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HEALTH HORIZONS

INSTITUTE FOR THE FUTURE

Over the next decade, the growing well-being economy will demand new roles and responsibilities, ultimately creating new authorities and decision-makers for health. Tools—ranging from algorithmic-based diagnostic tools to crowdsourcing—are enabling organizations to experiment with defining new models for improving health. Meanwhile, these tools are enabling individuals and communities to rethink their own responsibilities as patients, consumers, and citizens and reimagine how they relate to the broader health system.

This year's Health Horizons Program will map work in the well-being economy over the coming decades and identify these new authorities, emerging jobs, and shifting decisions of self-care.

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 the health economy. As health moves out of the clinical environment and into people's everyday lives, the program offers a platform for advancing your organization in a world of anytime, anyplace health.

Our research and forecasting networks can help your organization to:

- › **SENSE THE CHANGING LANDSCAPE** of well-being by tracking innovations in beauty, food, retail, bio-pharma, medical technologies, and consumer electronics
- › **IMMERSE YOURSELF** in the latest experiments and innovations in person-centered anytime, anyplace health through site visits, videos, and digital personas
- › **CONNECT TO A NETWORK** of health innovators, participating in open exchanges about new ideas
- › **MAP THE PATHWAYS** from present practice to future resilience
- › **BEGIN MAKING THE FUTURE TODAY** with toolkits for prototyping strategies and testing them against alternative scenarios

HEALTH HORIZONS 2013 RESEARCH AGENDA

As health has moved out of hospitals and doctor's offices into more diverse areas of our lives, we've witnessed a shift from treating patients to meeting consumer demands in a broader well-being economy. Over the next decade, the well-being economy will expand beyond the product lines and services we see today and create new jobs, skills and responsibilities.

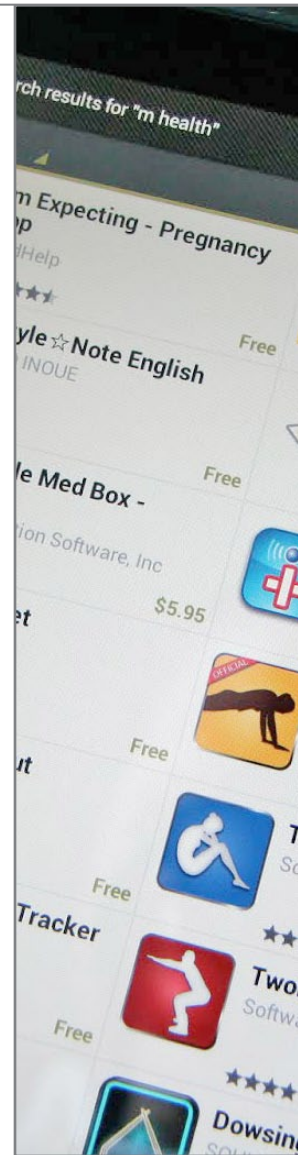
As this expansion of well-being work takes shape, the roles and responsibilities of patients, consumers, caregivers, and providers will be up for grabs, creating space for new health authorities to emerge and for players throughout the landscape to recreate the basic elements of work in a well-being economy.

