



PORTEA



BOARD



SENIOR
MANAGEMENT &
EMPLOYEES



ENTREPRENEURS
/ CONTRACTORS



CONSUMERS



COMMUNITY
MEMBERS

Portea is a home healthcare company operating across 16 cities in India. Founded in 2013, Portea has logged in over 2 million patient visits and serves approximately 200,000 patients on an ongoing basis through its 4,000 employees. With a team of qualified doctors, nurses and trained caregivers, Portea offers services such as physiotherapy, lab tests, doctor consultations, nursing, vaccination, medical equipment rental, in-home ICU set-ups, prenatal & neonatal care.

PORTEA
HEAL AT HOME



Photo credit: Portea

SUMMARY

YEAR ESTABLISHED: 2013

NUMBER OF EMPLOYEES: 4,000+

Women comprise...

58% of workforce

45% of leadership

25% of doctors (compared to 16.8% nationally)

55% of nurses (compared to 83.4% nationally)

71% of caregivers (compared to 27.3% of ancillary health workers nationally)

COUNTRIES OF OPERATION: India

AREAS OF VALUE CHAIN & GENDER OPPORTUNITIES INTEGRATED:

Senior Management/Employees

- ☐ CEO / leadership commitment to gender equity, which is clearly communicated to managers and staff.
- ☐ Employ women throughout all roles and levels.
- ☐ Provide staff with ongoing training opportunities to enhance knowledge and sensitivity to deliver services effectively.
- ☐ Work with male employees to enhance acceptance of female co-workers and management.
- ☐ Increase male support (household and community) for women's involvement in roles along the value chain.
- ☐ Utilize job functions and psychometric testing to assess fit so qualified applicants are not overlooked on the basis of strict education requirements (E.g., if caregiving compassion is core competency, assess history of providing care to family members)
- ☐ Engage male employees in trainings to ensure broader adoption of new gender-inclusive programs and policies.

Consumers

- ☐ Provide in-home care services to reduce female caregivers' burden.
- ☐ Provide in-home care to women (particularly neo-natal and post-natal care) to eliminate mobility challenges.

BUSINESS IMPACTS:

- ☐ With greater staff capacity to serve patients in-home, Portea has managed a month-on-month growth of 15% in the number of home visits since 2013, with over 2,000,000 total to date.
- ☐ Upskilling for low-education caregivers (71% women) provides more female staff with motivation and opportunities for professional development in the company, with anticipated gains in employee retention and quality of services provided.
- ☐ High customer satisfaction rates allows Portea to maintain over 200,000 active, ongoing patient relationships.

SOCIAL IMPACTS:

- ☐ Over 50,000 monthly home health care visits, to a primarily underserved patient base.
- ☐ Patients receive high quality comprehensive care at home, reducing care burden on household members and providing access to important medical services outside of hospital settings.

BACKGROUND ON GENDER STRATEGY

From its founding, Portea has focused on promoting gender equity both in the workplace and through the services it offers. Founder and CEO Meena Ganesh has maintained a strong diversity focus across the organization. A central feature of Portea's model is its network of caregivers, 60 percent of whom are women. As trained medical service providers who typically did not complete formal secondary education, Portea's caregivers were offered a pathway for professional growth within the company; however, many women did not want to advance to the next role in the career trajectory as it required much more travel and time away from home, and did not build on the skills they had already developed.

Taking this into account, Portea recently received funding from the CDC Group to provide professional development training for caregivers. This served as an opportunity for women to enhance their on-the-job skills, which creates an oppor-

tunity for rural women with limited education to advance in the company, and also improves the quality of patient care.

In addition to providing equitable growth opportunities for staff members to advance in the workplace, Portea's services are specifically designed to ensure that both men and women receive quality medical care. Through its network of traveling doctors, nurses, and caregivers, the company offers home-visits, reducing the constraints that may make it difficult for members of low-income households - and women in particular - to reach hospitals and other health care service facilities for routine procedures. Home-based care also enables patients to recover from procedures in their own house and avoid expensive hospital stays. Since caring for the health of family members is often the responsibility of women, Portea's model can further ease women's care burden in the household, freeing them to pursue other professional and personal interests.

GENDER OPPORTUNITIES IMPLEMENTED & RESULTS

Senior management/ employees

CEO Meena Ganesh's deep commitment to gender equity has been effectively transmitted to all levels of staff. The composition of the leadership team reflects this vision: 45% of leadership is female, with many women employed as the heads of portfolios and as directors.

Portea strives for gender balance throughout all roles and levels, including doctors (25% female), nurses (55% female), and caregivers (71% female).

**The vision is defined by the leader.
Once the CEO communicates it, everyone else gets the message.**

—NUZHATH AYAZ
HEAD OF SOCIAL RESPONSIBILITY DIVISION, PORTEA

Although the female share of doctors at 25% may appear low, in 2016 women comprised only 16.8% of all allopathic doctors in India. Interestingly, in India women make up 83.4% of all nurses,

so Portea's lower percentage of women in this function demonstrates a clear commitment to gender equity across all levels of service provision. The company has found that generally female patients prefer female practitioners, and vice versa. As often as possible, the company matches the patient with a healthcare provider of their sex. Employing women at all levels is therefore key to attracting and securing a loyal female patient base.

Portea has purposefully recruited women and men from remote villages to extend the geographical area of its service provision. Since the company was established, caregiver recruitment has been a gender-inclusive process, with successful candidates' educational attainment averaging 7th or 8th standard. By using objective hiring criteria, like a history of providing care to family members and psychometric testing to assess caregiving compassion, qualified applicants are not overlooked on the basis of strict education requirements.

