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Version: Post-print

**Publisher's version:** Brushett, Sara; Caldwell, Hilary A.T.; Cameron, Emma Stirling; Carrea, Cecilia; Embrett, Mark; Fierlbeck, Katherine; Hajizadeh, Mohammad; Kirk, Sara F.L.; Rothfus, Melissa; Sampalli, Tara; Sim, Meaghan. Strategies and indicators to address health equity in health service and delivery systems, JBI Evidence Synthesis: August 09, 2021 - Volume - Issue - doi: 10.11124/JBIES-21-00001

1 Strategies and indicators to address health equity in health service and delivery systems: a scoping review  
2 protocol

3 **Abstract**

4 **Objective:** The purpose of this review is to describe how health service and delivery systems support  
5 health equity and to identify strategies and indicators being used to measure health equity.

6 **Introduction:** It is widely acknowledged that a population health and equity approach is needed to  
7 improve the overall health of the population. The health service and delivery system plays an important  
8 role in this approach. Despite this, system transformation to address health inequities has been slow.  
9 This is due, in part, to the lack of evidence-based guidance on how health service and delivery systems  
10 can address and measure health equity integration. Most studies focus on health equity integration in  
11 the public health sector at a provincial or national level, but less is known about integration within the  
12 health service and delivery system. More information is needed to understand how that transformation  
13 is occurring, or could occur, to make a meaningful contribution toward improving population health  
14 outcomes.

15 **Inclusion criteria:** This scoping review will identify studies that describe the strategies and indicators  
16 that health service and delivery systems are using to integrate health equity and how progress is  
17 measured. Evidence from qualitative, quantitative, mixed method studies, and gray literature will be  
18 included.

19 **Methods:** This review will be conducted in accordance with JBI methodology for scoping reviews. A  
20 comprehensive search strategy, developed with a librarian scientist, will be used to identify relevant  
21 sources. Titles, abstracts, and full texts will be evaluated against inclusion criteria. Information will be  
22 extracted by two independent reviewers. Data will be synthesized and presented narratively, with  
23 tables and figures where appropriate.

24 **Keywords:** health care; health system; inequity; measures; population health

25 **Abstract word count:** 263

26 **Total manuscript word count:** 2000

## 27 Introduction

28 Conditions of modern life affect the health of communities, families, and people in ways that are  
29 complex, inter-related, and in many cases, unjust. Population health, defined as “the health outcomes  
30 of a group of individuals, including the distribution of such outcomes within the group,”<sup>1(p.381)</sup> is deeply  
31 connected to the social and societal conditions in which people are born, work, live, and age. These are  
32 known as the social determinants of health (SDOH).<sup>2-4</sup> There are myriad ways that SDOH have been  
33 described; however, they are commonly linked with health equity.<sup>5</sup> Health equity occurs when  
34 individuals have the opportunity to achieve their full health potential<sup>6</sup>, whereas health inequity occurs  
35 when unnecessary or unjust conditions cause differences in people’s health status or outcomes.<sup>7</sup> While  
36 many of the issues that affect the health and well-being of populations fall outside the health service  
37 and delivery system,<sup>2</sup> such as poverty, they have direct and indirect implications for health system  
38 performance, such as cost to access care or patient experience.<sup>8</sup> Health service and delivery systems  
39 are a component of the health system, with a specific remit to provide care, defined as the  
40 “organization of people, institutions, and resources to deliver health care services to meet the health  
41 needs of a target population, whether a single-provider practice or a large health care system.”<sup>9(p.671)</sup>  
42 These systems need to consider their role beyond delivering health care to ensure that they also  
43 achieve the goal of improving population health by measuring and integrating health equity in their  
44 practices. Health inequities that arise because of SDOH are recognized as a global killer,<sup>10</sup> which can  
45 only be address by intersectoral, whole-of-government action.

