

The State of Skills in the Indian Healthcare Industry 2020 Annual Report



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MedLern collaborated with IQVIA to carry out primary and secondary research to understand the current trends and challenges with regard to skill development and compliance training in the Indian healthcare sector. This report was compiled by interviewing corporate, speciality and small private hospitals in Mumbai, Delhi NCR, Bengaluru and Hyderabad. MedLern intends to publish this report annually to understand the state of skills in the Indian healthcare sector. This is an initiative by MedLern as part of its commitment towards improving the quality of healthcare in India by spreading knowledge through technology.

This report is a synopsis of our findings. To receive our detailed market research report, email us at info@medlern.com

Executive Summary



The hospital industry in India is expected to grow at CAGR of 16-17 per cent to reach INR 8.6 trillion (US\$ 132.84 billion) by FY22 from INR 4 trillion (US\$ 61.79 billion) in FY17

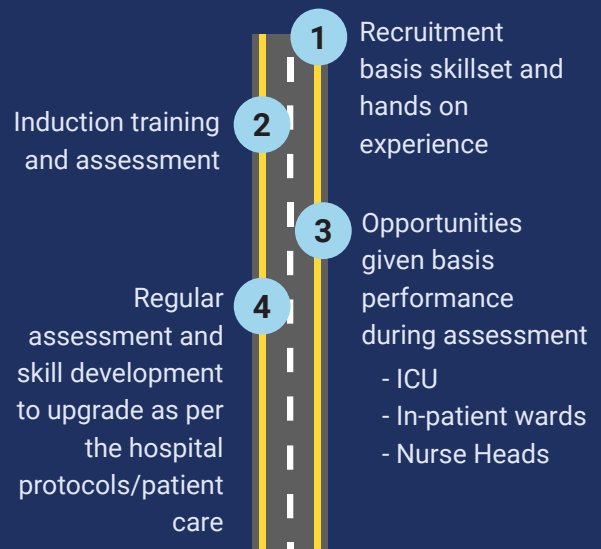
Key Drivers for Conducting Trainings

- 1** Ensuring quality care for patients
- 2** Maintaining safety of hospital staff and patients
- 3** Meeting accreditation standards

Current Need Gaps

- Reliable source of content
- Irregularity in training
- Low staff compliance
- Unavailability of effective trainers
- Lack of selection of training modules as per needs

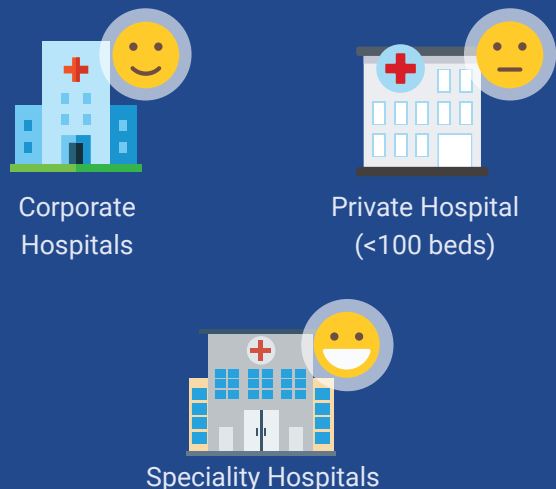
Nurses' Career Progression Pathway



Nurses - Topics of Trainings

- 1** Induction training
- 2** NABH related training by hospitals and workshops arranged by NABH-Nursing excellence programme
- 3** Trainings to upgrade patient care as per the protocols
- 4** Regular assessment like NLP to identify the Nurse Heads
- 5** Career development and progression related training

Reaction to Online Platform



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Abstract

The Government of India aims to increase healthcare spending to 3 per cent of the GDP by 2022 owing to indigenous demand and India being a major cost-effective healthcare provider. The National Accreditation Board for Hospitals and Healthcare Providers (NABH) operates accreditation programmes for healthcare organisations in India. They also offer workshops and quality improvement programmes to the hospital staff in order to ensure the utmost quality of patient care and best practices. Ensuring quality care for patients, maintaining safety measures for staff and patients, and complying with and maintaining NABH accreditation standards are three key drivers for hospital staff training sessions. Maintaining similar skillsets across staff is essential for NABH accreditation. Unlike corporate and speciality hospitals, small private hospitals (less than 100 bedded) struggle to provide structured skill development and training programmes.

