

# ASHP Pharmacy Forecast Workshop:

*PLANNING GUIDE  
for Three Options for Using  
Workshop Slides*



# Workshop Planning – 3.0 Hr Presentation

- Full Workshop Presentation: 112 slides
  - Discuss all survey themes and results from each domain
  - Present and discuss case studies
  - *Ideal for students and residents*

# Workshop Planning – 1.5 Hr Presentation

- Abridged Workshop Presentation: approx. 60 slides
  - Discuss selected survey themes and results from their respective domains
  - Select and discuss case studies
  - The presenter decides audience participation
  - *Ideal for a targeted employer/workplace workshop*

# Workshop Planning – 1.0 Hr Presentation

- Lecture: approx. 30 slides
  - Discuss 2-3 survey themes and results from their respective domains
  - Focus on Forecast Workshop overview and summary
  - *Ideal for state affiliate presentations or other targeted meetings*

# Workshop Planning – Presentation Cadence

- Theme overview
- ↓
- Survey question(s) (Capture audience ‘votes’)
- ↓
- Executive summary
- ↓
- Survey results (Forecast response)
- ↓
- Strategic recommendations
- ↓
- REPEAT

# ASHP Pharmacy Forecast Workshop: *Trends that Will Shape Your Future*

Prepared by ASHP's Section of  
Pharmacy Practice Leaders



**ashp**

pharmacists advancing healthcare™



# Special Acknowledgements

- ❑ Forecast 2026 Advisory Committee
- ❑ Chapter authors
- ❑ Forecast Panelists (FPs) who responded to the survey

# Acknowledgements for Preparing Workshop Slides: SPPL Advisory Group on Leadership Development and Succession Planning

- **Conner Ball, PharmD, MBA, BCPS**  
*Pharmacy Manager, Emergency Services, Automation,  
and Clinic Requisitions*  
*University of Michigan Health – Ann Arbor, MI*
- **Gene B. Decaminada, BS Pharm, RPh, FNHIA,  
FCPA**  
*Pharmacy Manager, Regional Operations Center*  
*Yale New Haven Health Home Infusion*
- **Amanda Grady, PharmD, BCPS, DPLA**  
*Drug Information Clinical Coordinator*  
*The University of Kansas Health System*
- **Carmen Gust, PharmD, BCPS, DPLA, 340B ACE**  
*Pharmacy Manager*  
*Ascension, St. Elizabeth Hospital – Appleton, WI*
- **Mileena Kendall, CPht-Adv, CSPT**  
*Lead Operations Technician*  
*Ruby Memorial - Morgantown, WV*
- **Kellie Knight, PharmD, MBA, BCPS, CPEL**  
*Regional Director of Pharmacy and Clinical Dietitians*  
*Indiana University Health South Region -  
Bloomington, IN*
- **Olga Vlashyn, PharmD, MS, BCPS**
  - *Associate Director, Hematology/Oncology  
Pharmacy Services*
  - *Boston Medical Center - Boston, MA*

# Objectives

1. Introduce and provide background on the Pharmacy Forecast Report
2. Discuss survey questions and results from each domain of the report
3. Apply key trends to case study activities

ashp | ashp  
Foundation

PHARMACY  
FORECAST™

2026

ASHP and ASHP Foundation  
Pharmacy Forecast 2026: Strategic Planning Guidance  
for Pharmacy Departments in Hospitals and Health  
Systems

# Pharmacy Forecast



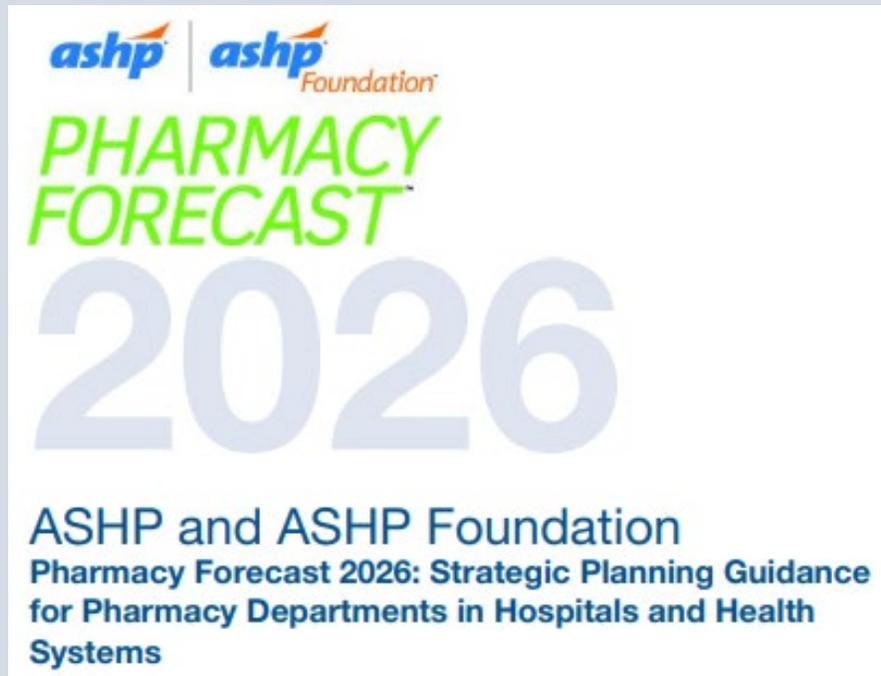
## Purpose

To identify and contextualize emerging trends that will influence healthcare, health systems, and the pharmacy profession. It provides recommendations to inform strategic planning that should prompt action by pharmacists and health-system leaders.

