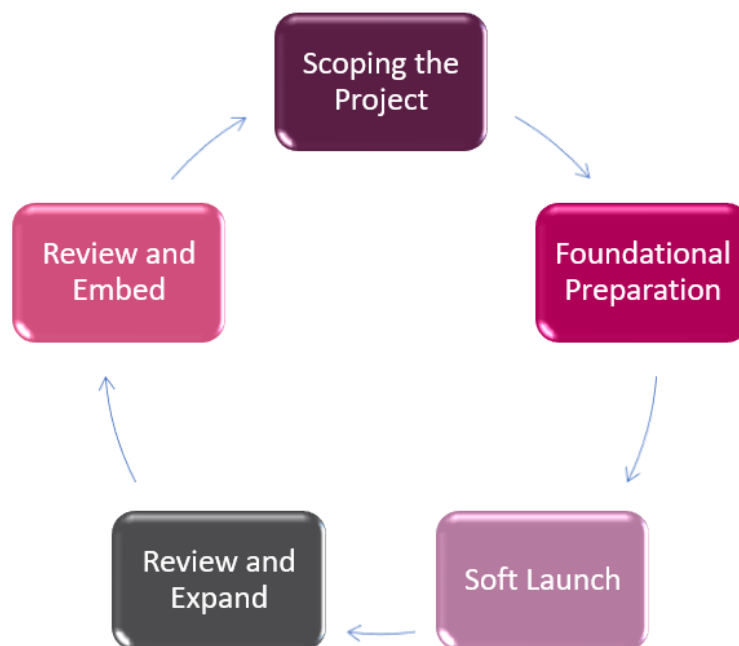


Implementing the Care Opinion Australia Platform

5-Phased Implementation Guide



Authored by Care Opinion Australia

November 2022



Care Opinion Australia is committed to supporting reconciliation among Indigenous, Aboriginal and Torres Strait Islander peoples and non-Indigenous Australian people.

In keeping with the spirit of reconciliation, we acknowledge the Traditional Owners of the lands. We wish to pay respect to their Elders – past, present and emerging – and acknowledge the important role Aboriginal and Torres Strait Islander peoples continue to play with our community.

This Implementation Plan is provided as a resource to subscribing services and may not be shared with any organisation that does not have a current, signed Service Agreement with Care Opinion Australia.

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Introduction

Care Opinion is an online transparent feedback platform, that works with the missing piece, that is, the feedback around what matters most to consumers. This relational aspect is often missed from traditional feedback mechanisms. People are at the heart of every care experience, Care Opinion closes the loop and elevates the development of a two-way connection and human-centred conversation between clients (consumers, patients, carers, their families) and health care staff and services.

This Implementation Plan has been developed to provide health service organisations (HSOs) with a sequenced framework to follow through five (5) phases of implementation. It is underpinned by strategic intent, determined by the health service organisation, that will inform the foundations upon which successful implementation is built on.

It is also designed to facilitate continuity of the project's momentum in the case of staff turnover and as different stakeholder groups take up different responsibilities as the health service organisation progresses through the five phases. There are two key responsibilities that play a pivotal role throughout the project:

1. Project Lead

It is strongly recommended that a Project Lead is appointed to oversee the implementation of the platform, particularly during phases one (1) to four (4). Ideally this is a staff member in a position of influence and leadership in order to build and maintain momentum whilst supporting staff through the change management process. The Project Lead will also support Site Administrators when challenging conversations are required around organisational responses to stories.

2. Site Administrator

Each subscribing health service organisation is required to appoint at least one (1) staff member as Site Administrator. They are responsible for:

- a. administering the platform for the service (e.g. maintaining, managing and ensuring the accuracy and currency of member listings and listings of services on the platform)
- b. liaising with Care Opinion (e.g. discussions about stories, responses and the progress of implementation), and disseminating communication about the platform (e.g. training sessions, webinars, learning resources)
- c. working with stakeholders with varying roles across different areas of the health service (e.g. quality and safety, clinical governance, patient experience, marketing and communications, consumer engagement, as well as clinical staff and volunteers).

Previous learnings have revealed that stories and data closely align with quality improvements. For this reason, it is recommended that the project is positioned within the Safety and Quality portfolio with support of the Clinical Governance team.

Phase 1 | Scoping the Project

Purpose

This phase is designed to articulate the strategic purpose of implementing the platform, and how relational feedback aligns with and/or complements current feedback processes and priorities and its application with the health service organisation's [Partnering with Consumers](#) activities.

Desired outcomes

Organisation

- Active support and commitment secured from the Board of Directors.
- The impact of change on each stakeholder group is understood and key messages are developed according to the desired change impact.
- Board of Directors has a mechanism to be kept up to date with progress with the organisational change process and the role they can have to support momentum.
- Operational and Executive leads work collaboratively to position and align the Care Opinion platform with organisational priorities and values.