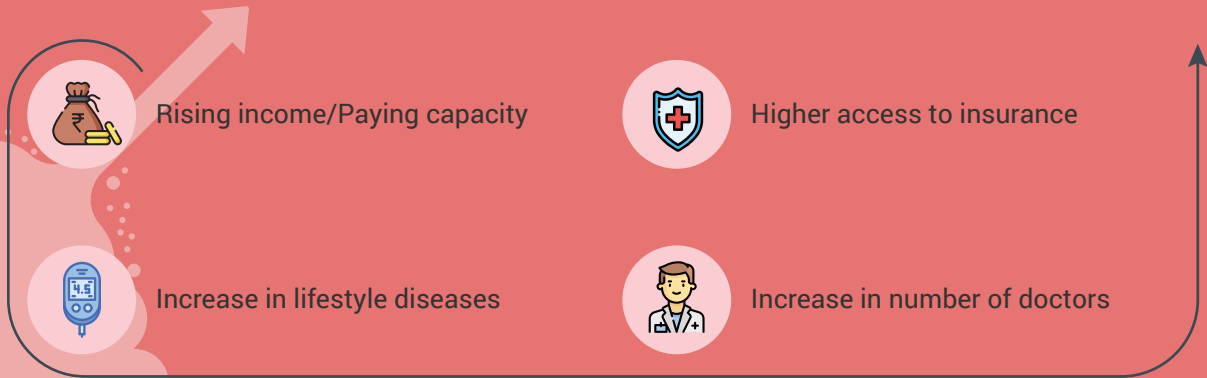
MedLern partnered with IQVIA to conduct a study among hospital stakeholders involved in training and skill development to understand current training infrastructure and key unmet needs. Lack of reliable content, ineffective trainers, irregular training record maintenance,

low staff compliance, and inability to select the training modules as required were identified as current need gaps. Low staff compliance due to work overload, lack of motivation to attend trainings, and difficulty in maintaining training attendance records for audits were identified as the major challenges faced by hospitals.

Nurses are directly involved in almost all aspects of hospital care. The industry-academia gap in the nursing sector is huge and most of the undergraduate trained nurses joining the profession are not immediately employable. Therefore it is important that their skillset and experience match hospital standards. Though nurses are regularly assessed, they need to take specialised courses for career progression.

The survey revealed that nurses are willing to take up online certification courses to upgrade their skills. Significantly, a majority of the respondents were interested in using online learning platforms for hospital staff. An online learning platform can be leveraged to educate, analyse the progress, and enhance employee-specific career goals.