# Pharmacy Forecast: Overview

- Predicts developments in general themes likely to challenge pharmacy leaders in hospitals and health-systems over the coming 5 years
- Presents actionable strategic recommendations to pharmacy practice leaders
- Reports survey results of trend watchers and leaders in health-system pharmacy and analyzes predicted trends

# Pharmacy Forecast Methodology



Appointed  
Forecast Panel  
(FP) completes a  
questionnaire

Survey asks  
likelihood of  
certain trends  
occurring over  
next five years

Experts recruited  
to write a brief  
chapter for each  
domain

Each chapter  
presents the  
survey results,  
authors  
assessment of  
predictions and  
strategic  
recommendations

# Pharmacy Forecast: Representation

- 61% of Forecast Panelists (FPs) employed by hospitals with 500 or more beds
- 25% of FPs were from hospitals of less than 500 beds

Region	Response Rate from FPs
Midwestern	31%
Southern	24%
Western	23%
Eastern	23%

# 2026 Forecast Themes

1. Policy, Drug Costs, and the Financial Stability of Health Systems
2. Stabilizing the Pharmaceutical Supply Chain
3. Patients as Consumers of Healthcare
4. Realizing the Potential of Therapeutic Advances
5. Environmental Sustainability and Resilience: A Strategic Imperative for Pharmacy Leaders
6. Transforming Safety

# Student Professional Development

**How is the forecast relevant for pharmacy students?**

- Recognizing emerging trends in pharmacy
- Providing insights into expected challenges in pharmacy
- Promote thought-provoking discussion and research
- Serve as themes for journal clubs, topic discussions, presentations, and interview questions



# Theme 1:

*Policy, Drug Costs, and the Financial Stability of Health Systems*

# Strategic Challenges Identified

- Federal and state policy shifts have created an unprecedented, highly disruptive policy environment that threatens health-system revenue and financial stability.
- Rapidly evolving manufacturer and payer strategies are fundamentally altering how medications are purchased, reimbursed, and delivered, adding operational complexity and financial risk.

# Strategic Challenges Identified

- Strategic challenges identified include:
  - Financial threat from Medicare price negotiations across payers
  - 340B program changes creating major operational, cash-flow, and savings risks for health systems
  - Restructuring of outpatient infusion and hospital-based services due to site neutral payments
  - Need to reevaluate or internalize Pharmacy Benefit Management (PBM) functions
  - Growing administrative and care-delay burden from prior authorization requirements

# ***Theme 1:*** **Forecast** **Question 1**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**Federal government negotiation of drug prices will have a “spill-over” effect to payers beyond Medicare, resulting in an overall decrease in health-system pharmacy revenue.**

1. Very Likely
2. Somewhat Likely
3. Somewhat Unlikely
4. Very Unlikely

# Forecast Response

1

Federal government negotiation of drug prices will have a “spill-over” effect to payers beyond Medicare, resulting in an overall decrease in health-system pharmacy revenue.



● VERY UNLIKELY ● SOMEWHAT UNLIKELY ● SOMEWHAT LIKELY ● VERY LIKELY

# ***Theme 1:*** **Forecast** **Question 2**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**75% of health systems will re-structure hospital-based outpatient infusion services due to a significant decline in patient volume and revenue.**

1. Very Likely
2. Somewhat Likely
3. Somewhat Unlikely
4. Very Unlikely

# Policy Changes Reshaping Care Delivery

- **Medicare Drug Price Negotiation Program starting in 2026**
  - Decreased reimbursement rates from Medicare Part D plans of only the Maximum Fair Price + dispense fee
  - 79% of FPs indicated it is somewhat or very likely that federal government negotiation of medication prices will have a “spill-over” effect to payers beyond Medicare, resulting in an overall decrease in health-system pharmacy revenue

# Policy Changes Reshaping Care Delivery

- **Site-neutral payment policies**

- With site-neutral payment policies in effect, healthcare providers will be paid the same rate regardless of where the medication is administered (hospital outpatient or in a physician office)
- These policies do not account for the higher costs hospital outpatient departments incur to meet standards for medication preparation, medication administration, care coordination, and regulatory oversight

# Policy Changes Reshaping Care Delivery

- **Prescription benefit management reform**
  - Payers increasingly forcing reimbursement of outpatient infusions through the pharmacy benefit of an insurance policy rather than medical benefit, also leading to complications with care delivery (brown-bagging, white-bagging, etc.)
  - Most health-systems (55%) are concerned by the prospect of declining patient volume and revenue for outpatient infusion services

# Forecast Response

2

75% of health systems will re-structure hospital-based outpatient infusion services due to a significant decline in patient volume and revenue.



