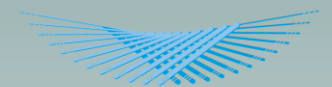


Every \$ Counts

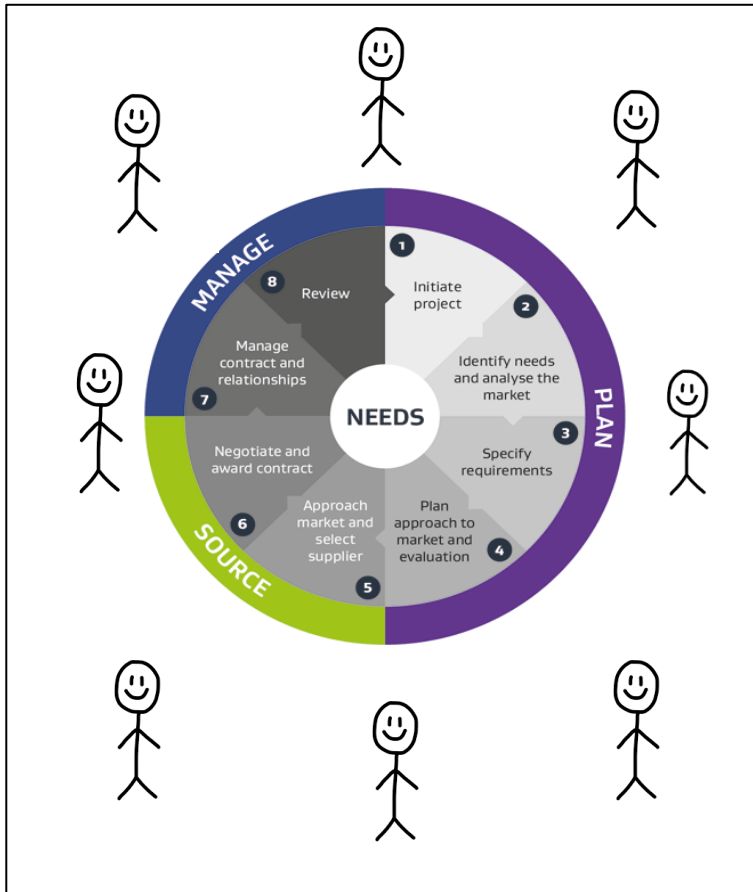
Applying a health equity lens to procurement in
Planning & Funding



COUNTIES
MANUKAU
HEALTH



Introduction



Team members name	Designation
Amy Carter	Service Development Manager, Child Health
Danielle Farrell	Project Manager, Ko Awatea
David Schaaf	Public Health Advisor, Pacific Health Development
Hinewai Pomare	Programme Manager, Maaori Health Development
Karli Menary	Legal Advisor, Corporate and Business Services
Kate Dowson	Programme Manager, Primary Care
Kitty Neill	Planning Advisor, Planning Team
Marianne Scott	Master Planner, Strategic Development
Mohammad Alshadiefat	Senior Improvement Advisor, Ko Awatea
Sarah Marshall	General Manager, Otara-Mangere Locality Clinical Partnership
Sarah Sharpe	Public Health Physician, Population Health Team

Aim Statement



This project will examine the CM Health Planning & Funding procurement system and processes with an equity lens in order to:

- Determine current status of the system from an equity perspective, including:
 - ✓ determining if equity approaches are being applied and describing these,
 - ✓ determining where the impacts on equity lie along the procurement pathway,
 - ✓ describing outcomes of procurement from an equity perspective.
- Improve the system and processes so that we are transparently and systematically applying an equity approach, including:
 - ✓ determining/developing and implementing an appropriate measure which can be used for ongoing monitoring.

Define the Problem



From an equity perspective, the current status of our procurement system and processes is not known, i.e. we do not know whether our procurement-related practices and decision making are enabling a reduction in inequities in our population, or whether in fact they are contributing to maintaining inequities. Furthermore, we do not currently have a mechanism for monitoring and improving equity-related procurement practices.

What is the data telling us?