Through the program sponsored by the CDC Group, Portea has been working to enhance women's (and men's) skills in service delivery, particularly in terms of the specialized care needs of patients with dementia. This training uses role playing and experiential learning to upskill caregivers (who are majority women) with greater knowledge and sensitivity to deliver services effectively and compassionately. The program, which also provides training on gender and empowerment, will increase their value as caregivers. Though still in early phase, Portea believes this training has a huge potential for enhancing service delivery and customer satisfaction. One of the biggest challenges in the program has been finding timeslots for training from regularly employed

attendants, as the patients' families prefer to work with a familiar caregiver rather than temporary replacements. Such trends in customer satisfaction indicate business significance of retaining staff, especially women who occupy the majority of patient-interfacing roles for Portea's home-based services.

Rural women - who often have less access to a consistent, secure income - particularly benefit from a salaried position at Portea. Although they had income security, Portea caregivers largely did not have an opportunity to advance in their careers. This is because the position available for them to grow into, a coordinator role, involves coordinating the provision of care services across a region and demands extensive travel. Many of Portea's rural female employees reported that the extensive travel was physically strenuous and logistically challenging alongside domestic responsibilities at home.

In response, Portea implemented a caregiver upskilling program for caregiver employees that would allow advancement into a newly created position, Care+. Those that did not want to become coordinators, could therefore pursue the training and new position, building off of their existing skills. Such gender-smart innovations to keep women and men engaged in the workforce benefit the employee by customizing promotion paths to their goals and lifestyle, and keeping them motivated to stay and advance. While the program is relatively new and data has not been collected on impacts, it is expected that the upskilling program will result in enhanced service delivery, and that the creation of the new position, Care+, will help retain employees.

Though the majority (60%) of participants were women, men have also enthusiastically participated in the trainings. Portea reports very little resistance to the gender sensitization modules in the new training. This is because Portea has already done work familiarizing male employees with concepts related to gender equity, so this is not new information to them. By frequently engaging male employees with trainings about the importance of workplace gender equity, Portea has laid the groundwork to ensure that male co-workers and management alike support the adoption of new programs and policies to empower women in the company.

Ayaz notes that it is critical to have open discussions about gender with both women and men to make sure that programs seeking to empower women are successful. Portea also hopes to sensitize female staff members' families on issues of gender empowerment and benefits that the program can bring to the staff members and their families. Portea acknowledges that sometimes female employees' families voice a concern that empowering their daughters makes them less obedient, however this has not caused major retention issues.

[It is important to make sure the families understand that] “the fact of the matter is, she has not become a rebel, just become more assertive.”

NUZHATH AYAZ

Consumers:

In contexts where women may have limited mobility and often take on the primary responsibility for other family members' healthcare needs, Portea provides services that greatly benefit women consumers—as both patients and primary points of contact for sick relatives. By offering in-home care and medical services, Portea reduces the cost and care burden on families, who are often the mothers, sisters and daughters of patients. The model of service delivery is inherently patient-oriented, through direct experience with trained caregivers and medical professionals, to the improved support that family members are able to offer with top of the line medical instructions and guidance from Portea practitioners. Additionally, Portea offers maternal health services, allowing pregnant and postpartum women to receive the professional antenatal and postnatal care they need in a convenient, comfortable setting.



Photo credit: Portea

LESSONS LEARNED:

1. In health care provision, employing women at all levels is a strategic decision that can lead to greater patient capture and customer loyalty – especially if providing medical services related to maternity and women’s health. This is because female patients have voiced a preference for female doctors.
2. Targeted investments in employee training build their skills and motivation to continue working for the company. When paired with internal promotion opportunities, previously static roles become a step towards a career goal for women with limited access to formal education.
3. Successful employee empowerment programs include women and men to ensure gender-related programming is understood and supported across the organization.



Photo credit: Portea

IMPACTS:

Business impacts:

- ❑ Women fuel the company’s capacity to reach remote patients. Since 2013, Portea has sustained a month-on-month growth of 15% in the number of home visits provided, with over 2,000,000 total to date.
- ❑ People tend to prefer healthcare providers of their same sex, Portea finds. Employing women at all levels is key to attracting and securing a loyal female patient base. The company maintains over 200,000 active, ongoing patient relationships.
- ❑ An expanding pipeline of talented caregivers is able to improve Portea’s quality of service, reach and organizational reputation.
- ❑ Professional development programs for low-education caregivers (71% of whom are women) provide upskilling, motivation and opportunities for growth within the company, along with anticipated gains in employee retention.

Social impacts:

- ❑ Every month, the company completes approximately 50,000 home health care visits to a primarily underserved patient base.
- ❑ Customers receive high-quality comprehensive care at home, reducing care burdens on household members and providing access to cost-effective medical services outside of hospital settings.
- ❑ Home-visits reduce the constraints that may make it difficult for patients who are members of low-income households (and women in particular) to reach hospitals and other health care service facilities for routine procedures.
- ❑ Given that women often fulfill caretaking roles at home, having nurses and doctors provide home-based care for patients can ease women’s care burden in the household, freeing them to pursue other professional and personal interests.

This case study was conducted through (1) a review of Portea’s website and documentation, including on Portea’s funding, (2) a key informant interview conducted with Nuzhath Ayaz, Head of Portea’s Social Responsibility Division, working on talent transformation, and (3) a WHO report on the health workforce in India.