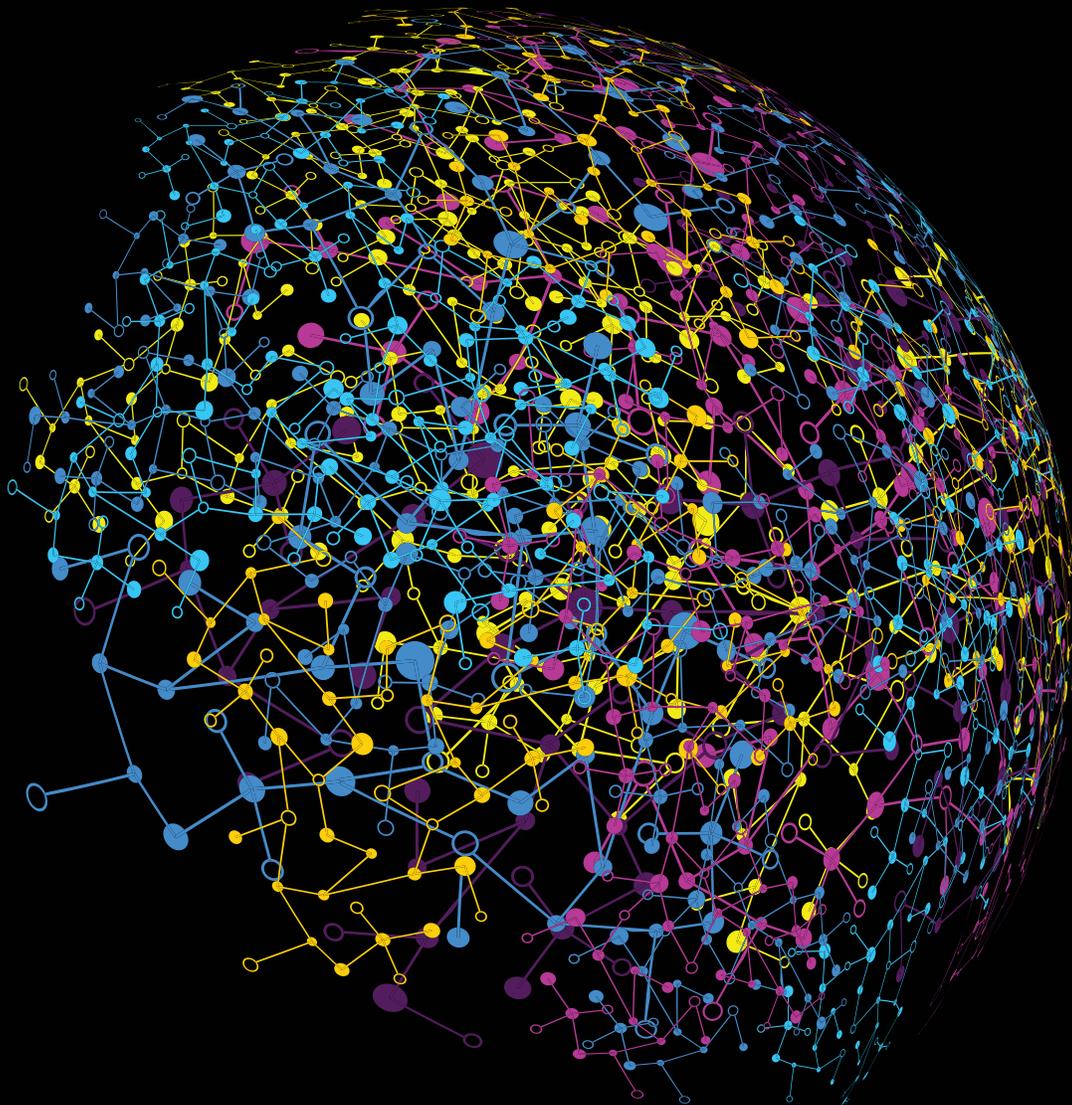


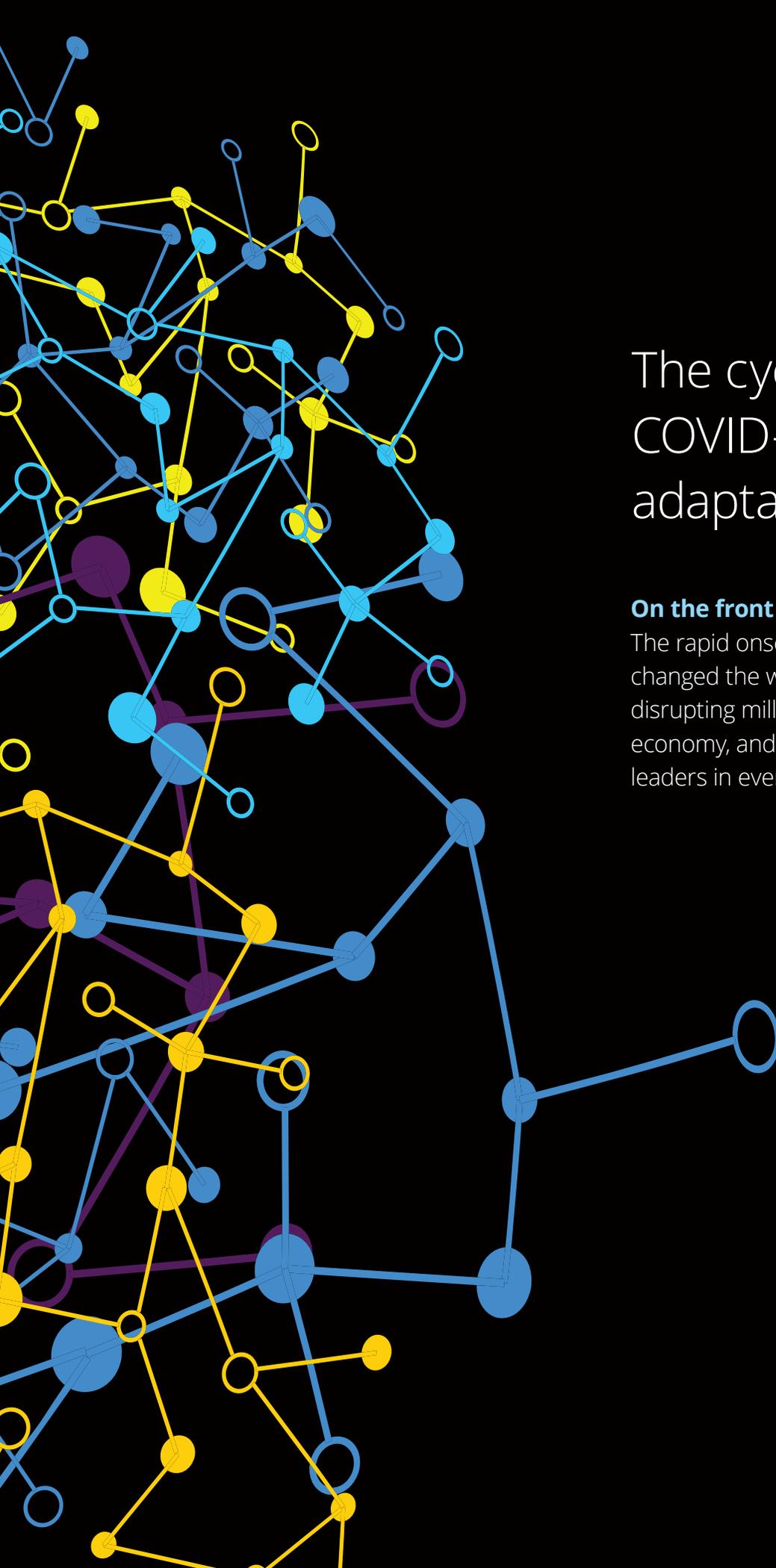
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COVID-19

Accelerating the evolution of the health sector

How to respond, recover, and thrive—then do it again



The cyclical nature of COVID-19 requires adaptability and agility

On the front lines of the COVID-19 pandemic

The rapid onset of the COVID-19 pandemic changed the world in the blink of an eye, disrupting millions of lives, damaging the global economy, and creating myriad challenges for leaders in every industry and country.

With the onset of COVID-19, we have observed organizations in the health sector mobilize quickly into crisis mode to diligently protect the health of citizens from the threat of this fast-spreading illness. From the rapid expansion of health system capacity, mass production and distribution of critical personal protective equipment (PPE), to the accelerated development of policies and legislation to protect the public, leaders in the health sector have been keenly focused on taking extraordinary measures to flatten the curve.