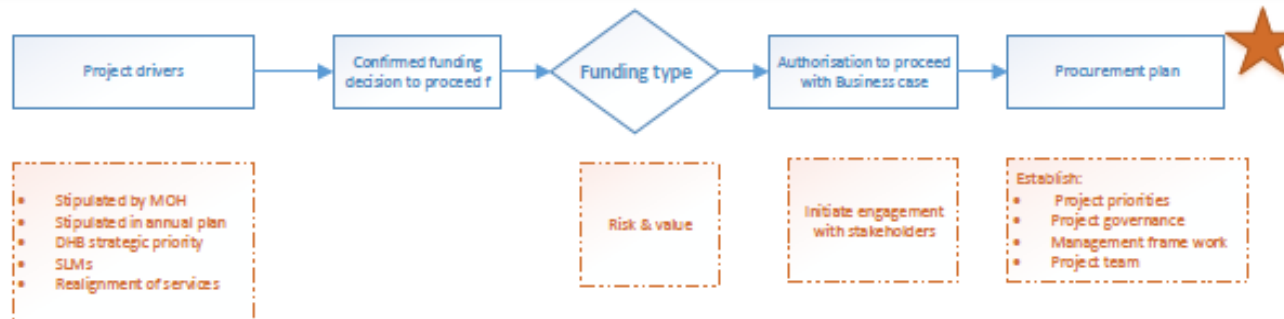
- Currently we don't have any data source or a mechanism for monitoring equity-related procurement practices.
- We are designing a measurement system as part of this project.
- First we wanted to develop a shared understand the procurement process, so we started by mapping the process and investigating where the impacts on equity lie along the procurement pathway.

