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HEALTH HORIZONS

INSTITUTE FOR THE FUTURE

As we look out toward 2025, we can see demographic patterns that are at once unprecedented and seemingly unsustainable. Numbers like a global population of 1.2 billion people over the age of 60 suggest a stark future in which many of our traditional health institutions are overwhelmed by a gap between capacity and demand. But these numbers conceal a wave of new adaptations by the entire population—adaptations to our rapidly changing economic, social, technological, and natural environments—that have the potential to transform the human experience of aging and how we pursue health, well-being, and joy in our lives.

In 2014, Institute for the Future’s Health Horizons program will embark on a year-long global exploration of the most novel and innovative efforts that will help us overcome this gap and create a sustainable and resilient landscape for aging.

For more than three decades, the Institute For The Future’s Health Horizons Program has been helping a vanguard of health and well-being organizations take the lead in remaking health. By identifying the intersections between large-scale forces and shifts in individual aspirations and needs around health, the program offers a platform for designing person-centered health strategies and initiatives in a world of rapid change.

- › **ANTICIPATE THE FUTURE** of health and well-being by tracking innovations in medical and information technologies, food and retail, health care, public health, biopharma, and consumer electronics
- › **IMMERSE YOURSELF** in the latest experiments and innovations in person-centered health and well-being through provocative foresight videos, and digital personas
- › **CONNECT TO A NETWORK** of practical visionaries already at work remaking health and well-being by participating in open exchanges
- › **MAP THE PATHWAYS** from present practice to future resilience
- › **DESIGN THE FUTURE TODAY** with toolkits for prototyping strategies and testing them against future scenarios

2014 HEALTH HORIZONS RESEARCH AGENDA

In one short decade, the scale of the coming challenges of age-related illnesses and demographic shifts threaten to upend the assumptions of people, families, and organizations around the world. And while this demographic shift is all but certain to take place, we face a widening cone of uncertainty about whether the whole paradigm of our institutional support of aging well can manage the speed and scale of these new demands. From growing demands on health care institutions to strains on family and informal caregivers, the gap between our existing capacities and emerging demands is widening.

Despite this incredible uncertainty, this gap creates an expanding field of options to reorganize our ideas, our practices, and our systems. It offers a window of opportunity to develop and scale a wave of innovative solutions—from fields as diverse as health, food, and consumer technology—to meet the new needs and demands of aging.

SPRING 2014 | REWRITING THE RULES OF AGING: FORECAST MAP AND CONFERENCE

To take advantage of this window of opportunity, we need to do more than understand the demographic transition in numbers. We will need to sense the early signals of innovation that point to ways humanity will rewrite the rules of aging.

We will explore innovations emerging from our formal institutions to organizations and communities outside the health system and track down the most novel efforts—the weak signals of small-scale efforts that point to entirely new approaches and systems—that have the potential to scale over the next decade and transform how we approach aging. We'll look beyond incremental change to identify the inventive approaches and outlier ideas that answer questions like:

- › How will people push the boundaries of the biological, social, and cultural experience of aging to radically improve the human experience?
- › How will different people balance work, retirement, and family life to redefine their aspirations and expectations as they age?
- › How will individuals and families take advantage of technological advances to transform approaches to caregiving, self-care and community health?
- › How are leading-edge medical practices collaborating with peer-to-peer networks to expand into communities, reach aging patients in new ways, and ultimately enhance medical outcomes?



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We won't just map new efforts to address these kinds of questions, but will work with and learn from the leading edge innovators developing these answers at our Spring 2014 Conference. During our two-day event, we'll meet the visionaries who are driving these new approaches to aging, share our research on how their efforts can intersect, spread and scale, and work collaboratively to explore how these new efforts will not only address the gaps between our capacities and health demands, but also highlight entirely new ways to age well.

FALL 2014 | REDEFINING AND REINVENTING AGING

This reinvention of aging isn't just coming from institutions. In a world where traditional ways of doing things are breaking down, individuals, families, and communities are likewise breaking out of traditional patterns, redefining expectations and actively creating new practices around aging.