● VERY UNLIKELY   ● SOMEWHAT UNLIKELY   ● SOMEWHAT LIKELY   ● VERY LIKELY

# ***Theme 1:*** **Forecast** **Question 7**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**50% of health systems will establish their own employee pharmacy benefit manager (PBM) or contract with a “transparent” PBM.**

- A. Very Likely
- B. Somewhat Likely
- C. Somewhat Unlikely
- D. Very Unlikely

# Reevaluating or Internalizing PBM Functions

- Patients, providers, and health-systems alike are increasingly frustrated by PBM structures, plans, and contracts leading to increased costs
- Some health systems are bringing PBM functions in-house or moving away from agreements with large, national PBMs
  - Helps manage health benefits for their patients
  - Improves transparency and control over prescription drug costs
  - Offer “pass-through” savings back to the health system

# Reevaluating or Internalizing PBM Functions

- Health systems with their own retail and specialty pharmacies have more insight into PBM practices and operations
  - Exposed rebate-based revenue model PBMs (and not their patients or plan sponsors) benefit from
- Health systems in every state have pushed for PBM transparency related to spread pricing and fees, and industry reform, and all states have taken steps to regulate PBM practices
  - Currently no federal government regulations, but state actions have created good momentum for change on a federal level

# Forecast Response

7

50% of health systems will establish their own employee pharmacy benefit manager (PBM) or contract with a “transparent” PBM.



● VERY UNLIKELY   ● SOMEWHAT UNLIKELY   ● SOMEWHAT LIKELY   ● VERY LIKELY

# ***Theme 1:*** **Forecast** **Question 5**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**Federal policy will require health plans and pharmacy benefit managers (PBMs) to publicly disclose prior authorization and denial rates for select therapies.**

- A. Very Likely
- B. Somewhat Likely
- C. Somewhat Unlikely
- D. Very Unlikely

# Forecast Response

5

Federal policy will require health plans and pharmacy benefit managers (PBMs) to publicly disclose prior authorization and denial rates for select therapies.



● VERY UNLIKELY ● SOMEWHAT UNLIKELY ● SOMEWHAT LIKELY ● VERY LIKELY

# ***Theme 1:*** **Forecast** **Question 6**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**Growing personal healthcare debt will drive increased consumer support for a single-payer health system, shifting from below 50% currently to a strong majority.**

- A. Very Likely
- B. Somewhat Likely
- C. Somewhat Unlikely
- D. Very Unlikely

# Patient Access & Affordable Care

- The prior authorization (PA) process remains one of the most frustrating elements of health insurance coverage for both patients and providers.
  - These requirements cause delays or denials in accessing prescribed diagnostic tests, treatments, and procedures.
  - Leads to worsened health outcomes and increased emotional and financial stress for patients.
- Increased patient healthcare cost burden will likely accelerate public calls to reduce patient healthcare costs.
  - Most panelists think it is unlikely that growing personal healthcare debt will result in support for a single-payer health system from a majority of consumers.

# Patient Access & Affordable Care

- Providers cite administrative complexity of PAs as a significant barrier to delivering timely, effective care.
- Panelists anticipate increased transparency for PA practices and denial rates
  - 57% indicated it is somewhat or very likely that federal policy will require health plans and PBMs to publicly disclose prior authorization and denial rates for select therapies

# Forecast Response

6

Growing personal healthcare debt will drive increased consumer support for a single-payer health system, shifting from below 50% currently to a strong majority.



● VERY UNLIKELY ● SOMEWHAT UNLIKELY ● SOMEWHAT LIKELY ● VERY LIKELY

# Strategic Recommendations for Practice Leaders

1. Pharmacy leaders should determine state and federal policy priorities impacting medication use and create an advocacy agenda that aligns with the organization's mission and core values.
2. Pharmacy leaders must identify key areas of vulnerability within their institutions, model the financial impact of policy changes on medication and therapeutic interventions given their patient populations and payer mix, and implement proactive strategies to mitigate financial and operational risk.
3. Pharmacy leaders should regularly meet with health-system and state hospital association government relations staff to determine the potential impact of state and federal policy changes related to medication use.
4. Pharmacy leaders should engage with executive leadership to develop a strategy that supports medication affordability and access and ensures the pharmacy perspective is represented in the organizational response to evolving healthcare policies.
5. Health-system leaders should seek innovative solutions to maintain financial health in response to the shifting payment and regulatory environment. For example, restructuring delivery of infusion services or bringing select PBM functions in-house may present opportunities for pharmacy leaders to shape care decisions and influence organizational strategy.





# Theme 2:

## *Stabilizing the Pharmaceutical Supply Chain*

# Pharmaceutical Supply Chains

- Pharmacists and pharmacy technicians continue to diligently manage a pharmaceutical supply chain (PSC) impacted by a variety of manufacturing issues, disruptions such as natural disasters, and other upstream factors
- This is further complicated by interactions among stakeholders of the PSC such as:
  - Federal government
  - Manufacturers
  - Group purchasing organizations (GPOs)
  - Wholesalers
  - Providers
  - Patients

# Data, Transparency, and Drug Manufacturing

- Increasing transparency of supply data at each stage of the PSC is fundamental to future improvements
- In current state, free data exchange across industry stakeholders is a challenge due to a lack of a common infrastructure, the sensitive and proprietary nature of the data, and the potential impact of data sharing amount competitors
- Pharmacy leaders can look to reduce PSC expenses by making strategic investments in predictive models such as the application of artificial intelligence and inventory management software

## ***Theme 2:*** **Forecast** **Question 6**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**The FDA will implement an early warning system (e.g. using artificial intelligence predictive modeling) for healthcare sector supply chain instability, including critical drug shortages.**

- A. Very Likely
- B. Somewhat Likely
- C. Somewhat Unlikely
- D. Very Unlikely

# The Role of Government Agencies

- Transparency would be fundamental to any US Food and Drug Administration (FDA) early warning system
- Health-system data, such as drug inventory and utilization trends, would be useful for upstream stakeholders including:
  - To better plan for significant changes in utilization
  - Adjust inventory and reserves
  - Improve allocation systems
- Full transparency will require data infrastructure, trust, and use of information in good faith by all stakeholders
- Ultimately, all stakeholders are working to improve margins while decreasing costs

# Forecast Response

- 6 The FDA will implement an early warning system (e.g., using artificial intelligence predictive modeling) for healthcare sector supply chain instability, including critical drug shortages.



