness</strong> of the prospects for and from a continuously learning health system.</td>
</tr>
<tr>
<td>2. Foster the development of a <strong>shared commitment</strong>, vision, and strategy among health system leaders for building and maintaining the networked capacity.</td>
</tr>
<tr>
<td>3. Identify <strong>common applications</strong> in meeting health systems responsibilities for science, technology, ethics, regulatory oversight, business, and governance.</td>
</tr>
<tr>
<td>4. <strong>Consider and learn</strong> from models and examples of productive integration of research with care delivery programs.</td>
</tr>
<tr>
<td>5. Explore <strong>strategic opportunities</strong> for executive, clinical, and research leaders to forge working partnerships for progress.</td>
</tr>
<tr>
<td>6. Consider the particular opportunities for <strong>CEO leadership</strong> in building, growing, and making full use of the infrastructure necessary.</td>
</tr>
</tbody>
</table>

Day 1: Wednesday April 23, 2014

8:00 am Coffee and light breakfast available

**Welcome, Introductions, and Overview**

This session will include welcomes from the IOM, the activity sponsor and the Planning Committee chair. Comments will include an overview of the series and meeting goals, a brief discussion of the scope of the meeting, and a review of the agenda.

**Welcome from the IOM**

*Michael McGinnis*, Institute of Medicine
Opening remarks, workshop series, and meeting overview
Joe Selby, Patient-Centered Outcomes Research Institute
Eric Larson, Planning Committee Chair, Group Health Research Institute

8:45 am  Integrating care delivery and clinical research: case examples
This session will highlight examples of organizations that are on the leading edge of integrating care delivery and research in a way that has lead to greater efficiency, better value, and/or improved health, including a discussion of the value proposition, and its components, which has led some organizations to embrace and succeed in gaining value.

Moderator: Hal Luft, Palo Alto Medical Foundation

The REDUCE MRSA Trial
Susan Huang, University of California Irvine

Improve Care Now Network
Uma Kotagal, Cincinnati Children’s

Group Health Cooperative
David Grossman, Group Health

The High Value Health Care Collaborative
Edward Havranek, Denver Health

Q&A and Open Discussion

10:15 am  Break

10:30 am  Defining the value proposition of continuously learning health care
This session will give a brief introduction to the vision for a continuously learning health system including a brief review of past and current research network efforts, an explicit description of the proposed value proposition for health systems’ leaders, and brief discussions of value propositions for stakeholders groups of key importance to health systems leaders (eg. patients/families, clinicians, payers).

Session presentation:
Is the time right for continuously learning health care?
Sarah Greene, Patient-Centered Outcomes Research Institute

Panel respondents:
Increasing efficiency and eliminating waste
Thomas Graf, Geisinger Health System

Improving our ability to choose wisely
Rita Redberg, University of California San Francisco
Establishing infrastructure to pay for value  
*Trent Haywood*, Blue Cross Blue Shield Association

*Q&A and Open Discussion*

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>12:00 pm</td>
<td><strong>Lunch</strong></td>
</tr>
</tbody>
</table>
| 1:00 pm  | **Creating the conditions for sustainability**  
This session will explore the business and financial issues and opportunities presented to organizations by moving towards continuous learning and improvement.  

**Moderator:** *Lew Sandy*, UnitedHealth Group

**Session presentation:**  
**Creating the conditions for sustainability**  
*Brent James*, Intermountain Healthcare

**Panel respondents:**  
**Evaluation and improvement of care delivery**  
*Thomas Garthwaite*, HCA Inc

**Improving care for me and patients like me**  
*Sally Okun*, PatientsLikeMe

**Leveraging data for improvement**  
*Karen DeSalvo*, National Coordinator for Health IT

*Q&A and Open Discussion*

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>2:30 pm</td>
<td><strong>Break</strong></td>
</tr>
</tbody>
</table>
| 2:45 pm  | **Addressing issues of regulatory oversight**  
This session will take on the challenges and opportunities around the legal and ethical oversight of integrating care and research efforts.  

