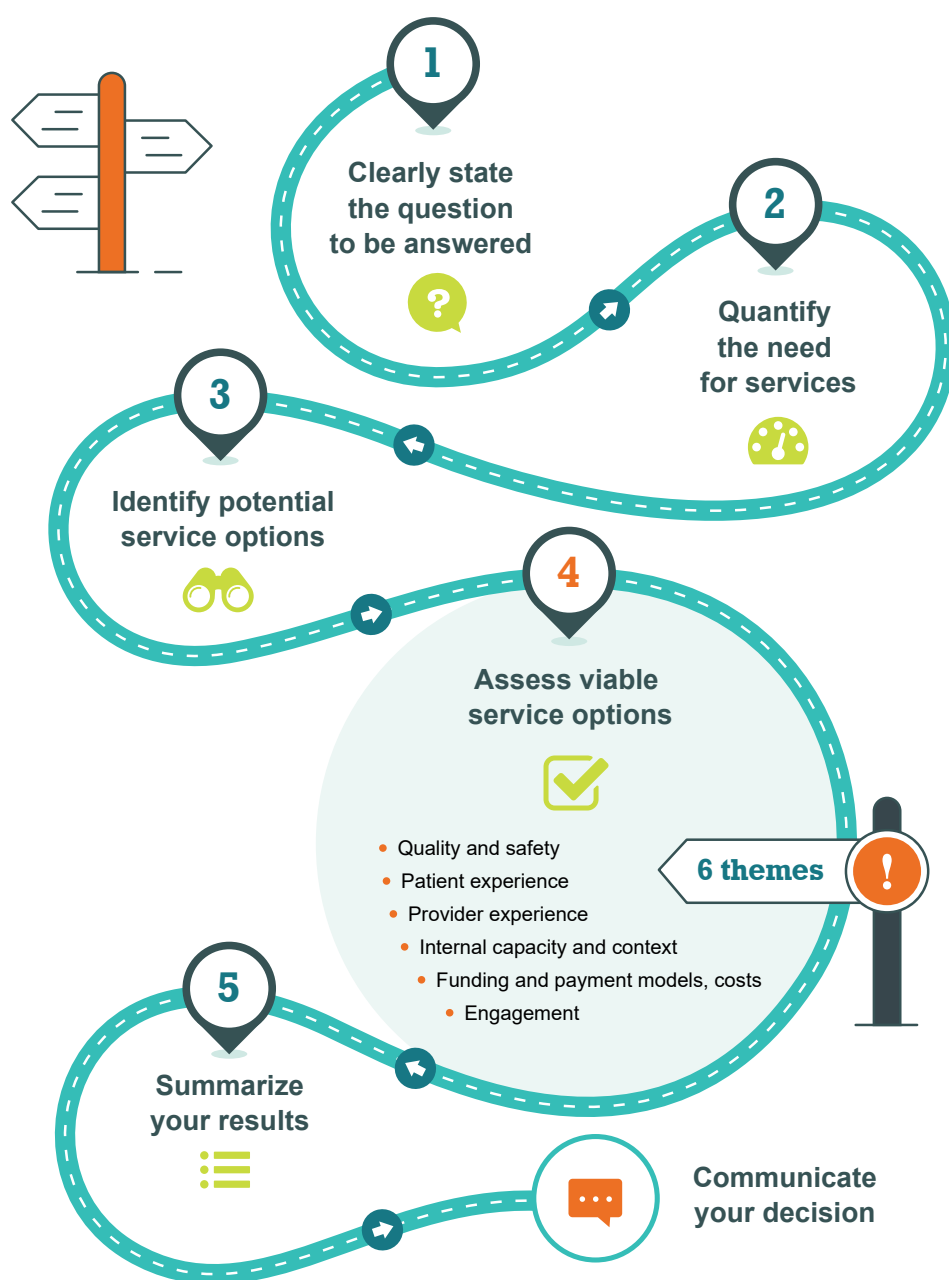


Quick Reference: Rural Health Service Decision Guide

The Rural Health Service Decision Process

The Rural Health Service Decision Process includes 5 steps, which we recommend you follow in order. As you work through the process, you may find it helpful to document your thoughts, questions and findings. You can use this process even when time and resources are tight, and you may consider involving key stakeholders in any of the steps. For more information, review the [complete guide](#).