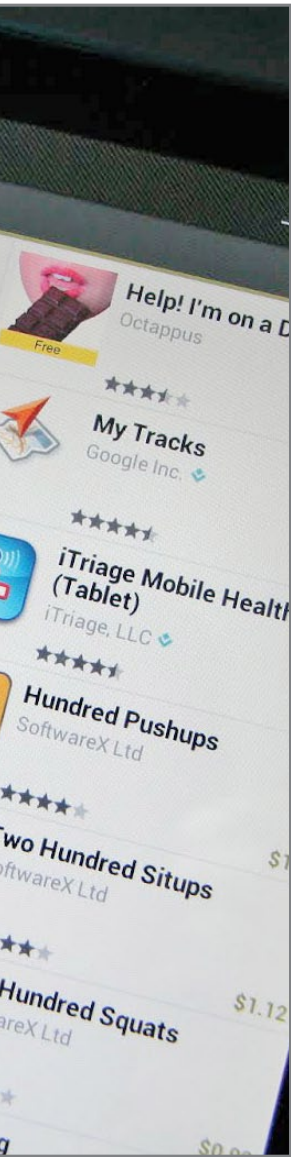
MAPPING WELL-BEING WORK: NEW JOBS, NEW DECISION MAKERS, NEW AUTHORITIES

Signals are emerging from across the health and well-being landscape that point toward new kinds of work in a well-being economy. Individuals and care providers alike are moving into increasingly data-driven roles—relying on each other, and on algorithms, to distribute work and information needs. New roles, such as health coaches, have been central to some of the most innovative efforts to manage chronic illnesses, enabling one New Jersey clinic to lower health emergencies by 40 percent. And the lines between formal and informal work are increasingly blurring—even beyond the uncompensated caregiving that AARP values at over \$500 billion annually in the US alone. Initiatives—Genomera, for instance, which enable patient communities to self-organize clinical trials, point toward a future where organized informal efforts increasingly shape science, R&D, and the well-being landscape.

In 2013, IFTF's Health Horizons Program will map how these formal and informal efforts will converge to meet the demands of a well-being economy. Along the way, we'll ask questions such as:

- › How will the familiar roles of patient, consumer, caregiver, retailer, and provider be transformed, and what new roles will emerge?
- › Who will be the new authorities and decision makers stewarding knowledge and resources for supporting health and well-being?
- › What kinds of health and well-being work will be formalized, and what kinds of work will people and communities do on their own?
- › How will the changing world of work impact the institutions and business models of health and well-being organizations?





The program year is structured around a set of deliverables and interactions designed to stretch your thinking about new kinds of health work—and ground this with insights you can begin to put to use in your organization today.

FORESIGHT: MAPPING NEW ROLES, RESPONSIBILITIES AND AUTHORITIES

Health Horizons will create a map of the decade exploring the new formal and informal roles, responsibilities and kinds of work that will emerge to enhance person-centered well-being over the next decade. This at-a-glance view will forecast how formal and informal work in health will converge over the next decade and reshape traditional roles, such as those of patients, consumers and care providers—and create new kinds of decision-makers in health and well-being. As part of this process, we'll develop a set of companion perspectives that take a deep dive into the drivers, signals and implications of each forecast.

INSIGHT: COLLABORATIVELY GENERATING IMPLICATIONS

We will debut our map of the decade at our Annual Conference at Cavallo Point in Sausalito, California in June 2013. IFTF researchers and external experts will present our foresight work and explore its implications over the course of two days. We'll also engage you and your team in a series of group processes to develop insights into how these forecasts will inform our responses to the next decade of health and well-being work.

ACTION: STRATEGIC WORKSHOP

Health Horizons will visit your organization in the fall of 2013, to facilitate private, half-day workshops with you and your team. With a deeper focus on organizational insights and potential action steps, these workshops will help jump-start your efforts to take action today to develop a more robust set of insights and begin to embed these insights into your ongoing work.



HEALTH HORIZONS 2013 PROGRAM DELIVERABLES

MAP OF THE DECADE

A visually engaging map of the new jobs, decision-makers and skills that will emerge to meet the demands of a global well-being economy.

FORECAST PERSPECTIVES

Deeper dives into each of the forecasts from the map will expand on their drivers and implications.

CUSTOM WORK

IFTF and the Health Horizons team offer custom experiences of the Foresight to Insight to Action process. This work 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 MAP OF THE DECADE:** Working together with your internal teams, we develop a map that serves as a basis for identifying core competencies, strategic advantages, and potential new opportunities for your organization.
- › **CUSTOM FORECAST MEMO:** We identify five key issues for your leadership group to discuss and use to develop strategies for the next year, considering the trends of the next three to five years, and we will present these forecasts to your leadership team in an executive workshop and in a written memo.
- › **STRATEGIC OPPORTUNITY MAPPING:** We work together with you to produce a graphic map of the big-market opportunity areas for your company, by combining your internal perceptions of capabilities, positional strengths, and market directions with our foresights to identify potential new markets, products, or services, and outline a plan for next steps.
- › **IMMERSIVE LEARNING EXPERIENCES:** We believe individuals develop tacit insights into complex problems and emerging phenomena by fully engaging in immersive learning experiences that include both content and context. Drawing on our extensive network of leading-edge thinkers and innovators, our immersive experiences include expert workshops and in-field experiences with startups, university labs, and research facilities.

ANNUAL CONFERENCE AND RESEARCH IMMERSION

A face-to-face retreat will connect you with IFTF researchers and external experts to provoke insights around this new landscape of well-being work.

PRIVATE RESEARCH ACCESS

A web portal offers members-only access to past Health Horizons content and reports.





