

HEALTHCARE DATA IN A POST-COVID WORLD

A Survey of Government Experts on Emerging
Issues and Opportunities

Report Author: Emily Wolfteich



Table of Contents

Overview	3
Executive Summary	4
Research Findings	5
Government Data Decisions	5
Honing in on Healthcare	7
Data Sharing and Access	8
Agility and Constituent Needs	12
Looking Forward	15
Final Considerations	17
Respondent Profile	18
About	19

Overview

Purpose

The data and subsequent analysis within this report is intended to reveal sentiments and perceptions among government healthcare experts about the changing landscape of data sharing and management. In addition to providing insight into how agencies are using, storing, and sharing their data, the survey looks at current challenges facing government agencies, including how COVID-19 has affected agency priorities.

Methodology

In April 2021, GBC deployed a survey to a targeted population of federal and state and local public servants in order to assess their perceptions, attitudes, and experiences of data sharing and service provision. The pool of respondents represents a variety of leadership roles across agencies and departments, particularly centered on those familiar with information technology and the healthcare field.

Agencies represented within this survey represent a wide variety of health provider, public health, and non-provider agencies across the federal government.

Following general questions to establish overall sentiments among public servants, respondents were filtered for their involvement in a healthcare-related agency, capturing the insights of 88 experts in this field.

For more information on respondents, please see the Respondent Profile section.

Executive Summary

Challenges in 2021

Respondents across the government report facing a myriad of challenges going into 2021, including legacy technology, data issues, and workforce inefficiencies. Ninety-one percent of all respondents say that COVID-19 has had an impact on the way that their agencies operate. This includes 92% of respondents who work in healthcare, who identify outdated technology and weak strategic planning as two of their biggest challenges.

Data-sharing gaps

Ninety-nine percent of healthcare respondents agree that data and data sharing between agencies is crucial to quality service provision. However, secure and readily accessible data sharing is not a reality for most respondents. Fifty-five percent of healthcare workers find it difficult to view and analyze data from partner agencies; 29% are slightly or not at all confident in the security of their constituent data; and 37% are slightly or not at all confident that their agency can effectively manage a transition.

Works in progress

Despite these pain points, respondents in the healthcare field see progress in their agencies. Forty-two percent of respondents say that their agency is actively looking to help underserved constituents; 88% see their organization is making efforts to improve how they manage and store data, and another 43% report efforts to remove barriers to data sharing. These respondents do see changes happening within their agencies, even if that change is slow.

Evolving priorities in 2021

Looking forward, government healthcare agencies are likely to prioritize using data more flexibly to improve constituent experiences. Respondents also see their agencies as relatively likely to invest in emerging technologies and specialized personnel.

Government Data Decisions

Data Challenges in 2021

Which of the following are data challenges your organization faces in 2021?



*Percentage of respondents, n=414
Note: Percentages may not add up to 100% as participants selected all that applied.*

48%

of all respondents indicate that outdated technology and resources are one of their organization's major challenges in 2021.

57%

of all respondents identify data access issues, such as data siloes or the inability to find needed data, as a challenge for their organization this year.

Management challenges also play a role.

42%

of all respondents identify workplace inefficiencies as a challenge.

34%

report a lack of effective trainings.

28%

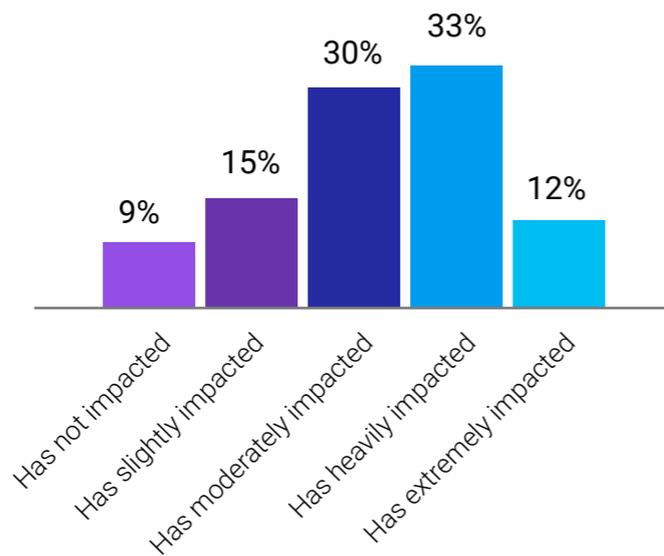
see weak strategic planning as key pain points in 2021.

Healthcare-focused respondent concerns align with their colleagues' choices, with their top choices including outdated technology (48%), workplace inefficiencies (44%) and lack of effective trainings (38%).

Government Data Decisions

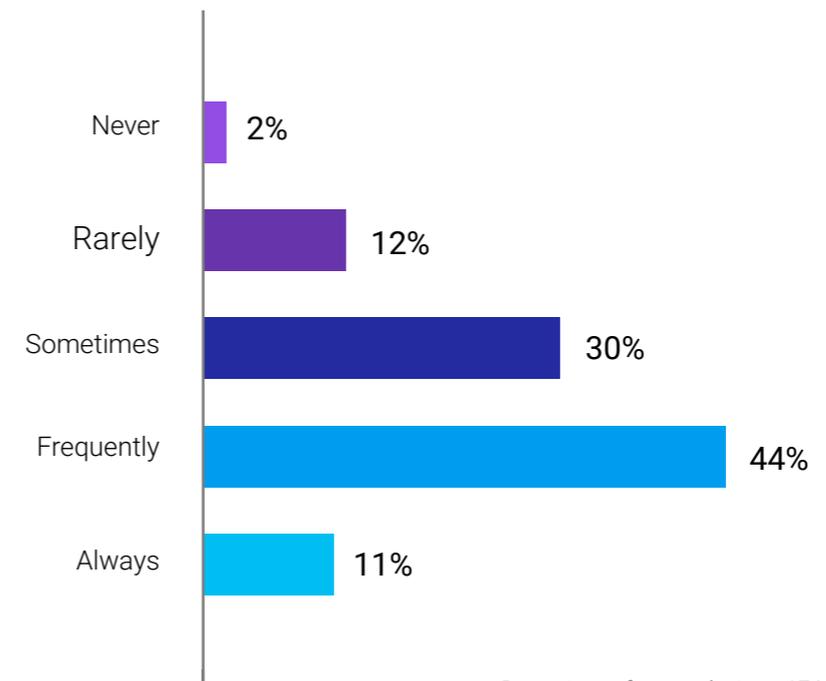
Changing landscape of data decisions

To what extent do you believe COVID-19 has permanently impacted how your agency will conduct its data operations in the future?



Percentage of respondents, n=413
Note: Percentages may not add up to 100% due to rounding

How often are decisions made in your organization based on data (rather than anecdotal evidence)?



Percentage of respondents, n=374
Note: Percentages may not add up to 100% due to rounding

91%

of all respondents believe that COVID-19 has impacted how their agency will choose to conduct data operations going forward.