46 The need to integrate a population health and health equity approach within health service and  
47 delivery systems has long been recognized. In 1974, the Lalonde Report in Canada suggested that  
48 health systems move beyond a biomedical view of health (free of illness and disease) toward a health  
49 promotion approach.<sup>11</sup> This was expanded in 1986 with the Ottawa Charter, a framework that  
50 identified the need to reorient health services to a population health approach that includes SDOH,  
51 rather than an individual health approach.<sup>12</sup> In 2011, the Rio Declaration on the Social Determinants of  
52 Health stated that the health sector should address SDOH and prioritize health equity to achieve social  
53 prosperity.<sup>13</sup> Despite persistent global inequities<sup>8,9,14</sup> and the documented importance of integrating  
54 health equity into health service and delivery systems, transformation has been slow.

55 In Canada, significant progress toward health equity integration has been made in the public health  
56 sector. For example, the National Collaborating Centre for Determinants of Health has produced  
57 frameworks to guide public health roles and tools for action since 2005.<sup>15</sup> Organizational frameworks to

58 guide capacity for health equity action have also been developed for public health agencies,<sup>16</sup> including  
 59 the identification and development of indicators.<sup>17,18</sup> Health Quality Ontario developed a Health Equity  
 60 Plan<sup>21</sup> that embeds equity into the provincial health system based on a review of provincial and  
 61 national health equity strategies; however, examples of health equity integration within the health  
 62 service and delivery system (beyond public health) are hard to find. Among the few studies that exist,  
 63 Shahzad et al.<sup>19</sup> examined cross-sectoral collaboration between public health and clinical care to  
 64 integrate a population health approach to health care delivery to address inequities. Shankardass et  
 65 al.<sup>20</sup> explored international, intersectoral, governmental approaches to health equity action, noting a  
 66 need to improve the description of these complex, multi-actor processes in the literature. In a recent  
 67 overview of reviews that identified and synthesized strategies to reduce health inequities, the authors  
 68 highlighted that most strategies have targeted health care delivery, and more work is needed to  
 69 understand how health systems can integrate equity within the entire system to address the health and  
 70 well-being of the population. A review to examine health equity strategies and indicators that focuses  
 71 on the entire health service and delivery system is still lacking. Such a review is needed to guide system  
 72 transformation by clarifying the role of the health service and delivery system in addressing health  
 73 inequities and identifying possible strategies and gaps.

74 The aim of this review is to identify strategies and indicators that health service and delivery systems  
 75 are using to promote and measure health equity in the population to improve health outcomes. Our  
 76 overarching aim is to describe the role that health service and delivery systems play in promoting and  
 77 supporting health equity across all populations. This is to understand how health equity is defined and  
 78 measured within these systems, and to learn how these translate into better outcomes and system  
 79 improvements.

80 A preliminary search of PROSPERO, MEDLINE, the Cochrane Database of Systematic Reviews, and the  
 81 *JBI Evidence Synthesis* was conducted and no current or in-progress systematic reviews on the topic  
 82 were identified. The overview of reviews by Garzon-Orjuela et al. (2020) summarized strategies or  
 83 interventions aiming to reduce health inequalities<sup>22</sup>; however, that work differs from our proposed  
 84 review. We will examine both strategies and indicators for health equity and will include literature  
 85 older than the past five years as well as both academic and gray literature.

86 The aim of this review is to identify the role that health service and delivery systems have in addressing  
 87 and measuring health equity.

88 **Review question**

89 What health equity strategies and indicators are health service and delivery systems using to address  
90 health equity?

- 91 i. How is health equity defined and operationalized within health service and delivery systems?
- 92 ii. What frameworks are commonly used to guide the integration of health equity indicators  
93 within health service and delivery systems?
- 94 iii. How are health service and delivery systems measuring health equity integration (eg,  
95 indicators, accountability frameworks)?
- 96 iv. What strategies exist to address health equity and for what populations (eg, patients, families,  
97 communities, health care workers)?
- 98 v. What are the levels of integration of health equity indicators within health service and delivery  
99 systems (eg, delivery arrangements, financial arrangements, governance arrangements, and  
100 implementation strategies)?