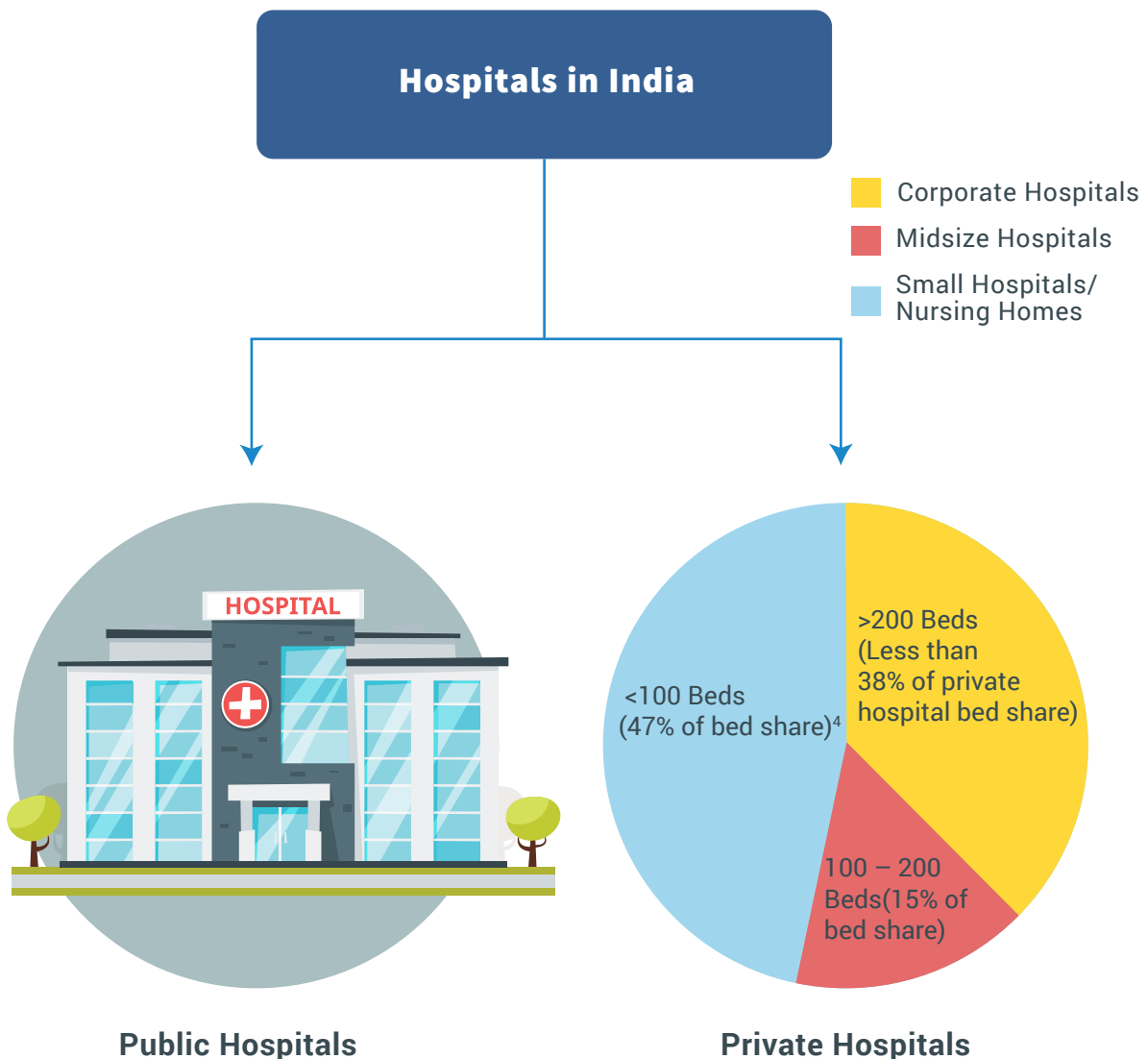
Indian Hospital Industry is Growing



Indian Hospital Scenario

India is expected to rank amongst the top three healthcare markets globally in terms of incremental growth by 2020. The hospital industry in India is witnessing a huge investor demand and is expected to grow up to INR 8.8 trillion (US\$ 132.84 billion) by FY 2022.¹ Moreover, the Indian Government is aiming to increase the healthcare spending to 3 per cent of the country's Gross Domestic Product (GDP) by 2022.^{2,3}

Based on ownership, the Indian hospital market can be divided into public and private hospitals.

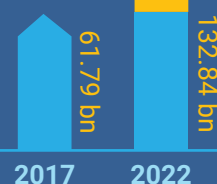


By 2020, the Indian hospital industry will be growing at a CAGR of over

17%



INCREMENTAL GROWTH
\$71.05 bn



Though the private sector has emerged as the highest contributor to health expenditure, there are some major hurdles they regularly face. Shortage of efficient and well-trained paramedical staff, lack of standardisation as per international accreditation of healthcare facilities, and improvement of management practices in the public healthcare delivery system are some well-recognised hurdles.

The National Accreditation Board for Hospitals and Healthcare Providers (NABH) was created to ensure patient safety, and to establish and operate accreditation programme for healthcare organisations. The NABH helps private hospitals to ensure the utmost quality of patient care and best practices by offering workshops and quality improvement programmes to the hospital staff.⁵

On their part, the hospitals need to provide quality care while adhering to stringent protocols. Additionally, a high ratio between junior and senior staff makes it difficult to educate the junior staff about safe working practices.