● VERY UNLIKELY ● SOMEWHAT UNLIKELY ● SOMEWHAT LIKELY ● VERY LIKELY

# ***Theme 2:*** **Forecast** **Question 3**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**A major cybersecurity incident will impact health-systems' ability to deliver patient care to 80% of the US population.**

- A.** Very Likely
- B.** Somewhat Likely
- C.** Somewhat Unlikely
- D.** Very Unlikely

# Disruptions

- All supply chains are susceptible to disruption, with the PSC having additional risk from complexities of cost, storage, regulatory requirements, and potential patient impact
- Pharmacy leaders must understand major touchpoints of technology and supply chain management unique to their organization (e.g. online ordering and inventory management systems)
- Weather events, labor disputes, increased patient demand for medications, and a worldwide pandemic are some recent disruptors that have strained health systems

# Forecast Response

3

A major cybersecurity incident will impact health-systems' ability to deliver patient care to 80% of the US population.



● VERY UNLIKELY ● SOMEWHAT UNLIKELY ● SOMEWHAT LIKELY ● VERY LIKELY

## ***Theme 2:*** **Forecast** **Question 4**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**30% of health systems will develop partnerships or establish capabilities to manufacture their essential drugs through on-site, current good manufacturing practices (cGMP) technology.**

- A. Very Likely
- B. Somewhat Likely
- C. Somewhat Unlikely
- D. Very Unlikely

# Strengthening the Pharmacy Supply Chain

- Supply chain management requires understanding of the intricacies of GPOs, wholesalers, manufacturers, and health systems and how each of these impacts supply chain integrity
- Pharmacy leaders should factor in origin of product, location of manufacturing, and quality and performance indicators such as historical shortages and FDA inspection findings
- It is also important to share, influence, and advocate more globally—beyond the direct interest to their own organizations

# Forecast Response

4

30% of health systems will develop partnerships or establish capabilities to manufacture their essential drugs through on-site, current good manufacturing practices (cGMP) technology.



● VERY UNLIKELY   ● SOMEWHAT UNLIKELY   ● SOMEWHAT LIKELY   ● VERY LIKELY

# Strategic Recommendations for Practice Leaders

1. Pharmacy leaders should demand more supply chain transparency and accountability for their industry partners. This will require health system to be more transparent regarding their own practice.
2. Pursue robust policies and procedures that mitigate high-risk disruptions to the PSC. Pharmacy leaders should also collaborate with peers and other industry stakeholders to share best practices and address existing gaps.
3. Pharmacy leaders should broaden their approach to product and vendor selection beyond cost and consider quality and supply redundancy.
4. View the pharmacy supply chain more globally, towards end-to-end chain management and beyond local drug distribution and procurement, to future-proof and protect the PSC.
5. Leverage partnerships to coordinate with GPOs, wholesalers, and manufacturers. This could be as simple as better understanding business practices and their impact to supply chain resiliency, or it could be more strategic, such as by identifying mutually beneficial opportunities to partner.
6. Partner with industry-leading supply chain enterprises to incorporate supply chain best practices into healthcare, such as a strategy towards “Industry 4.0” whereby industries are transforming through the application of digital technologies.





# Theme 3:

## *Patients as Consumers of Healthcare*

# Digital Health Technologies Empower Patients

- Advances in health-related technologies likely influence consumer choice when seeking health care
- Telehealth, patient portals, home diagnostics, and remote monitoring have shifted the landscape of modern healthcare
  - Standardized approaches in deploying these technologies and other innovations will help measure impact on care outcomes and quality
  - Likewise, the impact of digital health technologies on equitable access to care

# ***Theme 3:*** **Forecast** **Question 1**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**75% of health systems will offer contactless health care services because of strong consumer preferences**

- A. Very Likely
- B. Somewhat Likely
- C. Somewhat Unlikely
- D. Very Unlikely

# Enhanced Efficiency, Increased Patient Demands

- What was once innovative is now considered essential for patient access and continuity of care
  - From 2020 to 2030, the telehealth market is expected to grow from ~**\$18B** to **\$140B**
  - Digital health data informs health-system decision-making and drives efficiency
  - With more access, patient demands for convenience are expected to increase

# Forecast Response

1 75% of health systems will offer contactless health care services because of strong consumer preferences.



● VERY UNLIKELY   ● SOMEWHAT UNLIKELY   ● SOMEWHAT LIKELY   ● VERY LIKELY

# ***Theme 3:*** **Forecast** **Question 3**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**Most patients will view artificial intelligence as an enhancement to care (e.g., decreasing the time to diagnose and treat or providing education)**

- A. Very Likely
- B. Somewhat Likely
- C. Somewhat Unlikely
- D. Very Unlikely

# Attitudes Toward Artificial Intelligence

- In general, attitudes are positive regarding AI in healthcare
- There is potential for the application of AI to advantage certain demographics, such as those who are economically advantaged
- Advantages of digital health services include:
  - Reduced time, travel, and travel-related pollutants
- Emerging concerns center around the environmental impact of generative AI
  - Generative AI: A type of artificial intelligence that creates content using machine learning which mimics human intelligence

# Forecast Response

3

Most patients will view artificial intelligence as an enhancement to care (e.g., decreasing the time to diagnose and treat or providing education).