101 **Inclusion criteria**

102 **Participants**

103 Participant details will not be used for the selection of studies for this scoping review. Instead, this  
104 review will consider primary studies and other literature reflecting: i) the integration of actions to  
105 address health equity within health service and delivery systems, and ii) the clinical and operational  
106 services that comprise these systems. Only studies from high-income, developed economies (see  
107 Appendix IV) will be included in this review. The results will be stratified by country and/or by type of  
108 health system used in that country (see Appendix III for health system classifications).

109 **Concept**

110 The main concept of interest for this scoping review is to identify what health equity strategies (and  
111 related indicators) have been developed and/or used by health service and delivery systems. We define  
112 strategies as any efforts or measures put in place with the purpose of enhancing health equity for  
113 patients or broader populations served by such systems. Examples include policies that aim to provide  
114 equitable access to health services through transportation services to and from medical appointments  
115 or providing translation services to those who may not understand the local language. Such strategies

116 can be reflected in frameworks (policy, quality, organizational, governance), models of care, programs,  
 117 policies, workforce, and financing management that are integrated within the health service and  
 118 delivery systems. We define indicators as ways to measure health equity integration within the health  
 119 service and delivery system, such as a tool to measure diversity among health care workers.

## 120 Context

121 The context of this study will be health service and delivery systems.<sup>9</sup> We define health systems as all  
 122 organizations, people, and actions whose primary intent is to promote, restore, or maintain health.<sup>9</sup>  
 123 See Appendix III for relevant health system definitions and country classifications for health system  
 124 types.

125 To identify the levels at which health equity strategies and related indicators within the health service  
 126 and delivery system are being addressed and where gaps exist, we will use the Cochrane Effective  
 127 Practice and Organization of Care (EPOC) taxonomy of health system interventions.<sup>23</sup> There are four  
 128 main domains in the EPOC taxonomy: i) delivery arrangements, ii) financial arrangements, iii)  
 129 governance arrangements, and iv) implementation strategies.<sup>24</sup>

## 130 Types of studies

131 This scoping review will consider studies employing quantitative, qualitative, and mixed methods  
 132 methodologies. It will also consider reviews and both published and unpublished studies (eg, gray  
 133 literature, dissertations, white papers, policy reports, quality reports). Text and opinion papers will also  
 134 be considered for inclusion in this review.

135 To capture evidence globally, the scoping review will not limit the search to the English language.  
 136 Studies published (or available) in all languages will be included in the search, provided that an English  
 137 abstract is available; however, data extraction will occur only if an English translation is available. All  
 138 efforts will be made to locate English versions of articles, including contacting authors of relevant  
 139 studies. Studies published from 1986 to 2021 will be included because 1986 marks the publication of  
 140 the Ottawa Charter for Health Promotion.<sup>11</sup>

## 141 Exclusion Criteria

142 Articles will be excluded if: they are not available in English (or a translation is not available), published  
 143 before 1986, they do not describe implementation of strategies or indicators in the health service or

144 delivery system, or they are implemented outside the health service or delivery system (i.e.,  
145 community-based strategies).

## 146 Methods

147 The proposed systematic review will be conducted in accordance with JBI methodology for scoping  
148 reviews.<sup>25</sup>

## 149 Search strategy

150 A JBI three-step search strategy will be implemented in this review. The search strategy, developed in  
151 cooperation with a librarian scientist, will aim to locate both published and unpublished studies. The  
152 search strategy underwent a Peer Review of Electronic Search Strategy (PRESS) by a qualified health  
153 sciences librarian (MH) and adjustments were made accordingly.<sup>26</sup> An initial limited search of MEDLINE  
154 and CINAHL was undertaken to identify articles on the topic. The text words contained in the titles and  
155 abstracts of relevant articles, and the index terms used to describe the articles were used to develop a  
156 full search strategy (see Appendix I). The search strategy, including all identified keywords and index  
157 terms, will be adapted for each included information source. The reference list of all studies selected  
158 for critical appraisal will be screened for additional studies.