Set Up

- 1-5 key Site Administrators are identified to oversee the quality and implementation of the subscription scope.

Communications

- Potential champions are consulted with and set up to receive story alerts and respond to stories.
- Key messages are developed and ready for release to internal stakeholders.

Timeframe

Within two (2) months after the subscription contract (Service Agreement) has been signed and returned to Care Opinion Australia.

RESOURCES PROVIDED

Strategy

- Strategic Positioning of the Platform (Worksheet)
- Stakeholder Map (Template)
- Stakeholder Matrix & Engagement Strategy Reference Model (Template)
- Summary of Change Impacts (Template)

Set Up

- Service Tree (Template)

Communications

- Co-branding Agreement and Visual Identity Guidelines
- Communications Plan (Framework)

Phase 1

Phase 1 Action Plan



Action	Stakeholders involved	Resource provided	Timescale for delivery	Activity Owner	Progress
Present Care Opinion subscription to the Board of Directors	CEO Board members				
Develop a statement of intent for the use of the platform in collaboration with Care Opinion	CEO/Executive Team/Project Lead Board members	Strategic Positioning of the Platform (Worksheet)			
Establish Site Administrators: 1. Identify 1 -5 people to be the subscription managers (Site Administrators) Email their names, job titles, phone numbers and email addresses to Care Opinion Australia (info@careopinion.org.au)	CEO Executive team				
Conduct stakeholder analysis using the Stakeholder Matrix	Executive team	Stakeholder Map (Template) Stakeholder Matrix & Engagement Strategy Reference Model (Template)			

Phase 1

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Action	Stakeholders involved	Resource provided	Timescale for delivery	Activity Owner	Progress
		Summary of Change Impacts (Template)			
Determine the scope of the subscription: <ol style="list-style-type: none"> How the health service organisation's services will be listed in the Care Opinion platform (scope of the subscription) Complete and return the service tree 	CEO Executive team Site Administrator(s)	Service Tree (Template)			
Identify 'soft launch services' (departments and wards that the platform will be rolled out in initially)	Executive team Patient Experience team Department Heads				
Identify and consult project champions about the platform and the role they will play in its adoption	Executive team				
Complete and return 'Care Opinion Co-Branding Agreement'	Site Administrator	Visual Identity Guidelines Co-Branding Agreement			
Develop communications:	Operational and Executive Leads	Communications Plan (Framework)			

Phase 1

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Action	Stakeholders involved	Resource provided	Timescale for delivery	Activity Owner	Progress
<ol style="list-style-type: none"> Develop key messages to each internal stakeholder group using the Stakeholder Analysis completed in Phase 1 Adapt communications plan framework and commence delivery of key messages to internal stakeholders 	Site Administrator Communications and Marketing Teams				
Identify and brief the health service organisation's Project Lead, Executive and Operational Leads about the platform and the role they will play in its adoption	CEO				
Add the ' <i>Implementation of Care Opinion</i> ' as a regular agenda item in future Board meeting on Care Opinion stories and progress for subsequent meetings	Board Secretary				
Meet with Care Opinion team to discuss readiness to progress into Phase 2	Site Administrator				

Phase 1

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Phase 2 | Foundational Preparation

Purpose

This phase lays the foundations to inform, prepare and equip key stakeholders to engage with narrative, relational feedback. During this phase, the focus is primarily on internal stakeholders, including staff in soft launch services and includes internal promotion, training and communications.

Desired outcomes

Organisation

- Statement of Intent for the use of Care Opinion is articulated and agreed upon.
- Site Administrators:
 - understand and are confident in the role and its responsibilities
 - have attended training and feel capable of demonstrating platform features.
- Key stakeholders (identified as part of the analysis in Phase 1), understand:
 - the health service organisation's intent for using Care Opinion
 - the basic principles of narrative, relational feedback and online safety
 - key messages and how to promote Care Opinion and engage staff in the process.

Set Up

- Processes and key messages are developed to support staff in soft launch services through the change process and to help them understand, and gain confidence in the use of the platform.
- Staff members who require access to the platform and alerts of published stories during Phase 3 have been identified.
- Member Roles template is complete and shared with Care Opinion.

Communications

- A community awareness strategy is developed, including promotional plan and promotional materials (co-branded) to engage external stakeholders with the platform.

RESOURCES PROVIDED

System Set Up

- Member Roles (template)
- Response and Story Escalation Workflow (template)

Training Sessions

- Orientation & Site Navigation Responding (online)
- Creating Invitation Links (webinar)
- Engaging Consumers in Narrative Feedback (webinar)
- Assisted Storytelling (webinar)

Stakeholder Engagement

- Site Administration: Roles, Responsibilities & Training Outcomes (PDF)
- Understanding Care Opinion for staff (PDF)
- Care Opinion FAQs

Communications

- Visual Identity Guidelines
- Co-Branding Agreement
- Consumer Engagement Guide
- Care Opinion Campaign and Events Calendar.