To support people aging and even dying well, it will be critical to understand the large-scale changes of aging through a human-centered lens. Through deep ethnographic exploration with individuals, families and community groups, we'll explore how seniors' aspirations, values, fears, and decision-making will evolve over the next decade. To bring these future needs to life, we'll develop a set of personas that will immerse you in the lives of individuals as they age over the next decade. Designed to provoke practical insight, these personas will offer a tool to explore how to innovate to enhance person-centered approaches to health and well-being in aging.

We'll reconvene in the fall for a research immersion and working session focused on inventing human-centered health innovations. During this session, we will meet the personas and begin exploring and experiencing some of the future possibilities today. With a focus on connecting these future possibilities to the present day, we will facilitate a series of exercises to develop robust insights into different personalized approaches to health and well-being.

2014 HEALTH HORIZONS RESEARCH AGENDA

"Aging today has become an improvisational art form calling for imagination and willingness to learn."
— Mary Catherine Bateson, *Composing a Further Life*

2014 PROGRAM DELIVERABLES

Health Horizons members will gain practical insight into how new approaches to health, food, technology, work and retirement will transform aging through the following program deliverables:

- › **MAP OF THE DECADE** will forecast the new kinds of initiatives and innovations that will emerge to meet new demands around health, caregiving, food, and technology as people age.
- › **SPRING CONFERENCE** will connect you with leading innovators from around the world as we collaboratively explore new approaches to meet the demands of aging.
- › **PERSONA INSIGHT TOOL** will introduce you to the values, practices and needs of current and future seniors to focus your long-range strategic initiatives with a person-centered approach.
- › **FALL EXCHANGE AND MAKE THE FUTURE EVENT** will guide you through a series of exercises to begin developing prototypes to jumpstart your action steps today.
- › **PRIVATE RESEARCH ACCESS** Members' only access to past Health Horizons content and reports.

CUSTOM WORK

IFTF and the Health Horizons team offer custom experiences that can be tailored to fit the needs of your organization and add value to your strategic planning, new product development, capacity-building, and innovation efforts. Examples include:

- › **CUSTOM RESEARCH: TOPICAL FORESIGHT** | IFTF frequently develops original research pieces including white papers, environmental scans, and custom maps of the decade to offer strategic foresight to an area of critical importance. As part of this process, we work with your internal teams to develop practical insights into the game-changing opportunities, potential threats, and strategic implications of this research.
 - alternative approaches to intellectual property or alternative health care policies. For these scenarios, we can bring all of our creative media skills to bear, from digital video stories to custom artifacts of the future.
- › **STRATEGIC PLANNING: FORESIGHT-INSIGHT-ACTION** | Through our Foresight-Insight-Action workshops, we can assist your strategic objectives by bringing external foresight and alternative futures to a group, and then helping them uncover relevant insights for their organization or initiatives. By participating in this insight phase of the cycle, participants are better able to articulate and agree upon action steps—as the process moves from strategy to tactics.



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CUSTOM WORK (CONT.)

- **CUSTOM WORKSHOPS: CONTENT FACILITATION** | We bring foresight to the workshop setting and facilitate group processes that achieve your goals. We can design workshop agendas and lead groups to embed foresight into your decision-making styles.
- **PUBLIC EVENTS: FROM FORESIGHT TO PARTICIPATORY DISCUSSIONS** | IFTF can bring foresight to public discussions at the local, regional or national level. We can convene the right experts, provide the foresight frameworks, and get people talking about the best way forward. We have multiple processes and platforms to encourage constructive, participatory dialogue among multiple stakeholders.

