COVID-19: Sharing global lessons for recovery and resilience in healthcare

Dr Edward Fitzgerald
—
Head of Healthcare, KPMG Islands Group
@DrEdFitzgerald
Dr Edward Fitzgerald, KPMG Healthcare Advisory

Professional Experience

— Head of Healthcare for KPMG Islands Group, based in Bermuda
— Lead our international work supporting the unique challenges and opportunities in island healthcare.
— Physician executive with 20 years’ experience, including 12 years in front-line clinical practice
— Experience working in >30 countries on >60 occasions, providing deep knowledge of global trends and best practice
— Design, plan and implement complex strategic change, leading and managing project delivery
— In addition to traditional KPMG services, specific healthcare advisory experience in:
  - Care system and pathway design, reform, and integration
  - Digital health and medtech / health tech transformation
  - Clinical operations and service delivery reviews
  - Workforce redesign and clinical engagement
  - Health system and hospital management
  - Benefits package and payor reforms
  - Universal health coverage design and implementation
KPMG has worked extensively with islands to implement healthcare transformation. Our teams include those with unrivalled experience in island jurisdiction healthcare which means that we can quickly understand local challenges, such as population, geographic isolation and self-reliance, better than any other supplier.

KPMG international island healthcare experience

Leading island healthcare credentials

Bermuda
- Cost and Quality Improvement
  Supporting the Hospital to improve efficiency and quality and build local capabilities

Bahamas
- National Health Insurance
  Implementation of a NHI platform to provide Universal Health Coverage for citizens
- Governance and Regulation
  Ensuring proportionate regulation and strong governance processes with appropriate membership and oversight

Cayman Islands
- Economic Impact Study
  Presentation of quantitative and qualitative economic impact findings
- Financial Advisory
  Financial advisory in support of new long term mental health facility

Jamaica
- Financial Sustainability
  Assessment of financial sustainability of The National Health Fund

Trinidad & Tobago
- Hospital planning
  Redevelopment plans for three major hospitals
- National Health Insurance
  Service design of health and social insurance

Curacao
- Hospital planning
  Developing an island-wide view of care in support of a new hospital

States of Jersey
- Care System Redesign
  Design of a new integrated care operating model including regulation, governance, Primary Care with a fully costed financial model to appraise options

States of Guernsey
- Care System Redesign
  Focused programme of cost reduction for the NHS Trust including integrated care benefits and on/off island care model review

Isle of Wight
- Quality and Cost improvement
  Mental health system clinical redesign and evaluation

Cyprus
- Care System Redesign
  Examination of data systems, financial information and patient record to develop a costing methodology

Philippines
- Care System Redesign
  Providing global insight into Service Delivery Networks

Malta
- Service Evaluation
  Evaluating mental health services for future planning
- Health research
  Researching the social determinants of health in education

Tasmania
- Operational Excellence
  Mental health system clinical redesign and evaluation

Bermuda
- Integrated Care
  Support to the MoH and hospital on island healthcare strategy, payer reform and integrated care

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Over 100+ major Covid-19 healthcare projects globally

- Regional test capacity
- Supply chain for PPE
- Program management for national contact tracing
- Self-monitoring & patient engagement app
- Review for City of Stockholm
- Assisting HMOs building post-COVID strategies and operating models
- Cyber security testing of national tracing app
- RPA for financial claims handling
- Supporting PM Modi’s Fed Govt. national response room with analytics and modeling
- Command center for PPE and critical equipment
- Citizens scan QR codes for location safety
- Composition and operations of the Saudi-Disaster Medical Assistance Teams (DMAT) for an effective emergency response in the Kingdom
- Management of emergency funds
- NHS Nightingale
- Digital portal for 1.5m vulnerable citizens
- Rapid expansion of acute hospital capacity
- Comprehensive practical guidelines for PPE and staff testing
- Creation of emergency hospital capacity
- Telehealth assessment for patient triage
- NHS Nightingale
- Digital portal for 1.5m vulnerable citizens
Challenges facing today’s systems health systems globally

Ageing and growing populations

By 2030, the number of people in the world aged 60 years will have grown to 1.4 billion (+56%)

Rising healthcare costs

Public and private health systems are facing revenue pressures and declining margins while the cost of healthcare rises

Workforce shortages

The world will be short of 12.9 million healthcare workers by 2035; we need to think now about the workforce of the future

Advances in medicine and technology

Technology becomes pervasive in healthcare, for example, increasing accuracy for diagnosing, treating, and delivering care – but in many areas also increasing cost

Wider determinants of health

90% of premature deaths worldwide are from cardiovascular diseases. This could be prevented through a healthy diet, regular physical activity and avoiding the use of tobacco

Growth in complex conditions and multimorbidity

Multimorbidity increases with age

Chronic conditions now claim at least three-quarters of all healthcare spending in most developed countries.
# Ten ways that health systems are reacting & becoming more resilient

## The 10 ways health systems are adapting to a new reality

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Modelling suggests recurrent waves of infection requiring cyclical societal restrictions and repeated peaks of patients.

