Building an Effective Research and Innovation Hub Within a Community-Based Health System

Raena Zupan, Account Director, Futurety
Stephen Behm, Entrepreneur In Residence, Bon Secours Mercy Health

AHA Events

Outline/Agenda

Agenda:

1. Defining Innovation in Community-Based Health Systems
2. Shifting Organizational Culture for Progress
3. Innovation Programs in Action: BSMH Case Study
4. Evaluating Ideas and Uncovering Opportunities
5. Case Study: Market Landscape Assessment
6. Case Study: Impact of Innovation - Noura Health
7. Q&A

Learning Objectives:

- Understand why and how to foster innovation in community health settings, through in-house teams.
- Explore methods employed by hospitals and partners to discover, validate, and develop innovations.
- Learn actionable tactics to transform organizational culture, and the role this plays in attracting visionary clinicians.

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Bon Secours Mercy Health

- Top 20 largest health system in US (top 5 Catholic health system)
- 60,000+ associates in 7 US states and Ireland
- 11 million patient encounters annually
  - 1,200 care sites
  - 48 hospitals
- $600 million in community investment (2022)

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Speaker Bio: Steve Behm

Entrepreneur In Residence, Bon Secours Mercy Health

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Stephen Behm has over 30 years of industry experience in innovation, research, product development, marketing, and business development. Prior to joining BSMH, he was at University Hospitals in Cleveland and was instrumental in driving innovation at UH's Rainbow Babies and Children's Hospital, leading to the inclusion of Rainbow in The Disney Way and Parent's Magazine as examples of innovative organizations, driving the largest social media in its history. Prior to that he was a principal in four start-up organizations.

Steve received his BA from Hiram College and his MBA from Case Western Reserve University and also holds two US patents.

BON SECOURS MERCY HEALTH

Ohio Department of Development

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Futurety

- Digital marketing, analytics, and research consultancy based in Columbus, OH; primary focus on heavily regulated industries
- In-house team of data scientists
- Clients range from startups to Fortune 500; both in US and abroad
- Specialized knowledge of healthcare landscape, HIPAA regulations, PHI
- Founded in 2014 by Bill Balderaz
  - Top Minority Owned Business in Ohio (2020)
  - Fastest Growing Companies in Central Ohio (2021 Fast 50)
  - Fastest Growing Companies in the US (2023 Inc. 5000)

Speaker Bio: Raena Zupan

Account Director at Futurety
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Raena Zupan, a University of Florida BA graduate, is an Account Director at Futurety, a Midwest-based consultancy recently recognized by Inc. as one of the nation's fastest growing agencies. Her role entails leading client relationships, agile project management, and leveraging expertise in Data Analytics, Digital Marketing, and Market Research.

Raena stays current on HIPAA and PHI-related issues, data solutions, and marketing innovations. Proficient in feasibility studies, Google Analytics, SEO, and digital outreach, she loves helping empower organizations to increase market share, gain audience insights, and make impactful decisions.

Futurety
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Innovation in Community-Based Health Systems

- Healthcare innovation traditionally associated with academic/research hospitals
- Community-based hospitals generate equally viable contributions; drive progress, when an entrepreneurial mindset is integrated in culture
  - Clinicians enmeshed in patient care have unique insights
  - Smaller hospital → flatter structure → faster implementation and decision-making
  - Community roots for targeted innovation
  - Patient-centricity drives personalized solutions
  - Community partnerships as innovation enablers

Core Components of an Innovation Program

- **Leadership Support:** Top-down commitment to innovation, creating a culture of exploration and risk-taking. Establish reasons for Innovation program and goals.
- **Dedicated Resources:** Time, budget, and talent allocated to idea generation, development, and implementation.
- **Structured Framework:** Clear process for idea submission, evaluation, and execution.
- **Collaboration Emphasis:** Cross-disciplinary teamwork, diverse perspectives, and collective creativity.
- **Idea Generation Platforms:** Easy channels for staff to share ideas, such as suggestion boxes, digital platforms, and brainstorming sessions.
- **Implementation Strategy:** Actionable steps to turn ideas into solutions.

