ZDOROVI

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BAROMETER

of the state of provision of health care facilities and the needs of patients of Ukraine









The fifth wave of the study

1st quarter of

2024

Research purpose

National Agency for Humanitarian Aid "ZDOROVI" launched the BAROMETER project with the aim of systematically measuring the dynamics of changes in the state of the health care system, the state of provision of medical facilities and their ability to provide quality services to Ukrainian patients in full both during the war and after the victory of Ukraine.

The results of the survey will allow all stakeholders to receive an independent assessment of industry experts in order to increase the effectiveness of the joint efforts of the public, private and public sectors to effectively solve current problems and create a modern post-war health care system.

The updated study focuses on surveying several target groups: healthcare managers, doctors and patients, to provide the most complete and objective assessment of the state of provision of healthcare facilities and the quality of services provided.

Initiator

Charity fund "National Agency for Humanitarian Aid ZDOROVI" (hereinafter ZDOROVI) is one of the largest centers of humanitarian medical aid in Ukraine, which coordinates the support of international donors and partners to provide Ukrainian medical facilities with medicines and medical equipment, training programs.

Before the war, the agency made efforts to improve medical services in Ukraine by changing the business processes of medical facilities, implementing social and educational projects of a medical direction, which we implemented in cooperation with UNICEF, USAID, GIZ, Deloitte and Ukrainian state institutions.

Partners of ZDOROVI

Ministry of Health of Ukraine and more than 75 international donor partners, including:

Global Giving, ISAR Unity, Stichting Vluchteling, MedGlobal, GIZ, CMMB, MedShare, International Rescue Committee, Razom for Ukraine, Nova Ukraine, Americares, USAID

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Study methodology

We bring to your attention the results of the **fifth wave of the BAROMETER survey using the updated methodology**, a study of the state of the healthcare system in Ukraine.

The study was conducted through an online survey on the **KoboToolbox** platform.

160 representatives of the management of healthcare institutions took part in the fifth wave of the study.

We used a questionnaire, designed with the participation of industry experts, heads of healthcare institutions and taking into account critical response experience of ZDOROVI.

According to their profile and the results of previous studies, we asked respondents to answer different sets of questions.

Question section

regarding the demand for establishment services

regarding material and personnel shortages in war conditions

about the current needs of institutions for management training

regarding the experience of working with different categories of patients and the quality of service in the institution

Period of survey: April 2024

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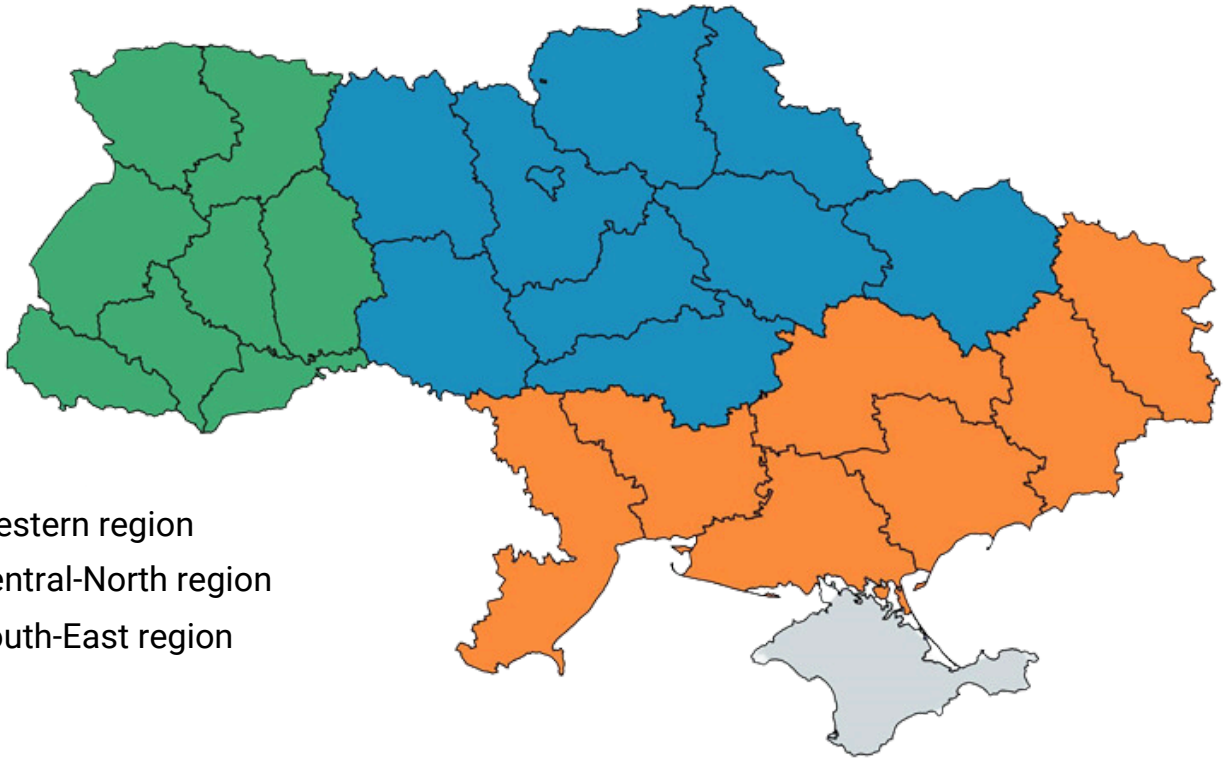
Geographical distribution of respondents of the study

Geographically, the respondents represent three conventional regions:

Western region
Khmelnytskyi, Volyn, Rivne, Ternopil, Ivano-Frankivsk, Chernivtsi, Lviv, Zakarpattia oblasts

Central-North region
Kyiv, Zhytomyr, Chernihiv, Kirovohrad, Poltava, Sumy, Kharkiv, Cherkasy, Vinnytsia oblasts

South-East region
Donetsk, Luhansk, Zaporizhzhia, Kherson, Mykolaiv, Dnipro, Odesa oblasts



17% Western region
52% Central-North region
31% South-East region

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Distribution of respondents of the study by position

Director / deputy director	**75%**
Head Doctor	**11%**
Department Head	**7%**
Director of Nursing, Coordinator, Head and Senior Nurse	**7%**

According to the results of the study, **28% of respondents are from de-occupied territories or territories bordering with the front line**, and **72% are from territories without a period of occupation**. **30% of the facilities in the study were damaged** as a result of hostilities.