We also offer custom presentations and workshops on a range of topics drawing from our Health Horizons research, including:

- **HEALTH AND ABUNDANT DATA** | For years, Health Horizons has been exploring the intersections of health and information technologies. With the ongoing, exponential increase in the amount of data in the world, our research dives into practical tools and new strategies to make this information relevant, personal and actionable.
- **HEALTH ENGAGEMENT** | As we look out to the next decade, a variety of technological and social forces will reshape who people trust for health advice and how they make decisions. Our research reveals the kinds of authorities that consumers will listen to, and engage with, when making health and well-being decisions.
- **BEHAVIOR CHANGE** | The greatest potential to encourage behavior change stems from marrying insights from the social sciences to technological and communication innovations. We have been uncovering the emerging theories of motivation and exploring the new kinds of innovations that will create new ways to target these motivations.
- **WORKPLACE WELL-BEING** | Meaningful approaches to workplace well-being need to grapple with simultaneous transformations in work practices and health practices. Drawing from our ongoing research, we share how these transformations will intersect over the next decade and explore what these will mean for a healthier and happier workforce.
- **SUSTAINABILITY AND HEALTH** | The convergence of health and sustainability is transforming how people relate to their homes, offices, cities and environments. Our work here explores how new relationships with the environment are creating opportunities to address health through the spaces we inhabit.
- **WELL-BEING** | This research moves beyond purely pathological definitions of health to understand what health and illness mean in a broader context of well-being. With an emphasis on understanding connections between subjective experience and medical outcomes, this research explores the broad range of factors that make us both healthy and well.



HEALTH HORIZONS TEAM

Bradley Kreit, Program Co-Director



Brad is co-director of the Health Horizons and Global Food Outlook programs. Since joining IFTF, Brad's research has focused on applying a human-centered lens to make sense of the effects of large-scale change in health, food and well-being. From this perspective, he has led research into how shifts within a broad range of subjects, including emerging technologies, genetics, abundant data, neuroscience, and global water will impact the future of human experience. A frequent speaker and meeting facilitator, Brad particularly enjoys working with groups to use foresight to spark fresh thinking and inspire innovation.

Prior to joining IFTF in 2009, Brad worked in a variety of roles in and around health care, including as a writer for the Advisory Board Company and a freelance health and business reporter. Brad holds a BA in history from Connecticut College and an MA in anthropology from UC San Diego.

Miriam Lueck Avery, Program Co-Director



As an anthropologist, Miriam has an overarching interest in how individual and collective choices make the future. Her passion as a forecaster is envisioning futures that inspire people to navigate complex transitions, make resilient communities, and create circumstances in which

we all can thrive. She began interning with IFTF in 2003, joined the research staff full time in 2007, and served as a research director working primarily with the Health Horizons, Global Food Outlook, and Ten-Year Forecast programs before becoming co-director of the Health Horizons and Global Food Outlook programs in 2012.

As co-director of the Health Horizons and Global Food Outlook programs, Miriam identifies and evaluates emerging trends and innovations in health and well-being, health care, food, nutrition, and sustainability. She presents forecasts in strategic roadmaps, conferences, panel discussions, and keynote presentations. She also designs group processes that facilitate anticipating the future and making strategic decisions in the present. Her areas of research interest include well-being futures, food futures, human futures, retail and retail alternatives, and participatory foresight and youth leadership. She holds a BA in anthropology from UC Berkeley.

Richard Adler, Distinguished Fellow



Richard spent a decade on the staff at IFTF, where he focused on exploring the potential of online communications for individuals and organizations. His 1980s research anticipated many of the social and economic impacts of the Internet once it became a true mass medium.

After leaving IFTF in 1990, Richard pursued an interest in the intersection of aging and technology. He joined the staff of SeniorNet, where he built a national network of more than 200 Learning Centers that offered computer classes specifically designed for older adults.

In 2006, Richard returned to IFTF as a research associate to co-lead a multi-client research program called Baby Boomers: The Next 20 Years that was based on the premise that the aging of our population is not just an economic burden but also provides

exciting opportunities for innovation. Recently, he was named an IFTF Distinguished Fellow in recognition of his contributions to the Institute.

Richard holds a BA from Harvard, an MA from the University of California, Berkeley, and an MBA from the McLaren School of Business at the USF. He serves on the boards of several local and national organizations.

Mary Cain, Research Affiliate



Mary Cain's relationship with IFTF goes back more than a decade; she was a research director for Health Horizons from 1996 to 2003. She has spent the past 20 years either in strategic planning or "in the trenches" of health and wellness services organizations. Mary led product management at LifeMasters Supported SelfCare and StayWell Health Management, where she was responsible for the development and management of products and services across the health continuum. At LifeMasters, Mary conceived, designed and implemented an award-winning health change coaching program. She is passionate about creating opportunities to increase individual activation and for activated patients to engage in self care.

