Quick-Hitting Survey
Oncology Technology & Innovation

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Executive Summary

Methodology

In October 2019, The Health Management Academy conducted a quick-hitting survey of Leading Health Systems to better understand innovation within the Oncology service line. The 24 responding Oncology leaders represent health systems with an average Total Revenue of $6.8 billion that own or operate 239 hospitals and have approximately 2.8 million admissions per annum.

Key Findings

- The top focus areas for Oncology innovation over the next five years include care pathways and care coordination (83%), direct patient care (71%), and treatment methods (71%).

- No responding health system has a defined Oncology service line innovation budget; however, 55% approve funds for innovation from the broader oncology budget on a case-by-case basis.

- The majority (89%) of Oncology leaders agree that competing resources is the greatest barrier to implementing innovative initiatives.

Results

Among responding executives, the primary focus areas for oncology innovation in the next year include direct patient care (75%) and care pathways/care coordination (71%) (Figure 1). In the next five years, executives expect to prioritize innovation around care pathways/care coordination more highly (83%). Additionally, they anticipate a greater prioritization of treatment method innovation (71%) and a slight decline in innovation around direct patient care (71%). Executives expect to see the greatest increase in prioritization within financial/risk modeling, increasing from 33% to 71% over the next five years.

Figure 1. Where do you anticipate prioritizing innovation and technology within your oncology service line?
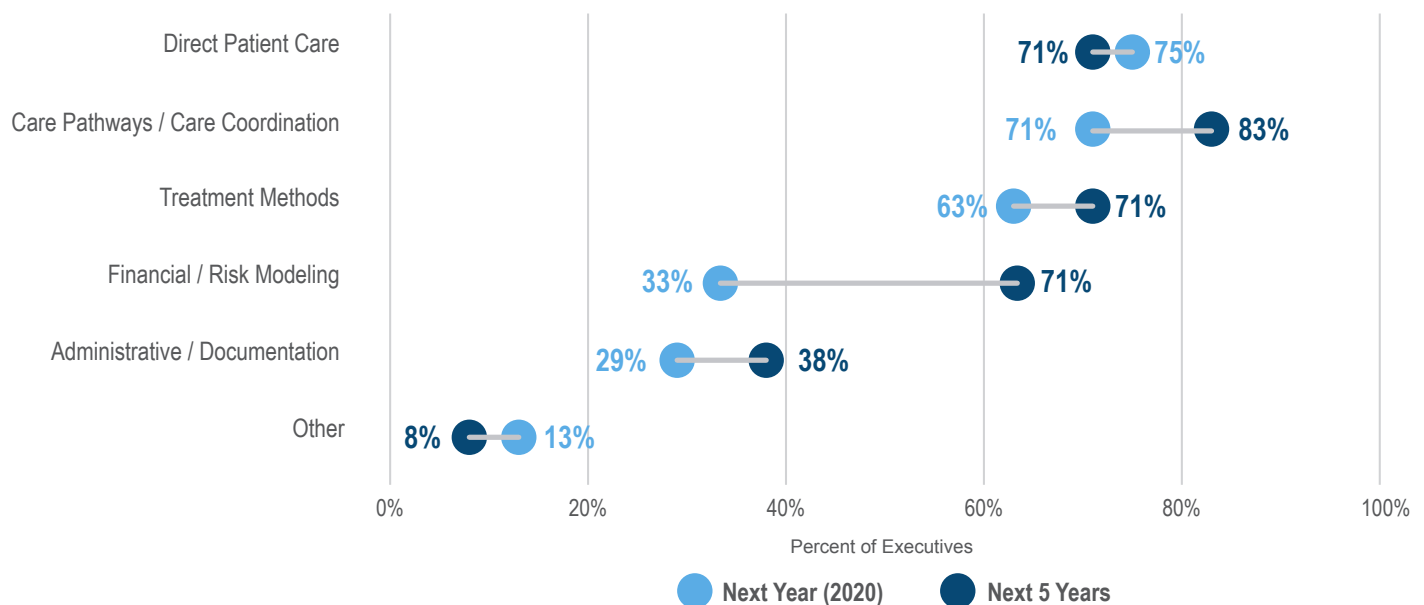
Most commonly, health systems leverage software/technology (100%), internal initiatives (94%), and partnerships (83%) to foster innovation within the oncology service line (Figure 2).

Figure 2. Within your oncology service line, what are the methods by which your organization drives innovation?
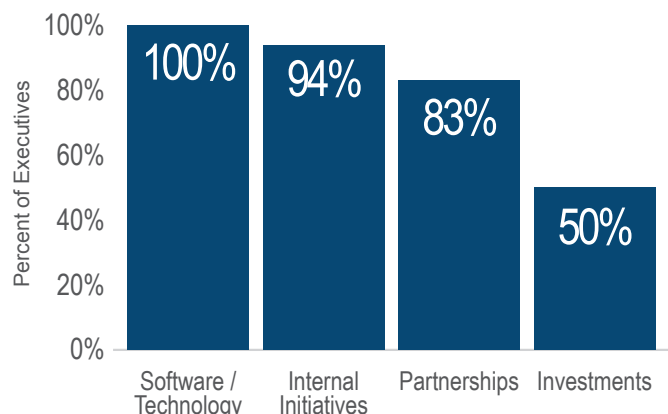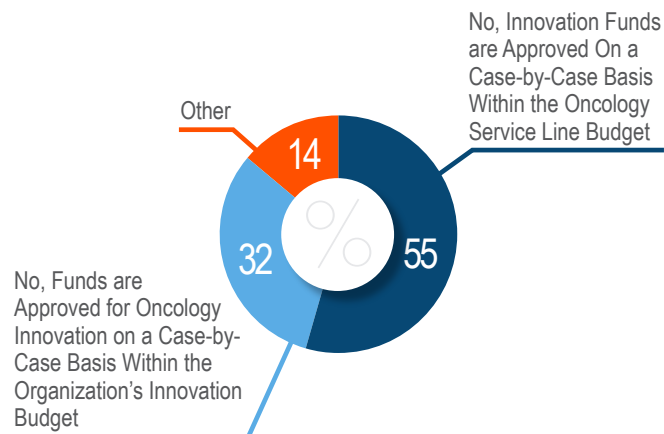

Figure 3. Does your organization have a defined budget for innovation within the oncology service line?