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Assessment of the demand for services of healthcare institutions

1. In order to study the demand for services, we asked respondents to select the **five most popular packages in the structure of service provision.**

During the study, **51%** of respondents indicated the package of preventive medicine, diagnostics, observation and treatment in an outpatient setting as one of the most popular in their institution.

45% indicated inpatient care for adults and children without surgical operations.

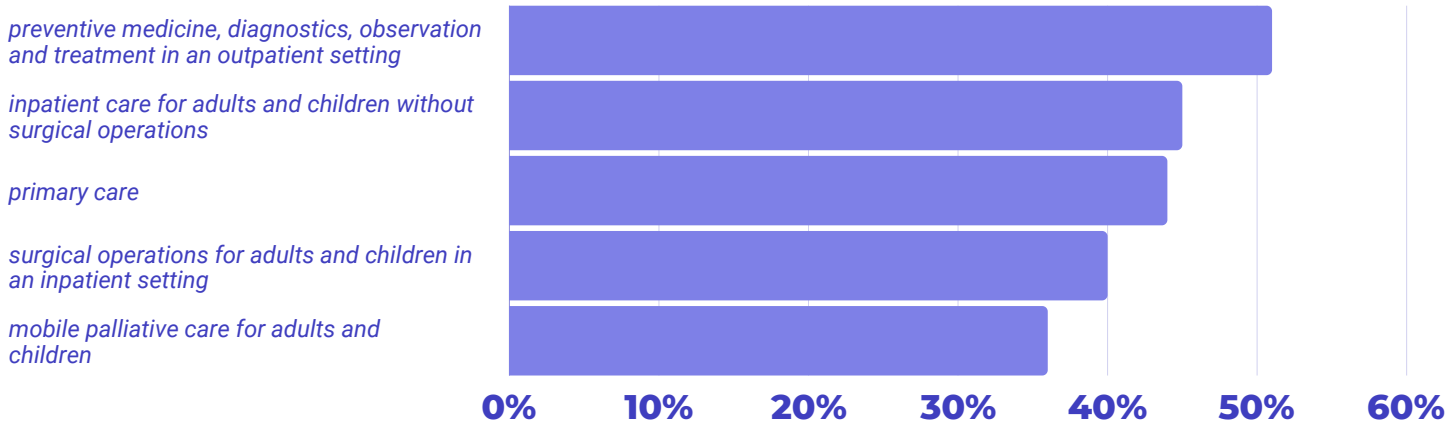
44% indicated primary care.

40% chose surgical operations for adults and children in an inpatient setting.

36% indicated mobile palliative care for adults and children.

Respondents identified the least popular packages as:

- treatment of adults and children using organ transplantation;
- neonatal screening;
- radiological treatment and support of patients with cancer in inpatient and outpatient settings;
- treatment and support of patients with hematological and oncohematological diseases in adults and children in inpatient and outpatient settings;
- rehabilitation of infants born prematurely and/or sick during the first three years of life.



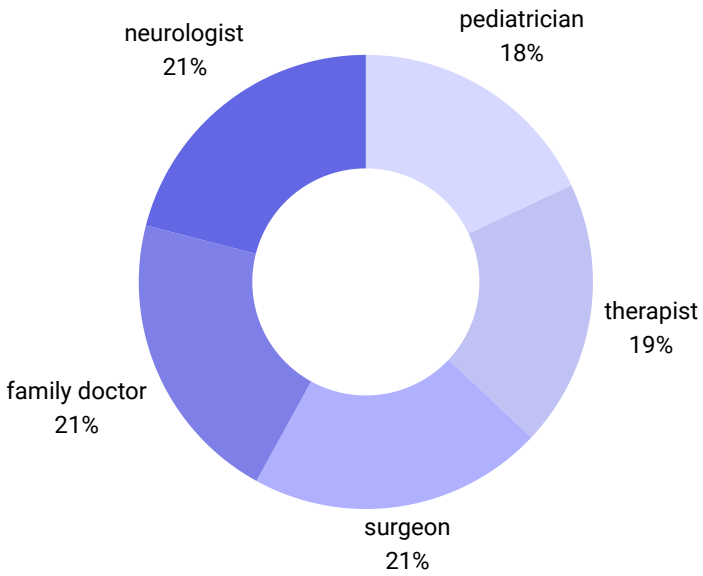
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Assessment of the demand for services of healthcare institutions

2. In order to study the demand for services of healthcare institutions, we asked respondents to select the **five most popular specialties in the structure of service provision.**

- During the study, **43%** of respondents indicated a neurologist as one of the most in-demand specialties in their institution.
- **42%** indicated a family doctor.
- **42%** indicated a surgeon.
- **38%** chose a therapist.
- **37%** indicated a pediatrician.

Which specialty doctors do patients visit most often?



Conclusion

The study shows that among the most popular service packages in institutions, preventive medicine, diagnostics, observation and treatment in an outpatient setting packages, inpatient care for adults and children without surgery, and primary care are the most popular packages. At the same time, packages related to high-tech procedures such as organ transplantation and radiological treatment of cancer are less in demand.