55%

of all respondents report that their agency frequently or always makes decisions grounded in data. Fifty percent of healthcare agency respondents agree. However, 17% of these respondents say that their agency never or rarely makes decisions based on data, compared to 14% of all respondents.

Honing in on Healthcare

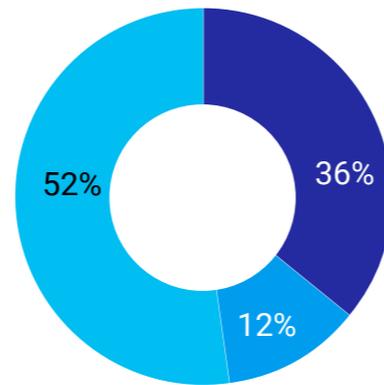
Health agencies are improving how they work with data, but may not see it as that important

To what extent are the following statements applicable to your professional experience?

- Fully applicable
- Not applicable
- Somewhat applicable

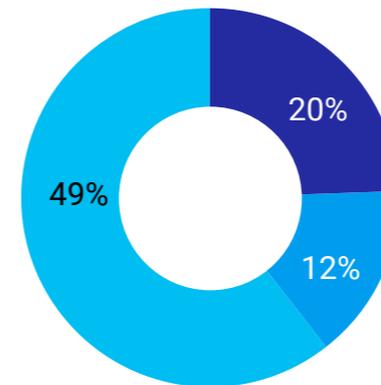
Note: Percentages may not add up to 100% due to rounding

"My organization actively invests resources to improve how we store, manage, and analyze data."



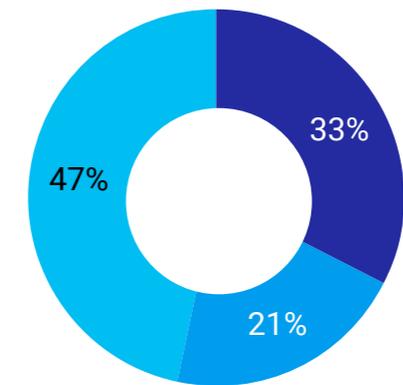
Percentage of respondents, n=73

"My organization uses data as a non-essential approach to making decisions."



Percentage of respondents, n=74

"My organization sees data management as one more item on a checklist of other government mandates."



Percentage of respondents, n=74

Management challenges also play a role.

88% of healthcare respondents report that their agency is actively working to improve its data management.

69% also report that data is not an essential component of decision making

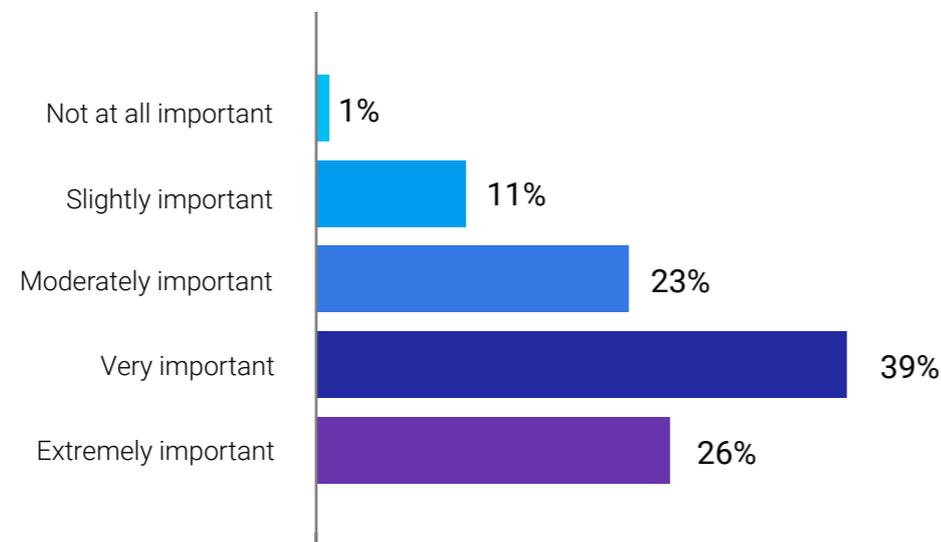
80% say that their agency sees data management as more of a government requirement than an opportunity.

The 2018 Federal Data Strategy, which aims to leverage data as a strategic asset, offers 40 actionable goals (known as Practices) for agencies working on their data transformation. These include goals for building a culture that values data and promotes public use; governing, managing, and protecting data; and promoting efficient and appropriate data use. Healthcare agencies know the importance of this kind of data management. However, translating these goals into action can be a long process.¹

Data Sharing and Access

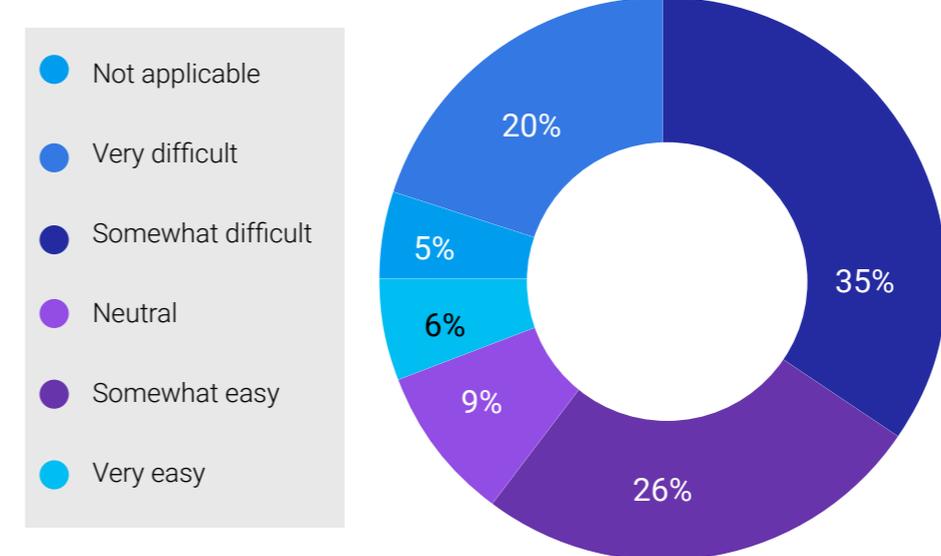
Healthcare respondents overwhelmingly report that pooling data is important – but also report that it’s difficult to access

How important is it for your organization to pool data with different agencies across federal, state, and/or local levels?



Percentage of respondents, n=70
Note: Percentages may not add up to 100% due to rounding

How difficult is it for you to view and analyze data from a partner agency?



Percentage of respondents, n=67
Note: Percentages may not add up to 100% due to rounding

99%

of healthcare respondents report that it is important to their organization to pool data with different agencies across the government.

