

News & Updates from the

US Cooperative for International Patient Programs (USCIPP)



October 11, 2023

Dear USCIPP Members:

This edition of USCIPP News & Updates contains the release of several work products (see “New Announcements” for further details). These work products include the following:

- The 2022 Year-End Report for the International Patient Experience Survey is now available to all participating organizations.
- The 2021-2022 USCIPP benchmarking results are now available to all organizations who completed the survey.

As we’re preparing for the NCHL All-Member Conference, please note the following logistics:

- This is a final call to register for the conference (click [here to register](#)).
- Register for the NCHL Gail L. Warden Leadership Excellence Award Celebration Event [here](#).
- If you are registered for the conference and interested in attending a local hospital tour, please contact uscipp@nchl.org to confirm your registration status. Registration for hospital tours must be received by Friday, October 13.
- The room block for the conference is sold out (please see “New Announcements” for accommodation recommendations).

USCIPP Team
National Center for Healthcare Leadership
uscipp@nchl.org

| New Announcements

▲ 2021-2022 Benchmarking Data is Now Available

The 2021-2022 USCIPP benchmarking data are now available to members who completed the benchmarking survey. The PDF report is available in the USCIPP benchmarking workspace on the member portal. The data are also live in the [Qlik Sense dashboard](#).

As a reminder, a session at the NCHL All-Member Conference will recap the 2021-2022 survey results and review year-over-year trends.

Please contact the USCIPP team with any questions.

▲ New Round of Listserv Questions due October 25 | August Results Now Available

Below is this month’s NEW round of listserv questions. Responses are due by October 25.

1. If the USCIPP team at NCHL were to offer future business development matchmaking that is 1) tailored to your institution's specific interests and 2) provided your organization with five to six 1:1 meetings with potential partner organizations abroad, what would you consider to be a fair price for this service? Would your answer change depending on whether the service was provided virtually or in person? How so?
2. How does your organization structure and calculate incentive compensation for employees who are responsible for international business development? Is this incentive structure the same or different for employees responsible for domestic business development?

RESPOND TO THIS MONTH'S ROUND OF LISTSERV QUESTIONS

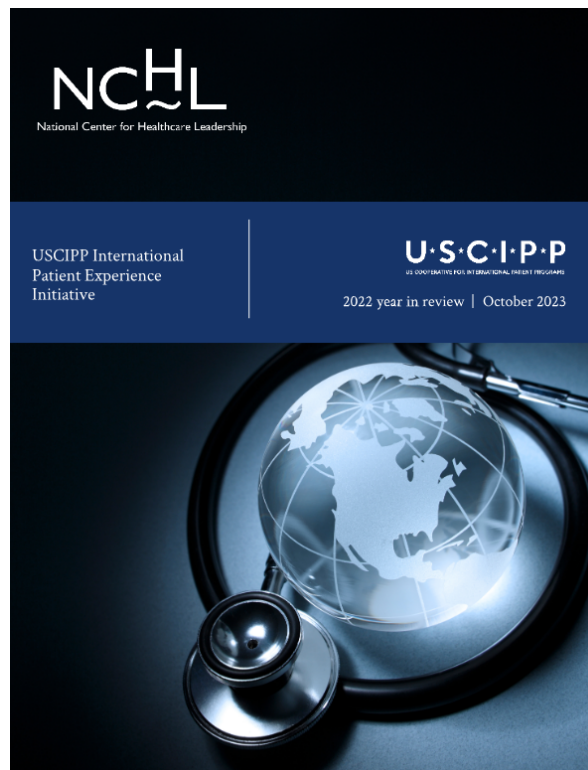
All USCIPP members are welcome to participate in the monthly USCIPP listserv questions activity. This activity allows members to anonymously ask questions to peers and receive blinded responses. The USCIPP team puts together a report based on the submissions to the questions and releases it to members in our [Listserv Archive](#).