In the field of specializations of medical workers, the most in demand are neurologists, family doctors and surgeons. This indicates a significant demand for medical professionals specializing in general medicine, as well as specialists working with neurological diseases.

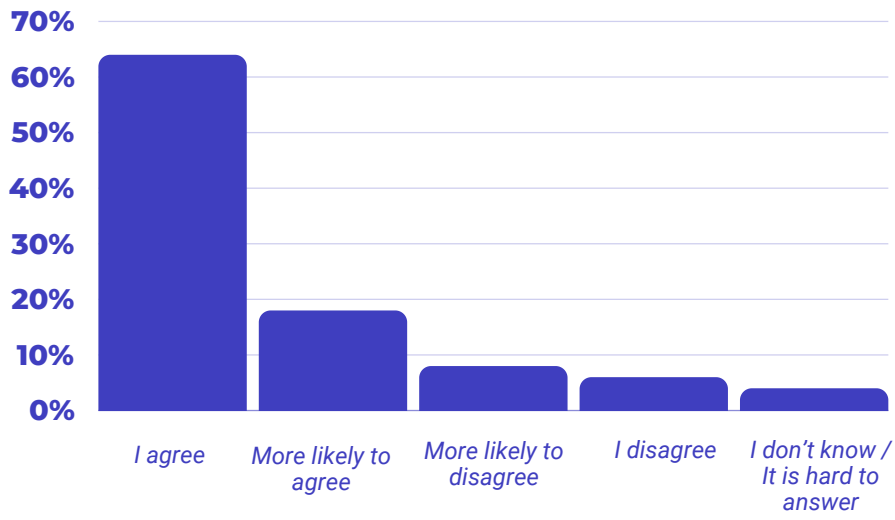
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Assessment of the level of needs of healthcare institutions

3. In order to study the needs of institutions, participants were asked to respond to the statement: **“For better functioning of my medical institution, there is a lack of some medical equipment and medical supplies.”**

- The majority, namely **64%** of respondents, completely agreed with this statement.
- **18%** of respondents were more likely to agree with the statement than to disagree.
- **8%** of respondents were more likely to disagree with the statement than to agree.
- **6%** of respondents disagreed with this statement.
- **4%** of respondents found it difficult to give a clear answer.





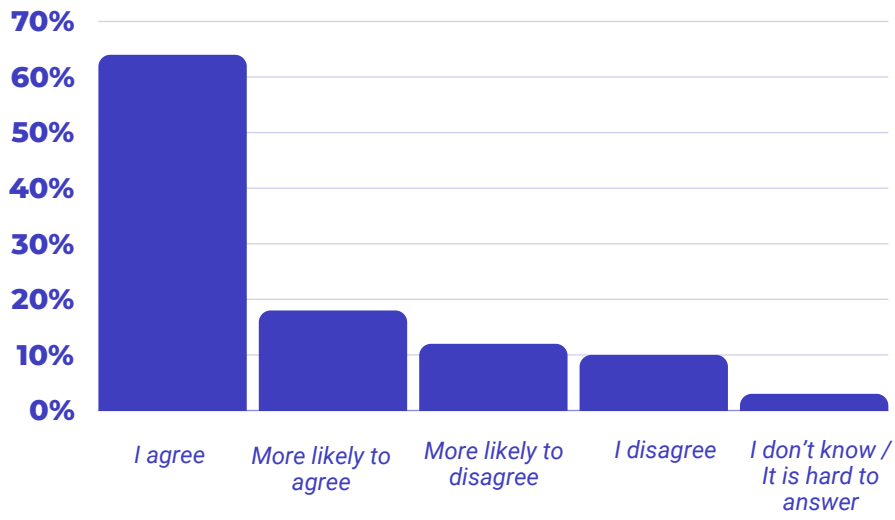
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Assessment of the level of needs of healthcare institutions

4. In order to study the needs of institutions, participants were asked to respond to the statement: **“For better functioning of my medical institution, there are not enough doctors in certain specialties.”**



- An overwhelming majority, that is **57%** of respondents completely agreed with the above statement.
- **18%** of respondents were more likely to agree with the statement than to disagree.
- **10%** of respondents were more likely to disagree with the statement than to agree.
- **12%** of respondents disagreed with this statement.
- **3%** of respondents found it difficult to give an answer.