Mapping the process

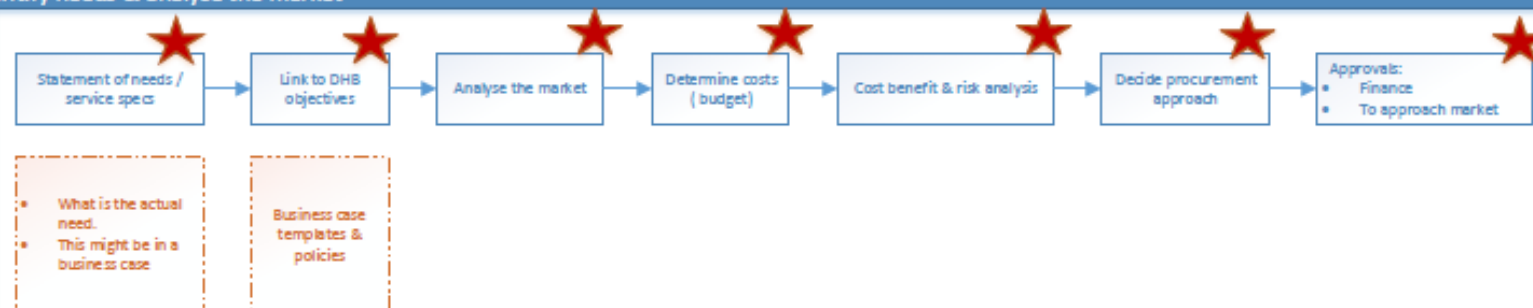


Mapping the process

1. Initial Project



2. Identify needs & analyse the market

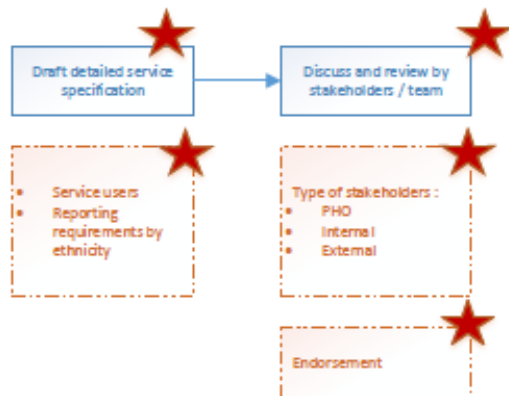


** Red Stars indicate places where we identified opportunities to consider equity issues*

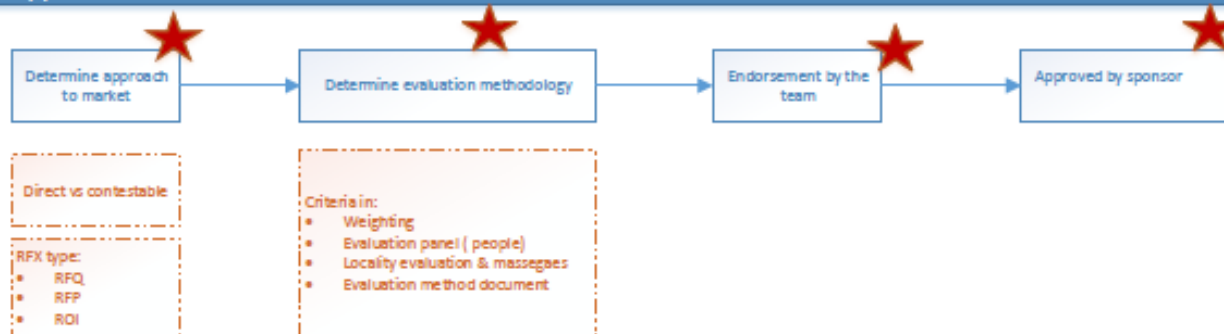