Thus far, priorities have been on expediting and facilitating a rapid response to flatten the curve of new infection cases. The results of these measures have begun to indicate progress across Canada. Total new cases are stagnating or are on a decline, testing capacity has increased, and PPE and bed capacity have been optimized to continue to meet the demands of COVID-19. As the current wave of the virus subsides, the health sector is now shifting from a frenetic response to a new focus: recovery.

Recovery is a phase that comes with new and multi-dimensional challenges. Decisions are now focusing on what businesses, institutions, and facilities to open, when to open, and for whom to open, and ensuring the appropriate controls are in place to prevent the risk of recurrent outbreaks. Health leaders in some provinces have already activated comprehensive frameworks to gradually resume scheduled surgeries and procedures, while maintaining capacity to respond to new COVID-19 cases.

At this point, leaders are faced with new questions: how do we better prepare ourselves and empower citizens to manage a potential second wave of COVID-19? How will the sector shift back to a response phase while continuing to plan for stages of recovery, and steady state once a second wave subsides? How will recurrent outbreaks be managed as they coincide with other health system priorities, such as the fall flu season? What kind of data will be needed to support a successful recovery, and how can we ensure that robust data quality, privacy, and security safeguards are in place to protect this data?

Soon after recovery, the health sector will shift, once again, to the next evolution in health care, with differences in care provisioning, a renewed focus on data and digital solutions, and overall citizen health and well-being.

"The greatest danger in times of turbulence is not the turbulence itself, but to act with yesterday's logic."

Peter F. Drucker

A respond, recover, and thrive framework can help the health sector remain flexible in uncertain times, allowing organizations to adapt to the changing demands of a pandemic

COVID-19 will undoubtedly come with its ebbs and flows, and potentially new infection waves. The cyclical nature of the virus demands flexibility among organizations in the health sector to be able to continually adapt to the dynamics of the virus, and to recognize the challenges, opportunities, and symptoms of change that come with each phase. With the industry being at the forefront of a pandemic, the ability to pivot quickly between priorities will not only affect public health, but also the stability of adjacent industries that intersect with health care, such as retail pharmacies, insurance, and pharmaceutical companies, among others. This therefore requires the ecosystem of health players to come together to break traditional orthodoxies and build a radically new system to better meet tomorrow's health care needs.

To help health leaders keep their organizations flexible in uncertain times, the respond, recover, and thrive (RRT) framework was developed to guide them in navigating through the various cycles and expected timeframes of COVID-19. This framework focuses on helping health organizations respond quickly, recover effectively, and thrive purposefully after the pandemic.

Each phase of the RRT framework will be explored in this paper to help you:

1. Understand the challenges you may face at each phase
2. Explore areas of opportunity that each anticipated challenge may bring
3. Recognize the conditions that may indicate a shift between the RRT phases



Respond:

Managing the unpredictability of the crisis

The response phase is characterized by unpredictability. With uncertainties in true and expected case counts, disease progression and transmission, fatality rates, and treatment options, leaders in the health care sector are forced to operate in crisis management mode and concentrate on contingency planning. Their goals are to optimize supply and demand for PPE, increase bed and testing capacity, create structures and policies, and seek partners in the broader ecosystem to help manage rapid surges and outbreaks

Challenges of navigating the uncertainties

Regulatory and policy barriers:

Meeting heightened demands in volume across services—including virtual care, telehealth, and acute care services—poses significant challenges for the health system, highlighting the need for agility, optimization, and standardization. The initial response to the pandemic showed that organizations face significant barriers in integrating data and accessing critical physical, digital, and data infrastructure to meet PPE, testing, and bed capacity demands. Addressing these needs requires a regulatory environment that can adapt quickly to data-sharing, privacy management, procurement hurdles, remuneration planning, and professional and licensing requirements.