159 The databases to be searched include MEDLINE (Ovid), CINAHL (EBSCO), Embase (Elsevier), Scopus  
160 (Elsevier), Academic Search Premier (EBSCO), and PAIS (ProQuest). Sources of unpublished studies and  
161 gray literature to be searched include databases such as ProQuest Dissertations and Theses; internet  
162 search engines such as Google and DuckDuckGo; the relevant organizations specified in CADTH's Grey  
163 Matters Tool; and the websites of other pertinent organizations, such as the Institute of Health Equity,  
164 Institute for Health Improvement, and the National Collaboration Centre for Determinants of Health,  
165 among others.

## 166 Study selection

167 Following the search, all identified citations will be collated and uploaded into Covidence (Veritas  
168 Health Innovation, Melbourne, Australia) and duplicates removed. Titles and abstracts will then be  
169 screened by two independent reviewers for assessment against the inclusion criteria for the  
170 review. The full text of selected citations will be assessed in detail against the inclusion criteria by two  
171 independent reviewers. Reasons for exclusion of full-text studies that do not meet the inclusion criteria

172 will be recorded and reported in the systematic review. If any systematic reviews are identified in the  
 173 search, relevant studies will be extracted individually and analyzed separately from the review. They  
 174 will be used to identify individual research papers for inclusion. Any disagreements that arise between  
 175 the reviewers at each stage of the study selection process will be resolved through discussion or with a  
 176 third reviewer. The results of the search will be reported in full in the final systematic review and  
 177 presented in a Preferred Reporting Items for Systematic Reviews and Meta-analyses (PRISMA) flow  
 178 diagram.<sup>27</sup>

### 179 Data extraction

180 Data will be extracted from papers included in the scoping review by two independent reviewers using  
 181 a data extraction tool developed by the reviewers. The data extracted will include specific details about  
 182 the population, concept, context, study methods, and key findings relevant to the review objective. A  
 183 draft data extraction tool has been piloted (see Appendix II). This tool will be modified and revised as  
 184 necessary during the process of extracting data from each study. Modifications will be detailed in the  
 185 full scoping review report. Any disagreements that arise between the reviewers will be resolved  
 186 through discussion or with a third reviewer. Authors of papers will be contacted to request missing or  
 187 additional data, where required.

### 188 Data analysis and presentation

189 The extracted data will be presented in tables, charts, and conceptual presentation styles to best reflect  
 190 the objective of this scoping review (eg, a table will be used to summarize the identified strategies to  
 191 address health equity and their frequency in the included studies).<sup>28</sup> In addition, a visual representation  
 192 (honeycomb heatmap) of topics covered will be used to display the topics (definitions,  
 193 measures/indicators, strategies) and their frequencies in the literature. Color codes will be used in this  
 194 figure to visually separate data for the various contexts and participant groups in the included studies.<sup>28</sup>  
 195 If appropriate, bubble plots, word clouds, and pie charts will also be used.<sup>29</sup> A narrative summary will  
 196 accompany the tabulated and/or charted results, describing how these relate to the review objective  
 197 and questions.



198 **Funding**

199 Funding is provided by a Canadian Institutes of Health Research Catalyst Grant (FRN 170322). Funding  
200 for this project from the Canadian Institutes of Health Research provides salary support for SB, HC, CC,  
201 and EC. MS and ME each hold a Health System Impact Fellowship that is partially funded by Nova Scotia  
202 Health.