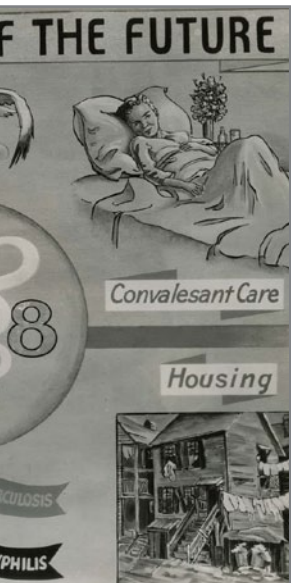
OTHER CUSTOM RESEARCH

We frequently work together with clients to produce other customized research to meet their needs.

In addition, we encourage our members to work with our Strategic Action Toolkit, which was a Health and Health Care 2020 deliverable in 2009. The Toolkit provides a set of Foresight to Insight to Action workshop templates that can be used to facilitate your own meetings. Health Horizons researchers can also work with you to develop custom-designed workshops.

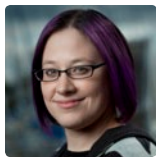
We also offer custom presentations and workshops on a range of topics, including:

- › INFORMATION ECOSYSTEMS OF WELL-BEING
- › ECOSYSTEMS OF WELL-BEING IN CITIES
- › SCIENCE, TECHNOLOGY, AND WELL-BEING
- › HEALTH AND HEALTH CARE 2020: SIGNALS AND FORECASTS
- › THE GLOBAL HEALTH ECONOMY
- › THE DO-IT-YOURSELF HEALTH CONSUMER: BIOCITIZENSHIP, SOCIAL MEDIA, AND PARTICIPATORY CULTURE
- › ANYTIME, ANYPLACE HEALTH—MOBILE HEALTH
- › INNOVATION AND OPEN HEALTH
- › SUSTAINABILITY AND GREEN HEALTH
- › FUTURE OF FOOD AND NUTRITION
- › HEALTH AND WELLNESS IN RETAIL



HEALTH HORIZONS TEAM

Miriam Lueck Avery, Program Co-Director

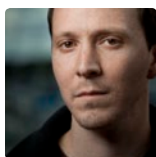


As an anthropologist, Miriam has an overarching interest in how individual and collective choices make the future. Her passion as a forecaster is envisioning futures that inspire people to navigate complex transitions, make resilient communities, and create circumstances in which we all can thrive.

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.

Bradley Kreit, Program Co-Director



Brad's research since joining IFTF in 2009 has built on his background in anthropology and history by exploring how everyday challenges, decisions, and contexts shape long-term futures—both in individual lives and at larger scales. As co-director of the Health Horizons and Global Food Outlook programs, his interests lie in considering the different

strategies and approaches people are using to navigate an increasingly complex web of choices. He frequently speaks at and facilitates meetings with health system, food, and consumer goods companies and regularly blogs at IFTF's The Future Now site.

Brad previously served as research manager and then research director for the Health Horizons and Global Food Outlook programs. As a researcher, his focus has been issues involving food, health, and biological identity. He has written on how emerging life sciences and technologies are reshaping our understandings of illness, identity, and well-being, and how individuals are creating new ways of managing their health and health care. Before joining IFTF, Brad wrote about breakthroughs in medicine for the Advisory Board Company in Washington DC. Brad holds a BA in history from Connecticut College and an MA in anthropology from UC San Diego.

Rachel Maguire, Research Director



Rachel is a research director in the Health Horizons Program. Her research interests include migration and health, the global trade of health services, the global portability of health and pension benefits, and the international movement of health professionals.

Since joining IFTF, Rachel has applied trends in new media and mobile technologies to her health systems expertise to study how personal technologies are informing health care practices and delivering care. Much of her technology research has focused on mobile technologies and access to digital content in Latin America. Rachel has written on standardizing education and training for international health professionals, the role of telehealth in facilitating service delivery across borders in the European Union, the increasing opportunities for Mexican health professionals to work in the United States, and service delivery schemes and financing for U.S. citizens living in Mexico.

She has a BA in politics and international studies from Oberlin College and an MPA from the University of Texas at Austin.

Rod Falcon, Program Director, Technology Horizons



Rod currently leads IFTF's Technology Horizons team. With a deep background in public health policy, he has served in several different capacities at IFTF since 1995, including leading the Global Food Outlook and Health Horizons programs and directing research for the Technology Horizons Program. In the course of his work, Rod speaks to

executive audiences and helps them find innovative strategies for participating in the global economy. Rod's research focus areas have included personal health technologies, communication and messaging practices in the workplace and home, social networks and abundant connectivity, and health-aware environments.