Key Hurdles for Private Health Sector



Shortage of Medical and Para-medical Staff

India has a density of 0.615 allopathic physicians and 0.613 nurses and midwives per 1000 population.^a Hence existing physicians and para-medical staff need to be efficient and well trained in order to handle patient load



Lack of Standardisation or Accreditation

India offers low cost healthcare. However, private hospital needs to standardise themselves as per the international accreditation of healthcare facilities



Quality In-country Healthcare

Many experts have an opinion that healthcare management practices in the public healthcare delivery system have scope for improvement

^aWHO Library Cataloguing-in-Publication Data – The health workforce in India. World Health Organization. [https://www.who.int/hrh/resources/16058health_workforce_India.pdf]

Driving Force for Hospital Staff Trainings

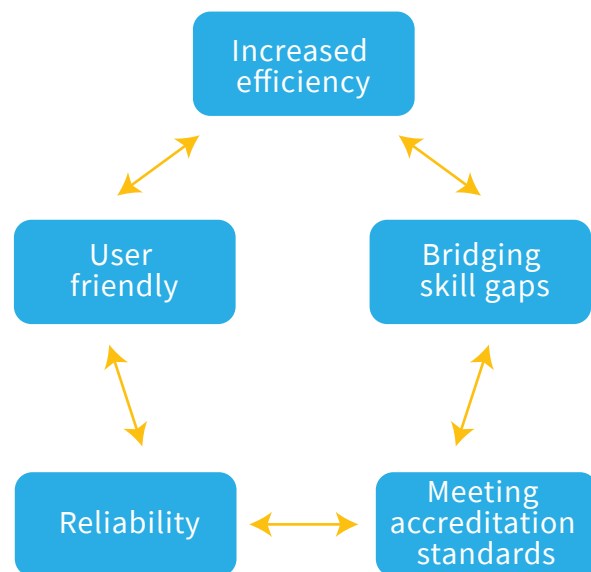
Maintaining a safe environment in the premises is important because hospitals cater to highly communicable diseases. Therefore, the safety of not only patients but also of the hospital staff needs to be maintained by following stringent safety measures. It is important to receive NABH accreditation for the hospital. However, maintaining the NABH accreditation over the years as also similar skillsets across staff (especially the fresher staff) is even more critical. Lack of expert trainers to motivate the staff, lack of awareness about recognised certifications, fewer practical trainings and on-job demonstrations, and lack of motivation to attend trainings are major reasons why trainings are neglected by hospital staff.

Increase in staff efficiency by offering structured trainings, and meeting the accreditation requirements are the key factors hospitals need to keep in mind while choosing a training platform for their employees. Hospitals also prefer trainings that are either recommended or referred by a training authority or offer a user-friendly course interface. or offer user-friendly course interface.

Key Drivers for Hospital Staff Trainings



Factors Considered for Training Selection



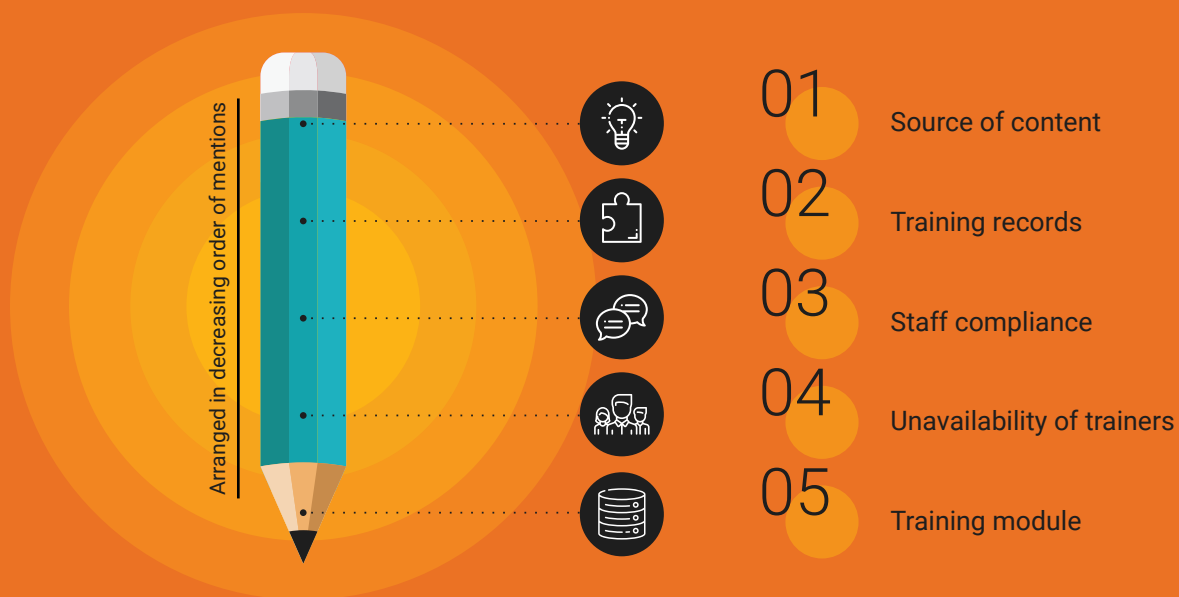
Assessment of Current Need Gaps

To acquire a comprehensive understanding of the training and skill development programmes followed by hospitals to meet accreditation standards, MedLern partnered with IQVIA to deep-dive into the challenges and need gaps faced by Indian hospitals.

