



Aug. 12, 2015

To: Chief Executive Officers
CHA Member Hospitals and Health Systems

From: Steven Summer
President and CEO

Subject: CHA 2015 Environmental Scan and Presentation

This spring, Colorado Hospital Association partnered with the Colorado Health Institute (CHI) to develop an in-depth and comprehensive environmental scan. The document identifies a series of critical issues and emerging trends of importance to CHA members. This exercise, along with the recent CHA member survey and interviews of virtually all members of the CHA Board of Trustees, was used to inform the Association's development of its 2016-2018 strategic plan. Together, these components are ensuring that we develop a strategically focused scope of imperatives that will be pursued on behalf of our member hospitals and health systems over the next three years.

Our work on the strategic plan continues, but we are pleased to make the scan – as well as a companion PowerPoint presentation, complete with notes accompanying each slide – available to all CHA members. The PowerPoint slides, as well as the script located below each page, will allow you to present this information to a variety of key stakeholders including senior management teams, boards of trustees, members of the medical staff, community and business leaders and others who will benefit from this assessment and our predictions of issues impacting hospitals and the patients you serve.

In all, CHA and CHI identified seven major trends, facts and questions facing Colorado hospitals over the next three to five years. The seven sections of the report are titled as follows:

- Integrated Care is the New Normal
- New Competitors are Narrowing Service Line Margins
- It's All About Maintaining Loyalty
- Technology Promises New Solutions ... at a Price
- Regional Capacity is the Next Frontier
- Risk is Here to Stay. Get in the Game.
- Are Hospitals in the Hot Seat?

CHA is pleased to have partnered with CHI on this endeavor given the Institute's reputation as a trusted source of independent and objective health information, data and analysis for our state.

Please do not hesitate to let me know if you have questions or would like to discuss this report in further detail. As always, we welcome your feedback and comments on this material and anything you feel needs to be considered as we hope to periodically replicate the scan.

Steven J. Summer
President and CEO