Phase 2

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Timeframe

It is recommended that Phase 2 is completed within one (1) month of Phase 1's completion.

This is three (3) months after the subscription contract (Service Agreement) has been signed and returned to Care Opinion Australia.

Phase 2

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Phase 2 Action Plan



Action	Stakeholders involved	Resource provided	Timescale for delivery	Activity Owner	Progress
<p>Training</p> <p>Site Administer(s) set up a login to the Care Opinion platform and attend the following training sessions:</p> <ul style="list-style-type: none"> • Orientation & Site Navigation • Invitation Links • Assisted Storytelling 	<ul style="list-style-type: none"> • Site Administrator 	<p>Online training sessions:</p> <ul style="list-style-type: none"> • Orientation & Site Navigation • Creating Invitation Links • How to Engage Consumers • Assisted Storytelling <p>Site Administrator: Roes, Responsibilities & Training Outcomes (PDF)</p>			
<p>Prepare staff access to the platform:</p> <ol style="list-style-type: none"> 1. Determine which internal stakeholders are to receive access to the platform, their access level (administrator, responder or member) throughout Phase 3, and 	<ul style="list-style-type: none"> • CEO • Executive Team • Project Lead • Site Administrator 	<p>Member Roles template</p>			

Phase 2

Action	Stakeholders involved	Resource provided	Timescale for delivery	Activity Owner	Progress
<p>what group of stories they require alerts for</p> <p>2. Complete and return the Member Roles template to Care Opinion</p>					
Adapt response process workflow and escalation strategy for responding to critical stories	<ul style="list-style-type: none"> Executive team Project Lead Site Administrator 	Response and Story Escalation Workflow template			
Collaborate with Care Opinion staff to co-brand electronic promotional materials	<ul style="list-style-type: none"> Communications Team Site Administrator 				
<p>Communications:</p> <p>1. Develop key messages for each internal stakeholder group using the Stakeholder Analysis completed in Phase 1</p> <p>2. Adapt the Communications Plan Framework and commence delivery of key messages to internal stakeholders</p>	<ul style="list-style-type: none"> Project Lead Site Administrator Communications Team 	<p>Understanding Care Opinion for Staff (PDF)</p> <p>Communications Plan Framework</p> <p>Care Opinion FAQs (PDF)</p>			
Discuss promotion of Care Opinion with soft launch departments/wards	<ul style="list-style-type: none"> Site Administrator Communications Team Soft launch services 	<ul style="list-style-type: none"> Engaging Consumers in Narrative Feedback (webinar) 			

Phase 2

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Action	Stakeholders involved	Resource provided	Timescale for delivery	Activity Owner	Progress
Meet with Care Opinion team to discuss readiness to progress into Phase 3	<ul style="list-style-type: none"> • Project Lead • Site Administrator 				

Phase 2

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Phase 3 | Platform Roll Out – Soft Launch

Purpose

This phase sees the platform launched in soft launch services, with consumers being made aware of the platform through key messaging and communications, and staff engaging and actively,

1. feeling assured of their safety within the platform
1. actively asking consumers to share their stories
2. appropriately responding to stories told on the platform
3. sharing learnings from the platform with interdepartmental colleagues.

Desired outcomes

Organisation

- Staff and/or volunteers are assisting consumers to share their stories where this is appropriate.

Set-Up

- Processes are established to:
 - actively support staff in soft launch services to engage with the platform
 - equip and support responders to respond to stories appropriately.
- Board Members and Consumer Advisory Councils/Groups are set up on the Care Opinion platform to receive weekly digests.

Communications

- Consumers of soft launch sites:
 - are aware of the health service organisation's partnership with Care Opinion
 - are invited to share their stories of care experiences
 - know how they can share their story and that it will be responded to
 - believe their feedback is genuinely welcomed by the team.
- The Communications/Marketing/Web Development team(s) have scheduled an update to the health service organisation's website to go live in Phase 4, prominently displaying:
 - a commitment to welcoming and responding to narrative, relational feedback in the online environment
 - Care Opinion Australia's logo (high resolution, no pixilation)
 - a blurb about the platform clearly stating that Care Opinion Australis is independent to the health service organisation,

RESOURCES PROVIDED

System Set Up

- Website content and information on how to embed widget(s) on a website
- Care Opinion logo

Training and Support

- Support via phone, email and videoconferencing with Care Opinion staff as required

Communications

- Hard copy and/or digital promotional materials

Phase 3

that stories are moderated for anonymity and safety, public, and will be responded to publicly.

