

Annual Report 2022 /2023

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Foreword

2023 was a watershed year for Value in health. Since our establishment in 2019, we have promoted the topic of value-based health and care in the Kingdom of Saudi Arabia and globally, through the Global Innovation Hub for Improving Value in Health, hosted by the Center.

Last year, a clear shift in our work was evident. From behind-the-scenes support of the national health system transformation, we took on a more visible, system-facing role to guide those actively deciding upon and delivering the changes needed to realize a high-value health system in Saudi Arabia. The great interest shown by the many policymakers and practitioners who attended Value in Health 2023, our first national conference on health value, attests to this.

This report, covering the 2022/3 period, shares highlights from our recent efforts and looks ahead to what we have planned for 2024 and beyond.

Dr. Reem Al Bunyan

Chief Executive Officer, Value in Health
Executive Director, Global Innovation Hub for Improving Value in Health





2022/2023 review

Policy for high-value health systems

The Saudi health sector is several years into its end-to-end transformation to deliver better value services. Extensive progress has been made; much remains to be done. Value in health provides guidance to policymakers on a range of issues relating to value-based healthcare, both analyzing issues to support decision-making and helping to put those decisions into practice.



Our recent engagements with policymakers and practitioners in Saudi Arabia have demonstrated the high level of interest and excitement about the opportunities offered by value-based healthcare. Stakeholders want to know more, especially about how they can make better value a reality. We convened webinars, roundtables, and events in 2022 and 2023 that were well attended, generated lively debate, and spurred action. Our first annual conference, Here and Now | Accelerating transformation to a high-value health sector in Saudi Arabia, attracted speakers and attendees from across Saudi Arabia, the Gulf region and globally (see Case Study).



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Leveraging digital technology is undoubtedly one of the more critical enablers of value-based healthcare. Saudi Arabia is well advanced in deploying digital innovations in care delivery and using data for better value care. A collaboration between global management consultancy McKinsey and the Center, the paper Ten ways to accelerate the benefits of digital health in Saudi Arabia estimated that digital transformation could unlock up to SAR 100bn for the Kingdom by 2030.



While structural levers such as financing and digital are certainly important, we know that value is ultimately created through interactions each day between individual clinicians and patients. There is much that can be done by policymakers to ensure patient preferences are acknowledged and citizens are enabled to take charge of their own health status in an informed way. Our exploration of the patient and public engagement topic included our contribution to the 2023 Roland Bergy study Voices of the GCC Population on Value in Health, which reiterated the need for health systems to deliver - and measure - what matters most to citizens and patients.



The global evidence base on value-based healthcare has expanded rapidly over the last decade. However, the most published studies still relate to healthcare policy in the United States and countries in Europe. Value in health is supporting health policy research in Saudi Arabia by engaging with and guiding research students whose investigations are yielding locally valid insights. Through national and global partners, we have continued to promote the necessity of greater health policy research in the Kingdom

Here and Now | Accelerating transformation to a high-value health sector in Saudi Arabia and the Value Network

This event, the first national conference focused on value-based healthcare, was convened in Riyadh on 11-12 December 2023.

Over 1,000 delegates - senior policymakers and practitioners responsible for shaping the future of healthcare in Saudi Arabia - participated in the program of presentations, panel discussions and workshops.

International speakers and national leaders shared insights on a range of topics including measuring outcomes and costs, addressing waste, improving productivity and utilization, and strengthening quality, safety, equity, and access.

The conference also featured abstracts on various aspects of value in healthcare, fostering innovation and creativity in the pursuit of high-value healthcare in Saudi Arabia



مؤتمر الصحة الحكيمة

Value in Health Conference

تحالف الصحة الحكيمة

Value in Health Network



Here and Now is the collaborative project led by the Value in Health Network, an alliance of organizations sharing a common goal to enable the health system in Saudi Arabia to deliver superior value.

The Value in Health Network is a group of organizations that share the common goal of enabling the health system in Saudi Arabia to deliver superior value. It was founded in August 2023 and was launched in October 2023 at the Global Health Exhibition.

The Network consists of seven Saudi national healthcare organizations, and it is open for

Over the coming years, the Value in Health Network will deliver various high-impact initiatives leveraging the specific expertise and assets of members, taking a unified approach where this is most beneficial to the health system.



وزارة الصحة
Ministry of Health



المجلس الصحي السعودي
Saudi Health Council



مجلس الضمان الصحي
Council of Health Insurance



مركز التأمين
الصحي الوطني
Center for National Health Insurance



هيئة الصحة العامة
PUBLIC HEALTH AUTHORITY



الهيئة السعودية للتخصصات الصحية
Saudi Commission for Health Specialties



الصحة الحكيمة
value in health

Measuring what matters

It is only through measuring and comparing the value achieved by health and care services – the outcomes they achieve, and the resources used to deliver them – that we can identify and prioritize the right opportunities for transformation. We have found that more comprehensive, trusted and transparent data is perhaps the greatest enabler of health system value. Our recent contributions in this area have included policy advice, research and development of measures across each level of the health system.