Stakeholders involved in training and skill development were interviewed to understand current training infrastructure and key unmet needs. This report was compiled by interviewing corporate, speciality and small private hospitals in Mumbai, Delhi NCR, Bengaluru and Hyderabad.

Skill Development for Hospital Staff - Current Need Gaps

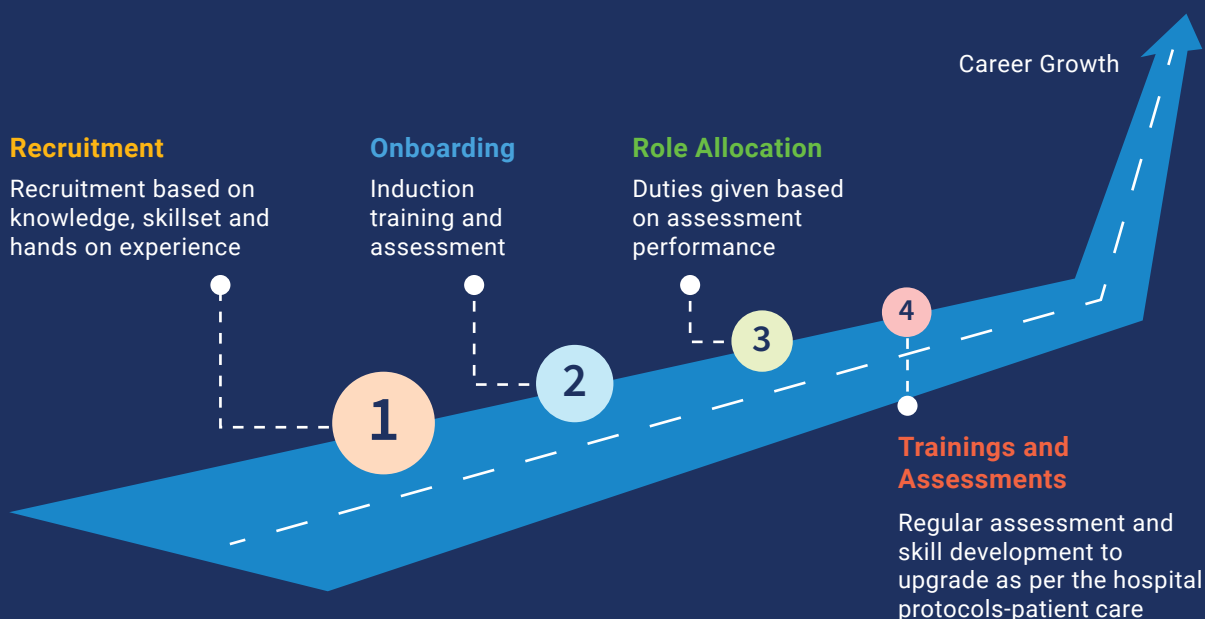
There is a need for standardisation of the process through which training and skill development programmes are carried out in order to increase the reliability and quality. One of the major challenges faced by the hospitals is the lack of reliable training sources. Arranging quality training content is a major struggle for the training and development department as the training content is usually taken from unreliable websites. On the other hand, documentation of training records is mandatory for NABH. Though staff use Microsoft Excel to manually update the training records, they often find it difficult to work with. Due to work overload, lack of motivation, and lack of effective trainers, the trainings are often ignored by the hospital staff. In some cases, the staff may not see the existing training modules as effective, standardised or user-friendly. Additionally, for small private hospitals, lack of budgets for online or outdoor trainings and irregular feedback also add up to low staff compliance. Last but not the least, hospitals prefer to have in-house training teams to avoid the use of outsourced platforms for skill development and training programmes mainly because of budgetary constraints.



