

OpenHIE Strategy Workshop Notes

Introductions

What would you like to get out of the meeting?

1. PB: Have a written doc that would allow others to weigh in - what aspects are important for us to consider
2. SG: Need to understand what this something(OpenHIE) is? Who are we? Where are we and where we want to go - set expectations - shorter term and longer term - different goals and agendas
3. CS: Represent the developing country perspective. Would like to know the forward trajectory of OpenHIE
4. MG: Seems to grow exponentially - Interested in expectations in the next 6 mos implements
5. DS: Representing the developer perspective - sense of the chart of the big picture, sense of the landscape
6. LP: Rwanda gave rise to OpenHIE - Pull together in a way that is easily described for other countries, we need a single voice, explain in a way the country understands it in relative to their actual problems
7. DR: i think there is a growing strategy for how these initiatives may be brought to bare to leverage these initiatives, becomes crisper to us all
8. JK: Keep a close eye on the actual community development - clue in from OpenMRS experience to boost the potential success
9. SM: believe fundamentally that people have the right to good health - it is going to involve good govt, good business model, good community for people to be involved - need tangible objective - how to build an ecosystem - learn from mistakes - involving the user and solving tangible problems
10. EJ: Help real people in real time - blend the best international experience in technology,integration to push the bar higher for performance & interoperability
11. BK: everyone will have their own vision - what is core and what is complementary - will have the big picture defined in snapshots in time - set of measurable factors defined, what defines the success will change over time. Important of what difference from others (OpenMRS), why its important to understand the difference. At the end of the exercise we will have a set of stories - the end state - have it written in the way of a story - what are the benefits so its tangible, how are we going to get there
12. KB: where's this community going over the next 2 yrs - define what we consider a success.

Strategy Session

1. What is a strategy? and why do we need one?

- Navigation - tactics serve the navigation - how are you going to get there - why are you going - where the reefs are and which way the winds are blowing
- Knowing what the goal is and how to navigate to the goal - what the goal is and why
- Boundaries of a river - danger if we are very fluid the water can get stagnate and not flow, serves the water well if there are boundaries then there is flow, how we're going to flow and where the boundaries are. Coordinate the directives and perspectives. Move between tactics and strategy (the dance and the balcony). Creating a whole that is stronger than its parts
- vision, mission, specific changes to deliver, challenges of the future, how the org will need to change to deliver priorities, indicators of performance, opportunities/challenges
- scope of this meeting is OpenHIE
- how to synthesize the ideas - leverage on the back of that - tangible outline of what we need to do - focus down on what problems are we really trying to solve
- strategy is like a framework - take objectives and measurements and see if it fits the strategy - if not, why are we doing it - can become too academic - how can we grow it
- Lays out short to long term goals - who benefits? why is it important to them? goal is a step toward a vision
- OpenHIE vision, mission and values -
<https://openhie.atlassian.net/wiki/display/documents/OpenHIE+Introduction>
- Don't want to go too deep into the tactics - basic idea of how we want to get there - Practical, Measurable, Achievable
- Suggest use of a framework to make sure value proposition, partners, customers, cost and revenue structures are aligned - a basic one can be seen here and filled collaboratively with post its or going around the table
http://www.businessmodelgeneration.com/downloads/business_model_canvas_oster.pdf
- Strategy should filter all the way down - specifics in support of strategy
- Is it our intent to direct those other communities
- Who do you want to be when you grow up?
- If we don't align with a funder - that would be a strategic decision
- Linchpin role -

2. What are the components?

- Gap between the strategy and the operations - puts umbrella around what it is we can do and the impact around that
- People focus too much on just the technology side and don't focus on what is necessary to make the technology successful
- Areas of conflict - we have to be aware - not necessary to solve
- What roles people play to achieve