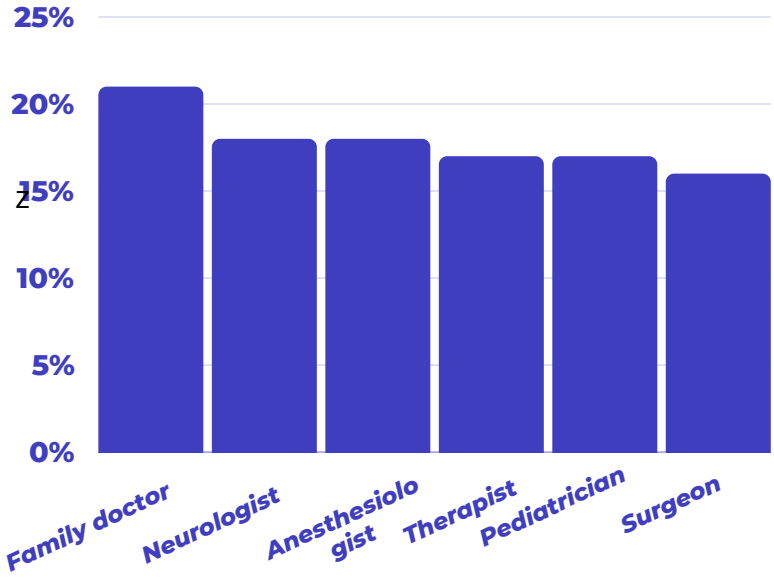


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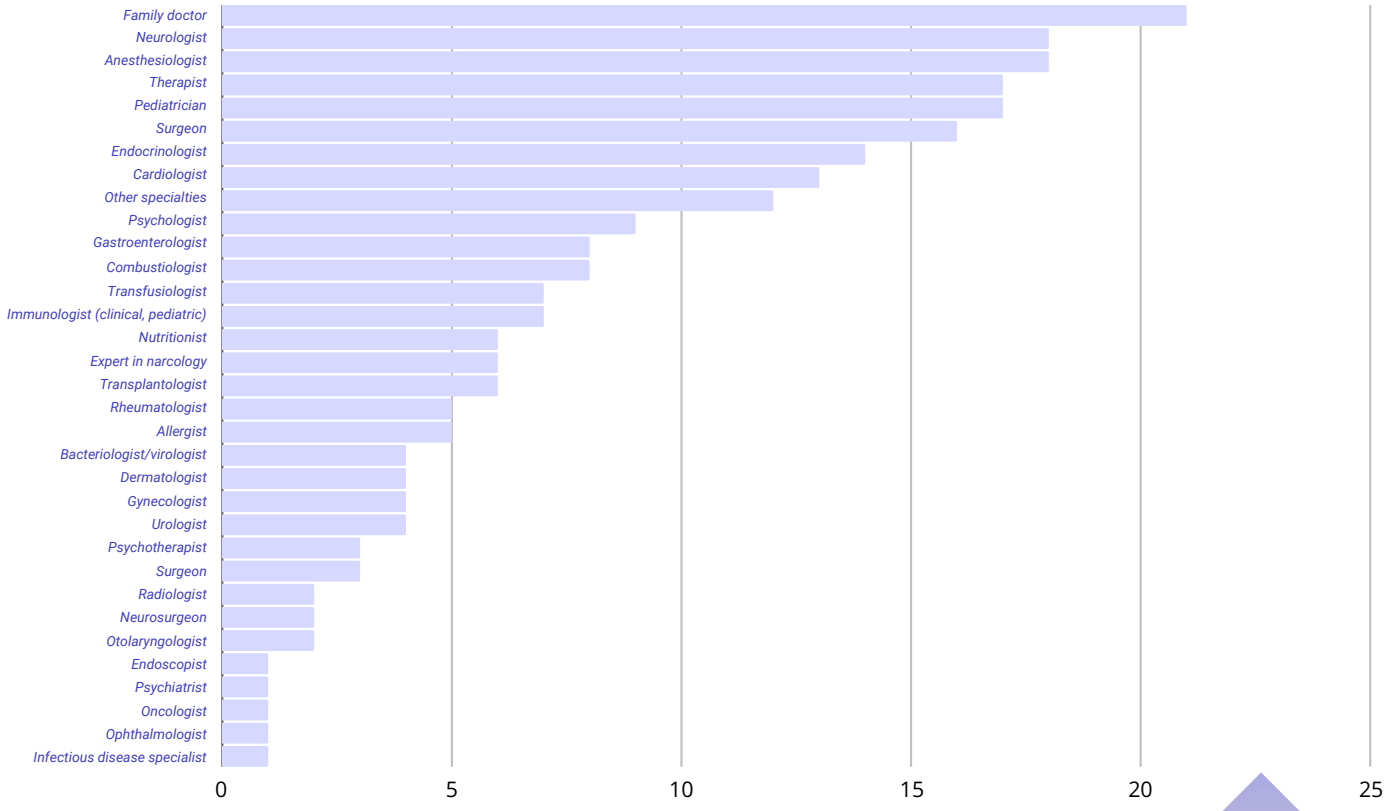
Assessment of the level of needs of healthcare institutions

5. In order to study the needs of institutions, participants were asked to select up to **five specialties that were understaffed in the institution for better work.**

- **21%** of respondents indicated that for better functioning of the institution there are not enough family doctors.
- **18%** of respondents indicated a shortage of anesthesiologists and neurologists.
- **17%** indicated a lack of therapists and pediatricians.
- **16%** of respondents indicated a shortage of surgeons.



In which specialties there is a need for more doctors?



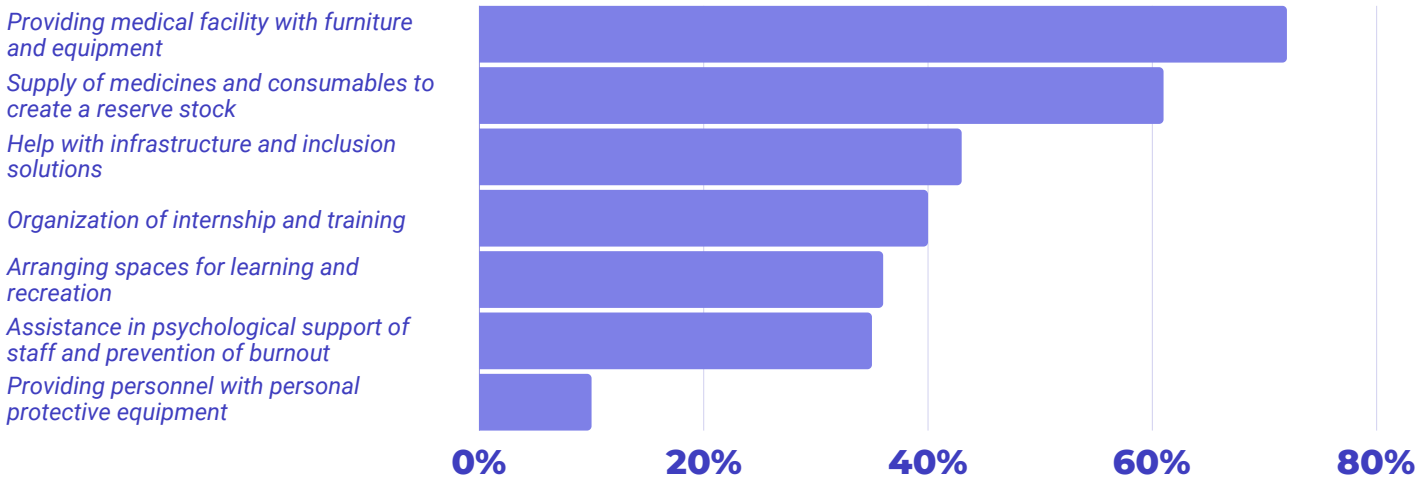
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Assessment of the level of needs of healthcare institutions

6. In order to study the needs of institutions, respondents were asked to indicate what kind of assistance from international donors they are currently counting on.