Mapping the process

3. Specify requirements

Planning

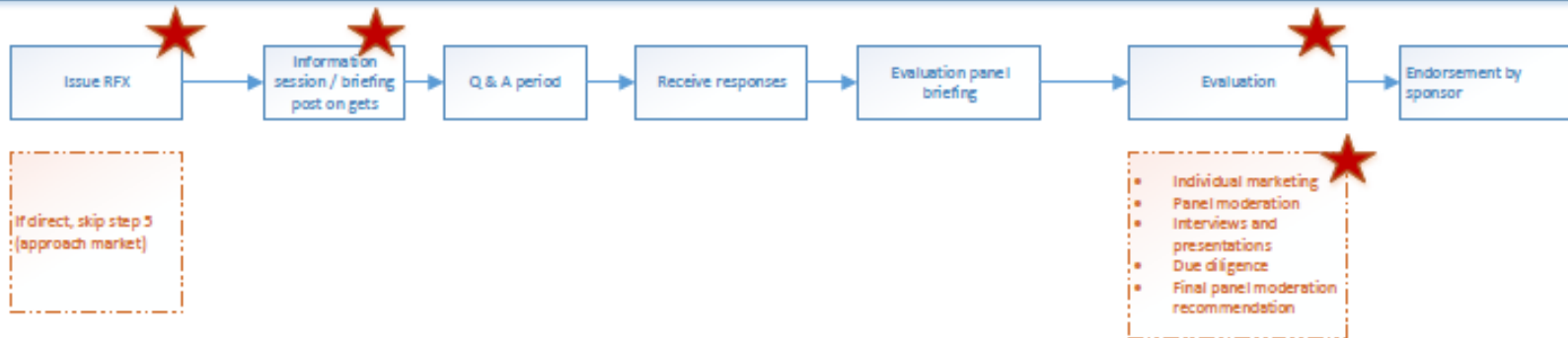


4. Plan approach to market and evaluation

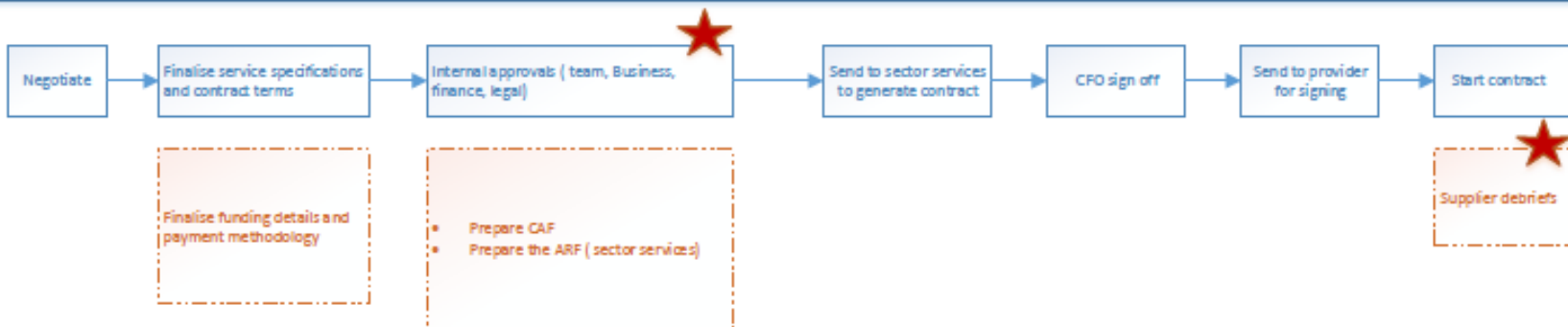


Mapping the process

5. Approach market & select supplier



6. Negotiate and award contract





Mapping the process

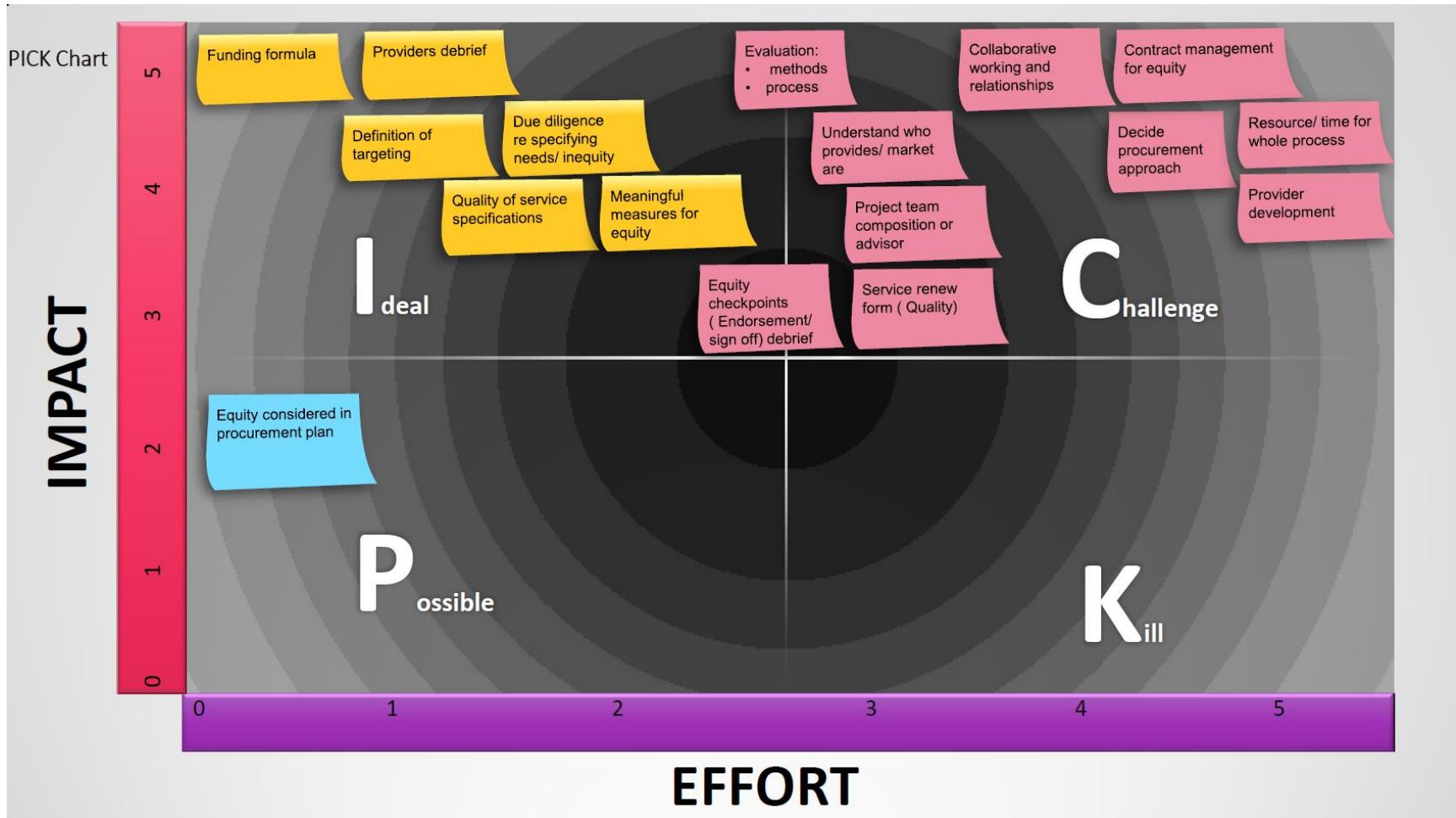