Born in Oakland, California, in a time and place of great social change, Rod attended nearby UC Berkeley to better understand what was happening. There he earned a BA in American history and a master's of public policy. After working one summer enforcing the Voting Rights Act for the Justice Department, Rod realized that public policy was not as future oriented as it might be and was inspired to do something about it. He came to IFTF to forecast the future of the California health care safety net and ended up staying on.

Mike Liebhold, Distinguished Fellow



Mike Liebhold is an IFTF distinguished fellow focusing on the mobile and abundant computation, immersive media, and geospatial web foundations for context-aware and ubiquitous computing. He provided the technical foundations for Health Horizons research projects on health-aware environments and mobile health, and he co-authored

the Global Health Mapping report. Mike is a frequent speaker, most recently at an NIH conference on infrastructures for behavioral health, and has authored a number of papers, including "Data Management in the World-Wide Sensor Web," for the *IEEE Pervasive Computing*.

Previously, Mike led research on semantic systems for MDconsult.com, a search service that provides physicians with integrated search of clinical information from medical publishers. He was also a visiting researcher at Intel Labs, working on a pattern language based on semantic web frameworks for ubiquitous computing. He has held the positions of senior consulting architect at Netscape Communications, vice president and chief technology officer at Times Mirror Publishing, and senior scientist at Apple Computer. Mike also served as principal technology policy adviser to Apple chairman John Sculley.

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. This year, 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.

Wil Yu, Advisor



Wil Yu has spent most of his career at the intersection of healthcare technology, policy, and finance. He's a passionate supporter of innovative work that improves care delivery and enhances people's well-being. Leveraging his expert knowledge of policy and technological change, Wil helps people create strategies for navigating new healthcare markets, increasing patient engagement, and transforming care delivery systems.

At the U.S. Department of Health and Human Services, Wil led nationwide efforts to facilitate the implementation of HITECH and Affordable Care Act within the private sector and, at the Office of the National Coordinator for Health IT (ONC), he helped fund breakthrough developments in health information technology and the achievement of Meaningful Use. Wil also served as a Senior Advisor at the CMS Innovation Center (CMMI), promoting engagements at the intersection of technology, care delivery, and reimbursement innovation, especially Accountable Care Organizations. In collaboration with the White House Startup America initiative, he promoted investments in health information technology infrastructure amongst early stage investors.

Recently, Wil founded a non-profit foundation dedicated to supporting healthcare innovation adoption and diffusion efforts. He is also an editor for a new academic journal focused on care delivery science and technology and serves part-time as an advisor to the San Francisco Mayor's Office of Innovation.

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.

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.

Ben Hamamoto, Research Manager



Ben Hamamoto's upbringing in the diverse socioeconomic conditions of the San Francisco Bay Area inspired his lifelong 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 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. He has researched and written for the Health Horizons and Global Food Outlook programs. In addition to his work at IFTF, he contributes to the *Nichi Bei Weekly* and edits the National Japanese American Historical Society's official magazine, *Nikkei Heritage*.

Neela Nuristani, 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 the programs' conferences, research, and project deliverables.

Neela's interest in health lies in her commitment to helping others by providing health and wellness information and assistance. Before IFTF, she worked on these issues 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.

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.



PARTICIPANTS IN THE HEALTH HORIZONS PROGRAM

AB InBev	Ascension Health	Humana
Alegent Health	BBVA	Intuit
American Heart Association	Campbell Soup Company	Kaiser Permanente
American Medical Association	Centers for Disease Control & Prevention	MultiCare Health Systems
Amway Corporation	Endo	The Hershey Company

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 institution 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 believe that a wide variety of stakeholders can be brought together to work toward more resilient solutions 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. Our research has examined how health and well-being change and expand over time, across consumer electronics, health information technology, food manufacturing, consumer packaged goods, social media, and the retail experience. Through years of engaging experts in our Foresight to Insight to Action processes, we have intentionally built a network of future thinkers that reach far beyond the traditional health and health care industry. We believe that by bringing people, innovative ideas, and futures thinking together you can spark new insight into the challenges facing global health and contribute to positive change..

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.

Cover image left: Flickr user: Gates Foundation