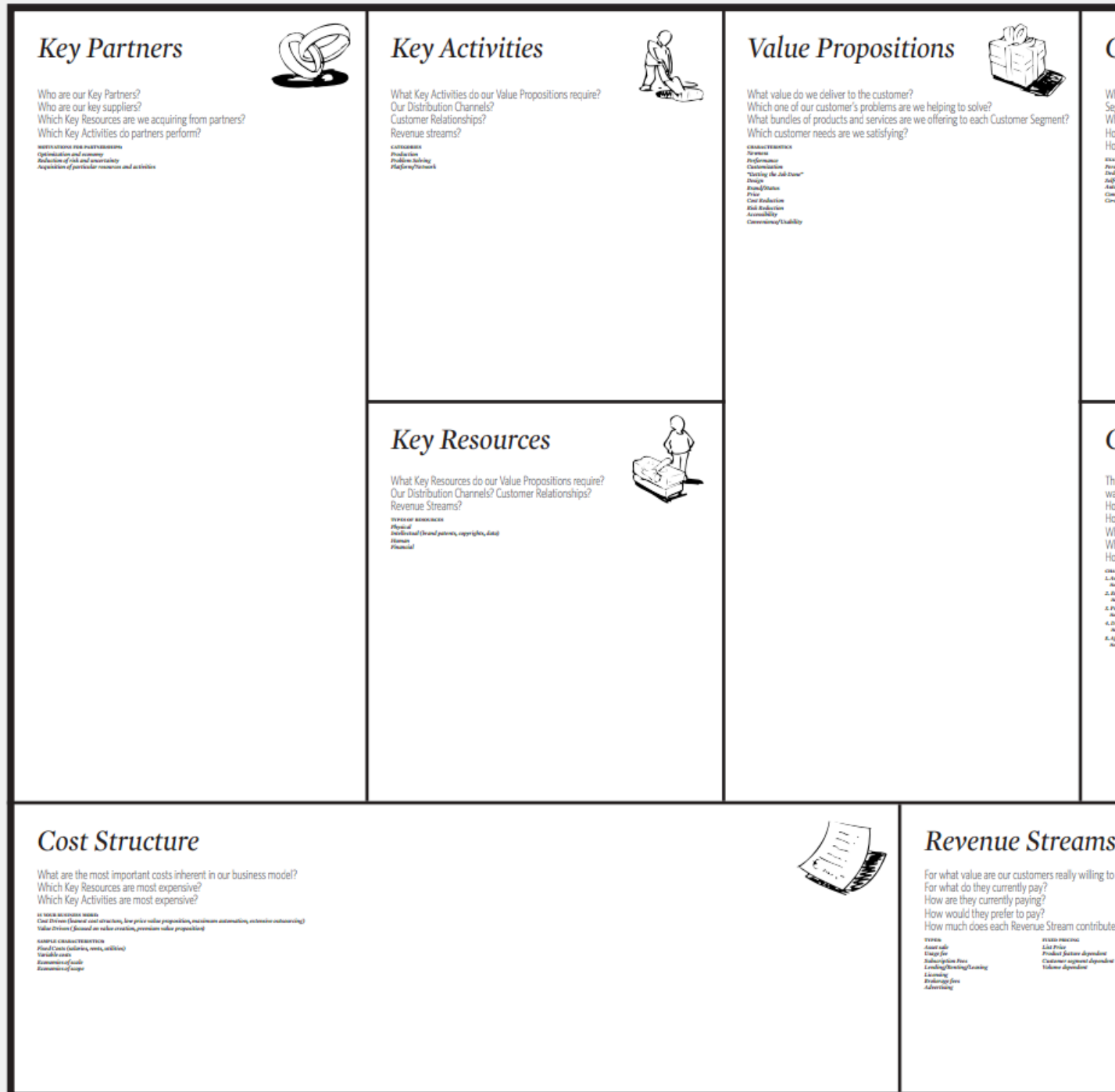
- What business are we in and who the users are
- Stakeholders are different from the users, stakeholder is an organization
- Early adopters different from stakeholder - where it all begins
- Committers, part of the ecosystem
- All should be articulated as part of your vision
- Focus on technology and mean on which the technology has
- Deployment community to support implementation
- need to think about what the business sustainability model from short to long term
- Hybrid open source - free code that businesses can place high value components
- Mind share - the most successful way to disseminate is through peer to peer conversations
- How do we encourage innovators and educators to become involved
- Important to understand who's engaged - stakeholders probably need to categorize and understand the different values they receive from being engaged.
- difference between product strategy and ecosystem strategy is fundamental
- Planning to be successful by making others successful
- Business model - sustainability plan - what will enable this to survive?
- Which one is the right one for you? What don't you do?
- Expressly prohibit competition? Commoditizing the technologies - do we want it to be possible for people to build value-added propositions on top of the architecture and make money off of that? Are they also stakeholders?
- constituencies of people, sustainability plan, ecosystem plan