Step 1: Clearly state the question to be answered

You need to clearly and specifically state the question you're trying to answer or the decision you're trying to make — whether you're addressing an issue or opportunity — and the context in which the decision will be made.

Clearly stating the question will help you determine whether it's the right one to answer at this time. Describe the current state, the ideal future state and the issue or opportunity. It might be helpful to include the *who*, *what*, *when*, *where*, *why* and *how* of the circumstances.

✔ What specific decision needs to be made and why?

Step 2: Quantify the need for services

Is the proposed service change aligned with population needs?

Gather evidence to better understand the need for a service or service change, and use it to characterize and quantify the current and anticipated future service requirements.

Solutions are often proposed that are based on anecdotal information which may not take into account some aspects of the broader health system context. Often, complicated or urgent situations are accompanied by strong emotions, which may be based on historical circumstances, influential and vocal opposition, and competing priorities of the broader health system and community.

The evidence you gather will help you see the need for services more broadly and objectively. If you don't have access to robust local data, you can identify reasonable proxies from similar contexts and use existing evidence relevant to rural populations and health systems. [CIHI's Rural Health Systems Model](#) can help you identify appropriate comparators based on key contextual factors.

Estimating future service requirements

Here's a frequently used approach:

1. Understand historic population-based utilization rates. You can find these using local or national data systems (e.g., hospital utilization rates available through CIHI's [Quick Stats](#) or [Your Health System](#)).
2. Considering the data from the step above, assess whether historical patterns might reflect under- or over-utilization and require adjustment to reflect a more ideal future state.
3. Apply the adjusted utilization rates to population projections (available locally or through Statistics Canada).
4. Adjust the result based on anticipated changes in service delivery (e.g., efficiencies you might expect given historic trends over time or technological advancements).

Questions to consider

Current service delivery

- Who currently uses the service?
- How much service do they use (e.g., utilization rates by 5-year age groups)?
- Where do they access services (e.g., referral or travel patterns)?
- Is the service meeting expected quality, safety and performance outcomes?

Future service delivery

- What growth or reduction do you expect for the current population that uses the service?
- How much service do you anticipate being needed in the future, after applying your estimated adjusted utilization rates to the future population?

Anticipated changes

- Are there any anticipated changes that would affect service delivery in the area (e.g., a new hospital being built, significant change in local industry, technological advancements, opportunities to find efficiencies)?

Is the proposed service change aligned with population needs?

Step 3: Identify potential service options

Which options should you assess?

Once you have a good understanding of the population and the level and type of service need, you can focus on identifying potential service options that you could employ to address the need.

If stakeholder or advocacy groups are involved, they may have already identified a feasible service delivery approach. There are likely alternative options to consider, including the status quo.

You need to think about an array of service delivery options, including providing the service locally, delivering it in selected centres in the region or relying on other regions to provide it.

Local service delivery options could consider a range of service provider and service mode options, including

- Whether the service provider is local or itinerant; and
- Whether service delivery is in person, virtual or a combination.

In some circumstances, it may be appropriate to consider reconfiguring the way existing providers deliver services. Start by defining potential options for service delivery, then narrow down the list of options to those that are most viable.

You may want to consult [CIHI's Rural Health Systems Model](#) to learn more about the population, geographic and health system factors that play a role in rural health services. These factors may help you identify and describe viable service options.

Questions to consider

Service delivery options

- What are the current local service delivery options (e.g., local delivery with local providers, local delivery with itinerant providers, local delivery with virtual providers)?
- What are the out-of-region service delivery options?

Viability of service delivery options

- Is the service need urgent/emergent or can it be planned and/or scheduled?
- What barriers or constraints are there on the mode of service delivery?
- Are there mechanisms to mitigate the impacts of these barriers or constraints?