1. Managing the Outbreak
   - Testing
   - Extra Capacity
   - Digital Channels
   - Program Mgt.

2. Exiting Confinement
   - Testing & Surveillance
   - Contact tracing
   - Population-based approaches
   - Partnerships & Collaboration

3. Finding the “Resilient New Reality” in healthcare
   - Developing New Care Models
     - Digital Delivery
     - Workforce Agility
     - Resilient Operations
     - Financial Recovery

Health conditions:
- Preparation & Containment
- Mitigate Peak & Lockdown
- Relapse & Recovery

Healthcare recovery phases:
- Managing the Outbreak
- Exiting Confinement
- Finding the “Resilient New Reality” in healthcare

Economic conditions:
- Reaction
- Resilience
- Recovery
- New Reality

COVID-19: Recovery and resilience in healthcare - KPMG Global (home.kpmg)
Global Healthcare: Five New Reality Priorities

As health providers and systems ‘flatten the curve’ and exit confinement, they need solutions to near-to-midterm challenges as they adjust to the ‘the new normal’.

- **Digital Delivery**: Dealing with backlogs and constraints of social distancing. Enhancing digital care delivery from 10% to 25%.
- **Agile Workforce**: Increase flexibility and ratios of crucial staff. Deal with burnout and attrition.
- **Developing New Care Models**: Caring for patients directly and indirectly impacted by COVID-19.
- **Operational Resilience**: Procuring and allocating critical capacity/materials to keep providers and patients safe.

- **Enhancing digital care delivery from 10% to 25%**
- **A workforce model supporting clinicians to work at the top of their licence - Nightingale**
- **Partnership working between NHS and Independent Sector to provide: 7,956 beds, 1,202 ventilators and 20,000 staff**
- **Command Centre for a State PPE supply chain**
- **Develop solutions to meet funding requirements**
In 10 days, Baptist Health managed an anticipated surge in demand at its 11 sites through:

- Telephone hotline service – repurposing 60 staff to handle calls with scripts and protocols
- Chatbots - to manage online queries
- Nurse triage - for suspected C19 patients
- Remote working – for 165 agents

What we’re seeing

- Rapid shifts to a digital front door (uptakes of 300-700%), which has placed new demands on payers, staff, and infrastructure.
- The patient outlook for telehealth is changing (US) with increased usage and satisfaction as high as 74%*

The New Reality

- Continued growth in digital delivery
- Scaling and sustaining virtual care
- Reinventing care delivery models

Client Needs

- Digitized and blended care pathways & operating models
- Building the digital infrastructure and D&A/AI infrastructure and tooling
- The capabilities required for a ‘connected’ organization
- New investment and reimbursement models

Finding a resilient new reality: Digital delivery

The journey from digitizing activities to digital transformation:

Wave 1 2020 - 2021
- Telehealth
- Client teams meetings

Wave 2 2021 - 2024
- Digital triage
- Digital nurse
- Blended care

Wave 3 2024 onwards
- One minute clinics
- Home monitoring
- AI guided interventions for vulnerable groups
In the UK, NHS Nightingale Hospital London developed a unique clinical model that defined roles by tasks and competencies. The ratio of ICU nurses to patients increased from 1:1 to 1:6, with professions in less short supply supporting them. This included lay members of the public, who had received training.