Responses to the August listserv questions are now available in the Listserv Archive.

Please [click here](#) to submit a question to be asked in the next round of listserv questions.

▲ **2022 Year-End Report Now Available to Patient Experience Participants**

The 2022 Year-End Report is now available to all patient experience participants. The report can be found in the [patient experience workspace on the member portal](#).



▲ **iNaira Webinar - Infrastructure Collaboratively Designed With and Built for US AMCs With Destination Medicine Programs**

**USCIPP PROGRAM @ NCHL WEBINAR:
INFRASTRUCTURE COLLABORATIVELY
DESIGNED WITH AND BUILT FOR US AMCS
WITH DESTINATION MEDICINE PROGRAMS**

SPONSORED BY  Brought to you by  

TUESDAY, OCTOBER 17 | 2:00-3:00 PM CT

CRMs are proficient at managing business development sources, and EHRs are proficient at managing a patient's journey from admission to discharge. Unfortunately, neither is designed at its core to support US AMCs managing the workflow process and a potential patient's journey from initial inquiry through telemedicine, second opinions, financial assessment, physical travel, special requirements, and to treatment – not to mention ultimately co-managing through admission, discharge, and follow-up. Indeed, high-value destination medicine programs are often afforded the least technical infrastructure within health systems. To address this tech-marginalization, destination medicine programs have tried many solutions:

- Hiring more people
- Competing for IT resources from the broader system
- EMR workarounds
- Forcing traditional CRM solutions into customized support platforms
- All the while relying on multiple systems to attempt to splice together data for longitudinal and strategic reporting/planning

In the end, each infrastructure solution works somewhat, but none is truly exceptional. Instead, the hardworking destination medicine teams fill in the gaps. In consultation with several industry experts and longtime USCIPP members who had explored multiple options, iNaira Healthcare Technologies has built a solution explicitly designed to support inbound destination medicine inquiries. The focus is on the traditional gap between business development within a CRM system and patient record management in an EMR. During this webinar, the iNaira team will share industry perspectives, why the infrastructure demands of destination medicine are such a struggle for traditional CRM and EMR solutions, key inputs from their partners, what they have learned along the way, and some upcoming analytics and reporting enhancements. A panel-led Q&A discussion will follow a short presentation.



JOHN MORRIS - MODERATOR
SVP, STRATEGY AND BUSINESS DEVELOPMENT, INAIRA HEALTHCARE TECHNOLOGIES

PAM FRANK - EXPERT
ADVISOR, CONNEXT HEALTH

STEVEN THOMPSON - EXPERT
PRINCIPAL, NORTHSTAR HEALTHCARE ADVISORS

CHANDU REVANUR - GLOBAL LEADER
CEO, INAIRA HEALTHCARE TECHNOLOGIES

[CLICK HERE TO REGISTER](#)

▲ Register for Part II of the Indonesia Healthcare Market Insights Webinar Series

Join us from 8:00–9:00 AM CT on Tuesday, October 17, as Jarrett Fowler, NCHL's senior director of strategic and international initiatives, introduces the second installment of our Indonesia-focused webinar series:

“Empowering Healthcare Evolution: Spotlight on Indonesia’s Transformation and FDI Growth Through Special Economic Zones”

Organized primarily by HSBC and in collaboration with the USCIPP program here at NCHL, this session will further explore some of the themes that our colleagues at Hogan Lovells first touched on during our initial Indonesia-focused webinar several weeks ago, including healthcare-focused special economic zones and potential partnership opportunities for US hospitals in the Indonesian healthcare market.

We are delighted that HSBC has organized such a distinguished panel of officials from the Indonesian government as well as leaders from the Indonesian private sector and that they are taking time out of their evening to present to us:



Content Overview

The Indonesian healthcare landscape is undergoing a significant transformation, characterized by strides in medical technology, innovative healthcare solutions, and policy reforms. The Ministry of Health of the Republic of Indonesia also recognizes a promising opportunity for healthcare investment. Health expenditure in Indonesia rose by 124.5% from 2013 to 2021, with a compound annual growth rate of 10.4%.