203 **Conflicts of interest**

204 The authors declare no conflicts of interest.

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- 277

278 Appendix I: search strategy

Medline (Ovid)		
Date searched: January 8, 2021		
No.	Query	Results
1	"Delivery of Health Care"/	93480
2	Health Services Administration/	4501
3	Public Health/	83514
4	Health Policy/	67519
5	(health* adj2 delivery).ti,ab.	23113
6	(financ* adj2 (healthcare system or health system)).ti,ab.	227
7	(investment? adj2 health*).ti,ab.	1426
8	(health* adj2 (organization or administ* or policy or delivery or public or authorit*)).ti,ab.	382230
9	Health Care Sector/	6417
10	Healthcare Disparities/	17925
11	Health Equity/	1530
12	(health* adj2 (equit* or determinant*)).ti,ab.	14588
13	(health* adj2 (inequit* or inequalit*)).ti,ab.	11000
14	(health* adj2 (fair or unfair or just or unjust or equal or unequal or differen* or disparit*)).ti,ab.	16915
15	((indicator? or measur* or assess* or evaluat* or success* or "KPI" or reporting or dashboard).ti,ab.	8969718
16	exp Quality Indicators, Health Care/	22094
17	exp "outcome and process assessment, health care"/ or exp program evaluation/ or exp quality indicators, health care/	1275345
18	1 or 2 or 3 or 4 or 5 or 6 or 7 or 8 or 9	555364
19	10 or 11 or 12 or 13 or 14	52616
20	15 or 16 or 17	9527287
21	18 and 19 and 20	6536

279

280

281 Appendix II: Draft data extraction instrument

<b>Evidence source details and characteristics</b>	
Citation details (eg, author/s date, title, journal, volume, issue, pages):	
Type of evidence source:	
Methodology/approach/design:	
Country:	
Context (health service/delivery system):	
Participant details (eg, age/sex and number; indigenous peoples; ethno-racial communities; low income; disability; religious; rural/remote; sex/gender; sexual orientation; other)	
Research question or study purpose:	
Key findings:	
<b>Details/results extracted from source of evidence (in relation to the concept of the scoping review)</b>	
How is health equity defined?	
What is/are the strategy/strategies used?	
Are frameworks used? If so, which one(s)?	
How is health equity operationalized and/or integrated within the health service delivery system?	
How is health equity measured in any way (indicators)?	
What are the levels of integration of health equity indicators within health service and delivery systems (delivery arrangements, financial arrangements, governance arrangements, and implementation strategies)?	