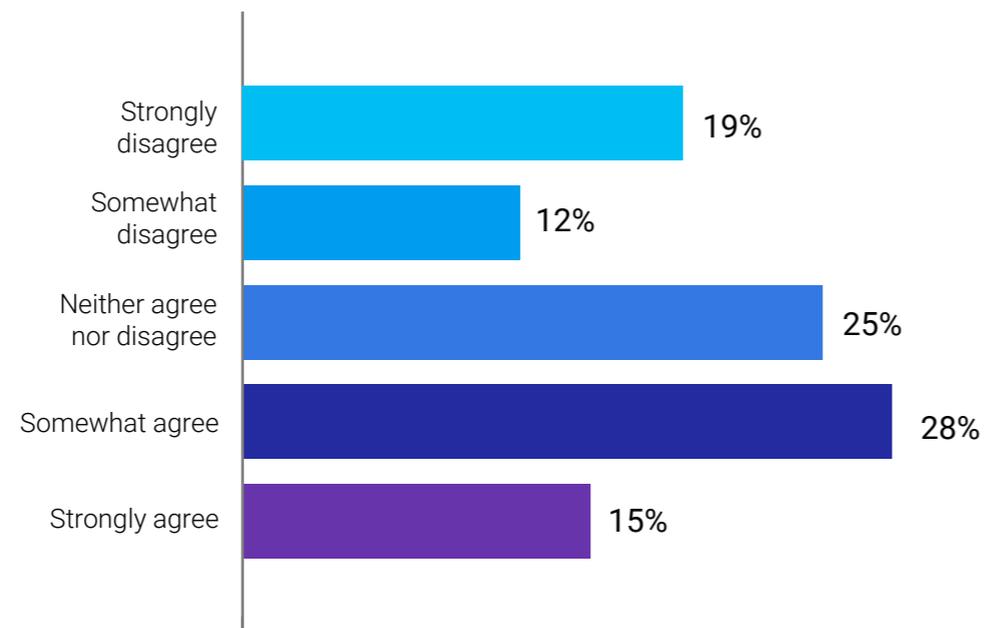
55%

of healthcare respondents report that it is difficult to view and analyze data from a partner agency. There have been efforts over the years to create a sharing ecosystem for health agencies, including exchanging eHealth information through the CONNECT portal, but consistent access remains a pain point.²

Data Sharing and Access

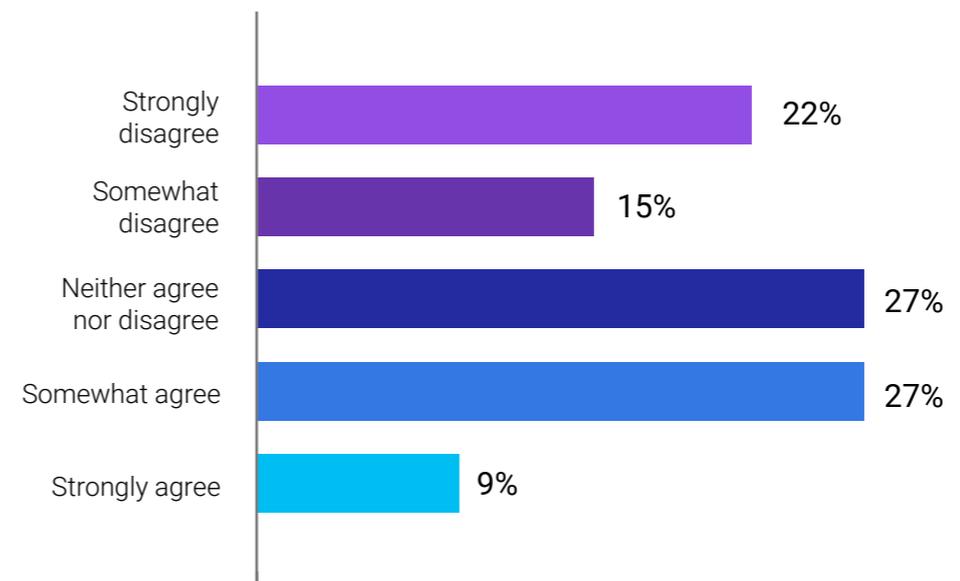
Healthcare respondents are divided on how well they feel their agency is preparing to share data with other agencies

“My organization is actively investing resources to remove barriers to information sharing.”



Percentage of respondents, n=67
Note: Percentages may not add up to 100% due to rounding

“My organization provides me with the proper tools and resources to share data with different agencies.”



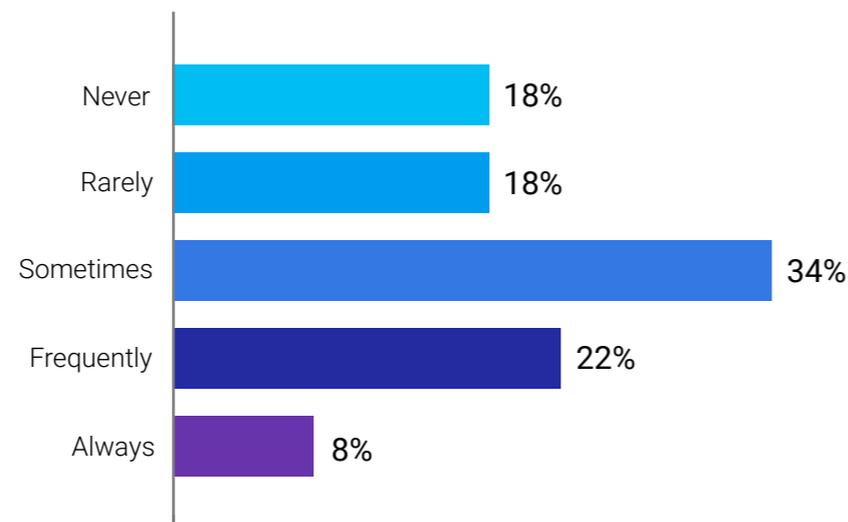
Percentage of respondents, n=67
Note: Percentages may not add up to 100% due to rounding

The appetite for increased sharing of data is not limited just to inter-agency transparency. In September 2020, the Pew Research Center released a study reporting that a clear majority of Americans support efforts to free up sharing of medical information between providers, as well as gaining more digital access to their own health information. The study wrote: “This survey shows that Americans recognize the importance of getting their own health data and sharing it with the clinicians that care for them. They want the government to make that process easier and more accurate – and to include more data than is being transmitted today.”³