To elevate FDI growth in the healthcare sector and to address the trend of Indonesian citizens seeking medical treatment abroad, the Ministry of Health is capitalizing on this by establishing the **Sanur Special Economic Zone (SEZ)** as an international medical travel destination and a way to attract foreign practitioners in the area.

The following topics will be discussed during the session:

- (i) Indonesia's healthcare transformation journey and how that can drive FDI growth
- (ii) insights into and the identification of interesting general investment opportunities in the healthcare sector
- (iii) deep dive on the Sanur Special Economic Zone
- (iv) the role of HSBC in supporting investors to Indonesia and showcase of relevant banking capabilities

[CLICK HERE TO REGISTER](#)

▲ Business Development Lead: KL Wellness City in Malaysia

We have received the following international business development lead from our colleagues at the International Trade Administration of the US Department of Commerce.

A Malaysian company, [KL Wellness City](#), is building a medical and wellness township in Bukit Jalil, Kuala Lumpur, with a gross development value of nearly \$3 billion. The development will include an international tertiary hospital, specialist clinic suites, and an oncology center. The company is interested in partnering with top oncology hospitals in the US either through a joint venture or with the US medical center developing the oncology center. Additional details about the project [are available in this article](#).

Please reach out to the following individuals at the International Trade Administration for more information and/or to be connected with KL Wellness City:

Bethany.Tien@trade.gov

Crystal.Mills@trade.gov

Mohan.Gurusamy@trade.gov

Frederick.Helfrich@trade.gov

Lisa.Huot@trade.gov

▲ NCHL All-Member Conference Room Block is Sold Out

The secured room block at the Westin Chicago River North is **sold out** for the NCHL All-Member Conference. Market rate rooms are still available at this location. Alternatively, NCHL has prepared a resource of [comparable accommodations](#) located approximately (5) miles from the event venue.

▲ USCIPP Chicago Area Hospital Group Tours During All-Member Conference (Final Reminder)

USCIPP is excited to be working with Chicago USCIPP-member hospitals to offer a group tour to USCIPP members as an optional and free add-on networking activity. This activity is being offered to USCIPP members only.

Members will have the option to select one campus to tour. The tours will take place from 1:00 – 2:00 PM CT on Wednesday, November 15. There are 5 different campuses to choose from that are within the Chicago city area limits. This is a great networking activity if you will be staying in Chicago for the evening or catching a late flight.

It is the responsibility of each individual to secure their transportation to/from their tour.

Click here for additional information about each campus:

- [Lurie Children's Hospital of Chicago](#) (approx. 1 mile from conference venue)
- [Northwestern Medicine](#) (approx. 1 mile from conference venue)
- [Rush University Medical Center](#) (approx. 3.2 miles from conference venue)
- [Shirley Ryan AbilityLab](#) (approx. 1 mile from conference venue)
- [UChicago Medicine](#) (approx. 8.5 miles from conference venue)

Attendees who register for the All-Member Conference may add a ticket for the tour and may select the campus they would like to tour. A confirmation of your tour, along with additional logistical information (meeting location, directions, etc.) will be shared closer to the conference date.

If you have any questions, please reach out to uscipp@nchl.org.

Space is limited!

▲ 2024 USCIPP Membership Prospectus

The 2024 USCIPP membership prospectus is [available here](#). This document provides an overview of membership benefits in 2024.

| Ongoing Announcements

▲ Information about USCIPP's International Patient Experience Initiative

As a follow-up to the previous International Operations call in June, we are sharing some information about USCIPP's international patient experience initiative.