Gap Analysis in Nursing Education

Amongst the hospital staff, the nurses are directly involved in almost all aspects of hospital care. After graduating from nursing college, fresher nurses lack prior experience and are not immediately employable. As per their skillset, nurses are hired and examined for an initial two or three weeks before they are confirmed. Post-recruitment, the nurses are allotted speciality wards after initial induction and assessment. They are regularly assessed and trained in terms of their knowledge and skills, and are further promoted as per their skillset. Hospitals also find the recruitment process for nurses very tedious. However, lack of a structured career development framework in hospitals and lack of training motivation are two important factors leading to high attrition rates amongst the nursing staff.

Career Progression Pathway for Nurses



Key Findings

As part of nursing reforms, it is recommended that the nursing colleges train their faculty and adopt the use of digital tools for skill development of students. Additionally, establishment of state-wise Centres of Excellence (CoEs) equipped with high-end training facilities for teaching, learning and clinical practice is recommended.

Another recommendation is to introduce Continuing Nursing Education (CNE) courses in digital format for all levels of nursing. Moreover, the introduction of management courses and trainers for nurses will enable private hospitals to hire fresher nurses with desired competencies. NABH credits or option of paid leaves to nurses for taking up speciality courses is also recommended in order to incentivise private hospitals.⁶

1. ACLS/BLS are considered mandatory certifications for nurses
2. Majority of the nurses are keen on taking online certification courses to upgrade their skills for career progression and salary increase
3. Low-cost online courses are preferred over costly instructor-led seminars or workshops
4. Online courses can be looked upon as a cost-effective option for hospitals in the long run for their training requirements
5. 75% of hospitals surveyed are keen to use an online learning platform for their hospital staff

Nurse skillsets are mainly enhanced by on-job demonstrations. Certification programmes such as Advanced Cardiovascular Life Support (ACLS) and Basic Life Support (BLS) are mandatory certifications required for nurses to be enrolled in a hospital. The results of the survey revealed that a majority of nurses are willing to take up online certification courses to upgrade their skills for career progression and salary increase. The nurses expressed a preference for low-cost online courses over expensive instructor-led seminars or workshops. Therefore online courses can be looked upon as cost-effective, yet preferred training method for hospitals in the long run. Speciality and corporate hospitals have adequate budgets which can be increased as per the training requirement. On the other hand, smaller private hospitals have lower, fixed budget for nurses' training.

Reaction to Online Platform

A major finding of this survey is that most of the hospitals (75 per cent) were extremely interested in using an online learning platform for their hospital staff, and expressed their willingness to adopt a learning management system.

25%



Corporate hospitals have existing training programmes/platforms. Small private hospitals show lack of importance given to training, and prefer classroom trainings.

75%



Hospitals were highly interested. They found it cost-effective and efficient compared to classroom trainings. They also acknowledge that attendance can be tracked/monitored.



Corporate Hospitals

- Highly interested
- Help in tracking and monitoring trainings
- But need internal approval



Speciality Hospitals

- All are willing to use
- Staff can take up training as per convenience
- Optimistic that it will help in improving patient care



Private Hospitals(<100 beds)



- Highly interested
- Help in monitoring and tracking attendance
- Specific trainings can be imparted in less time