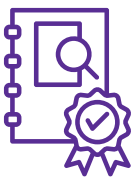
Highlights



National surveys are useful tools for identifying and quantifying opportunities to improve health system value. The Center made strong progress as lead for Saudi Arabia's national contribution to the OECD's international study, PaRIS, on long-term conditions management, use of primary care and development of patient-reported outcome measures.



In our working paper A framework for measuring health system value, we provided a description of the priority domains for value measurement in the Saudi health system. We noted how ensuring the availability and use of standardized and comparable measures of costs and outcomes poses two main challenges, one technical and one relating to change management and communications. In 2022/3, we continued our work to align stakeholders on the imperative for common standards and metrics.



We provided expert guidance and evidence to a range of national and local projects seeking to demonstrate how value measures can be operationalized. Together with partner organizations, we We provided expert guidance and evidence to a range of national and local projects seeking to demonstrate how value measures can be operationalized. Together with partner organizations, we strengthened the case for change and gathered key lessons for the practical implementation of value measurement in clinical settings.

Patient Reported Indicators Survey (PaRIS)

Value in Health conducted the OECD's PaRIS project in Saudi Arabia. This survey represents a crucial step towards understanding and addressing the diverse needs and experiences of patients within the Saudi healthcare system. PaRIS aims to capture a comprehensive view of patients' experiences, and outcomes, and areas for improvement within the Saudi healthcare ecosystem.

The survey is being conducted over three phases; a field trial in 2022, a first phase of the main survey where data is collected from patients aged 45 and older, conducted between 2023 and 2024, and the second phase of the main survey planned in 2024 where data is collected from respondents aged 18-45. Through structured questionnaires, patients and providers were asked to share their insights on a wide array of indicators spanning accessibility, quality of care, communication with healthcare professionals, and overall healthcare experience.

To test the survey operations, a pilot phase of the PaRIS survey was conducted in 2022. Results displayed a high prevalence of chronic diseases, where 85% of respondents had at least one chronic disease, most diabetes, hypertension, and arthritis or chronic joint pain.

The main survey phase started in 2023. Data was collected from 100 providers and 7,500 patients from all sectors of the Saudi healthcare system; the MOH, other Governmental Sector hospitals, and the private sector. Preliminary results showed variation in patients' experiences across sectors. There is also indication that there is a geographical variation in PROMs and PREMS.

The survey displayed valuable insights to shed light on areas of strength and areas necessitating attention within the Saudi healthcare landscape including patient satisfaction with the quality of care received, communication with healthcare providers, access to healthcare services, and patient-centric care.

Transforming services

It is not enough to measure value; we must also transform how we deliver health and care to deliver better value. Through multiple initiatives, value in health has promoted the use of improvement science to translate value-improving policies into practice. We also reviewed the capability gaps in health systems that need to be addressed to establish high-value health systems, and piloted capability-building interventions to address these gaps.

Highlights



We found national policymakers had strong alignment on the need to improve health system value. Improving the level of understanding of, and capability to deliver on, value-based healthcare among frontline staff was identified as a high priority for Value in health. A new initiative to address this gap was the launch of our Essentials of High Value Health systems, a set of online learning modules on value-based healthcare, tailored to Saudi Arabia.



It requires practical experience to build sustainability capability to transform clinical services. As part of the current health sector transformation, many clinical teams are seeking to redesign and strengthen services. We piloted an evidence-based and practical learning and coaching program, ACT for Value, to understand what kinds of training best supports those leading frontline change.



A community of practice is emerging in the Saudi health system around the topic of value-based healthcare. For those with an interest in becoming more expert on value-based healthcare, we continued to publish policy briefs and reports to build interest and knowledge. A milestone for the Center is the publication of our first book, How to Get Better Value Healthcare - Saudi Arabia's Edition, at the end of 2023.

Accelerating Clinical Transformation (ACT) for Value

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ACT for Value was co-created with the Oxford Value and Stewardship Program, a training consultancy expert in value-based healthcare. Together, we designed a practical five-step methodology for delivering better health, better healthcare and at lower cost, tailored to the specific needs of the Saudi health transformation.

The program was rolled out in three regions, working with multi-disciplinary teams of clinicians, managers and analysts across services addressing different clinical areas (including cardiology, stroke, maternity and diabetes). Local teams experienced a range of interactive training and coaching interventions.