- The overwhelming majority, **72%** of respondents, noted that they were counting on international assistance for providing furniture and equipment for medical facility.
- Also, the majority, **61%**, indicated that they were counting on the supply of medicines and consumables to create a reserve stock in the institution.
- **43%** of respondents noted that they expect assistance with infrastructure and inclusive solutions in organizing the reception of patients with physical disabilities.
- **40%** of respondents indicated that they were counting on organizing internships and training for doctors and interns.
- **36%** of respondents noted that they count on help through the arrangement of spaces for learning and recreation in institutions.
- **35%** of respondents noted that they count on help in providing psychological support to staff and preventing burnout.
- **10%** of respondents indicated that they count on the assistance of international donors by providing personnel with personal protective equipment.

What kind of help from international donors? are you counting now?



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Assessment of the level of needs of healthcare institutions

Conclusion

When assessing the level of institutional needs, it becomes apparent that there is a significant shortage of medical supplies and equipment in most of the institutions studied. The majority of respondents agree with the statement that additional equipment and technical facilities are required to improve the work of their medical institution.

It was also found that there is a significant need to increase staffing levels. Most respondents noted a shortage of doctors in certain specialties, in particular, family doctors, anesthesiologists, internists and pediatricians.

In the context of international assistance, the main areas that institutions are counting on are the arrangement of a medical facility with furniture and equipment, the supply of medicines and consumables, as well as infrastructure solutions for patients with physical disabilities. There is also a need for training and support for staff, including psychological support and burnout prevention.

Consequently, the above survey results indicate the need for further attention and targeted investments from international partners to ensure the quality and efficient functioning of medical institutions.

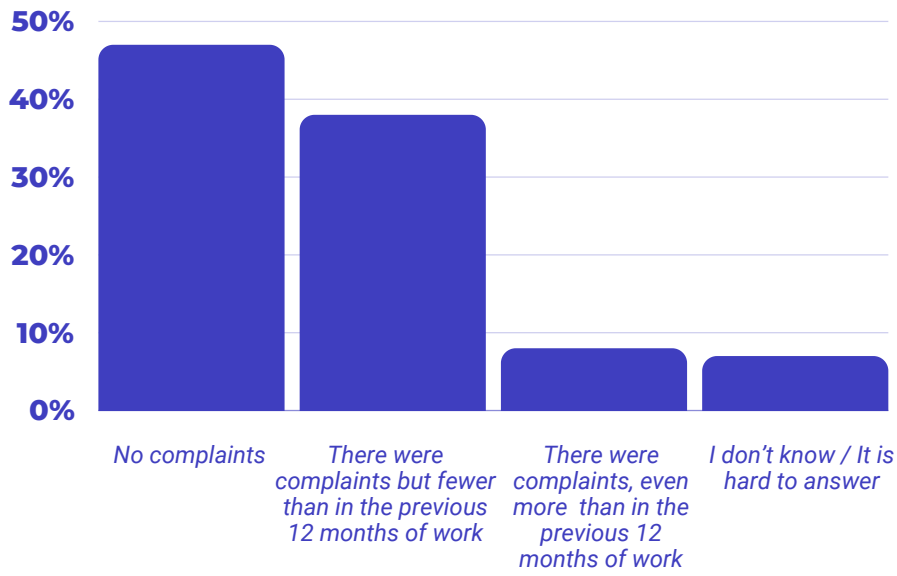
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Assessing the experience of working with different categories of patients and the quality of service in the institution

7. In order to study the experience of working with various categories of patients and the quality of service in the institution, respondents were asked to indicate whether the medical institution had received complaints from patients over the past 12 months.

- **47%** of respondents responded that there had been no complaints from patients over the past 12 months.
- **38%** of respondents indicated that there were complaints, but in fewer numbers than in the previous 12-month period.
- **8%** of respondents responded that there were complaints, but their number had increased compared to the previous 12-month period.

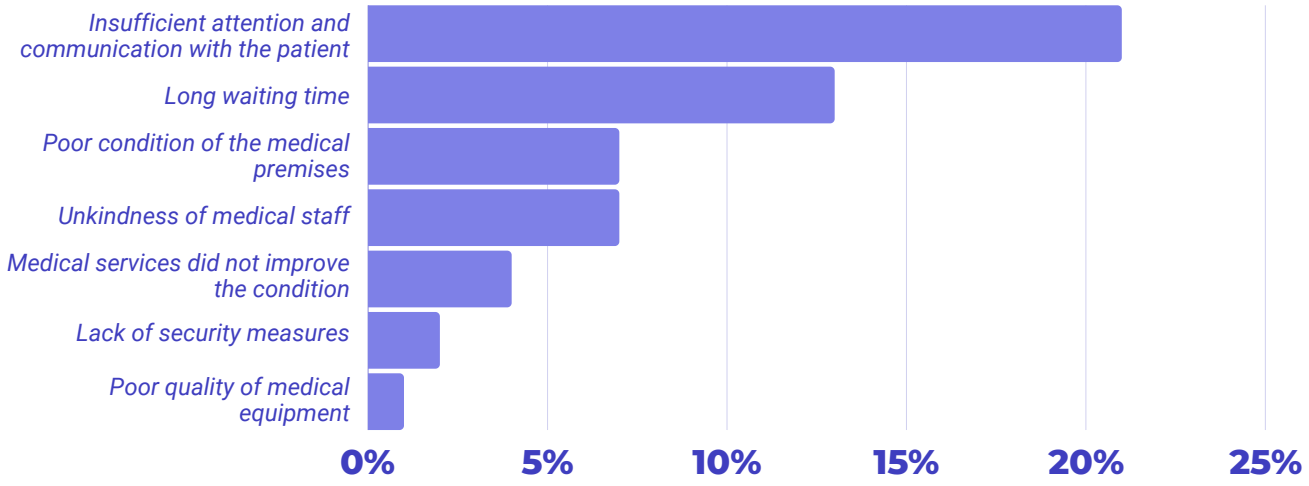




Assessing the experience of working with different categories of patients and the quality of service in the institution

