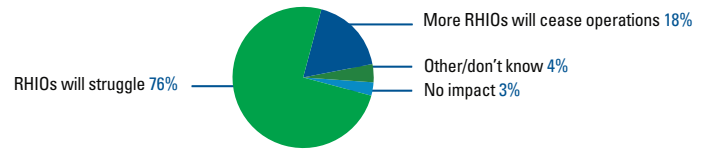


**Summary**

The Santa Barbara County Care Data Exchange, the longest running RHIO in the United States recently stopped operations. Less than 20 percent of respondents noted this development is an indicator that additional RHIOs will cease operations. Instead, there seems to be an air of caution, as three-quarters of respondents expect RHIOs to struggle in upcoming months. Indeed, nearly half of respondents said the biggest challenge facing RHIOs is to fund the operating costs of initiatives. Indeed, grants supplying seed money and ongoing funds are critical and more than half of respondents indicated these funds should come either from payor organizations or the federal government. Nearly half of respondents also said the availability of open source software could have a positive impact on RHIO development.

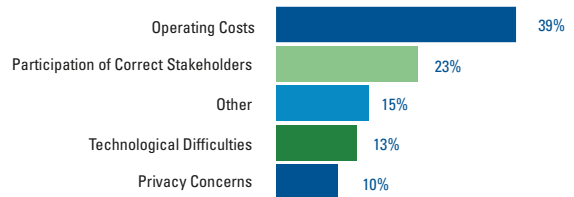
**Impact on Future RHIO Operations**

Less than twenty percent of respondents said the ceasing of operations by the Santa Barbara County Care Data Exchange is an indicator that more RHIOs will follow suite and cease operations in the future. Three-quarters of respondents said RHIOs will struggle as they strive to achieve their goals.



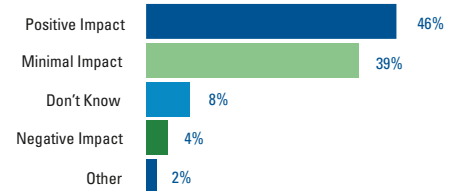
**Challenges for RHIO Operations**

Approximately 40 percent of respondents indicated operating costs are the biggest challenge to RHIOs. Another quarter said it was challenging to get all the required stakeholders engaged in the process. Only ten percent of respondents mentioned privacy of data was a concern.



**Potential Value of Open Source Software**

While nearly half of the respondents indicated making open source software available to the industry would have a positive impact on the emergence of RHIOs, a nearly equal percent said this would have only a minimal impact.



**Impact on Healthcare Delivery**

While there was no clear consensus on RHIOs' impact on healthcare delivery, it is clear respondents view RHIOs as having a positive impact on the care patients receive. Specifically, just over half of respondents said RHIOs can either promote improved outcomes of care or improved patient safety. Only 11 percent of respondents believe RHIOs will reduce the cost of healthcare delivery.