Participants reported high levels of satisfaction, interest and engagement in the project. Evaluating this feedback, we found the program to be highly effective in achieving the planned learning outcomes. Teams were keen to generate case studies from their experiences, and their lessons learned will be made available to other teams leading similar clinical change projects in the Saudi health system.

Essentials of High-Value Health Systems

This online learning initiative aimed to equip healthcare leaders with the knowledge and skills to deliver value-based healthcare. The course covered three main topics.

- Core principles of value-based healthcare and stewardship
- Strategies to identify and address low-value care practices
- Tools to optimize value for individual patients, populations, and the healthcare system as a whole

Over sixty participants completed the first wave of this program and, in recognition of this group's achievement, we convened an online graduation ceremony. We evaluated the impact of this course using feedback from participants and are planning to respond to the lessons learned in future iterations of this training

Leading better value globally

It is only through measuring and comparing the value achieved by health and care services – the outcomes they achieve, and the resources used to deliver them – that we can identify and prioritize the right opportunities for transformation. We have found that more comprehensive, trusted and transparent data is perhaps the greatest enabler of health system value. Our recent contributions in this area have included policy advice, research and development of measures across each level of the health system.

Highlights



The Hub made major contributions on the topic of value-based healthcare during the Indian and Indonesian G20 presidencies. We provided support primarily to three bodies: the Health Working Group, Health Ministerial Meeting and the Joint Health and Finance Ministerial Meeting. We hosted side events and contributed to discussions on a range of global health topics.



The Hub was active in producing numerous knowledge products, reports, events and webinars to share evidence and experience between countries on delivering value-based healthcare. During the year, topics addressed included: value-based provider payment models; regional comparisons of progress towards high-value health systems, globally and across the MENA region; innovating for value; health system resilience.

Health and Care Value at the G20 – Indonesia and India

During the Indian G20 presidency, the Hub contributed a series of engagements and interventions on the Health Working Group's focus topics: emergency prevention, preparedness, and response; medical countermeasures; and healthcare innovation. We contributed to side events on digital health and global vaccine research.

During the Indonesia G20 Presidency, the Hub contributed to the Health Working Group, Health Ministerial Meeting and Joint Health and Finance Ministerial Meetings. We contributed insight to discussions on health system resilience and pandemic preparedness.

Transitioning to High-Value Health Systems in G20+ Countries

In partnership with Health Systems Innovation Lab at Harvard University, the Hub conducted a collaborative study focused on a new framework to examine G20+ countries' progress transitioning to a high-value health system (HVHS) model.

The ten components of the HVHS model presented a health system design template centered on producing outcomes that matter to people while optimizing for efficacy, efficiency, and equity in health service delivery. Amid a rapid increase in health systems transformation efforts across the G20, the HVHS model could provide a helpful blueprint to guide such efforts and better position national governments to achieve value for their citizens and economies.

The study was published in 2023 and key insights were presented to a diverse range of stakeholders to inform health policy discussions across global, regional, and national-level forums.



Building the Center

2022/23 was a year of growth and transition for the Center. Our agile ways of working to support a more structured policy program were strengthened. We were able to operate in a more planned and proactive way, while remaining responsive to opportunities arising in discussions with our stakeholders.

Highlights



As a health policy think tank, we invested in building our expert capabilities. We developed a structured external and in-house training program for our policy team. We refined and embedded our agile work delivery approach, enabling us to produce high quality policy products at the pace required of us by the rapidly-evolving health transformation.



Ours is a small, expert team and the many opportunities for us to contribute positively to the health system will always be greater than our capacity to address them. We prioritized working with partner organizations as our primary method to maximize the scope and impact of our policy work.



key initiatives for 2024/2025

Key initiatives for 2024/2025

Two new policy programs

Value in health and care touches on almost all topics in healthcare policy and practice, so we are clear on the need to focus on areas where we can provide the most impactful and distinctive contribution with our insights and evidence.

Through discussions with our stakeholders during 2022/3, we identified the need to expand our policy program to address two additional pressing topics that are highly relevant to the delivery of better health system value.

- ◆ **Healthy lives for all:** how to unlock system value through health promotion and disease prevention, encouraging cross-sectoral collaboration, addressing social determinants of health and identifying opportunities to improve health equity.
- ◆ **Sustainable healthcare futures:** how to solve tomorrow's healthcare challenges as well as today's, reviewing the climate impacts of health and care delivery ensuring system sustainability and resilience and using strategic foresight and forecasting to anticipate future challenges.

Policy products relating to these new areas will be developed and released in the coming year.