Data Sharing and Access

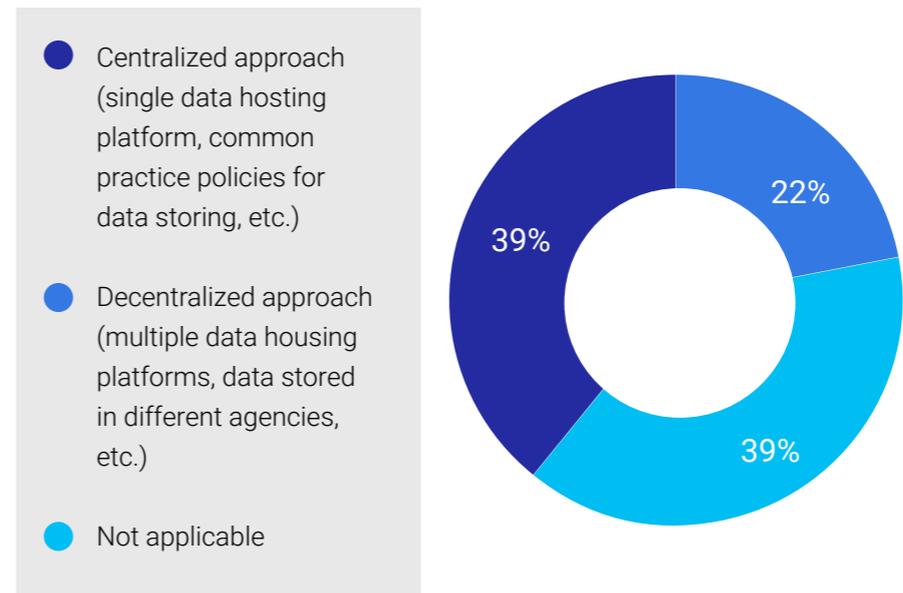
Healthcare respondents suggest that approaches to data management and decision making vary

How often do you consult experts from outside agencies and organizations to inform decisions you make for your constituents or beneficiaries?



Percentage of respondents, n=65
Note: Percentages may not add up to 100% due to rounding

Which of the following options most accurately describes your agency's approach to maintaining constituent, stakeholder, or beneficiary data?



Percentage of respondents, n=64
Note: Percentages may not add up to 100% due to rounding

64%

of healthcare respondents sometimes, frequently, or always consult experts from outside agencies and organizations to inform their decisions.

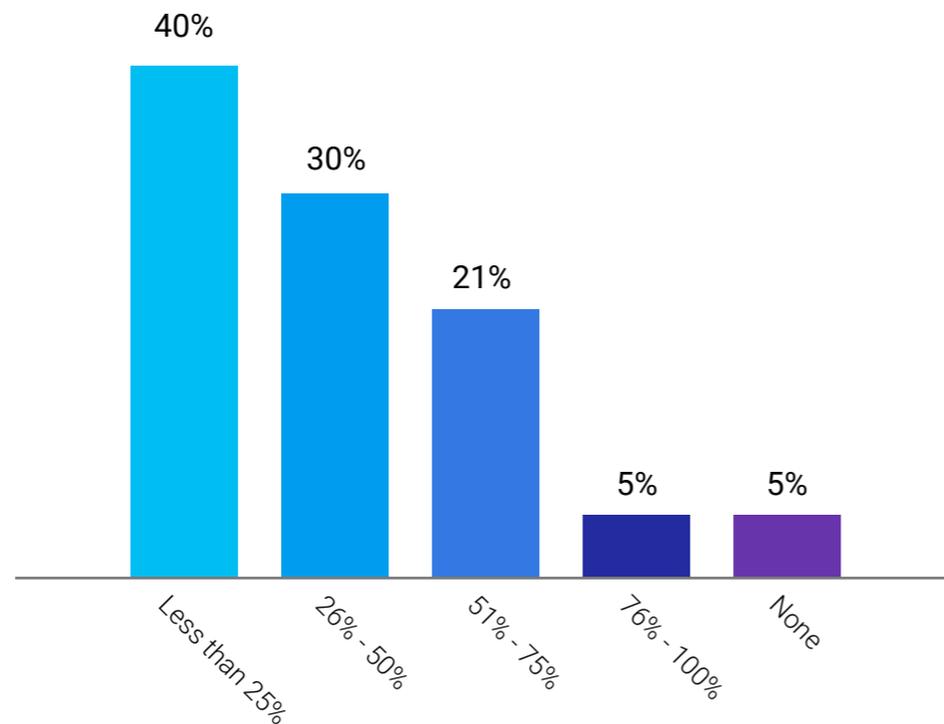
39%

Healthcare respondents are split equally on their agency's approach to maintaining constituent, stakeholder, or beneficiary data between centralized and decentralized approaches.

Data Sharing and Access

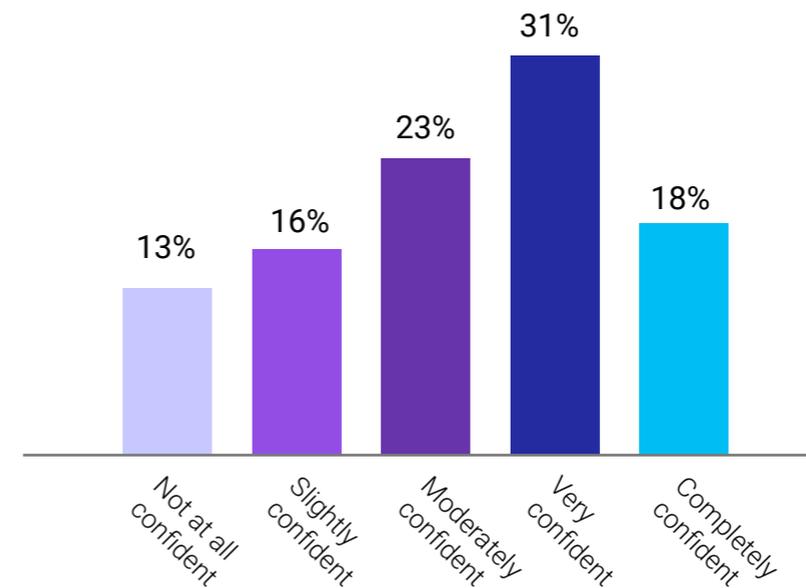
Not all agencies have moved fully to digital record-keeping, and security concerns persist

How much of your organization's record-keeping would you estimate is non-digital (i.e. on paper)?



Percentage of respondents, n=63
Note: Percentages may not add up to 100% due to rounding

How confident are you that your beneficiaries' data is fully secure?



Percentage of respondents, n=63
Note: Percentages may not add up to 100% due to rounding

36%

of healthcare respondents report that their agency still maintains over 50% of their record-keeping in a non-digital format.