From [here](#)

- Outline Value Propositions
- Key Activities / Key Resources / Key Partners (supply side)
- Customer Relationships / Customer Channels / Customer Segments (demand side)
- Cost structures and revenue structures (economic logic)
- Staging (what now/what later)

The Business Model Canvas

Designed for:



www.businessmodelgeneration.com

Another framework (less granular, but more abstract) that I've used is the Harvard Biz Review

one:

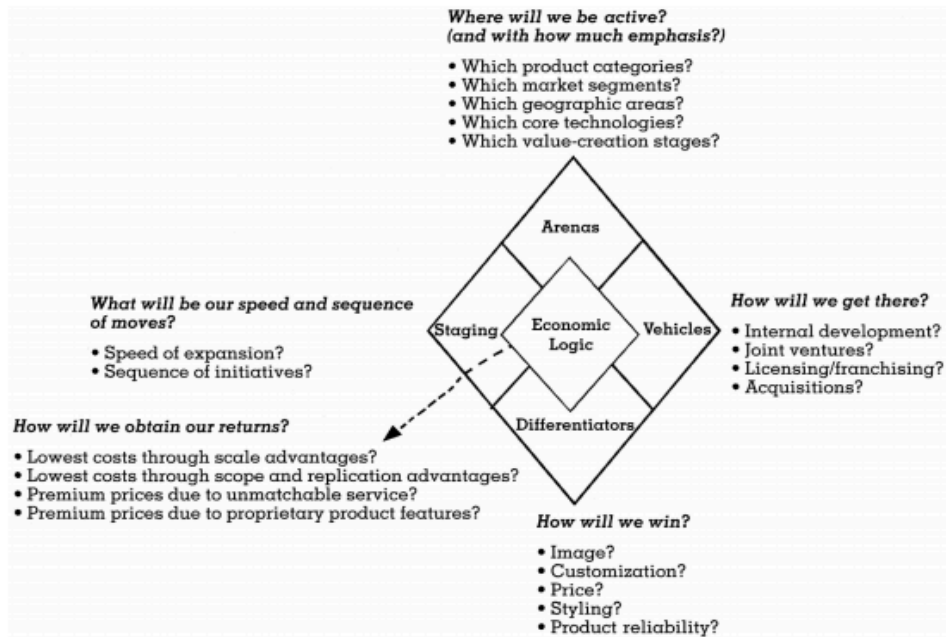


FIGURE 2
The Five Major Elements of Strategy

GOAL:

Funder perspective - as instrumental in laying Health Information infrastructure foundation in resource constrained environments(20yrs)

Overall long term goal in mind - 3yr phases

Have a draft to share in 3 weeks - 3yrs Time Period

Goals are bound by time and constituencies

Think in terms of story - who are we going to be when we grow up

What is OHIE? An "Initiative", "Community", "Program", etc? (this must be as crisp and precise up-front because it costs \$10M to establish a brand.)

What are we delivering?