Lack of ecosystem cohesion:

Canada is made up of decentralized health systems, with different players collecting unique tranches of data and developing their own infrastructure and analytics capabilities for their organization's day-to-day needs. To respond effectively to a widespread crisis such as a pandemic, health organizations need to quickly scale their infrastructure and capabilities as well as understand capacity challenges across multiple layers, including federal, provincial, regional, and local levels of the health sector. This requires substantive ecosystem cohesion, wherein health leaders can work together within and across the layers and lean on adjacent private industries for support to address gaps. With multiple disparate systems, lack of interoperability of data sources, paper-based workflows, and lack of public-private partnerships, health organizations were faced with a seemingly insurmountable challenge in understanding local and regional supply and demand of PPE, bed and testing capacities, and expected case counts.



Opportunities to address challenges

Acceleration of digital technologies:

Health organizations have significantly altered their digital engagement with patients, employees, and fellow stakeholders through the expansion of telehealth services and solutions that enable care provision outside the four walls of the hospital. Many have embraced these digital technologies through the power of ecosystem collaboration, working together to safely screen patients for COVID-19, care for non-COVID-19 patients, and increase bed capacity for critically ill patients. To continue to be proactive and prepare for future response phases, health organizations need to bolster their partnerships with adjacent industries while continuing their digital advancements in the areas of virtual care and screening, on-site testing, and supply and demand forecasting.

Integration of data sources and interoperable systems:

Coordinating these critical capabilities and assets across the wider ecosystem enables a synchronized response and improved patient care. Significant opportunities are present in using federated data and analytics platforms to enable organizations to collect, store, analyze, and share their data, resulting in a faster, evidence-based response. This includes more accurate capacity and demand models and more robust predictions for disease outbreaks that can inform faster, more reliable mitigation strategies to improve population health.

Pivoting from response to recovery:

Leaders will remain in the response phase until critical indicators are met (as deemed by governing health authorities, such as the World Health Organization) and signal the inflection point upon which their organization needs to pivot toward recovery. First and foremost, case counts in their jurisdiction will need to consistently decrease. Second, sufficient supplies for surge capacity need to be available, protection provided for vulnerable populations, and potential hospital outbreaks mitigated when regular procedures are resumed. Finally, workplaces in the health care sector need to deploy robust measures and solutions to prevent the spread of infection among health care workers. To succeed in this transition, leaders need to remain vigilant to avoid pivoting from response to recovery too soon, and they should lean on partners to fast-track the implementation of digital enhancements and interoperability within the health ecosystem.



Recover:

Emerging stronger in the next evolution of health

The recovery phase is the next evolution of population health.

Incidence rates are beginning to slow, case counts are decreasing, and organizations are building back capacity and implementing protocols to restore and move toward a steadier state. In this phase, leaders begin to move from crisis management to project management. For example, organizations can learn from PPE/bed capacity models and screening/testing ramp-ups in the response phase to build surgical and procedure ramp-up scenario strategies, vaccination allocation models, and think through ways of preparing and testing solutions for a wide variety of potential scenarios.

Challenges of navigating the evolution of health

Reactivity over proactivity:

To recover effectively, the health sector needs to break old habits and think and act proactively. Though Canada has made good progress in flattening the curve in the response phase, citizens and health ecosystem players alike must continue to act responsibly and require support from appropriate policies, measures, and contact tracing tools to mitigate the elevated risks of recurrent outbreaks. Leaders are challenged to identify and carefully consider measurable KPIs to be able to initiate timely service resumption, including elective surgeries, cancer screenings, and dental procedures, during the pandemic.

Fluctuating priorities and outbreaks:

With medical knowledge and advancements changing constantly, there are challenges in understanding how to apply lessons from the response phase to the health care system's new priorities with the restarting of the economy, creation of congregate living settings, and the onset of the fall flu season. Each health ecosystem member needs to be able to manage potential spikes in cases due to the reopening of the economy all while ensuring the necessary ramp-up of antibody testing and vaccines for the public when they become available. Leaders will need to re-engineer workspaces to include partitioned layouts and upgraded exhaust and ventilation systems, and prepare to deploy and manage portable COVID-19 testing kits.

Managing cybersecurity, privacy, and ethical risks:

With the significant ramp-up of virtual care technologies and remote working conditions, leaders have been facing increased cybersecurity, privacy, and ethical risks. Without robust safeguards and governance measures in place, health care and life sciences organizations will remain vulnerable to these risks, compounding the pressures of managing the virus. Recovery initiatives require close attention to privacy, security, ethics, and governance structures to maintain high standards of trust among ecosystem partners as well as the public.