8. In order to study the experience of working with different categories of patients and the quality of service in the institution, respondents who noted the presence of complaints were asked to indicate what patients of the institution most often complained about.

- **21%** of the total number of respondents noted that complaints were related to insufficient attention and communication with the patient on the part of medical personnel.
- **13%** noted that patients most often complained about long waiting time for appointments or examinations.
- **7%** of respondents noted that patients most often complained about the poor condition of the premises.
- Also, **7%** of respondents noted that patients most often complained about the hostility and conflict with medical personnel.



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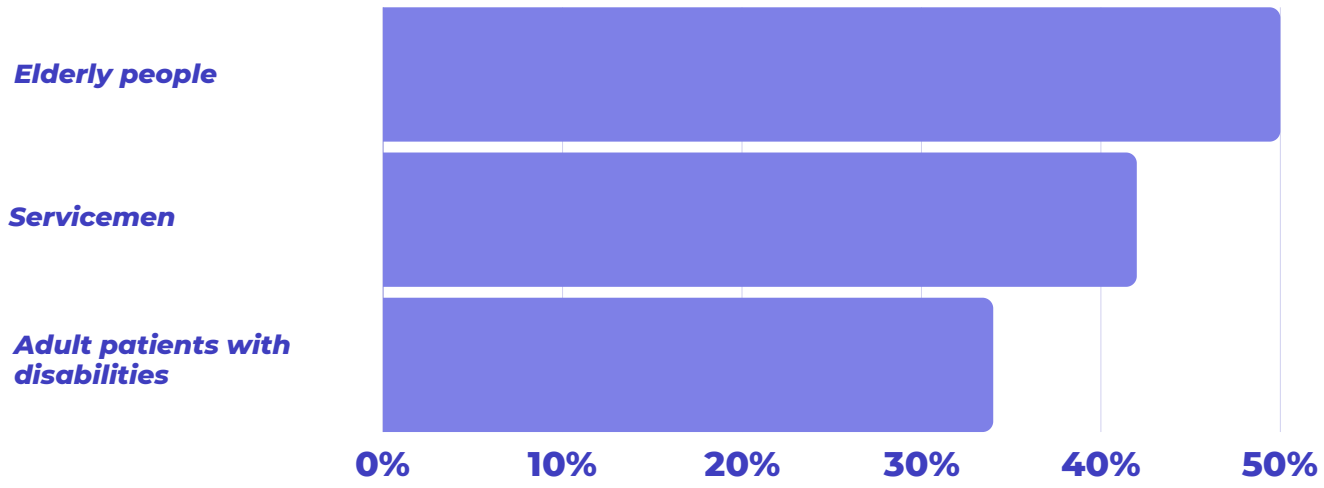
Assessing the experience of working with different categories of patients and the quality of service in the institution

9. In order to study the experience of working with different categories of patients and the quality of service in the institution, respondents were asked to indicate three categories of patients that require additional attention from medical personnel.

- Half of the respondents, **50%**, indicated that patients with high needs were elderly people.
- **42%** of respondents noted that servicemen needed additional attention from medical personnel as patients.
- **34%** of respondents noted adult patients with disabilities.

As patients with **the least needs**, respondents noted:

- children from 7 to 18 years old;
- pregnant women;
- veterans;
- people with chronic or orphan diseases



Assessing the experience of working with different categories of patients and the quality of service in the institution

Conclusion

An assessment of respondents' experience with different types of patients and the quality of service at the establishment indicates that although the majority of respondents report a low number of patient complaints over the past 12 months, there are some aspects that require attention.

In particular, among the complaints, the main reasons were insufficient attention and communication between patients and medical personnel, long waiting time for appointments or examinations, as well as the unsuitable condition of the premises. This indicates the need to further improve the quality of service and implement educational initiatives on interaction with patients.

It was also revealed that elderly patients, military personnel and adults with disabilities needed the most attention. Medical staff may require more communication skills and a specialized approach when receiving training to provide health services to these populations.

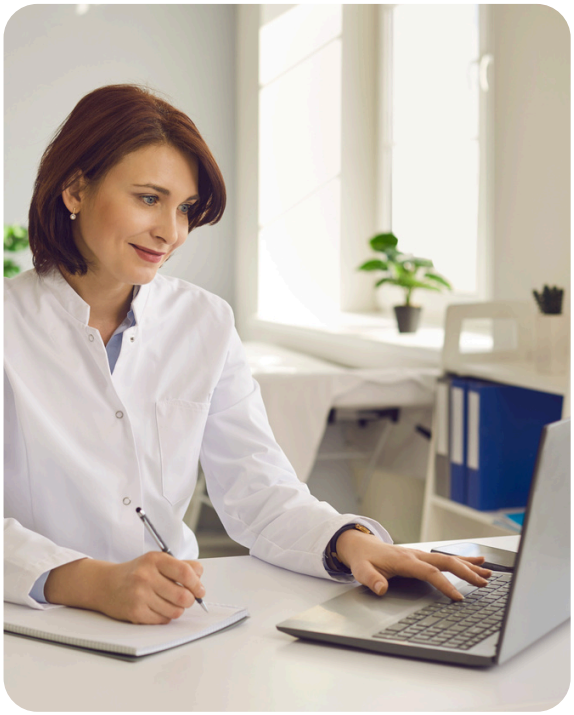
Overall, the assessment of the patient experience and quality of service in institutions indicates the need for further improvements in communication with patients, reducing waiting time, improving conditions in the premises and a specialized approach to different categories of patients.