You may also wish to think about the extent to which each option satisfies the dimensions of the [Institute for Healthcare Improvement's Triple Aim](#), or one of the various adaptations into the quadruple aim, which add service provider experience to the mix.

✓ Which service delivery options are viable?

Step 4: Assess viable service options

How well does each option address the questions below?

Once you've identified the most viable options, the next step is to assess the options, as well as the status quo, against 6 themes. The first 3 themes are outcomes you may wish to prioritize, and the other 3 themes are inputs related to context and processes.

Themes to prioritize

Outcomes to achieve	Inputs to consider
Quality and safety	Internal capacity and context
Patient experience	Funding and payment models, costs
Provider experience	Engagement

Conducting your assessment

1. Identify the themes that are relevant to your assessment. (All 6 themes may not be relevant in every service delivery option or decision-making situation.)
2. If appropriate, assign weights to the themes to reflect their relative importance (e.g., you may have good reason to prioritize provider experience over patient experience).
3. Assess each service delivery option, as well as the status quo, against each theme you've included. You might do this by assigning plus signs (or check marks), a rank or a score.
4. Step back and look at which options appear to have the most plus signs, the highest ranks or the highest score for the included themes.

This assessment doesn't have to be overly complicated or quantitative. The goal is to identify, for each theme, which service delivery options offer advantages or disadvantages over the others. To help with your assessment, you may wish to review common health system performance metrics to identify those that may be relevant to your situation. CIHI's interactive [Your Health System](#) tools offer a wide assortment of performance indicators grouped by domain to help inform planning. Additionally, you may wish to refer to CIHI's [Health System Performance Measurement Framework](#) when developing or interpreting performance measures and indicators, or to [CIHI's Rural Health Systems Model](#) to learn more about the population, geographic and health system factors that play a role in rural health services.

Key questions for assessing the 6 themes

These questions can help you assess your options against the 6 themes. You can find additional questions for assessing your options in the [complete guide](#).

Quality and safety

Before adding or changing any health service, you need to assess the impact on the quality of care and the experience of both patients and providers. Ask yourself questions like these:

Appropriate skills and competencies

- Are there clinical competency guidelines around the minimum procedure volumes required to maintain safety, competency, quality or licensing?
- Is there enough demand to support maintenance of clinical competencies?

Adequate human resources

- How many service providers will you need to ensure a safe and appropriate amount of care (including on-call coverage)?
- Do you have trained staff available?
- How will service providers get the training they need to maintain their competencies and ensure safety?

Cultural humility and safety

- Do all patients/clients feel safe receiving this mode of care?

Transitions/handovers

- What mechanisms are available to support handovers between providers, health services, and social-sector and community-based options?
- What means are available to provide adequate follow-up care (e.g., lab, diagnostic, therapeutic, rehab)?

 **Rate, rank or score each option on quality and safety**
Patient experience

Before adding or changing any health service, you need to consider the impact on patient experience, including things like respect for patients' preferences; coordination and integration of care; information and education; physical comfort; emotional support; involvement of family and friends; access to care, care transitions and care continuity; and travel requirements. Ask yourself questions like these:

Patient preference

- Which mode of service delivery do community members prefer?

Travel burden

- When patients have to travel to access care, what's their experience like (including time implications, out-of-pocket and opportunity costs, travel availability and travel-associated risks)?

Cultural safety and humility

- What supports are in place to enable culturally safe and linguistically appropriate care delivery?
- What role does health literacy and socio-economic status play in patients' ability to access care?

 **Rate, rank or score each option on patient experience**
Provider experience

Before adding or changing any health service, you need to consider the impact on service provider experience. Think about things like travel requirements, the effect on family members, and activities like decision-making and performance management. Ask yourself questions like these:

Travel burden for providers

- Will the service provider need to travel?
- How often will they need to travel?
- How much time will they spend travelling?
- Who will pay their travel and accommodation costs?