Opportunities to address challenges

Set the stage and scale for the future:

To prevent a relapse to the response phase, ecosystem players in the health sector need to work collaboratively, embrace digital capabilities, and increase their critical infrastructure. The early response to the pandemic revealed that the scalability of health services, such as virtual care services and telehealth services, was among the greatest challenges in battling the pandemic. As such, priorities need to shift toward scaling up contact tracing methods, creating holistic virtual care and digital enablement strategies centred around COVID-19 and non-COVID-19 patients, empowering citizens to participate in monitoring community risk and preventing recurrent outbreaks, and implementing stronger interaction models with citizens and within the health care ecosystem to alleviate bureaucracies and enable rapid change for the future. This phase is a critical one for leaders to set the tone for the health sector and embrace a culture of preparedness for future waves of the COVID-19.

Prepare for success through a focus on “citizen-centricity”:

Pursuing a system-focused lens to recovery without considering the needs of various populations may reduce the effectiveness and stickiness of your recovery initiatives. Whether your recovery planning includes deploying a new contact tracing tool, restoring health services in select geographies, or implementing new health policies for when businesses reopen, design with citizens at the centre of your plan and use the collective power of citizens to scale your initiatives.

Restore a sense of trust and purpose:

With the COVID-19 pandemic forcing organizations to navigate uncharted waters, leaders need to restore confidence and re-establish a sense of purpose and trust. They need to evaluate how the pandemic has changed their expectations of security and safety for their front-line health workers and develop strategies to resolve overwhelming fears of the virus and its economic impact on employees. Additionally, stakeholders can use scenario and resiliency planning to develop strategies to meet a multitude of possible futures. Scenario and simulation modelling can empower leaders to plug-and-play with different capacities, demands, changes in behaviours, and risks (e.g., susceptibility, transmissibility, environmental) and explore how the infection curve changes to re-establish a sense of trust and dampen underlying fears.

Pivoting from recover to thrive:

Transitioning to the thrive phase requires a stabilized infection rate with mass viral and serological testing available and widespread contact tracing. There needs to be a consistent downward trajectory and levelling out of COVID-19-like symptoms, suspected and documented cases, and hospitalizations. Leaders need to develop a strategy that defines where they are going and use the innovative interaction models and technologies that can take them there, including embracing the advantages of citizens and technology partners to quickly scale tracing and testing efforts.



Thrive:

Embracing full health and well-being

The thrive phase is about shifting our mindset to embrace a renewed focus on health and well-being

The future is filled with uncertainty - we may defeat COVID-19 by developing a vaccine, achieving herd immunity, or be forced to coexist with the virus, putting in place the appropriate infrastructure to effectively manage the disease through evidence-based treatments, protocols, and safety measures. In this phase, leaders focus on considering the long term and flexing to meet the needs of new surges of viral activity. This phase is the time to set standards and establish a foundation for a future that creates a new level of flexibility and sustainability, and builds a better resiliency for population health and well-being. Organizations in the health sector can ensure appropriate mechanisms, protocols, and infrastructure are in place to monitor, detect, and prevent future risks to devise policies to manage future lockdowns, and to reskill employees to thrive in digital workplaces.

Challenges to developing a foundation for full health and well-being

Future risk mitigation:

Mitigating the impact of recurrent waves will be a priority for organizations in the health sector during the thrive phase. This requires robust controls, policies, and infrastructure to continually monitor risks in the environment. Challenges will arise for leaders who lack the foundation and flexibility to be able to monitor and respond to risk. Without the appropriate operating model and processes in place to monitor case counts or continuous intelligence tools to alert leadership of emerging risks, citizens will remain vulnerable to risks posed by the coronavirus.

Defaulting to the status quo:

The onset of COVID-19 has undoubtedly taught health system leaders significant lessons, highlighting the importance of embracing digital technology, being nimble, and increasing openness to collaboration with citizens and the broader ecosystem in order to achieve greater economies of scale. Continuing to use data remains critical, and organizations that have tendencies to default to the status quo will have trouble keeping up with the pace of the new health system. Being agile and developing plans to continue digital adaptations is essential to success at this stage.