- Whom: Constituencies of people - Types of Stakeholders
 - Beneficiaries
 - healthcare providers - (e.g., AMPATH, doctors, nurses, midwives, CHW's, labs)
 - Value Prop - improved outcomes, improve quality & efficiency, capacity issues - scaling issue (extending the reach of health delivery), better transition of care(teaming), provider registry improves transparency of validity
 - manage healthcare system - (e.g., MoH, FBOs, NGOs, private sector organizations)
 - Value Prop:
 - better measure impact of interventions
 - improved surveillance/situational awareness/pandemic planning
 - quality improvement "grist"
 - greater control with health information infrastructure
 - policy control
 - resource planning (human, supply, etc)
 - lowering cost of support - integrating existing systems
 - business analysis & planning
 - inhibitors - privacy, hospital competition(managed healthcare system)
 - pay for the healthcare system - (e.g., insurance organizations, public sector, donors)
 - Value Prop:
 - lower healthcare expenditures through interventions in HIE
 - money goes farther and improves quality of care
 - Absence of HIE perpetuates the problem (which is increasing lack of interoperability)
 - actively seeking to improve the healthcare system - (e.g., WHO and other multilaterals, INGOs, researchers, academicians, internal quality improvement experts)
 - Value Prop
 - If you want to improve something you have to change it, if you want to change it you have to measure it, if you want to measure it you must have data. Without data you cannot improve something.
 - patients/clients
 - Value Prop
 - If the system is working effectively they get better care
 - better access to the data themselves (they can take care of themselves)

- Wait times may not be preferred even though the health outcomes are better
- System integrators and consulting orgs (e.g., NGO's, IBM, Accenture, GE, telecoms, local tech implementers)
 - Value Prop
 - helps to do integration - provide those solutions - to do it at all
 - time to market - cheaper cost at higher quality - less risk
 - do more with less & higher quality
 - provide new or better solutions
 - IBM's support of Apache as an example
- Solution providers - both above and below the interoperability layer (e.g., "every" mHealth app, OpenMRS, DHIS2, iHRIS, OpenEMPI, Apelon, Mirth, GE, Oracle, POS, medical device providers)
 - Value Prop
 - If they can move resources to something that provides higher value - synergy
 - reuse of common infrastructure
 - more resources of a higher quality because they're not having to build infrastructure
 - increase market share
 - enables the market for end point solutions
 - economies of scale with new endpoint solutions
 - levels the playing field
 - creating a new market - gives access to countries
 - common set of infrastructure that is easy to connect
 - supporting from outside country
 - peer network opportunity - incubator
- those seeking health information for secondary use purposes (ie, pharma)
 - Value Prop
 - Virtual RCTs
 - public health - surveillance
 - Analytics
- policy makers - operational policy
 - Value Prop
 - manifests delivery policies
 - creates a real-world platform to evaluate policy by providing an operational framework in which to gather evidence from operational clinical systems
 - creates a more rational and consistent framework in which to deploy policy (e.g., security and privacy policies are more easily implemented)
 - Improve governance and equity

- Contributors (single person or group in organization) people or entities that contribute to the success (SDO)
 - Business Requirements/Specifications
 - Business Analysis
 - job opportunities
 - SDOs
 - Value Prop
 - Helps to propagate and legitimize their work
 - Influence work in the future
 - Rely on the same type of community engagement
 - Projectathons - how do stacks solve bigger problems
 - Technology Development
 - Solution Providers (e.g., Sysnet, Apelon)
 - System Integrators (e.g., Thoughtworks)
 - Value Prop
 - size and quality of contribution *might* impact their influence within community
 - early access (because they've gotten into the substance of the work)
 - Financial Support
 - Donors
 - Value Prop:
 - influence - steer priorities
 - leverage synergies and each other's work
 - economies of scale / cross-project
 - Payors
 - Value Prop
 - TBD (TODO: Shaun will speak with Alvin)
 - Community Outreach
 - Volunteers
 - Value Prop
 - recognized among their peers - recognition
 - karma
 - experience - mentorship
 - Network/Advocacy (e.g., WAHO, OHT, WHO, JLM, AeHIN)
 - Value Prop
 - benefit their members - give them guidance & support
 - Runtime Support
 - Trainers
 - Documenters/Translators
 - Deployment

- Value Prop
 - early and insider access - improve market position
 - access to resources
- Competitors - need to come up with 3 differentiators (those that adhere to data specifications are not competitors)
 - Solution Providers
 - Alternative HIE **Products** for HIE:
 - [Axolotl / OPTUMInsight](#),
 - [Medicity](#),
 - [Orion Health HIE](#), Oracle, GE, Harris, [Connect](#), Mirth
 - Differentiators
 - vendor neutrality
 - standardized
 - Point of care applications that profit from creating one-off interfaces
 - Value Prop
 -
 - Alternative **Approaches** to HIE - MoTech, Comcare, SmartCare, [OpenEHR](#)
 - Architecture
 - Value Prop
 - We intend to be vendor neutral
 - Technology
 - Value Prop
 -
 - System Integrators
 - Accenture - alternative approach - get business on the different connections
 - Value Prop
 -