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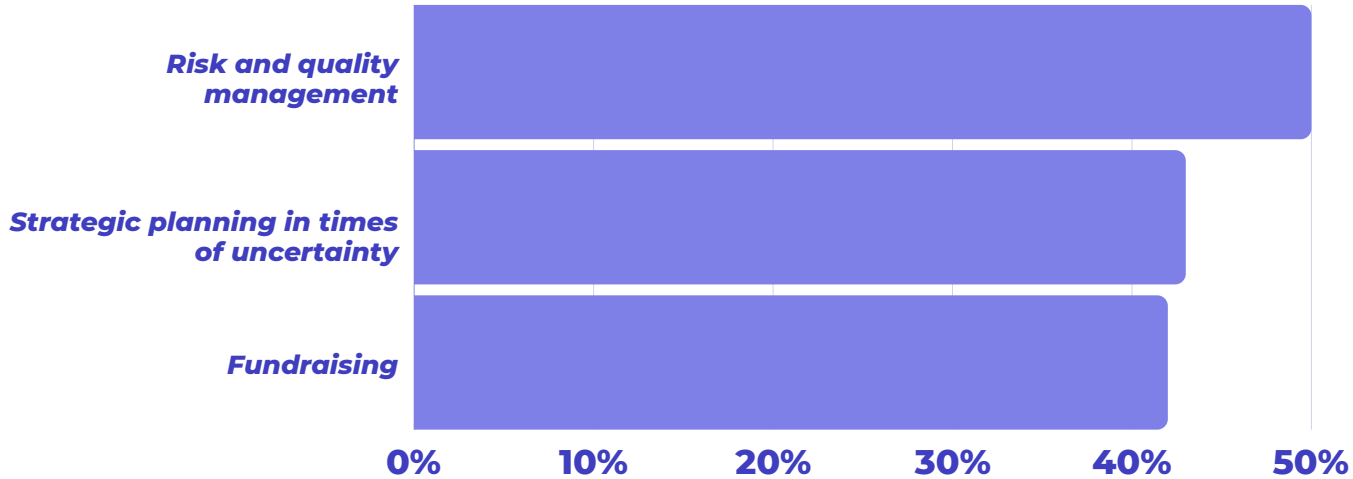
Assessing the current training needs of institutions

10. In order to assess the current training needs of institutions, respondents were asked to indicate three topics of training for medical personnel that are most relevant at the moment.

- Half of the respondents, **50%**, indicated that training on risk and quality management would be most relevant.
- **43%** of respondents indicated that training on strategic planning in times of uncertainty is most relevant.
- **42%** of respondents noted that training on attracting donor funds and grant writing would be the most relevant.



What topics in management training for medical personnel are the most relevant today?

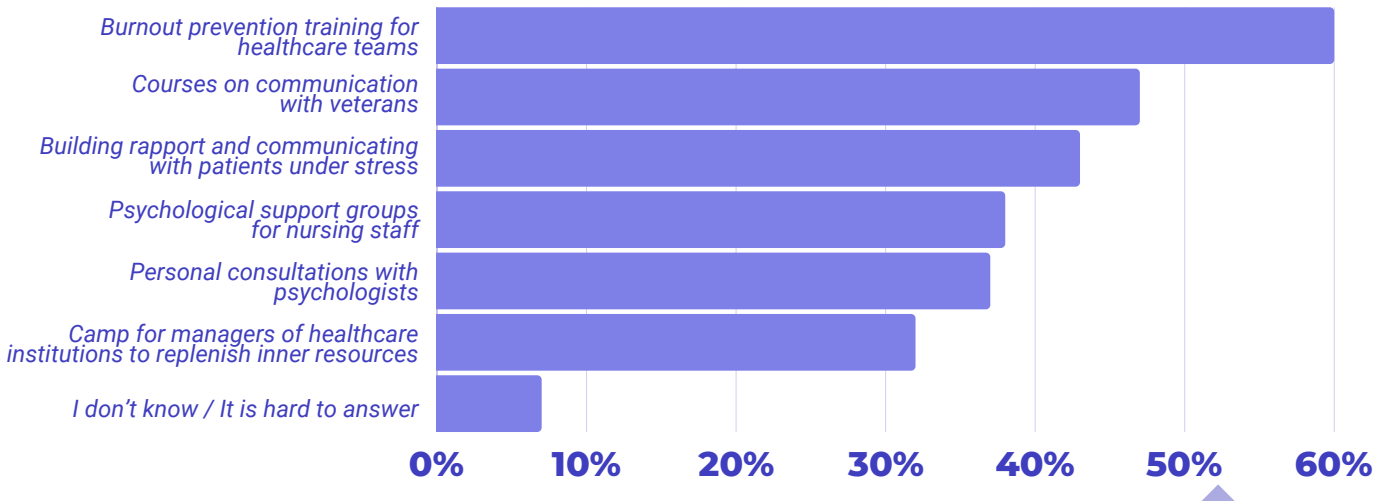


Assessing the current training needs of institutions

11. In order to assess the current training needs of institutions, respondents were asked to indicate which programs on mental support and prevention they have personally completed or would recommend that medical workers attend.