Addressing ongoing needs during recurrent surges:

Health ecosystem players need to work collaboratively, not only to prepare for recurrences of COVID-19 but also to operate effectively in an environment of new challenges and priorities. These include an impending mental health crisis due to employment loss and economic hardship, and the need to increase support for chronic disease and cancer patients because of the reduced focus on early screening.

Opportunities to address challenges

Adapt to digitally restructured workplaces:

As organizations quickly implemented telehealth and virtual care technologies in the respond and recover phases, we witnessed an evolution in health care delivery, with a shift from in-hospital to at-home and community-based care models, largely facilitated through digital technologies. There is considerable opportunity for health ecosystem members to establish more robust coalitions to expand these solutions and offerings across the care continuum. Virtual technologies can be used not only to treat patients, but also to support the upskilling of health care workers; training clinicians and employees at a distance can arm them with the necessary skills to return to their newly evolved, safe and secure, digitally enabled work environment.

Devise strategies to manage future outbreaks, build population resiliency, and foster health and well-being:

With anticipated outbreaks in COVID-19 and the seasonal flu happening concurrently, health sector organizations can look to devise and implement strategies that focus on prevention and promotion of citizens' health and well-being. Building population resiliency can mitigate the risk of future pandemics as well as their unintended consequences, such as a mental health crisis. Citizen-centric COVID-19 tools and technologies, including behavioural nudging and drones, can be used to prompt citizens to follow personal hygiene protocols, strengthen positive habits that reinforce personal well-being, and actively practice workplace safety.

Sustaining thrive:

The best approach for maintaining the thrive phase will not be the same for every organization, and will depend on having established a robust foundation that focuses on the health and well-being of the people. Leaders should define their destination, think innovatively, empower citizens in participating in this journey, and remain versatile throughout the transition.



Guiding principles to prepare for the evolution of health

Resilient leaders are acting now.

With more uncertain times ahead, health ecosystem members and citizens alike will need to emerge from this pandemic stronger than ever before. Navigating the respond, recover, and thrive cycle is an iterative process, and success can be achieved by keeping the following five principles in mind:

- 1** Explore plausible futures. Think about the variety of scenarios that could occur in each of the three phases and plan to adapt accordingly. Explore tools in scenario and resiliency planning, trend analysis, simulation modelling, and sensing and horizon scanning to learn from the past and facilitate data-driven decision-making, while respecting the ecosystem's evolving privacy, security, and ethical frameworks.
- 2** Develop a citizen-centred strategy that meets the needs of the ecosystem. Make sound decisions that are foundational for ecosystem cohesion, while focusing on the needs of citizens across access, education, and patient participation. Devise a clear plan to emerge stronger as a whole throughout all three phases of a pandemic cycle and be prepared to execute it. Effectively communicate and openly share lessons learned, data, tools (e.g., data platforms), skill sets, and capacity across the ecosystem to formulate a stronger, faster, integrated response in the future.
- 3** Establish your purpose and define your path. Define the end goal and identify the journey to get there. Capitalize on the cyclical nature of the RRT phases to review, modify, and develop KPIs, engagements, and opportunities with time. Think long-term and plan for the future by restructuring operating models, implementing digital workflows, service delivery, and engaging new partnerships.
- 4** Move quickly, redefine, and use the power of the ecosystem to help you do so. In these unprecedented times, speed is an organization's best friend. While the details are important, avoid allowing them to offset the progress and momentum established from previous phases. Recognize this is an iterative process and speed is the key to learning and responding in time. To be able to move quickly, engage the support of your peers in the wider health ecosystem. Establish immediate priorities, identify ecosystem members that can help you deliver faster, and execute collectively. Working collaboratively will not only help you accelerate current business plans, but will also help you evolve your organization toward a new era of health care, one that's focused on interconnectedness, a new data ecosystem, citizen empowerment, and overall well-being.
- 5** Own the narrative. Be versatile. Never forget to revise business strategies as the situation evolves. Be curious when facing uncertainty and exploring new technologies, tools, and assets. Think critically when using them to manage volatility and pursue development opportunities. With contact tracing, health risk assessments, and Plexiglas becoming standard, remain citizen-centric in your decisions (while respecting privacy and ethical considerations) to establish trust and engagement as the phases work through.