Roadmap: Build or Improve an Innovation Program

- **Establish objectives:**
  - **Employee retention & employee attraction**
  - **Create commercial opportunities**
    - License to existing organization
    - Creation of NewCo
  - **Support regional ecosystem** as a driver of growth
    - e.g., Health Anchor Network (HAN)
- **Assess/create a culture of innovation**
  - May vary by facility (and WILL vary by organization)
- **Elicit innovative ideas** from clinicians/staff
  - Ideas should solve challenges in the delivery of care
    - Patient facing
    - Operations

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Examining the Current Culture: Assessment Checklist

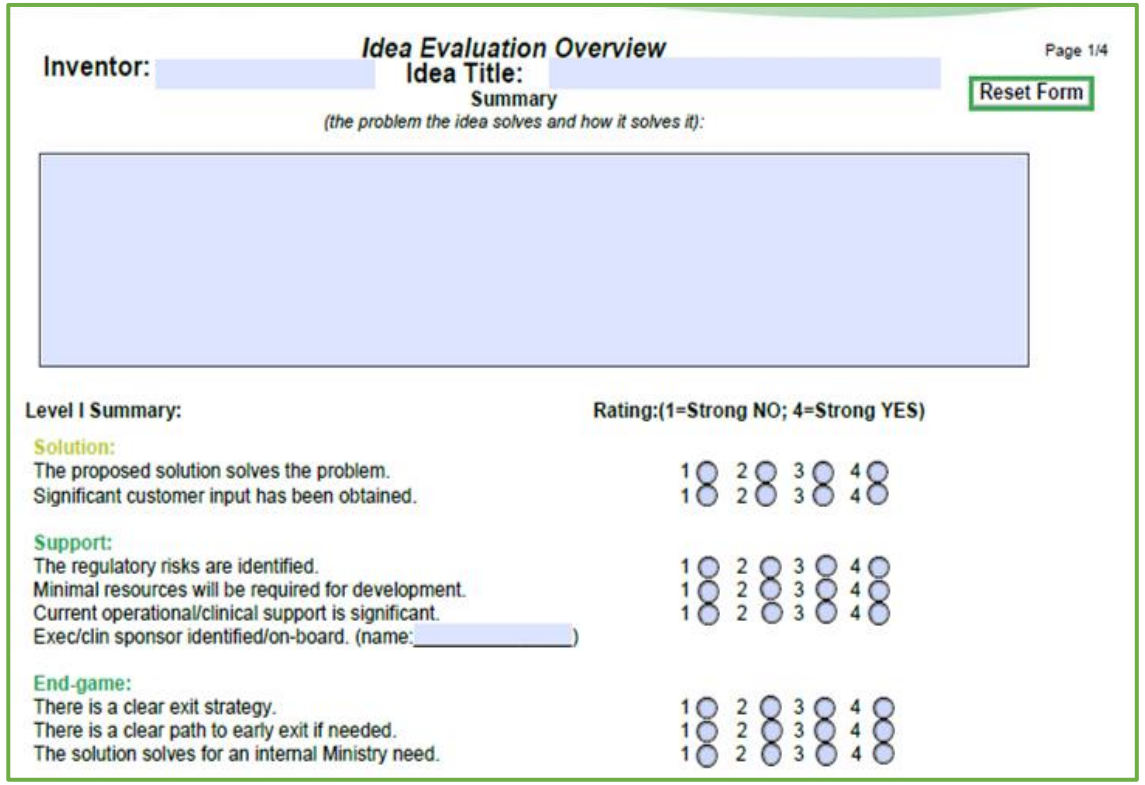
- History of innovation within the organization
  - Patents
  - Publications
  - Start-ups
- Current state
  - Personnel
  - Policies
- Codify ownership of Intellectual Property
  - IP provisions in all contracts
  - Revenue (net) sharing
  - Budget
- Research
- Regional ecosystem

Building a Culture of Innovation

- Shift the Internal Mindset
- Redefining the Innovator Role
  - Shift from seeing innovation as exclusive to certain roles.
  - Encourage all team members to contribute ideas and solutions.
- Clinicians as Catalysts
  - Recognize clinicians' unique insights and frontline experience.
  - Harness their perspectives to drive innovation.

Building an Innovation Program: Culture & Mindset

- Empower teams to:
  - Be creative and take risks.
  - Share new ideas, even if not fully formed.
  - Take risks, experiment, and fail.
- Provide support, resources for innovation.
  - This could include funding, training, and access to experts.
- Celebrate successes and learn from failures.
- Develop processes to evaluate and develop ideas (and provide constructive feedback 100% of the time, when ideas are formally submitted).