Launched in 2019, the USCIPP International Patient Experience Initiative is the first standardized survey of international patients' perspectives on hospital care. The USCIPP International Patient Survey is a survey instrument and data collection methodology for measuring patients' perceptions of their hospital experience. While many hospitals have collected information on patient satisfaction for their own internal use, until the International Patient Experience Survey, there was no standard for collecting and reporting information about patient experience of care that allowed valid comparisons to be made across hospitals with international programs.

The USCIPP International Patient Experience Survey asks discharged patients 32 questions about their recent hospital stay. The survey contains 24 core questions about critical aspects of international patients' hospital experiences (communication with care team, responsiveness of international program staff, financial services, overall satisfaction, and recommendation of hospital).

The survey is administered to adult and pediatric patients across medical conditions 48 hours and six weeks after the end of the patient journey. Hospitals may use REDCap, Qualtrics, or another approved electronics survey platform. The survey is administered via email by most programs, although some programs have operationalized sending the survey via WhatsApp. The survey is available in English, Spanish, Arabic, Chinese, and Portuguese. Participating hospitals use the custom-built USCIPP Qlik Sense dashboard to monitor individual results. The dashboard also allows them to compare their results with aggregated data from their peer institutions.

Annual participation in the initiative is \$3,000. The participation fee includes a template of the survey instrument in 5 languages that can be uploaded in REDCap, support with onboarding, ongoing monthly data uploads, in addition to hosting monthly check-in meetings. USCIPP also prepares an annual benchmarking report, and is responsible for dashboard maintenance, periodic survey instrument updates, and translation.

[Click here](#) for a preview of last year's report (only participants have access to the full report).

To understand how hospitals have used the international patient survey to improve operations at their program, we encourage you to watch a recording of last month's international operations call by [clicking here](#).

If you have any questions or would like more information on how to get started, please reach out to the USCIPP team at uscipp@nchl.org.

▲ Global Health Exhibition will be hosted in Riyadh October 29-31 + US-Saudi Business Council invitation

Business Development Mission to [Saudi Arabia's Global Health Exhibition](#)

October 29-31, 2023

Riyadh, Saudi Arabia

[I Will Attend](#)

[No, I will not attend](#)

Join this UNIQUE OPPORTUNITY to meet Saudi public and private entities driving the development of the healthcare sector and find potential business partners.

Saudi Arabia, the fastest growing G20 economy in 2022, accounts for 60% of the Gulf Cooperation Council's healthcare expenditure. Saudi Vision 2030, the nation's ambitious national development plan, recognizes healthcare as one of the country's most important sectors and is committed to developing it.

Industry Highlights:

- Annual Government Budget: \$36.8 billion on Healthcare and Social Development in 2022
- Sector Growth Rate: 5.8% from 2017 to 2029
- Saudi Pharmaceutical Market: \$12 billion in 2022; expected to reach \$15 Billion in 2027
- Saudi MedTech Market: represents 50% of the MENA market; expected to outpace global growth (estimated at 18%) within the next 6-7 months.
- Prioritization of partnerships with the private sector. The Private Sector Participation (PSP) Program at the Ministry of Health (MOH) aims to encourage the engagement of private sector contribution from 25% to 35% by 2030 through public-private partnerships (PPP) and offer non-PPP opportunities.

Market Overview and Opportunities:

The Saudi population is expected to grow from over 34 million currently to 39.5 million by 2030. By the same year, the population of vulnerable people aged 65 and up is expected to grow by 7%, to reach nearly 5 million people. Medical conditions such as cancer and diabetes remain prevalent, and the Kingdom continues to invest significant resources in treatment, care, and research development. Medical tourism is rising and the local patient population is remaining in the country to leverage the high quality of privatized services.

Saudi Arabia has more than 500 hospitals, 78,000 hospital beds (of which approximately 20,000 are provided by the private sector), and 5,000 health clinics. The region needs close to 700 hospitals by 2030 (99,000 beds spread across government, private and semi-government), long term care centers, and suppliers of services in specialty areas such as oncology and cosmetology. Moreover, the country aims to set up 20

healthcare delivery clusters with the capacity to serve 1 million to 2 million people each. The clusters have the freedom to create infrastructure, launch new health programs, and support the population's health while managing their own budgets.