**Moderator:** *Barbara Bierer*, Brigham and Women’s Hospital

**Session presentation:**  
**An ethical framework for learning health systems**  
*Nancy Kass*, Johns Hopkins University

**Panel of example approaches to dealing with oversight challenges:**  
*Susan Huang*, University of California Irvine
James Weinstein, Dartmouth-Hitchcock

Christopher Forrest, Children’s Hospital of Philadelphia

Q&A and Open Discussion

<table>
<thead>
<tr>
<th>4:15 pm</th>
<th><strong>Governance that accelerates progress and sustainability</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>This session will focus on issues of institutional governance of continuous learning activities.</td>
</tr>
<tr>
<td></td>
<td>Moderator: Paul Wallace, Optum Labs</td>
</tr>
</tbody>
</table>

Session presentations:

Aligning research with institutional goals
James Rohack, Baylor Scott White

Data sharing in a competitive environment
Mary Brainerd, HealthPartners

Governing inter-institutional research
John Steiner, Kaiser Permanente Colorado and HMO Research Network

Q&A and Open Discussion

<table>
<thead>
<tr>
<th>5:45 pm</th>
<th><strong>Summary and preview for day 2</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Eric Larson, Planning Committee Chair, Group Health Research Institute</td>
</tr>
</tbody>
</table>

| 6:00 pm | **Reception** |

| 7:00 pm | Adjourn |

Day 2: Thursday April 24, 2014

8:30 am  Coffee and light breakfast available

9:00 am  **Welcome and Overview**

Opening remarks and meeting overview
Eric Larson, Planning Committee Chair, Group Health Research Institute
9:15 am | **Fostering the well-prepared stakeholder culture**
This session will take on challenges and opportunities in the engagement of clinicians, patients, families, and the public in integrating care and research efforts.

Moderator: Jean Slutsky, Patient-Centered Outcomes Research Institute

**Session presentations (10 min each):**

**Creating a culture of learning**
Peter Knox, Bellin Health

**Clinician engagement**
Peter Margolis, Cincinnati Children’s

**Patient engagement**
Bray Patrick-Lake, PCORnet Executive Leadership Committee

**Q&A and Open Discussion**

10:45 am | **Break**

11:00 am | **Priority opportunities for CEO leadership to make a difference**
This session will draw on previous sessions and discussions to identify and prioritize the key issues for health systems leadership in moving toward greater integrated care and knowledge generation activities, including whether a shared value proposition is the key to sustainability.

Moderator: Michael McGinnis, Institute of Medicine

**Panel:**
Raymond Baxter, Kaiser Permanente

David Labby, Health Share of Oregon

Patricia Smith, Alliance of Community Health Plans

Janice Nevin, Christiana Cares Health System

**Q&A and Open Discussion**

12:30 pm | **Summary and next steps**

**Parting comments from the Sponsor and Chair**

Joe Selby, Patient-Centered Outcomes Research Institute

Eric Larson, Planning Committee Chair, Group Health Research Institute
Comments and thank you from the IOM
Michael McGinnis, Institute of Medicine

1:00 pm  Adjourn, box lunches available for pick up

*********************************************

Planning Committee

Eric B. Larson, MD, MPH, MACP, Group Health, Chair
Raymond Baxter, PhD, Kaiser Permanente
Barbara E. Bierer, MD, Brigham and Women's Hospital
Mary K. Brainerd, MBA, HealthPartners, Inc.
Meighan Girgus, MBA, American Heart Association
Regina Holliday, Artist and Patient Data Activist
Brent James, MD, Intermountain Healthcare
Uma R. Kotagal, MBBS, MSc, Cincinnati Children's Hospital Medical Center
David Labby, MD, Health Share of Oregon
Jonathan B. Perlin, MD, PhD, MSHA, Hospital Corporation of America
Lewis G. Sandy, MD, UnitedHealth Group
Joe V. Selby MD, MPH, Patient-Centered Outcomes Research Institute
Jonathan N. Tobin, PhD, Clinical Directors Network, Inc.
P. Jon White, MD, Agency for Healthcare Research and Quality

Staff officer: Claudia Grossmann PhD
cgrossmann@nas.edu
(202) 334-3867