- The vast majority of respondents, **60%**, were interested in burnout prevention training for healthcare teams.
- **47%** of respondents expressed interest in courses on communication with veterans.
- **43%** of respondents were interested in training on how to communicate with patients under stress.
- **38%** of respondents are interested in psychological support groups for nursing staff.
- **37%** of respondents expressed interest in personal consultations with psychologists.
- **32%** of respondents were interested in a camp for managers of healthcare institutions to replenish inner resources.

What mental support and prevention programs would you personally take or would you recommend healthcare workers take?



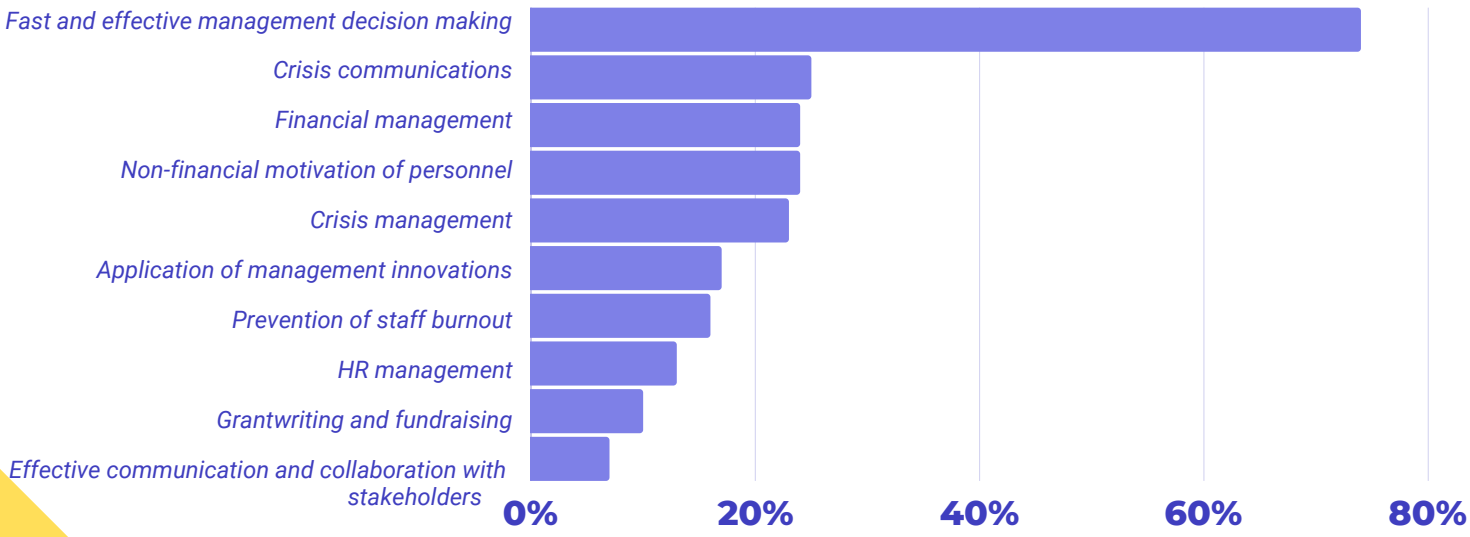
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Assessing the current training needs of institutions

12. Finally, respondents were asked to indicate which trait/skill/competency they were best able to develop while working in health care during the war.

- The majority of respondents, **74%**, identified quick and effective management decision making as a skill that was best developed while working at the institution during the war.
- **25%** noted financial management as a skill acquired during the war.
- **24%** of respondents indicated the competence of crisis communication and management as the one acquired during the war.
- **23%** of respondents noticed newly acquired skills in non-financial motivation of personnel during the war.
- **17%** of respondents noted the skills in the introduction of management innovations.
- **16%** of respondents note that they have acquired competencies in preventing staff burnout.
- **13%** noted skills in HR management.
- **10%** of respondents indicated competencies in grant writing and fundraising as acquired during the war.
- **7%** of respondents noted effective contact and cooperation with stakeholders.

In your opinion, what trait/skill/competency did you best develop while working in war?



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Assessing the current training needs of institutions

Conclusion

An assessment of the current training and staff development needs of institutions indicates several key areas that are relevant and important to health care personnel.

First of all, training on risk management and quality indicators, strategic planning in times of uncertainty, as well as attracting donor funds and grant writing are identified as the most relevant topics. This indicates a demand for improved management and strategic skills, as well as skills for the attraction of financial resources to support the activities of institutions.

In the field of mental support, trainings on preventing burnout for medical teams, communication courses, as well as on building communication with patients in stressful situations are popular. This indicates that health care personnel considers supporting mental health and improving communication skills to be important.

In conclusion, the skills and competencies acquired while working in a medical institution in war conditions include the following skills: quick and effective management decision-making, financial management, crisis communication and crisis management. This demonstrates the rapid development of leadership and management competencies among medical personnel for effective management in crisis situations.

The study's findings highlight the need to invest in educational programs and training that meet the current needs and challenges facing healthcare organizations.

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THANK YOU FOR YOUR ATTENTION

About ZDOROVI

Charity fund "National Agency for Humanitarian Aid "Zdorovi" was founded by healthcare professionals who, from the first days of the invasion of the Russian Federation, as a manifestation of their civic position, left the main area of their activities and dedicated their efforts to help victims of armed hostilities in Ukraine.

ZDOROVI was founded in July 2013 as an organization that creates educational and research projects in the health sector, closely related to reform.

However, since February 24, 2022, the ZDOROVI team has reorganized with the goal of creating an effective system for providing humanitarian medical aid throughout Ukraine: ZDOROVI has focused its efforts on helping victims of war and continues to implement large-scale training projects, activities to support mental health, and projects to support the reform of the medical system.

Today ZDOROVI is one of the leaders in providing medical humanitarian assistance and an agent of behavioral change in the healthcare sector in Ukraine.

More information about the activities can be found at the organization's website: https://www.zdorovi.help

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