The Health Sector Transformation Program, launched in 2021, aims to improve access to health services, the quality and efficiency of healthcare services, promote health risk prevention, and improve traffic safety. The MOH has transitioned from a service provider to a regulatory body, focusing on its planning, regulatory, and supervisory roles in health care.

The private sector serves as an important strategic partner for the Saudi Government through the contribution of capital, development of new and innovative solutions, and help in resolving challenges to improve access to quality care. There are approximately 45 domestic MedTech manufacturers that are producing low-value, single-use devices such as syringes and gloves. They account for 6% of the market.

Saudi Priorities and Opportunities:

Top Saudi priorities in the medical industry are increasing the privatization of healthcare services, encouraging PPPs, scaling up medical education and training of its local workforce, as well as boosting the adoption of digital information systems.

Opportunities are related to infrastructure, facilities management, operations, medical equipment, primary care centers, virtual/digital care, extended care, laboratories, radiology, cardiology, diabetes care, medical waste, etc.

As healthcare resources and workforce are limited in supply, there is an opportunity for companies with expertise in sophisticated training solutions for clinicians for workflow optimization as well as adopt the latest technologies that can automate or shorten the workflow, such as leveraging AI for clinical decision-making.

In terms of MedTech products, there is a growing demand for capital equipment, diagnostic devices, implantable devices (ophthalmic, dentistry, and cardiac surgery), consumables, remote, real-time patient monitoring devices, self-health management tools, and connected devices, as well as add-on services such as consultation on workflow management, coordination of production, inventory, location, and transportation.

As specific clusters focus on oncology, cardiology (hypertension and acute coronary syndrome), and chronic care, it offers MedTech companies the opportunity to introduce disease-ownership models centered on end-to-end disease management from diagnosis to treatment to recovery/rehabilitation. In addition to products, the MedTech companies can elevate their role to integral partners offering a combination of

hardware, software, and professional services, offering value-based care models, which are increasingly becoming the global and regional norm.

About the Global Health Exhibition

October 29-31, 2023

The Global Health Exhibition (GHE) 2023, held under the patronage of the MOH, aims to bring together the Saudi & global healthcare communities together to connect, network and do business. The event gathered more than 14,000 professionals and generated over \$42 billion of business in 2022.

To learn more about the GHE, please click [HERE](#).

Who Should Join the Mission?

- MedTech Manufacturing
- Pharmaceuticals
- Medical Infrastructure
- Healthcare IT
- Support Services
- Hospitals and Clinics (Construction, Operation, and Management)
- Long-Term Care and Skilled Nursing Home
- Medical Rehabilitation
- Home Healthcare Services

Mission Fee Includes:

- Participation at the GHE23
- Opportunity to raise profile of your company/products and services in the U.S.-Saudi Business Council booth on the exhibit floor
- Promotion of your product/service to targeted audiences in Saudi Arabia prior to the Global Health Exhibition
- Private briefing in Riyadh on doing business in the healthcare sector (legal aspects, perspectives from U.S. companies doing business in the Kingdom)
- 1-on-1 meetings with potential Saudi business partners, end users, and government officials
- Group ground transportation to and from the GHE23 venue.
- Onsite support during the GHE23.
- Business visa facilitation service.
- Assistance with follow-ups for 3 months post-mission without charge.

Mission Fees:

- \$2,500 per company (Council Members); \$1,000 per additional team member
- \$3,000 per company (Council Non-Members); \$1,000 per additional team member

Expenses for air travel, lodging, incidentals, and meals are the responsibility of each participant.

Mission Application Deadline: October 6, 2023

For questions, please contact Jay Ennis at jennis@ussaudi.org.