Mary holds a Masters of Public Health in Health Policy and Administration with a focus in Aging from UC Berkeley. She has been a member of Care Continuum Alliance's Transitions of Care Workgroup and the Markle Foundation's Connected for Health Workgroup.

Rachel Maguire, Research Director



As a principal health care researcher for IFTF's Health Horizons program, Rachel combines a deep understanding of health finance with an interest in the impact of new media and mobile personal technologies on health practices. She shares her perspective on the future of health, health care, and well-being as the author or co-author of numerous IFTF reports, as a speaker at health care conferences, and as a meeting facilitator at client workshops and strategic retreats. She serves on the Henry Ford Hospital and Medical Group National Advisory Council.

Rachel's research efforts center on the intersection of health care delivery systems and mobile technologies. She studies how smart, mobile, and increasingly less expensive technologies are transforming self-care and beginning to disrupt clinical care. She has been a contributor to the Health Horizons program's annual forecast perspectives, map of the decade, and annual retreats since 2006. Rachel holds a BA in politics from Oberlin College and an MPAff (master of public affairs) from the University of Texas at Austin.

Kathi Vian, PhD, Director, Ten-Year Forecast Program



Kathi leads IFTF's Ten-Year Forecast Program. For nearly a decade, she has been looking at the global future through three intersecting lenses: the evolution of smart networking and social media, the innovations in open economies, and the extreme environments in which human communities will evolve over the coming century. Kathi has a long

history of applying new methodologies and frameworks to thinking about cutting-edge issues in technology and society and their impacts on individuals, communities, organizations, and the world at large. She is a visual thinker and author of IFTF's annual Map of the Decade.

Kathi's current research focus is the urgent futures that will challenge us in the coming decade as we transition from a world organized at the scale of large institutions to a world organized by distributed networks of social, political, and economic value. She is particularly interested in the tools and social innovations that will reshape the way people organize to get things done in the face of extreme global inequities, an uncertain climate, a transformation of the nature of work, and a basic redefinition of our human biology. Kathi began working with IFTF in 1974 and holds a BA in languages and linguistics from Ohio State University and a PhD in communications from Union Graduate School.

Ben Hamamoto, Research Manager



As research manager for the Health Horizons and Global Food Outlook programs, Ben uses insights from his background in journalism covering issues of race and inequality to explore how well-being is shaped by social and environmental contexts. He has researched the

future of food technology, environments that enhance well-being, and the design of healthy places, and he has an ongoing interest in narrative and health, the meaning of place, and equity and social justice. In addition to his work at IFTF, Ben contributes to the *Nichi Bei Weekly* and edits the National Japanese American Historical Society's official magazine, *Nikkei Heritage*.

Ben believes that short-term thinking is a major cause of today's social inequity and that foresight is critical to successful social change and effective governance. His upbringing in the diverse socioeconomic conditions of the San Francisco Bay Area inspired his interest in issues of race, class, and social justice. He spent half a decade covering these issues as a journalist at Youth Outlook, New American Media, and the *Nichi Bei Times* before coming to IFTF in 2011. Ben holds a BA in cinema from San Francisco State University.

Sarah Smith, Research Assistant



Upon finishing the 2012 IFTF summer internship, Sarah Smith became the newest member of the Health Horizons team. A recent graduate from Loyola University Chicago, with a concentration in International Studies and Visual Communication, Sarah is working at the

intersection of research and design to visualize new stories about health and well-being. She savors deep immersion into other cultures—seeking out the stories that will help advance cross-cultural empathy, understanding, and collaboration.

Prior to joining IFTF Sarah led a research-based design project with Chicago's Iraqi refugee population to create a book of Iraqi recipes and stories about hospitality that will inspire cultural exchange between newly arriving refugees and American volunteers. She has also designed campaign materials for Amnesty International where she helped to promote health as a human right. She is interested in the future of community engagement and how new technologies can connect and empower everyone as activists for personal and community health and well-being.