Recruitment and retention

- Are there enough qualified and experienced health human resources available locally, regionally, nationally and/or globally to provide the service?
- What opportunities exist to develop local talent?
- What incentives (monetary and otherwise) are available to attract and retain the right people?
- What is the workload? Is it too little, sufficient or too much?
- What resources will you need to support effective recruitment?
- Are there professional practice supports to consider?
- Do the service provider's family members have needs that you'll have to address so you can retain the service provider?

Other supports

- What supports are available for service providers to develop cultural humility and provide competent, appropriate and culturally safe care for the populations served (e.g., regarding language, culture, ethnicity and religion)?
- What mechanisms are available to facilitate provider accommodation (e.g., housing supply, availability, affordability)?

 **Rate, rank or score each option on provider experience**
Internal capacity and context

Before adding or changing any health service, you need to consider the organization's internal capacity (including human, physical, technical and technological infrastructure), the cultural context and organizational readiness. Ask yourself questions like these:

Infrastructure requirements

- What infrastructure changes do you need to make to deliver services (e.g., buildings, equipment, space)?
- What are the capital and operating costs of the infrastructure?
- Is there enough demand to support these costs?

Alignment with organizational priorities

- Does the contemplated service change align with organizational priorities and culture locally, as well as within the region and province or territory?
- Does the organization's leadership support the contemplated service change?

Data availability

- Does the organization have the capacity to collect all necessary data (clinical and administrative) to support the delivery, evaluation and performance measurement of the contemplated service change?

 **Rate, rank or score each option on internal capacity and context**

Funding and payment models, costs

Before adding or changing any health service, you need to consider the financial impact, including the fixed and variable costs associated with service delivery, and the models for funding and payment. Ask yourself questions like these:

Affordability

- How much will it cost to provide this service?
- What are the start-up costs (capital, recruitment, training) and the ongoing operating costs?
- Are the benefits enough to warrant the costs of this service change?
- Is the service change affordable?

Funding source

- Is there funding available?
- Where will funding come from for necessary training, orientation and staff onboarding?
- How will you cover costs associated with staff turnover?
- Are there cost-recovery opportunities you might consider?
- Are there cost-sharing opportunities or efficiencies to consider (e.g., for scheduling, administration or other overhead)?
- Is there an alternative approach to funding the service?

Rate, rank or score each option on funding and payment models and costs

Engagement

Before adding or changing any health service, you need to consider how you'll engage appropriate stakeholder groups. Ask yourself questions like these:

Stakeholders

- Which stakeholder groups do you need to consider in the proposed service change (e.g., service recipients, service providers, suppliers, community partners, unions/associations, advocacy groups, funders, advisory boards, educational bodies)?
- What are their interests/priorities with regard to this proposed service change?
- Which organizations or groups could serve as advisors for the design, planning, implementation and ongoing operations of the proposed service change?

Engagement approach

- Which stakeholder groups should you consult or involve in the decision-making process? At what stage and to what degree?
- What kind of input do you need from each of them?
- How would they prefer to be engaged?
- What are their communication preferences?

Rate, rank or score each option on engagement

Step 5: Summarize your results

The final step is to summarize the results of your assessment.

You can use this summary to develop internal communications and to host discussions about the decision, as well as to support external communications with stakeholders. When constructing your summary, it's important to think about your audience, and the level and type of information they'll want to receive about the decision and its context. This summary will also be helpful for record-keeping, should you need to revisit a decision in the future. Due to the wide-ranging situations that you may assess and the various needs of multiple audiences, a template has not been developed for this step; however, you may wish to structure your summary based on the previous 4 steps of the process (including the 6 content domains in Step 4), highlighting the prominent aspects of the process that led to the preferred option.

Conclusion

Health system decision-making is complex, particularly in rural contexts. The Rural Health Service Decision Process can support you as you assess a proposed or contemplated service change. The process is intended to be thought provoking, systematic and comprehensive. But it can't possibly be exhaustive given the wide-ranging circumstances that affect rural health systems and the specifics linked to each decision.

We hope you find this process helpful and we'd like to hear about your experience using it. Please email us with your thoughts and feedback: westernoffice@cihi.ca.

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