No, Innovation Funds are Approved On a Case-by-Case Basis Within the Oncology Service Line Budget — 55

Other — 14

No, Funds are Approved for Oncology Innovation on a Case-by-Case Basis Within the Organization's Innovation Budget — 32

No responding health system has a defined innovation budget for the oncology service line (Figure 3). Many (55%) organizations approve innovation funds on a case-by-case basis within the oncology service line budget, while 32% approve funds on a case-by-case basis from the organization's broader innovation budget. In some cases, oncology-specific innovation initiatives are funded through multiple budgets (e.g., oncology, innovation, IT, external grants).

When evaluating innovation within oncology, health systems assess several key criteria when making go-forward decisions. Most commonly, health systems evaluate the impact on care quality and clinical outcomes (94%), followed by cost/capital investment (89%), forecasted ROI (89%), and alignment with stated organizational goals (83%) (Figure 4).

Figure 4. What are the key criteria evaluated when making a go-forward decision around oncology innovation initiatives?
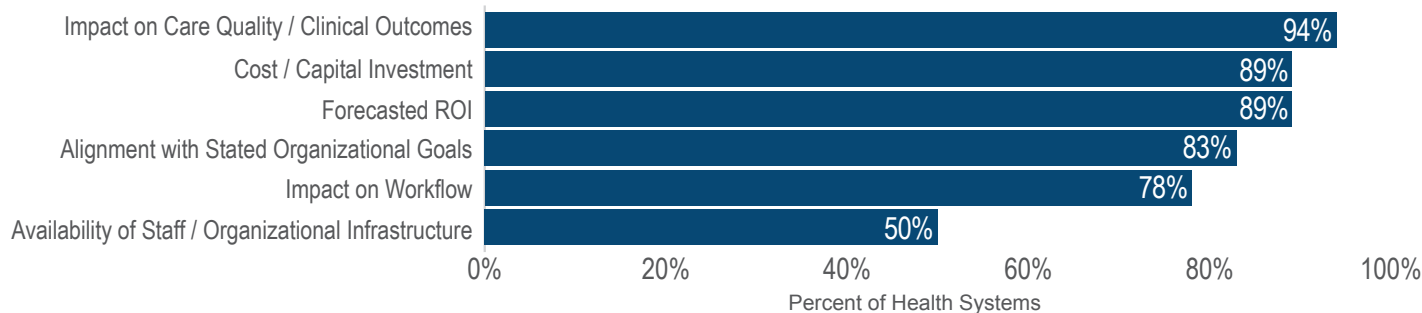
Once initiative funds are approved, executives note a number of challenges in implementing and scaling innovation across the service line. Most commonly, Oncology leaders cite competing resources as the most common barrier (Figure 5). Additional challenges include organizational infrastructure (44%) and lack of organizational priority (44%).

Figure 5. What are your greatest barriers for implementation and scaling new innovative technologies within the oncology service line?
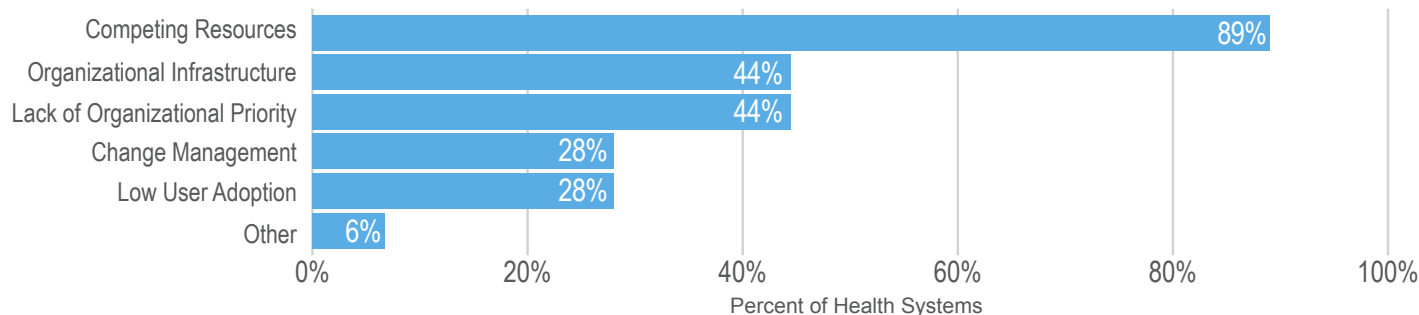
Oncology service lines have implemented innovative technologies across many different areas. The most common area of technology investment is in EMR optimization (e.g., clinical decision support software, longitudinal tracking software, APIs for coordinating EMR data, coding software), with 36% of executives focusing their technology initiatives in this space (Figure 6). Additional areas of focus include developing clinical pathways, building telemedicine solutions, and implementing radiation and oncology software.

Figure 6. What new innovative technologies have you been implementing?