Adam Elmaghraby, Research Manager



With a background in business strategy and the design process, Adam describes himself as "a trained thinker, passionately dedicated to collaboration and the sharing of ideas." He joined IFTF in March 2013 as research manager for the Health Horizons program. In this role he uses design thinking in the application of ethnographic research and strategic foresight to assist in a deeper insight process. He also serves as co-curator of TEDxSFED.

Adam's research focuses on understanding the evolving global health economy and the future forces that will shape the health and health care industries over the next three to ten years. He has a special interest in how we age and what it means to be an elder in our society, as well as an interest in the future of the developing world. He previously worked as managing director of Talent Academy, a design school in Cairo, Egypt, during the Arab Spring and taught in the District of Columbia public schools and at Sidwell Friends School. Adam holds a BA in philosophy and a BS in pan-African studies from the University of Louisville and an MBA in design strategy from the California College of the Arts.

Neela Lazkani, Program Manager



As manager of the Health Horizons and Global Food Outlook programs, Neela facilitates the team's wide range of projects and priorities to keep the programs running smoothly. On top of managing day-to-day coordination and logistics, she collaborates with the programs' directors, and is involved in all aspects of planning and overseeing the programs' research, project deliverables, conferences, and budgets. As a mission controller, she oversees and mentors project management across the institute.

Neela's interest in health lies in promoting safe and healthy communities. Before IFTF, she worked on projects in this field at organizations such as Planned Parenthood, Good Samaritan Hospital, and Breathe California. She holds a BS in health science with a focus on community health promotion from San Jose State University.

Dawn Alva, Business Development Manager



Dawn Alva oversees client services for the Health Horizons program and across other projects at IFTF, contributing to the business relationship part of the equation. She began her technical sales career more than a decade ago after realizing her skills lie in building partnerships between organizations and their clients. She was intrigued by the topics IFTF covers because she believes in living life passionately. This view of life has taken her on many adventures, from starting a company in the dot-com era to dancing the tango in Buenos Aires. Recently, this passion has taken a more personal turn to focus on her new son.

Before joining IFTF, Dawn worked at International Data Corporation (IDC), a global provider of market intelligence. She graduated from Western Washington University with a BA in finance and economics.

PARTICIPANTS IN THE HEALTH HORIZONS PROGRAM

AARP	CareOregon	MultiCare Health Systems
ABInBev	CIGNA	NBTY
Alegent Creighton Health	Centers for Disease Control & Prevention	Procter & Gamble Company
American Heart Association	Humana	Sanitarium Health & Wellness
American Medical Association	Kaiser Permanente	Shell
Ascension Health		W.L. Gore & Associates

CONTACT INFORMATION

For more information about the Institute for the Future please visit our Web site at www.iftf.org or contact: Dawn Alva at 650-233-9585 or dalva@iftf.org

ABOUT HEALTH HORIZONS

No single organization can solve the complex challenges facing the world today, particularly in the fields of health and health care. At the Institute for the Future (IFF), we bring together a wide variety of stakeholders—from health care to food and retail—to work toward more resilient responses for the complex challenges facing global health. For more than 30 years IFTF's Health Horizons Program has brought futures thinking to the world of health and health care by looking for unexpected connections across this variety of stakeholders. Our research explores the social, scientific, economic and technological forces affecting health and grounds them with a deep understanding of the lives of individuals and families. By sensing how large-scale connections between large-scale change and individual lives, we help organizations develop strategic insights and long-range initiatives to transcend boundaries and create person-centered approaches to supporting health and well-being.

ABOUT THE INSTITUTE FOR THE FUTURE

The Institute for the Future is an independent, nonprofit strategic research group with over 40 years of forecasting experience. The core of our work is identifying emerging trends and discontinuities that will transform global society and the global marketplace. We provide our members with insights into business strategy, design process, innovation, and social dilemmas. Our research generates the foresight needed to create insights that lead to action. Our research spans a broad territory of deeply transformative trends, from health and health care to technology, the workplace, and human identity. The Institute for the Future is based in Palo Alto, CA.

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