Idea Evaluation Overview

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Inventor: Idea Title:

Reset Form

Summary

(the problem the idea solves and how it solves it):

Level I Summary: **Rating:(1=Strong NO; 4=Strong YES)**

Solution:

The proposed solution solves the problem. 1 2 3 4

Significant customer input has been obtained. 1 2 3 4

Support:

The regulatory risks are identified. 1 2 3 4

Minimal resources will be required for development. 1 2 3 4

Current operational/clinical support is significant. 1 2 3 4

Exec/clin sponsor identified/on-board. (name:_____)

End-game:

There is a clear exit strategy. 1 2 3 4

There is a clear path to early exit if needed. 1 2 3 4

The solution solves for an internal Ministry need. 1 2 3 4

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Outreach Tactics

- Marketing Materials
  - Fliers
  - Laminated Cards
  - Signage
- Innovation Challenges
  - Ensure steady top-of-the-funnel flow
  - Provide feedback to all submitters
- Strategic spaces for interaction
    - Break rooms
    - Physician lounges
    - Hospital cafeterias
- Harnessing gatherings
  - Wherever two or more are gathered…

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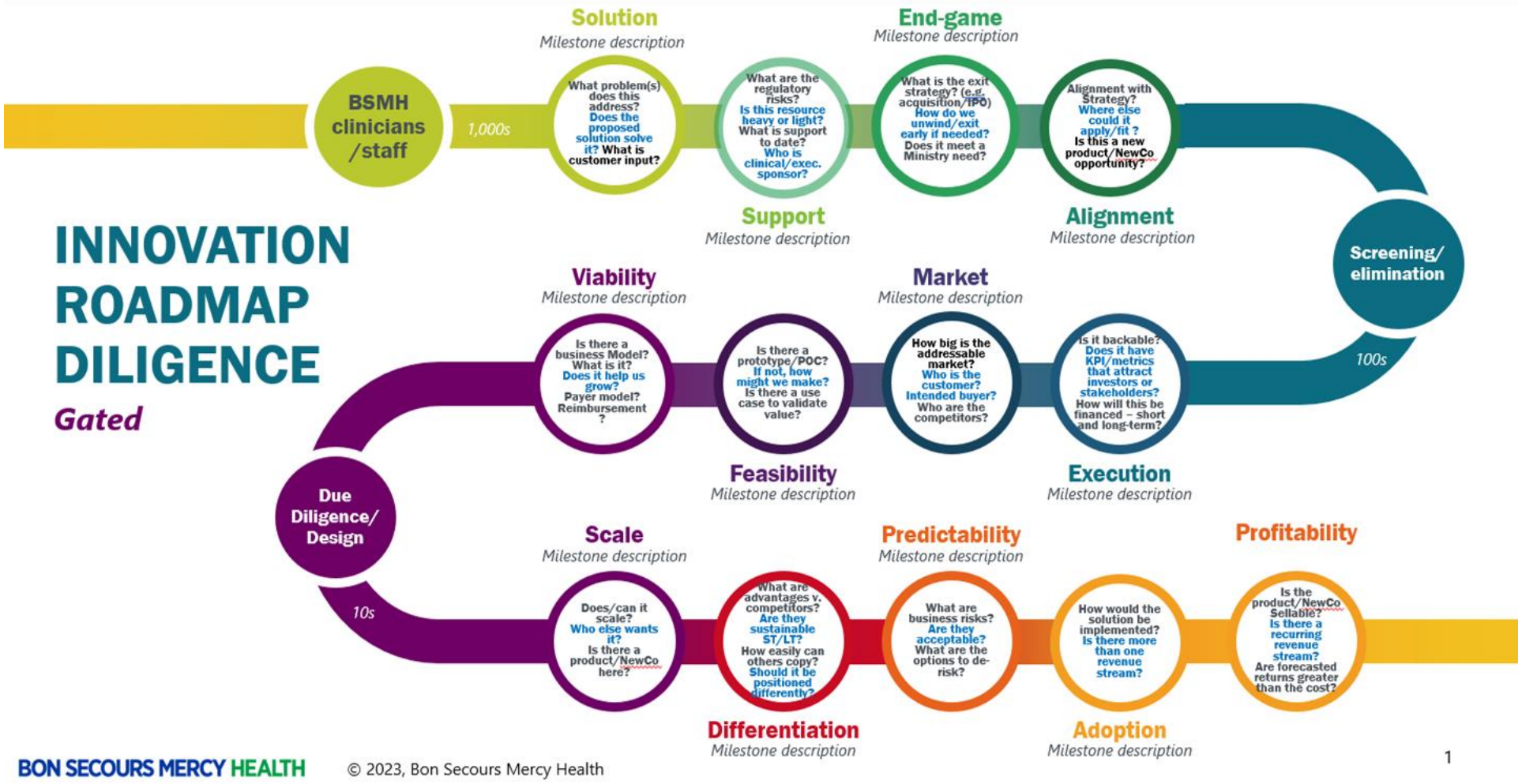
Idea Evaluation and Market Analysis