[I Will Attend](#)

[No, I will not attend](#)

ORGANIZER



| Upcoming Events

▲ USCIPP Monthly International Operations Discussion Call on October 24 @ 1:00 PM CT

The next topic will be **Organizational Policies and Employee Relations**. Register [by clicking here](#).

▲ USCIPP Monthly Embassy Relations Discussion Call on November 1 @ 12:30 PM CT

To register for the USCIPP Embassy Relations monthly call series, please [click here](#).

▲ NCHL All-Member Conference | November 13-15 hosted in Chicago

[Click here](#) for more information and to register.

▲ NCHL Gail L. Warden Leadership Excellence Award Celebration Event | November 14 @ 6 PM hosted in Chicago (Includes the International Healthcare Leadership Award)

[Click here](#) for more information and to register.

| USCIPP Pulse

The USCIPP Pulse is a new section members can go to for updates from the USCIPP Advisory Council and Subcommittees and other ad-hoc, member-wide initiatives and calls. USCIPP will share highlights from recent meetings so members can know more about the work these groups are doing.

International Operations Monthly Call Series

Last month's International Operations call topic was on "Concierge/Guest Services for International Patients."

See the list below to access recordings of International Operations Calls hosted in previous months:

- **February:** [International Dashboards/Scorecards](#) (Boston Children's & Ochsner Health)
- **March:** [International Intake Processes](#) (Northwestern Medicine & MD Anderson Cancer Center)
- **April:** [International Program Structures/Staffing Models](#) (Texas Children's Hospital & Henry Ford Health)
- **May:** [International Patient Discharge Planning](#) (Cincinnati Children's Hospital Medical Center & Mayo Clinic)
- **June:** [Improving International Operations through International Patient Surveys](#) (Cleveland Clinic, Houston Methodist, UCLA Health & Children's National Hospital)
- **July:** [International Self-Pay Finance Operations](#) (Cedars-Sinai & Mayo Clinic)
- **August:** [Concierge/Guest Services for International Patients](#) (UPMC & Shriners Hospital for Children)
- **October:** TBA

Advisory Council and Subcommittee Calls

- The USCIPP Advisory Council met on August 11 and discussed several initiatives that the USCIPP team is working on, including results for the international patient coordinator certification survey. The next meeting will occur during the All-Member Conference in November.
- The USCIPP Benchmarking & Research subcommittee met on October 6. The discussion included a review of the new market research tool the USCIPP team is developing for Premium members.
- The USCIPP External Relations Subcommittee met on July 28. Items discussed included coming up with a list of high-value conferences for USCIPP members in 2024 that USCIPP will seek partnerships with. Additionally, USCIPP will reach out to CMS to seek information about how to engage with relevant contacts to discuss the Good Faith Estimate Law (perhaps a webinar in 2024).
- The USCIPP Global Market Development Committee met on August 25. Items included updates to the partnership forums and future business development events.
- The USCIPP International Patient Experience Survey Subcommittee met in September and discussed process changes for data uploads. A new survey is expected to be rolled out at the start of the next calendar year with additional enhancements and the Hebrew language added.

Answer this month's listserv questions

PREMIUM MEMBER RESOURCES



DATA DASHBOARD



LISTSERV REPORTS & ARCHIVE



CALENDAR OF EVENTS



[Previous Editions](#)

- [September 13, 2023](#)
- [August 17, 2023](#)
- [July 24, 2023](#)
- [June 19, 2023](#)
- [May 25, 2023](#)
- [May 8, 2023](#)
- [April 15, 2023](#)
- [March 15, 2023](#)
- [February 23, 2023](#)
- [February 3, 2023](#)

U★S★C★I★P★P

US COOPERATIVE FOR INTERNATIONAL PATIENT PROGRAMS

USCIPP operates on a member-driven agenda of peer benchmarking and international market research, member-to-member education and collaboration, the creation of international business development opportunities for members, the development of industry standards, and more.