● VERY UNLIKELY   ● SOMEWHAT UNLIKELY   ● SOMEWHAT LIKELY   ● VERY LIKELY

# ***Theme 3:*** **Forecast** **Question 4**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**Health-system financial pressures will limit the adoption and access to technologies that have the potential to transform patient care (e.g., continuous glucose monitoring, generative AI)**

- A. Very Likely
- B. Somewhat Likely
- C. Somewhat Unlikely
- D. Very Unlikely

# Momentum for Healthcare Transformation

- Digital health technologies serve to transform health care, but there are barriers to full adoption
- Financial pressures serve as one barrier
  - Although patients may prefer telehealth visits, in-office services tend to have higher reimbursement rates
- Complete adoption of contactless care could increase total healthcare output, offering increased screening, diagnostic, and prescribing opportunities

# Forecast Response

4

Health-system financial pressures will limit the adoption and access to technologies that have the potential to transform patient care (e.g., continuous glucose monitoring, generative artificial intelligence).



● VERY UNLIKELY ● SOMEWHAT UNLIKELY ● SOMEWHAT LIKELY ● VERY LIKELY

# ***Theme 3:*** **Forecast** **Question 4**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**75% of health systems will see a significant increase in uncompensated care due to an increase in patients who are uninsured or underinsured.**

- A. Very Likely
- B. Somewhat Likely
- C. Somewhat Unlikely
- D. Very Unlikely

# Federal Actions Influencing Access to Care

- Federal policy changes and reductions in Medicare and Medicaid spending will limit access to care
  - Findings have shown that states where Medicaid spending did not expand, uncompensated care grew
  - Conversely, in states where Medicaid spending expanded, uncompensated hospital care did not grow
- Uncompensated hospital care will continue to accelerate financial strains placed on health systems
- Drug manufacturers have imposed restrictions on the 340B program, which threaten to limit programs targeted to improve care for underserved populations

# Forecast Response

5

75% of health systems will see a significant increase in uncompensated care due to an increase in patients who are uninsured or underinsured.



● VERY UNLIKELY   ● SOMEWHAT UNLIKELY   ● SOMEWHAT LIKELY   ● VERY LIKELY

# Patients as Consumers of Healthcare

- Digital tools are making patients more active in their own healthcare
- Financial pressures and policy changes are likely to strain health systems
- Pharmacists are well positioned to lead efforts in smart resource use and patient health literacy

# Strategic Recommendations for Practice Leaders

1. Engage in robust scenario planning for increased uncompensated care and declining patient health due to loss of insurance. This should include sensitivity analyses to determine which factors have the greatest impact or cause the most variability in care.
2. Actively seek collaborations with technology companies and relevant agencies to conduct needs assessments and gain insight into patient perceptions and expectations concerning digital health technologies.
3. Engage in multistakeholder planning to strategically prioritize technology adoption that balances growing patient demand with resource feasibility. These evaluations should encompass diverse groups to foster patient-centered and effective digital health initiatives.
4. Foster an environment that prepares the pharmacy workforce to embrace new technology, ensure the workforce is adequately trained, participate in technology implementation, and serve as the bridge between digital health and the patient experience.
5. Proactively develop and implement strategic planning to accommodate changes in the federal landscape, including a potential rise in prescription volumes through Medicare Part D plans as well as changes in care access for the underserved, such as the 340B program.





# Theme 4:

## *Realizing the Potential of Therapeutic Advances*

# Introduction

- Advanced therapeutics have emerged offering patients exciting and novel treatment options
- Therapies are transforming clinical care for rare diseases
- As cutting-edge advances continue to be approved, it is essential to maintain perspective on delivery, recognizing that innovative treatment strategies for small patient populations should complement, not overshadow, established treatment that can reach millions of patients
- Health systems must anticipate and be prepared for innovation

# ***Theme 4:*** **Forecast** **Question 1**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**The percentage of adults with obesity in the US will decrease**

- A.** Very Likely
- B.** Somewhat Likely
- C.** Somewhat Unlikely
- D.** Very Unlikely

# ***Theme 4:*** **Forecast** **Question 2**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**Medicare will cover the cost of medications used for the treatment of obesity.**

- A. Very Likely
- B. Somewhat Likely
- C. Somewhat Unlikely
- D. Very Unlikely

# Obesity Management

- Obesity affects close to 1 billion people around the world (40% of adults in the United States), with no sign of a downtrend
- Obesity is multifactorial and influenced by both individual and societal factors
  - High cost of healthy foods and limited access to recreational spaces
  - Lack of insurance and/or underinsurance
  - Weight stigma by clinicians
  - Lack of culturally competent care
  - Lack of access to newer therapies

# GLP-1 Therapy

- Demonstrates promise in weight loss reduction with up to 15% weight reduction
- Cost and access pose challenges (often not covered by insurances or require complicated prior authorization process)
  - Direct to consumer marketing has increased visibility of these products
  - Shortages due to high demand remain
- Would likely cost Medicare an additional \$35 billion from 2026 to 2034 to cover anti-obesity medications with minimal savings due to a reduction in obesity-related comorbidities
- Collaboration with community partners to address social determinants of health are key target areas to increase uptake, decrease obesity, and realize full potential of GLP-1 therapies

# Forecast Response

1

The percentage of adults with obesity in the US will decrease.