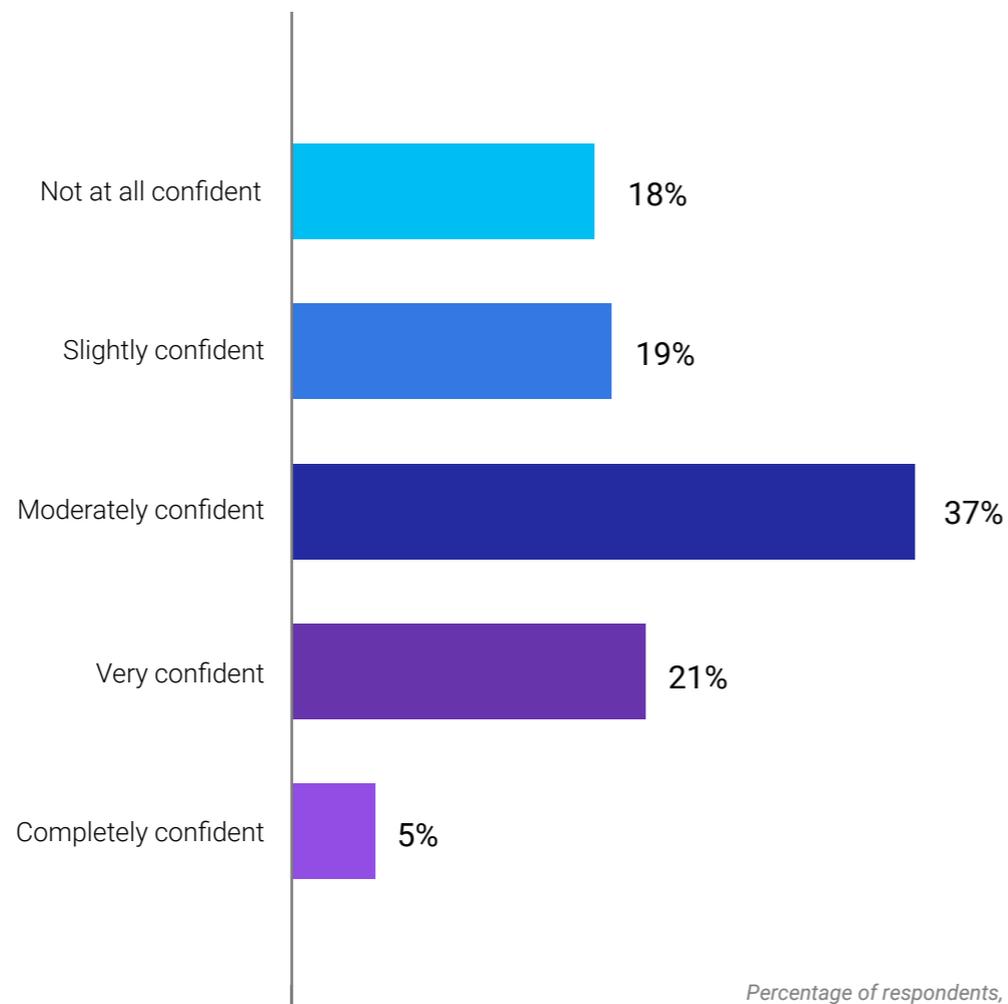
72%

The majority of healthcare respondents are moderately, very, or completely confident in the security of their beneficiaries' data. However, 29% of respondents are not at all or only slightly confident in that data security.

Agility and Constituent Needs

Confidence in agency adaptability is there, but there are doubts too

How confident are you that your agency can effectively adapt its services to your constituents' or beneficiaries' changing needs?



82%

Most beneficiaries have some degree of confidence that their agency can effectively adapt its services to suit changing needs of clients or constituents. However, 18% of healthcare respondents are not at all confident that their agencies can make this kind of transition.

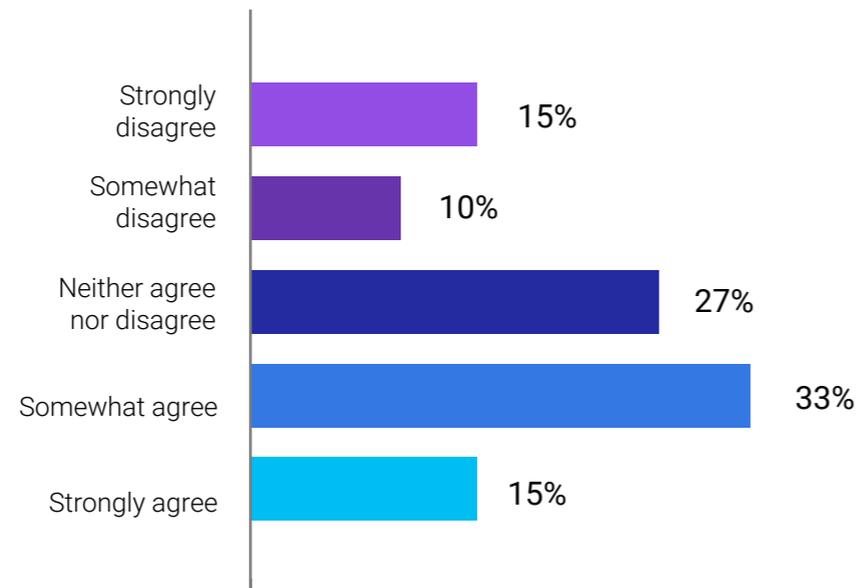
Successes in the Field

In 2007, Virginia stood up a state-local data sharing effort in response to a community opioid epidemic. The success of this program – in which data was shared between state and local law enforcement, social services, health agencies, and the judicial system – led to the creation of a data-sharing platform (Open Data Portal), a statewide chief data officer, and the Commonwealth Data Trust. Thanks to these early efforts and existing data-sharing agreements between agencies, Virginia was able to rapidly establish a COVID-19 dashboard in early 2020 that provided nearly real-time information about the locations of coronavirus outbreaks and hospitals in need of supplies.⁴

Agility and Constituent Needs

Some – though not all– agencies are working to improve both their efficiency and the quality of their care

“My organization’s legacy technology prevents me from better serving my constituents, stakeholders, or beneficiaries.”

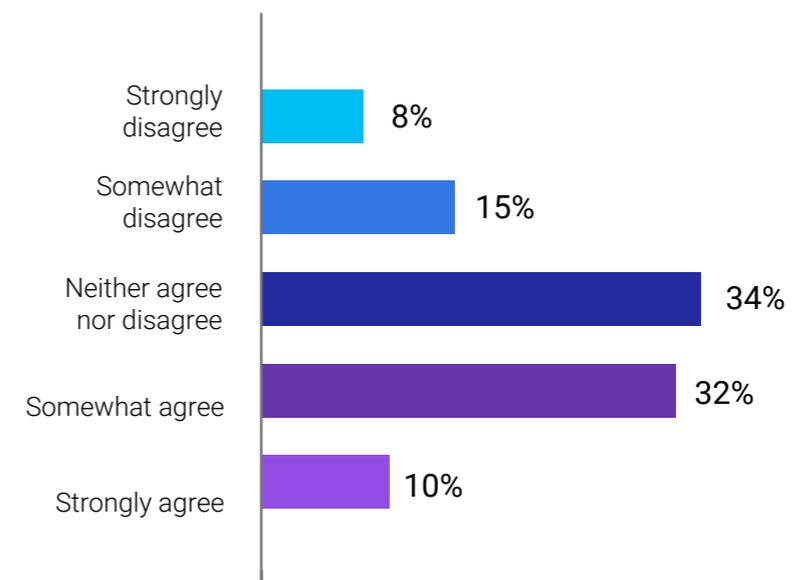


Percentage of respondents, n=60
Note: Percentages may not add up to 100% due to rounding

48%

of healthcare respondents believe that their agency’s legacy technology prevents them from providing quality service to their stakeholders.