7. Manage contract & relationships



8. Review



Describing and sorting identified equity issues



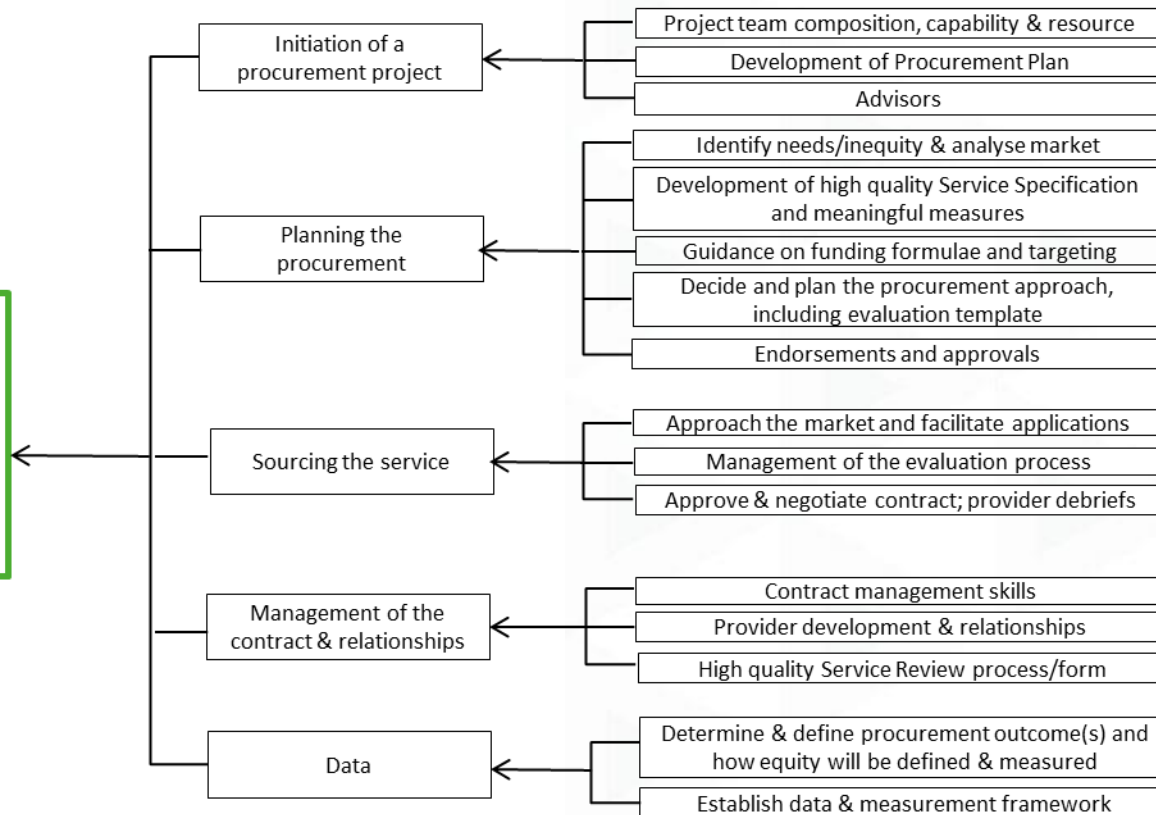
Driver Diagram



Primary Drivers

Secondary Drivers

AIM:
 To incorporate a defined health equity process in the procurement lifecycle for local selected contracts by 1 July 2018