● VERY UNLIKELY ● SOMEWHAT UNLIKELY ● SOMEWHAT LIKELY ● VERY LIKELY

# Forecast Response

2

Medicare will cover the cost of medications used for the treatment of obesity.



● VERY UNLIKELY ● SOMEWHAT UNLIKELY ● SOMEWHAT LIKELY ● VERY LIKELY

# ***Theme 4:*** **Forecast** **Question 3**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**The growth of theranostics will expand beyond oncology indications, driving broader and more common use across health systems.**

- A. Very Likely
- B. Somewhat Likely
- C. Somewhat Unlikely
- D. Very Unlikely

# Radiopharmaceutical Expansion through Theranostics

- Theranostics involves the integration of diagnosis and treatment strategies into one therapeutic approach for treating cancer with radiopharmaceuticals
  - Can precisely deliver vector-mediated radionuclides to tumor DNA and allow confirmation of delivery through imaging
  - Currently second- or third-line strategy

# Forecast Response

3

The growth of theranostics will expand beyond oncology indications, driving broader and more common use across health systems.

2%

22%

61%

15%



VERY UNLIKELY



SOMEWHAT UNLIKELY



SOMEWHAT LIKELY



VERY LIKELY

# ***Theme 4:*** **Forecast** **Question 4**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**Theranostics will require enhanced training of the health-system pharmacy workforce on regulatory issues, handling, administration and monitoring.**

- A. Very Likely
- B. Somewhat Likely
- C. Somewhat Unlikely
- D. Very Unlikely

# Potential Rapid Acceleration

- Respondents highlight a mismatch between the rapid acceleration of the theranostics pipeline and the available clinical expertise (+/- health system capacity)
- Use within a health system will require evaluation of personnel, infrastructure, staff knowledge, and qualifications and training program investments to ensure safe and effective radiopharmaceutical care delivery
- Other unique considerations include prevention and management strategies for radiodiagnostic emergencies, assessments of receiving areas, radioactive waste storage, and enhanced multidisciplinary partnerships

# Forecast Response

4

Theranostics will require enhanced training of the health-system pharmacy workforce on regulatory issues, handling, administration and monitoring.



● VERY UNLIKELY   ● SOMEWHAT UNLIKELY   ● SOMEWHAT LIKELY   ● VERY LIKELY

# ***Theme 4:*** **Forecast** **Question 6**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**State health professions' licensing boards will require education for providers on recognition and care of patients who present with previously eliminated vaccine-preventable diseases.**

- A. Very Likely
- B. Somewhat Likely
- C. Somewhat Unlikely
- D. Very Unlikely

# Vaccine Preventable Diseases

- Despite successes of modern medicine, smallpox remains the only pathogen fully eradicated
- There has been a resurgence of pathogens previously considered nearly eliminated (polio and measles)
  - System mistrust and vaccine hesitancy in the setting of misinformation
- Response rates are encouraging and likely reflect preparations and infrastructure created by the COVID-19 pandemic
- Vaccine programs are essential to increasing immunization rates and prevention of disease outbreaks
- Recent changes in federal vaccine advisory decision making will demand reallocation of these responsibilities to those in non-public health organizations

# Forecast Response

6

State health professions' licensing boards will require education for providers on recognition and care of patients who present with previously eliminated vaccine-preventable diseases.



● VERY UNLIKELY ● SOMEWHAT UNLIKELY ● SOMEWHAT LIKELY ● VERY LIKELY

# Strategic Recommendations for Practice Leaders

1. Health systems must evaluate and develop clinical expertise, training, and infrastructure to provide theranostics and support access expansion across new service lines.
2. Pharmacy leaders should lead a multi-disciplinary effort to ensure robust clinical treatment pathways and medication access services for patients for whom advanced therapeutics like GLP-1 RAs are clinically indicated.
3. Health-system leaders must strengthen and develop new partnerships with nonpublic health organizations to ensure the ability to detect, contain, and communicate emerging vaccine-preventable threats to public health to supplement information from government agencies.
4. Health-system leaders must partner with non- public health organizations to develop vaccine promotion programs, share recommended vaccination schedules, and transparently publish best practices.
5. Health-system leaders must mandate refresher training and preparedness drills for all healthcare workers to ensure readiness to rapidly respond to outbreaks from the re-emergence of vaccine-preventable diseases.





# Theme 5:

*Environmental Sustainability and Resilience – A Strategic Imperative for Pharmacy Leaders*

# Environmental Sustainability and Resilience Overview

- Climate-related environmental hazards - extreme heat, wildfires, floods, and hurricanes - continue to harm public health, strain supply chains, and change healthcare delivery.
- The healthcare industry also contributes to these hazards through resource-intensive processes.
- Health systems must promote resilience to environmental hazards and reduce greenhouse gas emissions through:
  - Strengthening and incentivizing infrastructure
    - Workforce capacity and training
    - Climate-smart service delivery

# ***Theme 5:*** **Forecast** **Question 1**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**25% of health systems will experience a major weather-related infrastructure disruption that will impact the ability to deliver critical healthcare services.**

- A. Very Likely
- B. Somewhat Likely
- C. Somewhat Unlikely
- D. Very Unlikely

# Weather-Related Infrastructure Risks

- 73% of panelists believe major weather-related disruptions are somewhat likely, however only 66% report their health system is prepared for such events.
- Risks include:
  - Power grid failures
  - Facility damage
  - Staff displacement
  - Increased patient demand
    - Extreme heat now causes the most weather-related deaths in the U.S. and is worsening

# Forecast Response

1

Over 25% of health systems will experience a major weather-related infrastructure disruption (e.g., power, water, transportation) that will impact the ability to deliver critical healthcare services.