“My organization is actively trying to identify underserved groups of constituents or beneficiaries.”



Percentage of respondents, n=59
Note: Percentages may not add up to 100% due to rounding

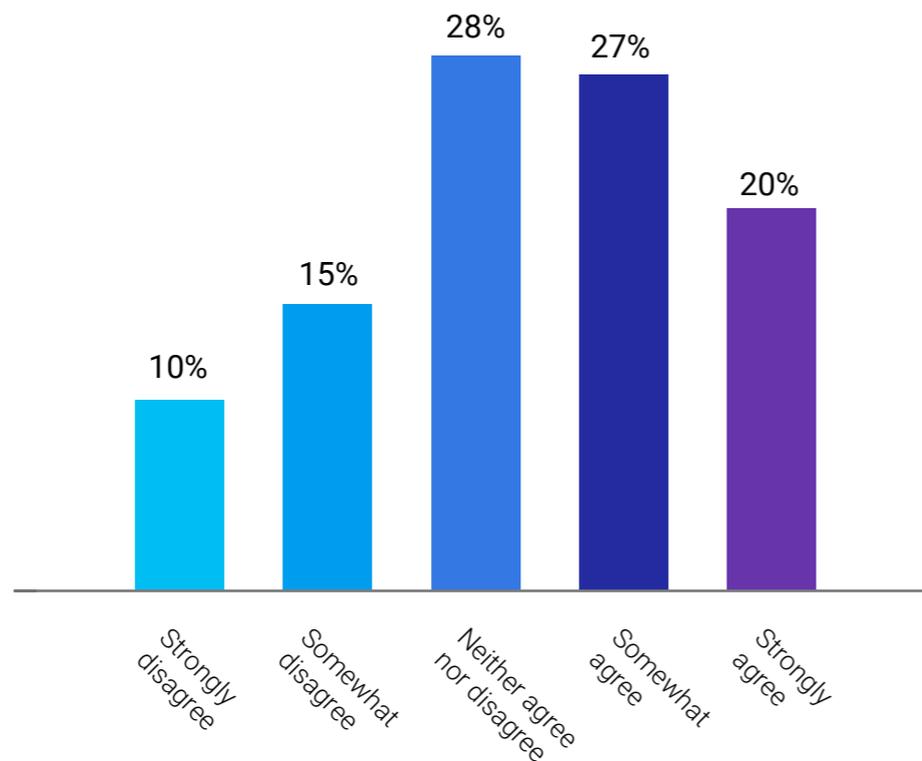
42%

of healthcare respondents agree that their organization is actively identifying underserved groups within their beneficiaries. However, 34% aren’t sure, and 23% disagree, indicating that there is still room for growth in reaching out to underserved communities.

Agility and Constituent Needs

Healthcare respondents vary in their interpretation of how well their agency is evaluating its own metrics

“My organization constantly analyzes metrics to improve the quality of care and services delivered to our beneficiaries.”



Percentage of respondents, n=60
Note: Percentages may not add up to 100% due to rounding

47%

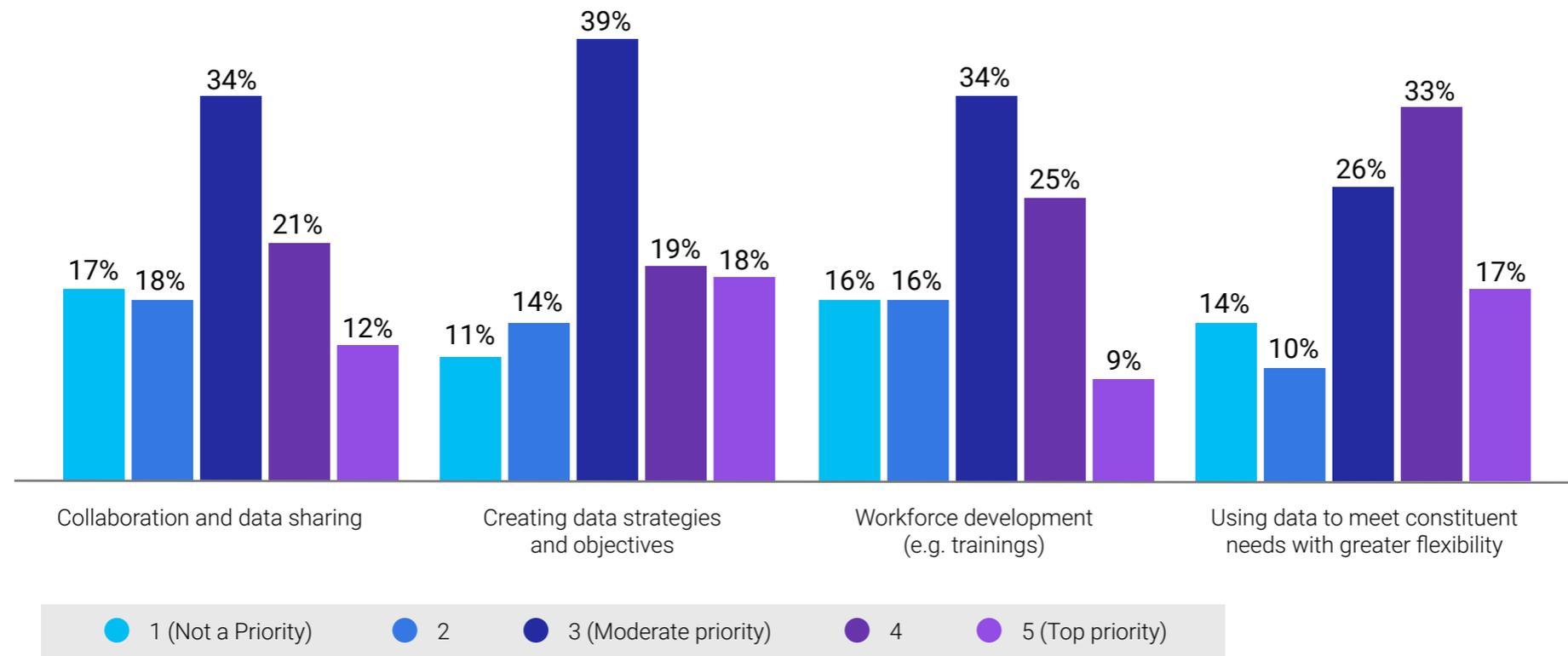
of healthcare respondents agree that their organizations frequently conduct analysis of their metrics to improve the quality of care and services for beneficiaries. However, a quarter disagree, and 28% aren't sure.

Respondents seem to indicate that agencies are generally attempting to self-evaluate and ensure that they're providing quality care to all those who need it, but they may not be doing it successfully or publicly enough for respondents to be aware.

Looking Forward

Healthcare respondents are prioritizing constituent care and building data strategies in 2021

How will your organizations prioritize the following data initiatives in 2021?