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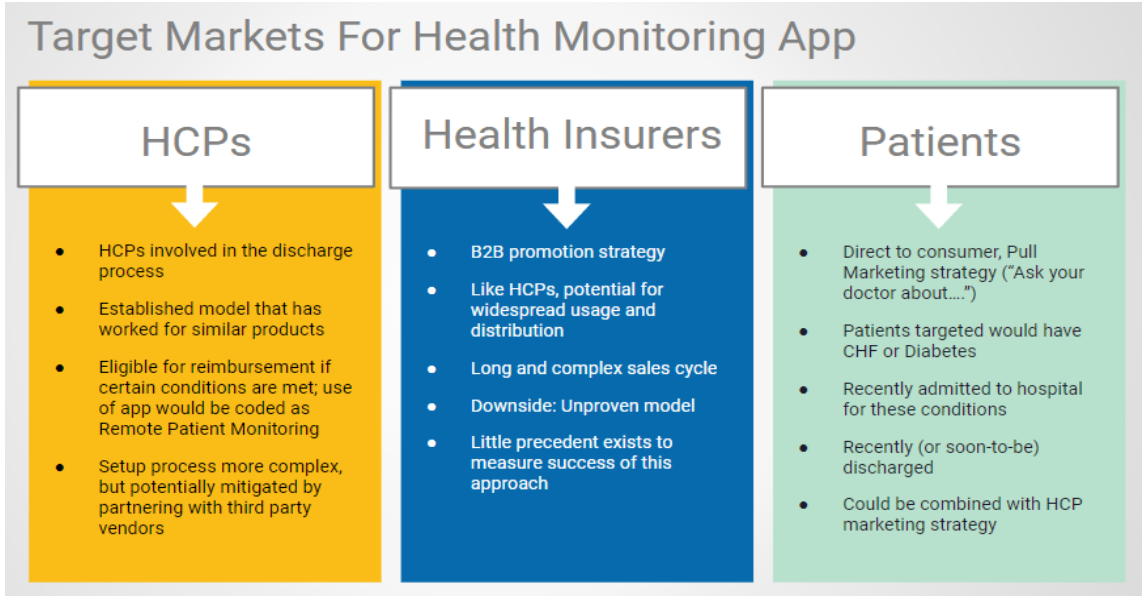
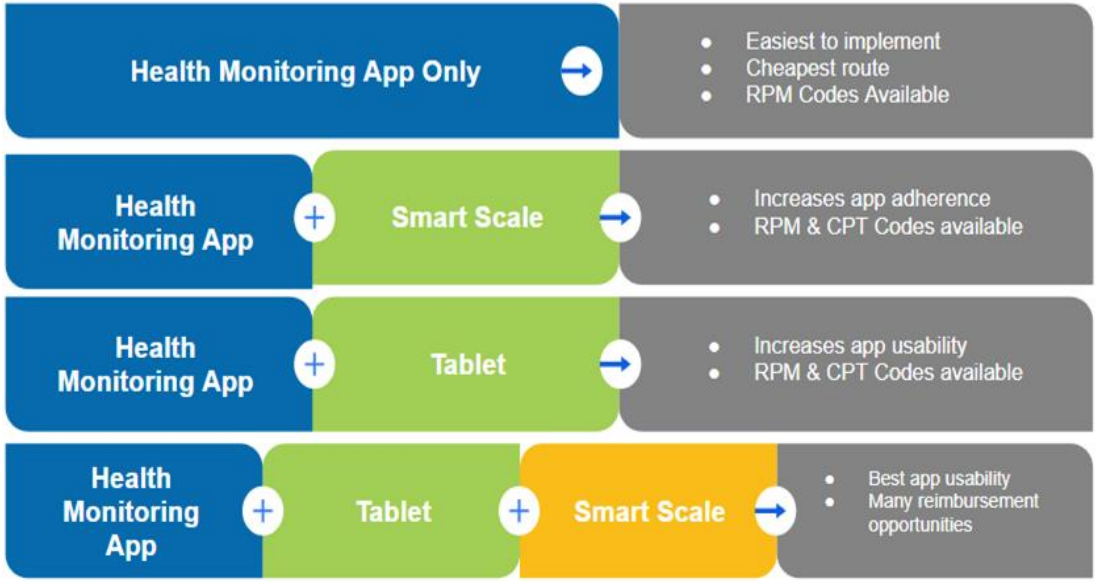
Selecting R&D-Worthy Ideas: When to outsource research?