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**What we’re seeing**
- Changes to current healthcare staffing and competency models
- Greater flexibility in roles and scopes of practice
- Shifts to flexible/remote work

**The new reality**
- Lasting impacts to workforce planning practices

**Client needs**
- New agile workforce models
- Dedicated COVID-19/non-COVID-19 staffing and rostering
- Dealing with Staff burn out
- Support staff to work at the top of their professional licence

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Of **1257** health care workers in China:
- 34% reported insomnia
- 44.6% reported symptoms of anxiety
- 71.5% reported distress

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Finding a resilient new reality: Developing new care models

Developing new care models

- One aligned strategy for “Hospitals at home-Hospital in the LTC-setting-Hotel hospital’ for less complex cases, convalescence and palliative care”
- Integrated Covid-19 care delivery by cooperation between medical specialists and community partners to deliver services in the right setting (including digital delivery)
- Integration of early stages advanced care discussions

What we’re seeing

- Adoption of innovative new care models
- Provision of care in non-traditional settings

The new reality

- Care models that separate COVID-19 and non-COVID-19 cases
- Balancing COVID-19 responses like social distancing with ‘business as usual’
- Development of care pathways and programs

Client needs

- Focus on hot and cold sites as well as working within infection prevention and control guidelines.
- More specialised centres
- New regional design of care models
- Regional governance and capacity planning across borders
Finding a resilient new reality: Operational resilience

In Australia, the Queensland Government deployed:
— A command Centre for State PPE supply chain
— A sophisticated data and analytics to model demand and supply
— Visualization outputs to support purchasing and operational decision-making

What we’re seeing
— Difficulty forecasting and maintaining the supplies needed
— Addressing market shortages, challenges with local logistics, and lack of predictive analytics to forecast requirements

The new reality
— Understanding supply chain needs across the continuum of care
— Centralized and cooperative procurement
— Uptake of innovative technologies and analytic methods and models
— Shortage of capacity
— Social distancing

Client needs
— Modelling and dashboards of critical capacities
— Management of backlog of elective care
— Development of supply chain to ensure availability when/where supplies are needed
— Centralized/cooperative procurement
Finding a resilient new reality: Financial resilience

Cash flow management

In the Netherlands, a mental healthcare provider, Parnassia Group, has implemented **robotic process automation to increase financial stability, insights and flexibility**. Furthermore, it reduces pressure on its workforce and reduced the cost baseline, which proved very valuable in these COVID-19 related times.

**What we’re seeing**

- Rising costs, increased cash burn, and pressure in accessing financing have impacted profitability
- Delayed or redundant budgets ahead of government stimulus

**The new reality**

- Financial settlements for reimbursement of COVID19-care and cancelled care
- Increasing the focus on revenue generation in business models (e.g. through case mix, commercial measures or alternative financing arrangements)

**Client needs**

- Reimbursement models
- Reporting and accounting on COVID-19 related compensations and settlements
- Financial stress testing and forecasting / revenue projections
- Refinancing, debt renegotiation, and accessing funds: private or public
- Operational excellence in support functions
Ten messages to deliver a resilient new reality

1. Continued acceleration of digitally-enabled care transformation
2. Adopted solutions built care models to become sustainable alongside updated business models
3. Focus on tasks and competencies not roles and job titles, and revise existing workforce plans
4. Prevent staff attrition and burnout and improve support for remote and flexible working
5. Build and adapt new models to deliver healthcare outside of COVID-19 related care & address backlog
6. Increase virtual care, support care at home or in residential settings through remote consultations
7. Command centres to embed ops mgmt. systems for monitoring & managing system capacity & perf.
8. Collaboration and continuity planning across organizations and systems to provide a centralised view
10. Liquidity and financing to mitigate loss of revenue, stress testing and forecasting
Island implications and impacts of global healthcare trends

Digital medicine a potential healthcare game changer - Cayman Compass

Five ways Covid-19 is reshaping healthcare - The Royal Gazette

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Contact
Dr Ed Fitzgerald
Head of Healthcare, KPMG Islands Group
edwardfitzgerald@kpmg.bm
T: +1 441 534 1148
12 Global trends in health strategy, policy and operations

1. Quality
2. Workforce
3. Accountable and value-based care
4. Primary care & care closer to home
5. Patient power
6. Adapting to ageing
7. eHealth transformation
8. Partnerships, networks and alliances
9. Leadership
10. Transparency
11. Continuous improvement
12. Public private partnerships
Healthcare systems around the world are facing unprecedented challenges that require policy makers, payers, providers and suppliers to rethink how they work.

With deep industry experience, KPMG member firms are uniquely positioned to provide guidance and support to clients.

We help them to successfully navigate this rapidly changing environment to transform the way that Healthcare is provided.

Click here to join the conversation with KPMG’s Global Healthcare team by following us on

KPMG’s global healthcare network

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