Percentage of respondents, n=58
Note: Percentages may not add up to 100% due to rounding

50%

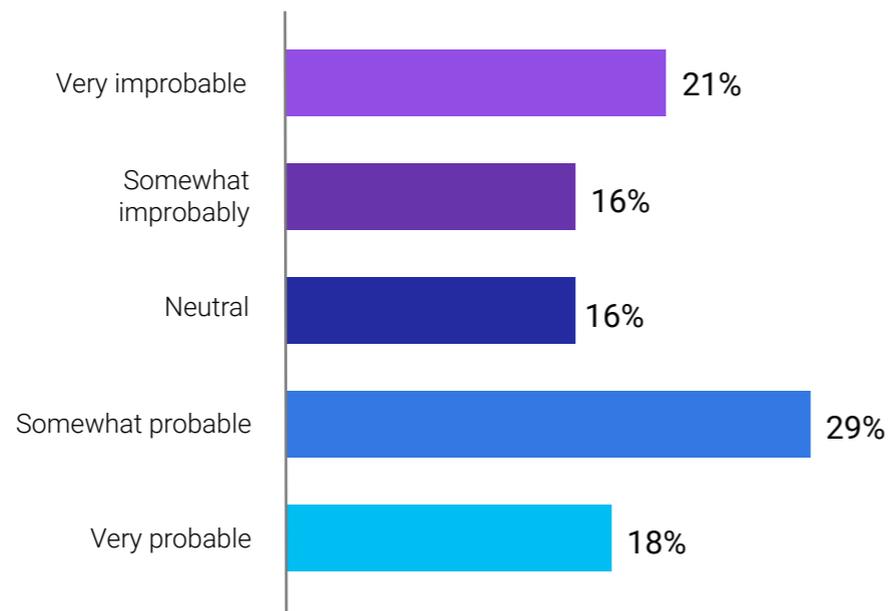
of healthcare-facing respondents believe that their organization will prioritize using data to meet constituent needs with greater flexibility in the coming year. Creating better data strategies and objectives is the second top-ranked (37%). Collaboration and data sharing looks like it is a priority for some (33%) but not at all a priority for others (17%), suggesting that data needs and priorities vary between different agencies. This may indicate that any inter-agency data strategies will have to encompass varying agency goals or priorities.

Looking Forward

Investments for the future

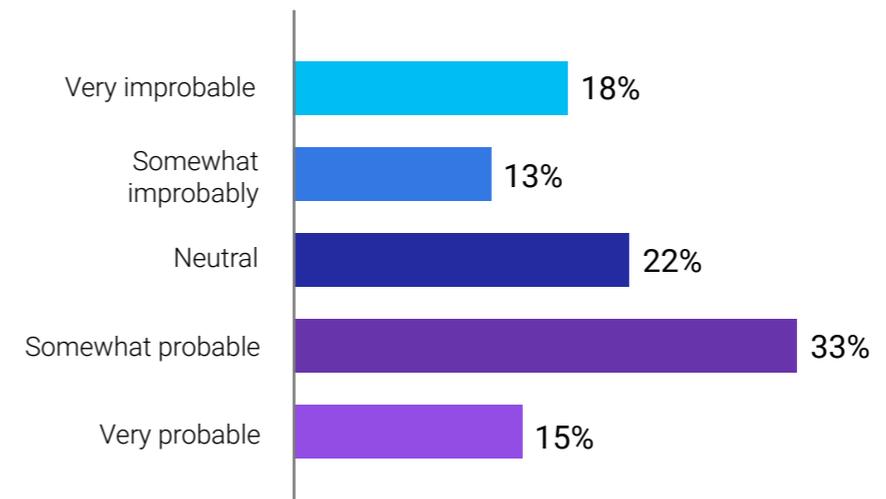
What is the probability that your agency will adopt or further invest in _____ in 2021?

Emerging technology (e.g., Artificial Intelligence, Machine Learning, Predictive Analytics)



Percentage of respondents, n=56
Note: Percentages may not add up to 100% due to rounding

Specialized personnel (e.g., SMEs, data specialists, industry experts)



Percentage of respondents, n=55
Note: Percentages may not add up to 100% due to rounding

Nearly half of healthcare respondents think it is probable that their agency will invest into both emerging technology (47%) and specialized personnel (48%) in 2021, perhaps as a result of lessons learned and goals set for the year ahead. However, over a third think that these investments are improbable, indicating that barriers to uptake remain despite an appetite for new technology and knowledge.

Final Considerations

Opportunities ahead

This survey highlights the window of opportunity for expanded data sharing within public sector healthcare. COVID-19's impact on agency protocols and experience with data has underscored some of the gaps that respondents deal with in their work, including inability to access needed data, concerns about beneficiary health information security, and less-than-agile systems that affect the quality of beneficiary care. Some agencies have already recognized this opportunity and are investing resources into improving data security and access. However, respondents report that this is not universal, and these gaps persist.

Adaptability and flexibility are key

Whether lessons learned from the COVID-19 pandemic, long-term agency goals coming to fruition, or emerging technologies that make transformations possible, healthcare agencies are looking first and foremost to continue improving the quality of care they offer their beneficiaries. Flexible and agile solutions are critical to meeting the needs of constituents and stakeholders. The COVID-19 pandemic showed agencies both in and outside the healthcare sphere the necessity of building inter-agency data sharing platforms before a crisis hits. With investments from healthcare agencies that respond to the needs of both their constituents and their employees, data can transform into a powerful tool with real-world, real-time impact.

Data sharing is crucial to effective collaborative work, both during and after a crisis