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283

284

285 Appendix III: Definitions

286

287 **Table 1: Health system definitions**

Term	Definition	Reference
Health service and delivery system	Organization of people, institutions, and resources to deliver health care services to meet the health needs of a target population, whether a single-provider practice or a large health care system.	Pina IL, Cohen PD, Larson DB, Marion LN, Sills MR, Solberg LI, et al. A framework for describing health care delivery organizations and systems. <i>Am J Public Health</i> . 2015;105(4):670-9.
Universal health care	Individuals receive, either through direct public spending or through more indirect means of state-imposed legal mandating of private health insurance, the medically necessary health services they need with as few financial barriers as possible.	Bump JB. The long road to universal health coverage: a century of lessons for development strategy. PATH and the Rockefeller Foundation; 2010 [cited 2020 Dec 18]. Available from: <a href="https://brasil.campusvirtualsp.org/sites/default/files/DIM-The-Long-Road-to-UHC.pdf">https://brasil.campusvirtualsp.org/sites/default/files/DIM-The-Long-Road-to-UHC.pdf</a> . Kutzin J. Towards universal health coverage: a goal-oriented framework for policy analysis. World Bank; 2000 [cited 2020 Dec 18]. Available from: <a href="https://documents.worldbank.org/en/publication/documents-reports/documentdetail/260141468779178780/towards-universal-health-care-coverage-goal-oriented-framework-for-policy-analysis">https://documents.worldbank.org/en/publication/documents-reports/documentdetail/260141468779178780/towards-universal-health-care-coverage-goal-oriented-framework-for-policy-analysis</a> .
National health service	An ideal type, where regulation, financing, and provision are governed by the state; universal coverage, funding from general tax revenue, and public ownership of the health infrastructure.	Bohm K, Schmid A, Gotze R, Landwher C. Five types of OECD healthcare systems: empirical results of a destructive classification. <i>Health Policy</i> . 2012;113(3):258-69.
National health insurance	Combines National Health Service (NHS) regulatory structures and tax financing with predominantly private service provision.	Bohm K, Schmid A, Gotze R, Landwher C. Five types of OECD healthcare systems: empirical results of a destructive classification. <i>Health Policy</i> . 2013;113(3):258-69.
Social health insurance	Services delivered by private for-profit providers; combined universal coverage with funding coming mainly from contributions and public or private delivery.	Bohm K, Schmid A, Gotze R, Landwher C. Five types of OECD healthcare systems: empirical results of a destructive classification. <i>Health Policy</i> . 2013;113(3):258-69.
Étatist (state-driven) social health insurance	Only completely mixed health care type; state is responsible for regulating the system, financing is organized by societal actors, and provision has been delegated to private sector.	Bohm K, Schmid A, Gotze R, Landwher C. Five types of OECD healthcare systems: empirical results of a destructive classification. <i>Health Policy</i> . 2013;113(3):258-69.
Private health insurance system	Private insurance only, which is the major funding source; delivery is characterized by private ownership; service provision is in the hands of for-profit providers.	Bohm K, Schmid A, Gotze R, Landwher C. Five types of OECD healthcare systems: empirical results of a destructive classification. <i>Health Policy</i> . 2013;113(3):258-69.

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290 **Table 2: Country classification in five health system types found in Europe and North America**

National health service (NHS)	National health insurance (NHI)	Étatist (state-driven) social health insurance (SSHI)	Social health insurance (SHI)	Private health insurance (PHI)
Denmark	Australia	Belgium	Austria	Mexico
Finland	Canada	Czech Republic	Germany	United States of America
Iceland	Ireland	Estonia	Luxembourg	
Portugal	Italy	France	Switzerland	
Spain	New Zealand	Hungary		
Sweden		Netherlands		
United Kingdom		Poland		
		Slovakia		
Source: Böhm K, Schmid S, Götze R, Landwehr C, Rothgang H. Five Types of OECD healthcare systems: empirical results of a deductive classification. Health Policy. 2013;113(3):258-63.				

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## 293 Appendix IV: Areas of data collection: High-income countries

Andorra	Denmark	Latvia	Saudi Arabia
Antigua and Barbuda	Estonia	Liechtenstein	Seychelles
Aruba	Faroe Islands	Lithuania	Singapore
Australia	Finland	Luxembourg	Sint Maarten (Dutch)
Austria	France	Macao Sar (China)	Slovak Republic
Bahamas	French Polynesia	Malta	Slovenia
Bahrain	Germany	Monaco	South Korea
Barbados	Gibraltar	Netherlands	Spain
Belgium	Greece	New Caledonia	St. Kitts and Nevis
Bermuda	Greenland	New Zealand	St. Martin (French)
British Virgin Islands	Guam	Northern Mariana Islands	Sweden
Brunei Darussalam	Hong Kong	Norway	Switzerland
Canada	Hungary	Oman	Trinidad and Tobago
Cayman Islands	Iceland	Palau	Turks and Caicos Islands
Channel Islands	Ireland	Panama	United Arab Emirates
Chile	Isle of Man	Poland	United Kingdom
Croatia	Israel	Portugal	United States of America
Curacao	Italy	Puerto Rico	Uruguay
Cyprus	Japan	Qatar	Virgin Islands
Czech Republic	Kuwait	San Marino	

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Source: World Bank (2021). High-income economies. Retrieved December 1, 2020 from <https://datahelpdesk.worldbank.org/knowledgebase/articles/906519-world-bank-country-and-lending-groups>.