● VERY UNLIKELY   ● SOMEWHAT UNLIKELY   ● SOMEWHAT LIKELY   ● VERY LIKELY

# ***Theme 5:*** **Forecast** **Question 2**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**As a priority, health system pharmacies will purchase medications with less environmental impact.**

- A. Very Likely
- B. Somewhat Likely
- C. Somewhat Unlikely
- D. Very Unlikely

# Forecast Response

2

As a priority, health-system pharmacies will purchase medications with less environmental impact (e.g., more efficient packaging, inhaler devices with a lower carbon footprint).



● VERY UNLIKELY ● SOMEWHAT UNLIKELY ● SOMEWHAT LIKELY ● VERY LIKELY

# ***Theme 5:*** **Forecast** **Question 3**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**75% of health system will prioritize decarbonization in strategic planning.**

- A. Very Likely
- B. Somewhat Likely
- C. Somewhat Unlikely
- D. Very Unlikely

# Forecast Response

3

75% of health systems will prioritize decarbonization in strategic planning.



● VERY UNLIKELY   ● SOMEWHAT UNLIKELY   ● SOMEWHAT LIKELY   ● VERY LIKELY

# Weather-Related Infrastructure Risks

- Only 21% of respondents believe health systems will prioritize decarbonization in the next 5 years, despite environmental disasters increasing
- Increasing barriers exist in prioritization
  - Supply chain instability
  - Lack of incentives and governance structures
  - Limited awareness or measurement of emissions (i.e., no baseline)

# ***Theme 5:*** **Forecast** **Question 5**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**Health systems will reduce reliance on disposable and single-use supplies by incorporating waste minimization in purchasing decisions (e.g., low-waste pharmaceutical packaging).**

- A. Very Likely
- B. Somewhat Likely
- C. Somewhat Unlikely
- D. Very Unlikely

# Forecast Response

5

Health systems will reduce reliance on disposable and single-use supplies by incorporating waste minimization in purchasing decisions (e.g., food waste reduction strategies, low-waste pharmaceutical packaging).



● VERY UNLIKELY   ● SOMEWHAT UNLIKELY   ● SOMEWHAT LIKELY   ● VERY LIKELY

# ***Theme 5:*** **Forecast** **Question 6**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**Health systems will see a positive return on their investment by implementing transportation efficiency programs (e.g., electric vehicles, virtual visits).**

- A. Very Likely
- B. Somewhat Likely
- C. Somewhat Unlikely
- D. Very Unlikely

# Forecast Response

6

Health systems will see a positive return on their investment by implementing transportation efficiency programs (e.g., electric vehicles, virtual visits).



● VERY UNLIKELY ● SOMEWHAT UNLIKELY ● SOMEWHAT LIKELY ● VERY LIKELY

# Strategic Recommendations for Practice Leaders

1. Pharmacy leaders should assess environmental impacts of medication use and pharmacy operations by establishing systems that measure and report GEGEs to support decarbonization goals.
2. Health systems should define governance structures and identify pharmacy champions to lead decarbonization and resilience efforts and ensure pharmacy representation in disaster planning and sustainability workgroups.
3. Health systems and pharmacy leaders should integrate environmental risk assessments and sustainability goals into strategic planning across procurement, operations, staffing, disaster preparedness, and patient care and should identify alignment with other priorities to capture co-benefits.
4. Pharmacy leaders should incorporate resilience and environmental sustainability metrics (e.g., GHGE reductions) into core quality and safety initiatives, supporting adaptive approaches and continuous improvement.
5. Health systems should expand workforce capacity and readiness through support for training and credentialing related to resilience and sustainability.
6. Pharmacy leaders should support innovation and research to identify and implement effective sustainability strategies and demonstrate pharmacist expertise in decarbonization and resilience.





# Theme 6:

## *Transforming Safety*

# Evolving Approaches to Safety

- Healthcare is complicated, demanding new ideas to ensure the safety of patients and staff
- Despite improvements in medication safety, avoidable medication-related injuries remain
- The lasting impacts of a worldwide pandemic that disrupted safety are still felt today, including problems like job instability and exhaustion among healthcare workers
- Using new safety science and advanced technologies gives us fresh tools to improve safety practices in healthcare systems

# ***Theme 6:*** **Forecast** **Question 1**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**Health-system leaders will develop or expand skills and ability to apply adaptive approaches to quality and safety to make real-time adjustments to processes.**

