The Future Mental Health Care Landscape & Its Likely Effect On Veterans & Families

Monica E. Oss, Chief Executive Officer, OPEN MINDS
“Times and conditions change so rapidly that we must keep our aim constantly focused on the future.”

Walt Disney
“The Future” Of Mental Health Depends On A Complex Set Of Factors

- Science
- Policy
- Demographics & Culture

Health (& Mental Health) Financing & Delivery System

Consumer Access To Mental Health Treatment
“The Future” Of Mental Health Depends On A Complex Set Of Factors

The future is embedded in the present. . . The seeds of almost everything that you will encounter in your lifetime already exist. . . .”

John Naisbitt
New developments in many scientific domains are reshaping mental health.
The Changing Science – Brain Science

• Epigenetics and the effects of trauma
• Brain stimulation therapies
• Nutritional psychiatry
• Virtual automated mental and cognition therapies
• Personalized medicine and ‘precision psychiatry’
The Changing Science – Augmented Intelligence

Diagnostics

Treatment matching
The Changing Science – Enhanced Telecommunications

New hybrid treatment systems emerging

- Telehealth
- Store-and-forward
- Text
- eCBT and automated therapies
- Smartphone-based platforms - real-time remote monitoring, consumer engagement, disease state management platforms
The Science To Service Gap In Health Care (& Mental Health Care)

15- to 20-year lag between the development of a practice and its use at the community level

Adoption Of New Technologies

New Treatment Services For Mental Health
Policy Sets

The Framework

For How Science Is Dispersed

Health care spending priorities and the looming deficit

Parity in benefits

“Protectionism” of stakeholder interests

Health care coverage

Health care coverage rules – preexisting conditions, limits, MLR
Demographics & Culture Shape The Consumer Landscape

- Age
- Stigma
- Incidence Of Trauma
- The Economy & Distribution Of Personal Income
The Drivers Of The Changing Service Delivery Landscape

- Mental Health & SDoH Drive Integrated & Coordinated Care
- Changing Reimbursement
- Service System Technology Adoption
- Changing Consumerism
- Service System Sustainability Drives Consolidation
The New Lexicon Of Health Care Consolidation

- Health plan merger
- Health plan backward integration
- Health system merger
- National health systems evolution
- Health systems acquiring specialty capabilities
- Specialty provider organization merger
- National ‘specialty’ delivery system evolution
- Health plans/pharma combinations
- Provider organizations/pharma combinations
- Pharma/tech combinations
- Tech-enabled service delivery

The ‘Melting’ Health Care Value Chain

- Geographic Service Boundaries
- “Specialty Care” Boundaries
- Health Plan Consolidation & Backward Integration
- Health System Functions – Payer, Provider, Vendor
- Consumer-Provider Interface
The Immediate Future Of Consumer Experience With Mental Health Treatment

- Access Determined By Health Coverage Type & Personal Income
- Limited Choice – Narrow Networks, Evidence-Based Practices
- Treatment Within Integrated Systems Of Care
- Tech-Enabled Treatment Is The Rule, Rather Than The Exception
The Advocacy

Issues Ahead

Coverage and its rules – universal or no? pre-existing conditions and coverage limitations? MLR rules?

The operational definition of value in mental health

Addressing the science-to-service lag

Data-informed decisionmaking by all stakeholders – unique challenges of politics/policy, health care professionals, and consumers
“We cannot solve our problems with the same thinking we used when we created them.”

Albert Einstein
Turning Market Intelligence Into Business Advantage

OPEN MINDS market intelligence and technical assistance helps over 550,000+ industry executives tackle business challenges, improve decision-making, and maximize organizational performance every day.