The Importance of Online Training Platforms

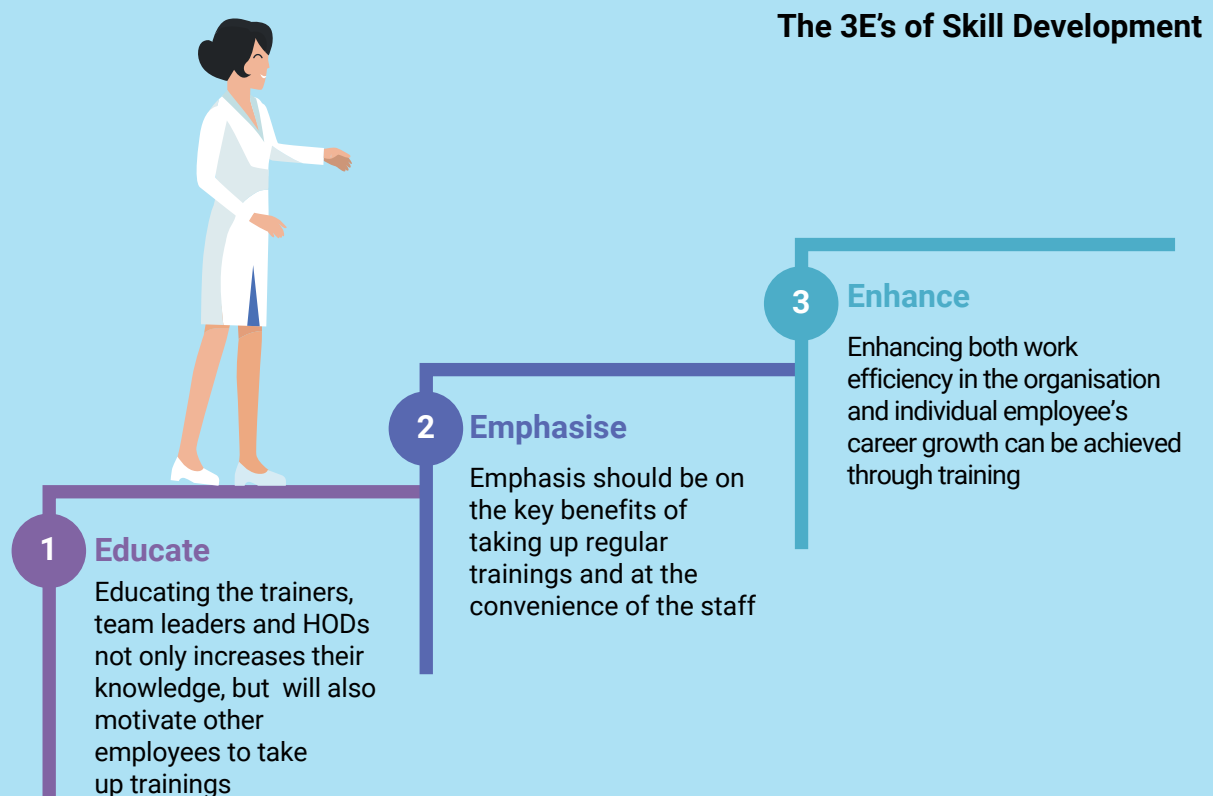
An online learning platform has the potential to address a wide range of challenges that are currently being encountered across hospitals. It can be leveraged to educate, analyse the progress, and enhance employee-specific career goals. Apart from providing a cost-effective yet efficient learning solution to the hospital, it will also allow the hospital staff to study at their own convenience. Moreover, an online learning platform will enable the hospital administrators, HR or training leads to efficiently track and monitor training programmes and training attendance. Additionally, unlike traditional methods, online learning platform will enable the hospitals to impart specific trainings in a shorter time. This will also help the administrators to keep the training records and compliance data ready for audit purposes. On the

other hand, since the courses or training materials will be developed by technical experts, these will be recognised by the regulatory authorities. Since the courses will be designed to suit the requirement of various staff types, there will be something to suit every type of health professional.

	
<h3 style="text-align: center;">Challenges Faced</h3> <ul style="list-style-type: none"> • Lack of motivation among staff • Difficulty of maintaining training records • Overloaded work schedule leading to missed trainings • Inefficient trainers • Difficulty of getting quality training content like emergency protocols, and new protocols implemented by the hospital 	<h3 style="text-align: center;">How Online Platforms Can Help</h3> <ul style="list-style-type: none"> • Allow learners to study at their own convenience • Track employee’s learning, gather data for creating reports for management, audits and more • Provide planned versus actual reports • Reduce dependence on training instructors

Conclusion

This gap analysis is the first of its kind to highlight the major challenges to skill development in India. The Indian healthcare sector is set to grow by leaps and bounds. Indian hospitals need to obtain and maintain NABH accreditation to get recognition for their services. Hospital staff training is vital to provide high quality care to patients and is one of the key elements for winning NABH accreditation for the hospitals. However, many hospitals find it difficult to conduct trainings and maintain training records. On the other hand, nurses are interested in getting training, but there are several roadblocks such as lack of time and well-structured training programmes. An online learning platform can be leveraged to provide a cost-effective and blended learning experience to healthcare professionals. It can not only enhance their skill set but also help them pursue specific career goals. For hospitals, the learning platform offers an efficient way to track, monitor and streamline their compliance trainings.



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