We started to describe project ideas

What	How	Who	Resources	Where	When
Establish baseline data & measures	<ul style="list-style-type: none"> Define & conduct audit Define measurement metrics 	<ul style="list-style-type: none"> Project team 	<ul style="list-style-type: none"> Time allocation 		<ul style="list-style-type: none"> April to August
Update procurement templates	<ul style="list-style-type: none"> Added new questions to specs template Training pack approach for workforce development 	<ul style="list-style-type: none"> Project team Program Managers 	<ul style="list-style-type: none"> Time allocation Internal training 	<ul style="list-style-type: none"> Service specs Evaluation Procurement plan Service review plan 	
Checkpoints & equity champion	<ul style="list-style-type: none"> Define requirements across the 3 checkpoints & protocols Define role expectation to who is involved Test the checkpoints 	<ul style="list-style-type: none"> Project team 	<ul style="list-style-type: none"> Time allocation Internal training 		
Training tool box	<ul style="list-style-type: none"> Develop the tool Test the tool Conduct training Implement the tool 	<ul style="list-style-type: none"> Project team 	<ul style="list-style-type: none"> Time allocation Internal training 		
Funding formula developed & agreed	<ul style="list-style-type: none"> Research & literature Engage team Scope recommendations Agree & approve from executive level 	<ul style="list-style-type: none"> Project team Contract Managers PHO 	<ul style="list-style-type: none"> Time allocation 		

Progress since LS1



- We reviewed the procurement process map and our learning from the first phase of project work.
- We defined the Outcome of the procurement process and have developed a Measurement Tree (see next slide) which depicts the Outcome measure, three process measures which are important for achieving the Outcome, and data domains for the process measures.
- We have developed:
 - a Measurement Tree table with the process measure definitions & details and,
 - an overview of baseline data collection methodology.

Every \$ Counts Measurement Tree

Contract reporting KPI's demonstrate progress has been made towards reducing the inequity identified in the Service Specifications

Inequity defined in Service Specification
Measure: % of Service Specs that define the inequity that the service is expected to reduce

i) Data used to help define equity
% of Service Specs that include/use data to define the inequity that the service is expected to reduce

ii) Evidence and/or intervention logic in Service Spec
% of Service Specs that outline the evidence &/or an intervention logic for how the service is expected to reduce the identified inequity

iii) Priority population defined in Service Spec
% of Service Specs that include who the priority population service users are in the inequity definition

iv) Measure and target for inequity in Service Spec
% of Service Specs that define a meaningful measure and target for the inequity

Appropriate steps in sourcing & evaluation process
Measure: % of contracts in which the sourcing and evaluation processes conducted included appropriate equity methods/steps to ensure that the most appropriate provider to deliver the service and reduce the inequity was appointed

i) Equity as a weighted criteria
(not included in baseline data collection)

ii) Appropriate questions included in the response template
% of ROI/RFP response templates that include appropriate questions that will enable the panel to assess the respondents capability to deliver the service to reduce the inequity

iii) Correct subject matter expert representation on the evaluation panel
% of evaluation panels that have an appropriate mix of SMEs to evaluate the respondent and proposal from an equity perspective

Contract Management
Measure: % of contracts that have contract KPIs collected, reviewed and actively managed in partnership with providers from an equity perspective
Measure for baseline data collection: % of contracts that have contract KPIs submitted and reported appropriately

i) All contract reports are submitted
% of contracts that have had all reports submitted as specified in the Service Spec

ii) KPIs reported by ethnicity (or other subgroups)
% of contracts with quarterly (or other interval) reports that include data reported by ethnicity (or other subgroups) to enable progress towards reducing the inequity to be tracked

iii) Quarterly meetings are held with providers, written notes taken and feedback provided
(not included in baseline data collection)

iv) Quality of Service Review Forms
(Qualitative analysis)

