

## 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 Member 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<sup>1</sup>

**70%+ of U.S. hospitals** now system-affiliated<sup>1</sup>

**98% of Vizient survey respondents** expect to reach a “maturing” systemness phase within three years<sup>2</sup>

1 Source: 2024 American Hospital Association. AHA Annual Survey Database, FY2022.

2 Vizient Research Institute; Vizient 2025 Systemness Assessment Survey

### Systemness in Motion: 2016–2025

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



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

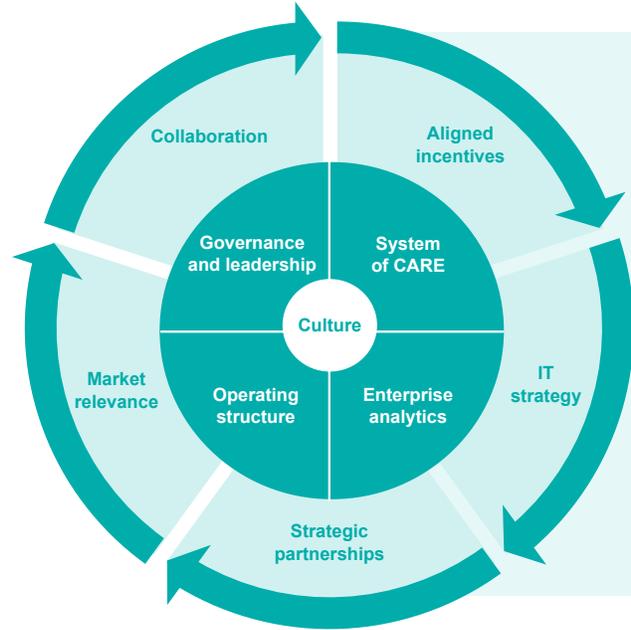
# Systemness as a lever for resilience

The Vizient Member 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 intelligence
- 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 Member 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.



The complete compendium of insights is available to Vizient Member Networks providers. **Contact us** to learn more about joining **Member Networks**.

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