Project Goals/Objectives - the “IT”

2. Technology/Implementation Services -

technology the provides seamless interoperability

“Year of engineering(2013)” - one example of

short to long term - one or more instantiations to set of specifications

reference implementation that deploys a set of specifications - one example that has utility(short term)

forcing function is the technology

- Short Term - 1-3yrs - version 1 limited to early adopters, version 2 pick up features
 - Interoperability
 - ESB - what it means
 - Hardened components - list some - what can they download and use

- Implementation Services that are going to change
 - Target the underserved
 - Target standard set of partners
 - Produce the code that
 - Reference implementation that gets used
 - Identify and embrace standards
 - Engage with SDOs through connect-a-thons and other appropriate processes to contribute to benefit evolving standards
 - feed information back from real world examples
 - Use when available
 - Input back to SDOs when issues - be part of the solution
 - be authors of what can be endorsable
 - Medium term - 3-5 yrs
 - multiple version of the components (by different development teams)
 - multiple implementations of the technology in varied environments (all components)
 - documented specifications
 - engage with SDOs and create when they don't exist.
 - Future State
 - The technologies and approach are working in high resource countries as well.
 - full embrace of the SDOs
 - # of endpoint solutions and 40% market share
 - every POC will start with OpenHIE as the infrastructure
 - Will presume a future where OpenHIE is mandatory
3. Deployment Community - Difference subsets of communities - Implementer, Developer, User, Providers
- There is a core team and then there is others that will come in with their own money
 - want to focus on the underserved
 - learn by doing - standard evolves from practice
 - build a collection of organizations with some skin in the game“Have an anchor and control it”
 - Goals
 - Short Term (1-3yrs)
 - development stakeholders (e.g., System integrators, solution providers)
 - development process documented
 - technical roadmap process defined and public
 - governance for component communities
 - sub-community charter and dependency lists
 - sub-community leaders
 - IP statement and review

- system design document
 - reference implementation w/ plug n play
- implementation stakeholders: System integrators, solution providers.
 - provide and educate people about opportunities
 - best practices guidelines
 - document samples and examples
 - reference implementations lessons learned
- end-user stakeholders:
 - educate them on the value prop
 - case studies
 - rules of engagement - how to get involved, stages of engagement, feeds measurement
 - get assessment of needs, values and readiness
 - express fundamentals of participation
 - express technology deliverables
 - create a number of end-user groups - community of practice (e.g, discussion forums, meetings, implementors conference)
- competitors stakeholders:
 - create a more concise list of competitors
 - create a short list of prime competitors (list of 3-5)
 - engage with/visit prime competitors - bring them in as collaborators
 - mind share / collaborate with competitors
 - make a clear definition of what a competitor is for OHIE
- Medium Term (3-5yrs)
 - development stakeholders:
 - implementation stakeholders:
 - at least one unanticipated use of OpenHIE components
 - provide means for opportunities
 - university / innovations program
 - end-user stakeholders:
 -
 - competitors stakeholders:
- Future
 - implementation outsourced “self serve”
 - reusable license
 - franchise - the approach/process
 - defined process
 - implementation guide for each of the HIE components as well as a full “HIE implementation guide”
 - grow attendance on community calls

