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VIZIENT NETWORKS EXECUTIVE SUMMARY

2025 Compendium on systemness in healthcare

A collection of insights, frameworks, and member examples advancing enterprise alignment and performance

The state of systemness: progress and potential

For more than a decade, Vizient® Networks, Performance Improvement Programs and the Vizient Research Institute have studied how health systems deliver on the promise of providing the right care, at the right place, at the right time. The findings are consistent: Progress has been meaningful, yet the full potential of integrated system performance is still unfolding.

Today, nearly 70% of hospitals and three-quarters of all beds are part of a health system—underscoring that systemness is no longer a structure; it's a strategic imperative. As organizations face margin pressure, workforce shortages and shifting payer dynamics, the ability to act as one enterprise is now the differentiator between scale and success.

KEY INDICATORS OF SYSTEMNESS TODAY

404
health systems nationwide—up from 167 in 1980[1]

70%+
of U.S. hospitals now system-affiliated[1]

98%
of Vizient survey respondents expect to reach a "maturing" systemness phase within three years[2]

1 Source: 2024 American Hospital Association. AHA Annual Survey Database, FY2022. 2 Vizient Research Institute; Vizient 2025 Systemness Assessment Survey of U.S. hospitals now system-affiliated[1]

Systemness in Motion: 2016–2025

FROM PROGRESS TO PERFORMANCE

A left-to-right timeline showing evolution of Vizient studies:

1. **2016** Untapped value in system design
2. **2019** Delivering on the value promise
3. **2021** Right care, right place, right time
4. **2024** Decision-making and organizational design
5. **2025** Systemness benchmarking and assessment

Health systems have entered a new phase—from expanding scale to optimizing it. The Performance Improvement Program's 2025 Systemness Assessment reveals that while growth through acquisition has slowed, alignment through governance, culture, and operating structure has accelerated.

Systemness today means more than integration: It's the disciplined alignment of people, processes, and data around shared goals.

> "Aligning as a system is not just a necessity but an opportunity to increase the impact on our communities when they need us most."
>
> — GERALD "J.P." GALLAGHER

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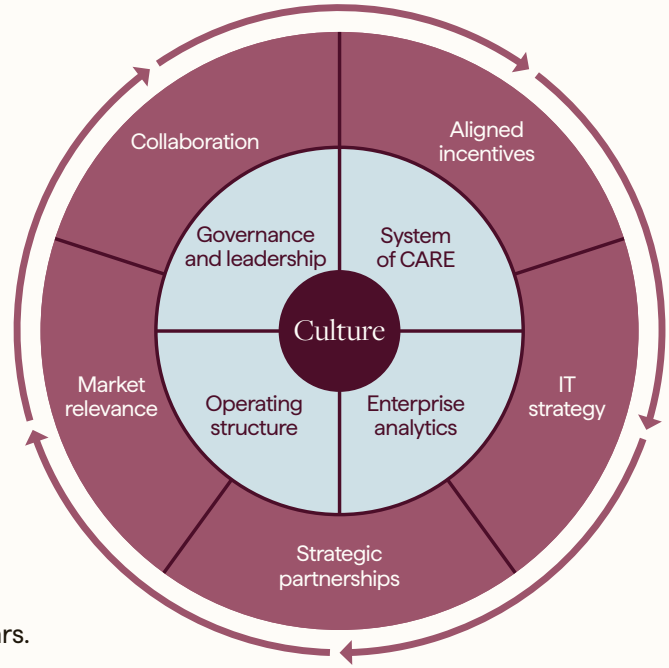
Systemness as a lever for resilience

The Vizient Networks' 2025 systemness framework identifies the strategic pillars that define mature systems—culture, governance and leadership, operating structure, System of CARE, and enterprise analytics—all powered by collaboration, aligned incentives, and data-driven execution.

Key insights from the 2025 systemness assessment:

- System growth continues, but the pace has slowed—focus has shifted from expansion to integration and execution.
- Governance and leadership is the most mature pillar; enterprise analytics shows the greatest opportunity for acceleration.
- Systemness maturity is rising—nearly half of systems identify as "maturing," and most expect full alignment within three years.

ADVANCING SYSTEMNESS:
from intent to **impact**



The leadership imperative

The Chief Quality Executive (CQE) is emerging as the pivotal leader in operationalizing systemness—bridging clinical excellence, governance and enterprise performance.

Three non-negotiable competencies define success:

1. **Strategic vision**
2. **Emotional intellegence**
3. **Systems thinking**

These attributes enable CQEs to translate complexity into coordinated action and to embed quality as the currency of systemness.

A call to action

- The journey toward systemness is continuous—and measurable.
- Vizient Networks provide the platform for accelerating alignment through peer collaboration, benchmarking, and research.
- Health systems that engage as one enterprise—rather than as individual entities—are best positioned to deliver sustainable performance, resilience and trust.

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About Vizient

Vizient, Inc. provides solutions and services that improve the delivery of high-value care by improving financial sustainability, system performance, and accelerating strategic growth for more than two-thirds of the nation's healthcare providers. Vizient provides expertise, analytics, consulting services, and a contract portfolio representing $156 billion in annual client purchasing volume to improve patient outcomes and lower costs.

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