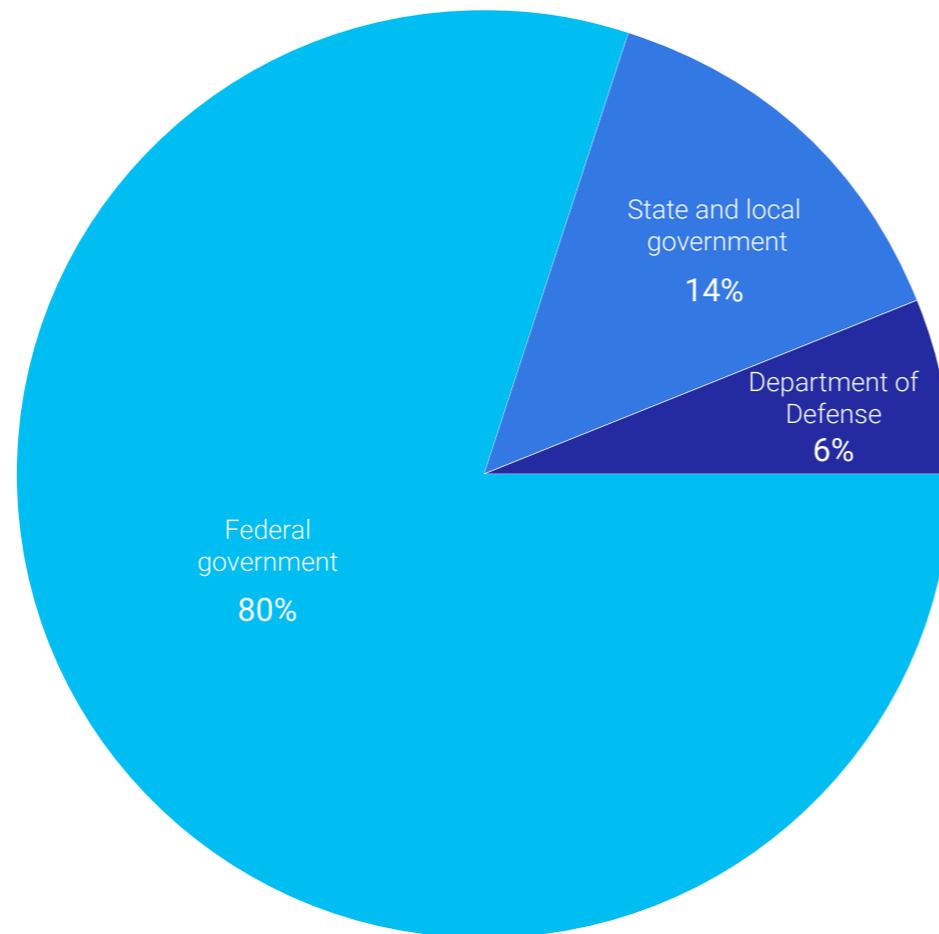
The COVID-19 pandemic showed agencies both in and outside the healthcare sphere the necessity of building inter-agency data sharing platforms before a crisis hits. Healthcare experts see this as critical to their work, but difficult to access in practice. Accessing and sharing data quickly and securely benefits employees and constituents alike, allowing for more complete understanding of the data and better collaborative solution-building. Agencies who look to shore up these capacities will be better prepared for both routine and extraordinary situations.

Modernization serves mission

Modernization is not just a buzzword. Outdated resources, siloed data, and slow reaction times all make it harder for those who work to provide healthcare to quickly and efficiently do their jobs. During a global pandemic where millions of Americans looked to these agencies to lead, these organizations had to find creative and rapid ways to adapt. As we look to a post-COVID world, modernizing these agencies to keep them agile, responsive, and ready for the next crisis is not an option – it is an imperative.

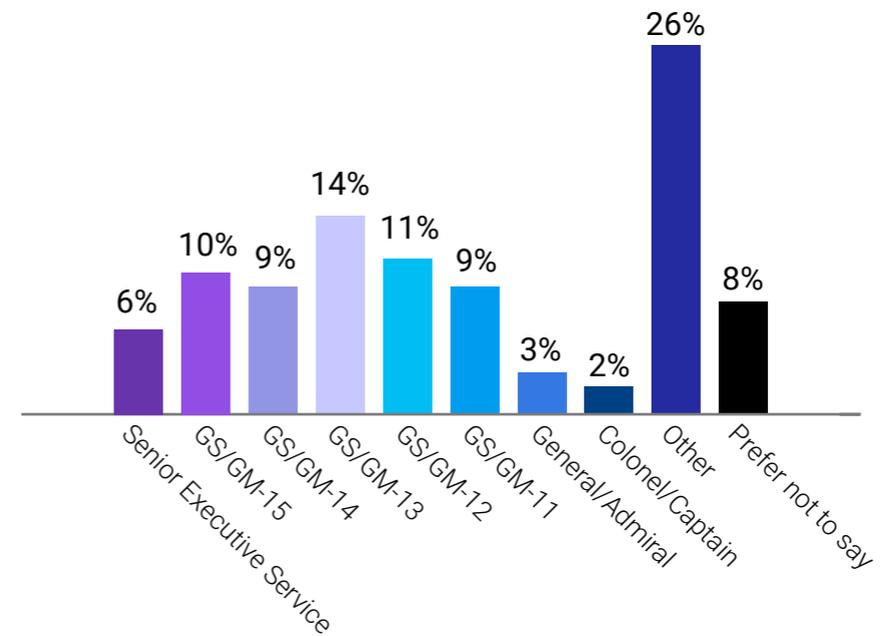
Respondent Profile

Which best describes your employment

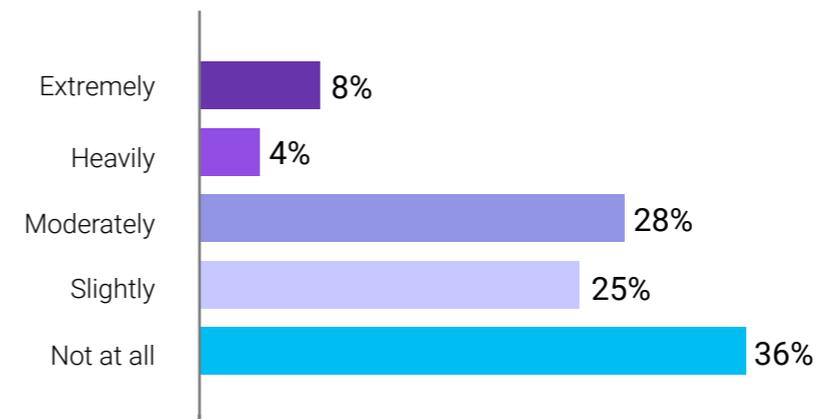


Percentage of respondents, n=88
 Note: Percentages may not add up to 100% due to rounding

Please indicate your job grade/rank.



"I am _____ involved in making decisions that affect how my organization uses, stores, or shares data."



Percentage of respondents, n=80
 Note: Percentages may not add up to 100% due to rounding.

Endnotes

1. <https://strategy.data.gov/practices/>.
2. <https://www.healthit.gov/topic/health-it-initiatives/federal-agencies-role-connect>.
- 3 <https://www.pewtrusts.org/en/research-and-analysis/articles/2020/09/16/americans-want-federal-government-to-make-sharing-electronic-health-data-easier>.
- 4 <https://www.govexec.com/technology/2020/12/looking-beyond-federal-data-strategy/171028/>.

About



Government Business Council

Government Business Council (GBC), the research arm of Government Executive Media Group, is dedicated to advancing the business of government through analysis and insight. GBC partners with industry to share best practices with top government decision makers, understanding the deep value inherent in industry's experience engaging and supporting federal agencies.

Learn more at: govexec.com/insights | [@GovExecInsights](https://twitter.com/GovExecInsights)

Contact

Joshua Okada

Manager, Research & Strategic Insights, Government Executive Media Group

Email: jokada@govexec.com



Cerner

Cerner is the leading U.S. supplier of health care information technology solutions that optimize clinical and financial outcomes. Around the world, health organizations ranging from single-doctor practices to entire countries turn to Cerner (NASDAQ: CERN) for our powerful yet intuitive solutions. Cerner offers clients a dedicated focus on health care, an end-to-end solution and service portfolio, and proven market leadership. Learn more at <https://www.cerner.com/>.