Storytelling/experiences

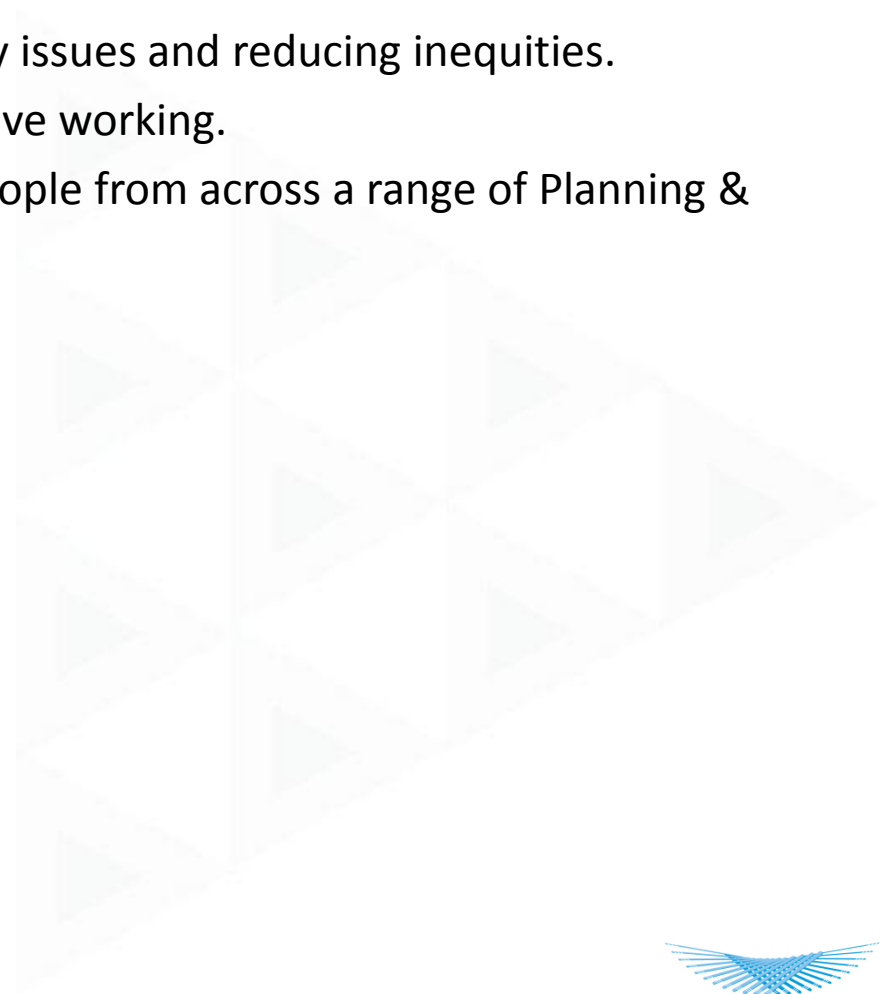


- Understanding, exploring, and mapping the procurement lifecycle/process required several workshops. Starting with this aspect of the project helped the project team to gain a shared understanding of what procurement involves. It has been valuable having people in our team who know a great deal about procurement, as well as others with less knowledge and experience of procurement who can bring ‘fresh eyes’ and other perspectives/experience to the project.
- We think there is a procurement knowledge and skillset gap in our setting.
- LS1 helped us to build on our phase one learning, and progress to the next step of defining a meaningful outcome and developing a measurement tree.

Highlights



- Team members are passionate about equity issues and reducing inequities.
- Excellent team participation and collaborative working.
- Valuable insights from bringing together people from across a range of Planning & Funding teams.



Next Steps



- Baseline data collection:
 - audit of 50 contracts/procurements
 - 8 data domains/indicators
- Review and redefine project aim (based on outcome measure defined in Measurement Tree and informed by findings of baseline data collection).
- Start testing improvement ideas utilising PDSA methodology.