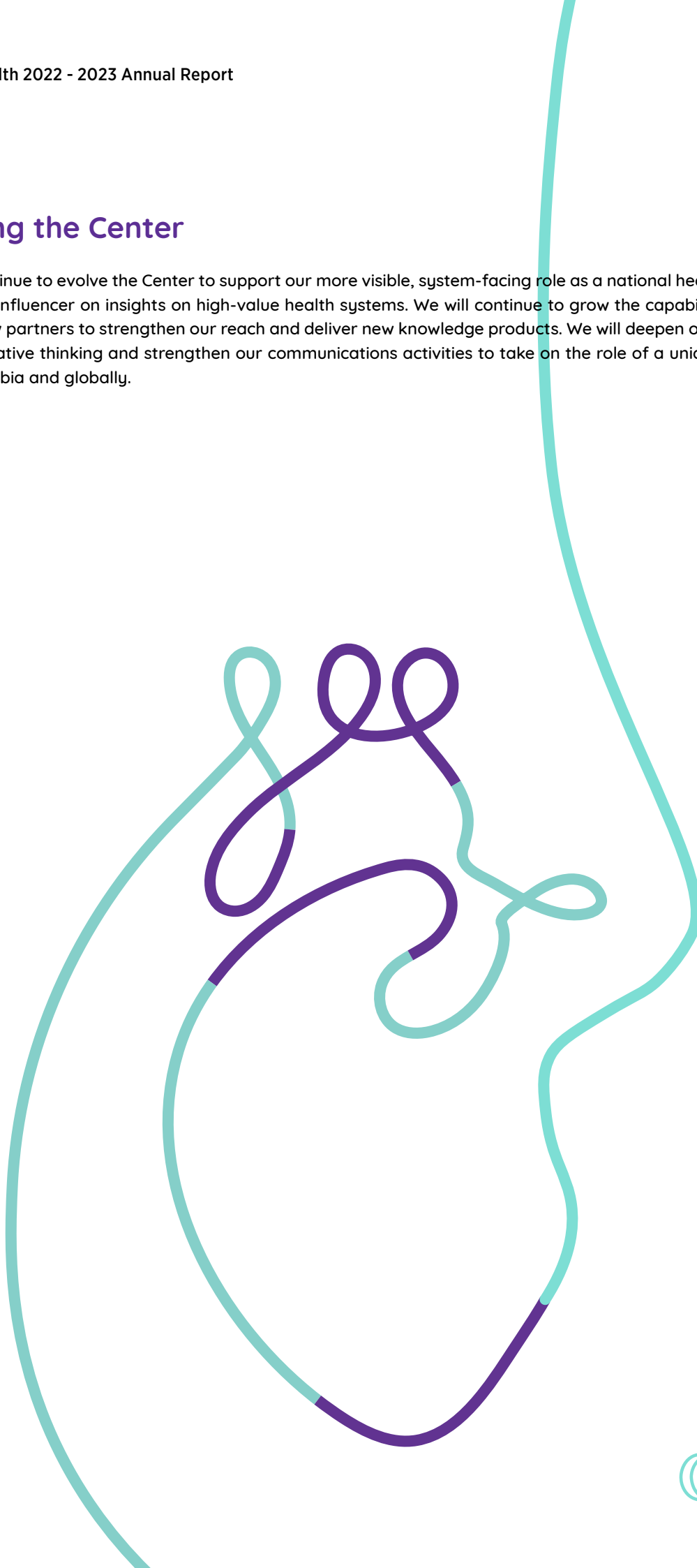
What's next for our ongoing programs

Building on our achievements this year, we will continue to research, evidence and promote the changes required to healthcare policy and practice to deliver better value in 2024.

- ◆ **Policy for high-value health systems:** We expect to see significant progress in the Saudi health transformation this year and we will continue to provide advice and evidence to support policymakers in driving required changes. We will publish an update to our 2020 paper on defining value in the Saudi health system.
- ◆ **Measuring what matters:** For PaRIS, a white paper will be published with deeper insights from the main survey and detailed analyses of the responses that will serve as a compass for policymakers, healthcare providers, and stakeholders in steering towards a healthcare system that truly prioritizes patient needs and experiences.
- ◆ **Transforming services:** Working with partners, we will evolve our capability offer to ensure the right trainings are available for policymakers and practitioners. We are currently running the next wave of the Essentials of High-Value Health Systems online course and will launch experiential learning for policymakers later in the year.
- ◆ **Leading better value globally:** We will contribute to the Brazilian G20 presidency on the value in health topic. We have knowledge products in development, including reports to compare health system progress to value in Latin America, and global lessons on ensuring health system sustainability.

Evolving the Center

We will continue to evolve the Center to support our more visible, system-facing role as a national health policy think tank and global influencer on insights on high-value health systems. We will continue to grow the capability of our team and engage new partners to strengthen our reach and deliver new knowledge products. We will deepen our expertise, provide more innovative thinking and strengthen our communications activities to take on the role of a unique “voice for value” in Saudi Arabia and globally.



Our team



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