- Much or all can be done in-house, with sufficient time + SME
  - Common reasons to outsource:
    - Access to specialized market research tools, databases, industry contacts
    - Perspective or insights from different geographic regions
    - Objectivity/due diligence
    - Risk mitigation, decision support
- Key Decision Data:
  - Market landscape: TAM, TOM, SOM
  - Competitor landscape & audience analysis
- Technological & Regulatory Factors
- Quantitative vs. Qualitative Research

Market Landscape Case Study: Mobile App for RPM





- **Challenge:** Assess the concept; charting a path to commercialization.
- **Key Insights:** In a crowded market, the app's unique selling proposition lies in its focused core functionality.
- **Specialized knowledge:**
  - Deep-dive into features, reviews, UX for related apps
  - Analyzed tech stack of competitor products and available open-source integrations
  - Researched CPT codes, reimbursement strategies, and potential synergy of bundling the app with other reimbursable devices
- **Outcome:** Recommended moving forward with further development; presented multiple roads to commercialization.

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Case Study: Transforming Vision into Reality

- Background on Dr. Aukerman
  - Well-known physician; in practice over 50 years
  - Well established practice; expertise in diet and supplements (Nutraceuticals)
    - 57,000+ patient visits
- Goal: Build mobile app; integrate labs and nutraceutical protocols
  - Benefits to the Ministry
  - Advantages for Dr. Aukerman
- Innovation team's path from innovation to product
  - Where did we start, and where are we now?
  - Develop, test, commercialize
  - Challenges along the way

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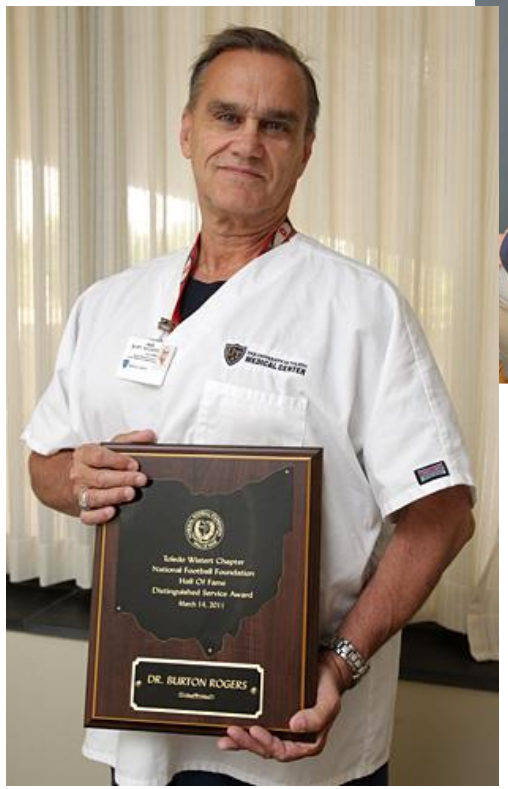
Case Study: Concussion Prevention

- Dr. Burton Rogers: Practicing trainer, inventor, and former head football coach. Licensed PTA; Certified Athletic Trainer.
- Unique insights from parent, coach, medical, and administrative viewpoints.
- Strong advocate for integrating evidence-based practices; prioritizes effective treatment for sports injuries
- Developed proprietary tool for accurately measuring isokinetic neck strength/cervical range of motion
    - Goal of device: concussion prevention
        - Where are we today?
        - Challenges/outcome



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Conclusion

- Know your organization - no two Innovation programs are going to look alike
  - Leadership support
  - Resource commitment
  - Shared goals and objectives
- Innovation is a contact sport
  - Meet clinicians and staff where they are
  - Engage with operations and care-delivery teams
  - Keep leadership engaged
- Leverage support
  - Engage external experts (don’t build too much in house)
  - Develop relationships with others in the ecosystem
- Have fun!

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SHSMD23 CONNECTIONS
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Questions?

Please be sure to complete the session evaluation!

AHA Events

Bibliography/References

- Licensing Executives Society link
- AUTM link
- Angel Capital Association link
- National Venture Capital Association link
- United States Patent & Trademark Office link
- DoTank (Human Centered Innovation & (free) Resources)
- Veema (Innovation Platform & (free) Resources)
- Landon Howell Start-up Resources link
- US Bureau of Labor Statistics & (free) Data Retrieval Tools
- PubMed Database of Research Articles (many free resources)