- A. Very Likely
- B. Somewhat Likely
- C. Somewhat Unlikely
- D. Very Unlikely

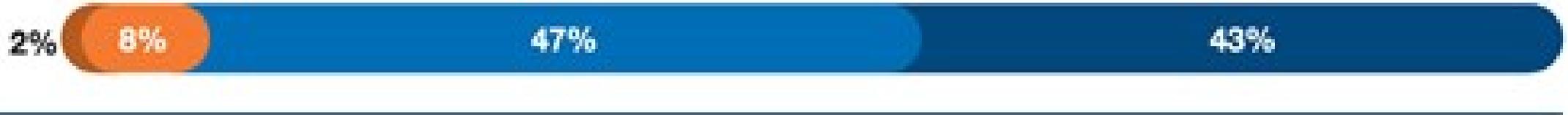
# Evolving Approaches to Safety

- High-risk or serious events often serve as the basis for new processes and rules aimed at reducing mistakes
- Despite improved safety, this approach requires learning from past errors rather than finding ways to learn from regular tasks before problems happen
- New methods that include proactive safety strategies in healthcare need to assist doctors and nurses in spotting and reducing risks before harm occurs

# Forecast Response

1

Health-system leaders will develop or expand skills and ability to apply adaptive approaches to quality and safety, including systems thinking, engaging front-line staff, and ability to make real-time adjustments to processes.



● VERY UNLIKELY   ● SOMEWHAT UNLIKELY   ● SOMEWHAT LIKELY   ● VERY LIKELY

# Evolving Approaches to Safety

- To improve safety, leaders should genuinely connect with the workers on the front lines
- This helps in understanding the challenges faced every day
  - An example includes conducting "walk-through talk-throughs," learning from what works well, and having safety meetings before issues arise
- To improve safety methods, health system and pharmacy leaders need to regularly check how they use quality and safety resources, including staff time

# ***Theme 6:*** **Forecast** **Question 6**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**The current practice of requiring double checks for high-risk medication dispensing and administration will be eliminated due to a lack of evidence supporting its value.**

- A. Very Likely
- B. Somewhat Likely
- C. Somewhat Unlikely
- D. Very Unlikely

# New Perspectives on Traditional Methods

- There may be new pressure to carefully evaluate how useful and reliable double checks are on high-risk medications
  - A systematic review found insufficient evidence that performing double-checks on high-risk medications resulted in a difference in medication errors or patient harm
  - Similarly, a review of double checks on pediatric medication administration was not associated with reduced errors or potential error severity
- Robust safety methods may include technology-assisted safety checks, such as barcode-assisted medication administration and infusion pump systems with built-in safety features

# Forecast Response

6

The current practice of requiring double checks for high-risk medication dispensing and administration will be eliminated due to a lack of evidence supporting its value.



● VERY UNLIKELY ● SOMEWHAT UNLIKELY ● SOMEWHAT LIKELY ● VERY LIKELY

# ***Theme 6:*** **Forecast** **Question 7**

How likely is it that the following will occur, by the year 2030, in the geographic region where you work?

**Healthcare quality and safety management will shift from reactive event tracking (e.g., medication errors) to proactive and predictive safety system design.**

- A. Very Likely
- B. Somewhat Likely
- C. Somewhat Unlikely
- D. Very Unlikely

# Passive vs. Active Med Safety Strategies

- Pharmacovigilance is shifting from passive reporting to active, predictive surveillance
  - Passive surveillance: voluntary reporting supports detection of rare and known events but risks underreporting
  - Active surveillance: automated, data-driven methods identify risks earlier and more comprehensively
- Active surveillance increasingly used by FDA, CDC, VA, and large health systems

# Passive vs. Active Med Safety Strategies

- Leaders recognize value in both approaches
- Voluntary reporting remains important, alongside automation and technology-assisted checks
- New, active medication safety strategies are likely to arise over time
- There may be an opportunity to reallocate resources toward proactive system design

# Forecast Response

7

Healthcare quality and safety management will shift from reactive event tracking (e.g., medication errors) to proactive and predictive safety system design.



● VERY UNLIKELY   ● SOMEWHAT UNLIKELY   ● SOMEWHAT LIKELY   ● VERY LIKELY

# Strategic Recommendations for Practice Leaders

1. Routinely evaluate how quality and safety resources, including staff time, are allocated and intentionally invest more time and effort in proactive and innovative safety strategies and functions.
2. Adopt new safety tools to enable learning and build adaptive capacity such as “walk-through talk-throughs,” learning from excellence.
3. Engage human factors engineers to optimize system safety, as their expertise in designing user-centered processes can reduce error, enhance workflow efficiency, and improve the usability of technology and environments, ultimately leading to safer, more resilient healthcare systems.
4. Critically assess the value and consistency of double-checking high-risk medications, especially considering technologies like barcode-assisted medication administration and infusion pump interoperability that offer built-in safety checks.
5. Regularly evaluate voluntary event reporting system to monitor, assess, and confirm that rare and new events are reported. Analyze how often voluntary event data prompts system changes to prevent similar adverse events.
6. Invest in active surveillance tools for real-time adverse event monitoring and develop predictive models to identify patients at risk for adverse events.



# Case Study Transition



pharmacists advancing healthcare™

- 30 minutes to work on assigned case and answer questions in a small group (4-8 people)
- 5 minutes per group to present the scenario and answer the questions from the case
- Each group should select:
  - A person to lead or facilitate discuss among the group
  - A person to record discussions/decisions made
  - A timekeeper to keep the group on task
  - One or two presenters

# Large Group Wrap-Up



pharmacists advancing healthcare™



# Conclusion

- The pharmacy forecast improves the effectiveness of leaders in hospital and health-system pharmacy practice
- The forecast allows for students or other pharmacy professionals to better understand the emerging trends and predicted challenges
- Pharmacists are positioned to improve access to care on multiple fronts associated with population health, technology and data, and virtual services

# Group Q&A

---