- development stakeholders:
 - implementation stakeholders:
 - certification to differentiate
 - end-user stakeholders:
 - competitors stakeholders:
- Measurement of Success
 - goals lead back to our mission
 - each goal will have a measurement of success
 - have one single measurement
 - have a third party reporting on in country implementation
 - implementing at depth in three - at scale in three
 - dominance in mind share, press, and the hearts of people (e.g, column inches by reference implementation, satisfaction by early adopters, relationship selling) - to be active or reactive?
- 4. Ecosystem Landscape - describe what it is 1yr/3yr (e.g., umbrella w/ niches)
 - a. Mindshare - who we are
 - b. Opportunities - what are we trying to address
 - c. Important to counterbalance vendor neutrality
 - d. Models
 - i. Case studies and examples of how projects evolved
 - ii. Talk about the elements of an ecosystem that could be developed
 - e. Start off with ecosystem principles - then focus on technology, community, business
 - i. Utilize and maximize the existing structure
 - ii. Make sure \$ opportunities are made available to community members
 - iii. Measuring our success by measuring success of partners
 - iv. likely some of the OpenHIE values can be elucidated here
 - v. infrastructure plays create long term business opportunities “the long tail”
 - vi. Will not be setting up country physical infrastructure - non-functional requirement - will need to seek out partner organizations for this
- 5. Governance Model - has an executive summary
 - We = Consortium
 - Executive Committee - determined by prime?
 - Architecture Counsel
 - List number of key components (e.g., bylaws)
 - Will note legal entity here
 - The governance model helps enable and protect the community
 - Big focus on project / process governance
- 6. Sustainability Model - what can it be - not how you get there - (Paul will draft)
- 7. Risk Management (paul will draft)
- 8. SDO (will not discuss today)
- 9. Development Process (paul will draft)
- 10. What is core and what is complimentary?

- core - we (we = consortium) are in charge of it (it = short and long term)
 - short term - reference implementation is core
 - long term - specification is core
 - consortium is determined by the prime (RI) through rules of engagement
 - need a process for transitioning from core to complementary
 - can change dramatically based on the needs of the community
- complimentary - important things / people for the core to be successful and can not live without - can be built by others
 - replaceable is an element of complementary
- laissez-faire - reaction to needs

List of participants:

Paul Biondich, Shaun Grannis, Chris Seebregts, Mike Gehron, Dykki Settle, Liz Peloso, Derek Ritz, Boris Kapitanski, Jeremy Keiper, Larry Lemmon, Mark Tucker, Jamie Thomas, Skip McGaughey, Ryan Yates, Lorinne Banister, Lauren Stanisic, Scott Teesdale, Jorge Queipo
 On phone: Karl Brown (logging off, back around 2:30 or so), Ed Jezierski

Review of OpenHIE Strategy Workshop

Is there anything we are missing?

Do we have a common understanding of the nomenclature?

No - We need a Glossary

Will have an executive summary - do you need to have a provocative executive summary?

Does it need to be explicit in the front about open source, etc.- Yes

Juxtapose the ecosystem principles to the actors - narrative makes it more concrete

Executive summary will reference the mission, vision, values

What "IT" is then the stakeholders

Goal of the strategy document is to interest people to get engaged and to engage interested people.

DS: We need to discuss all kinds of end applications and how they integrate with OpenHIE. How the OHIE will serve the mobile community

MG: Praise - very happy with the process and feel good about what we got out of it for the

strategy outline - What would be missing? We can't do as much as needs to be done. We are the Bus & above. Have to influence our application providers. **Main: System Arch** - IntraCommunity Space. Want to see a design doc and a community charged with developing the doc

SM: Conceptually - we are weak in terms of experience - tie it back to experience - show the legacy. Helpful process - technology forecasting and what do we need to do today to be a leader in 2016, can't be a leader in 2016 if we don't build the base now.

SG: Organizing and Clarifying - Stakes in the ground will be established - We are a community not technology - key to communicate what we start with and how they will change with time. I worry we might miss the trees for the forest - we lack implementation capacity, the architectural glue - this doc is just to set the boundaries - may need Critical Path Items - should be extracted and made clear to everyone - Roadmap (you can do both)

CS: strategy to create the business model for implementer - how we move from this group to getting it deployed. Opportunities (Mobile)

PB: when they think about POC apps as enabler of improved health outcomes. concerned there is something in our strategy would dissuade someone from becoming part of the community

ST: Shorter term - make sure the breadth, depth, mindshare goal is clearly articulated

Parking Lot Issues

- "Big Data vs. "Little Data"
- Legal Policy Framework
- Approach
- Countries in Scope?
- Role standards play and OHIE plays in standards
- Single point of contact - What does the bus do?
- Considered presumptions