Navigating the respond, recover, and thrive phases is challenging, but it also presents significant opportunity:

Leaders in the health sector who take advantage of the opportunities amid the ongoing COVID-19 crisis will likely emerge resilient, with new and improved strategies, technologies, solutions, and partnerships serving them well in the evolution of the management of public health and well-being.

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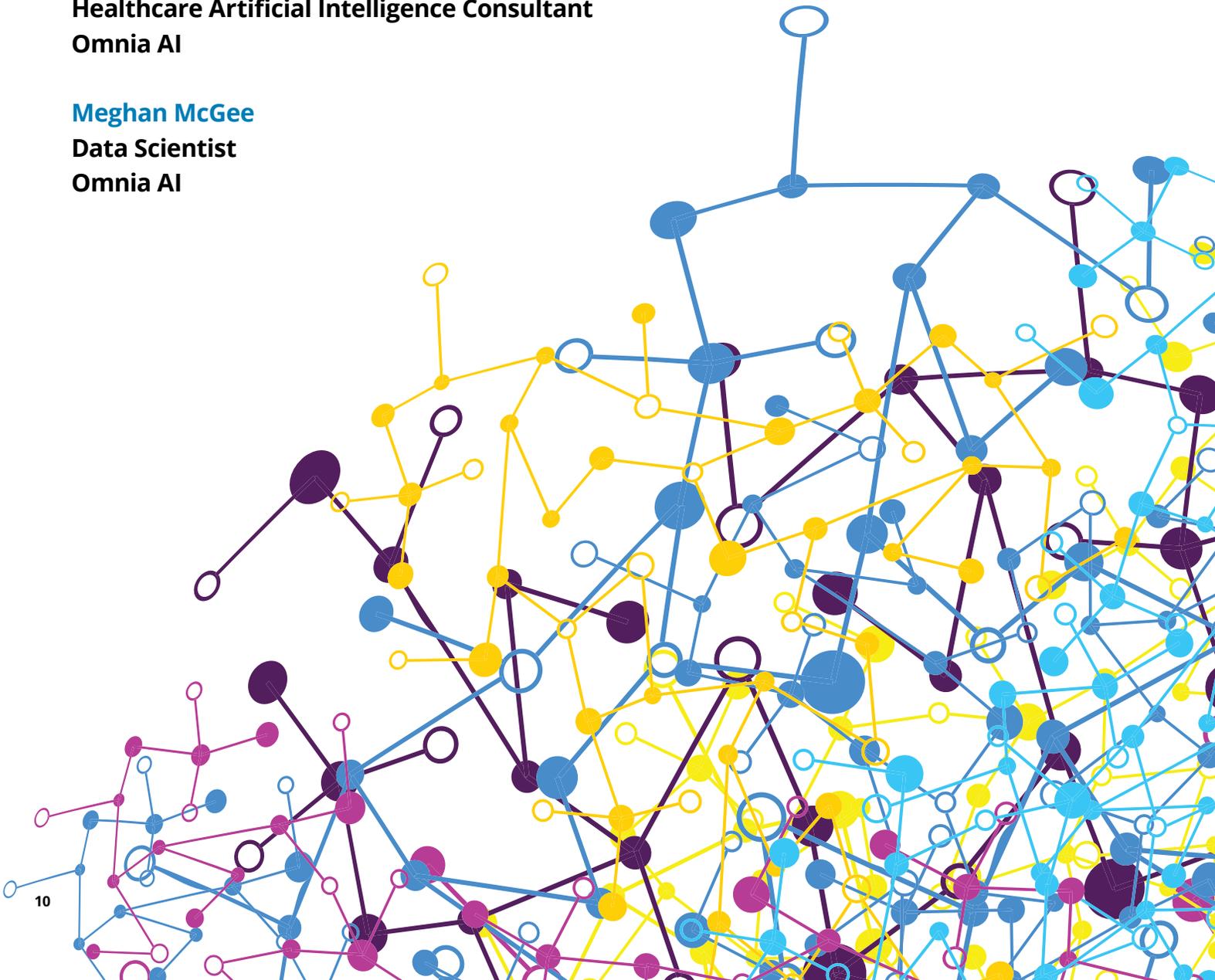
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