- a call to action with a button (link) leading to a story telling page and/or a widget (either the stories widget or the storytelling widget).
- Stories are being shared on the platform and are being responded to.

Timeframe

It is recommended that Phase 3 is completed within one (1) month of Phase 2's completion.

This is four (4) months after the subscription contract (Service Agreement) has been signed and returned to Care Opinion Australia.

Phase 3

Phase 3 Action Plan



Action	Stakeholders involved	Resource provided	Timescale for delivery	Activity Owner	Progress
<p>Design, develop and schedule a website update to go live at the beginning of Phase 4 with:</p> <ul style="list-style-type: none"> • information about the health service organisation’s partnership with Care Opinion • a personalised invitation to consumers to share their stories • stories and/or storytelling widget • logo and blurb about Care Opinion on homepage 	<ul style="list-style-type: none"> • CEO • Project Lead • Communications Team • Site Administrator 	<p>Website content and information on how to embed widget(s) on a website</p> <p>Care Opinion logo</p>			
<p>Staff training:</p> <ol style="list-style-type: none"> 1. Identify and coordinate key stakeholder groups’ attendance at their relevant training sessions (Responding, Invitation Links). 2. Ensure staff members of soft launch services have attended the requisite training and have access to resources and support. 	<ul style="list-style-type: none"> • Project Lead • Site Administrator 	<p>Campaign and Events Calendar</p>			

Phase 3

Action	Stakeholders involved	Resource provided	Timescale for delivery	Activity Owner	Progress
<p>Officially launch the platform in soft launch services:</p> <ol style="list-style-type: none"> 1. Print and distribute hard copy co-branded promotional material to soft launch services for prominent display 2. Add promotional material (e.g. stickers, business cards) to discharge papers and appointment cards 3. Send out electronic invitations (containing Invitation Links) to select consumer groups to share their stories 	<ul style="list-style-type: none"> • Site Administrator • Communications Team • Soft launch services 	<p>Hard copy and/or digital promotional materials</p>			
<p>Set Board Members and Consumer Advisory Council/Group Members up to receive weekly story digests</p>	<ul style="list-style-type: none"> • Site Administrator 				

Phase 3

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Glossary of Terms

Term	Explanation	Applicable Phase(s)
Assisted Storytelling	A process whereby stakeholders assist consumers to share their stories via phone, directly on the website or through a paper-based form. Care Opinion offers training workshops are in a 'train the trainer' model designed to equip participants to train other stakeholders (such as volunteers and consumer representatives) in the assisted storytelling process.	2
CO Hero co-branded certificate template	When stories name staff members in a positive context, Care Opinion Moderators add a neutral tag of Care Opinion Hero 'CO Hero' to enable services to search for these stories. A co-branded 'CO Hero' certificate template can be provided to subscribing services upon request to use to formally or informally recognise staff members acknowledge by name in stories.	4
Invitation Links	Links that can be created to provide consumers with a customised pathway to a storytelling page that is pre-linked to your specific service (e.g. hospital, ward, facility). Invitation Links can include a bespoke message you create, telling consumers what you would like their feedback to focus on. Stories told via the Invitation Link can be tracked and reported on.	2
Proposed Key Performance Indicators	Care Opinion Australia has developed a set of Key Performance Indicators to assist health service organisations to measure the 'success' of implementation based on data reflective of staff and consumer engagement with the platform.	5
Member Roles template	An Excel spreadsheet template subscribing services fill out that details the staff members you wish to receive alerts for stories about your health service. organisation and their access level to the platform (member, responder, administrator): <ul style="list-style-type: none"> • Members are granted access to read the stories. • Responders are granted access to read and respond to stories and create Invitation Links (see notes in Phase 1). • Administrators are granted access to read and respond to stories (for themselves or on behalf of other staff members), manage staff access to the platform and generate reports. 	2
Phase 1-3 Evaluation Form	Phase 1-3 Evaluation Form is a series of questions designed to assist the health service organisation to:	4

Glossary

Term	Explanation	Applicable Phase(s)
	<ul style="list-style-type: none"> ○ understand staff perceptions of the online, narrative feedback and barriers to the implementation of, and staff and consumer engagement with the platform; ○ understand the impact staff perceptions have on staff morale; ○ understand the impact barriers to implementation and engagement have on the numbers of stories shared on the platform and quality of responses to these stories; ○ develop strategies to overcome common implementation and engagement barriers, such as the capacity of Site Administrators to execute their responsibilities, workforce and resourcing restraints, staff turnover and COVID19 outbreaks. 	
Platform champions	Staff who quickly grasp the value and power of narrative, dialogical and relational feedback and are willing to drive enthusiasm for the project. Organisations with staff willing to champion the platform typically see successful outcomes early in the project.	1
Response and Story Escalation Workflow (template)	A suggested workflow on the approval process for responding to stories according to their level of criticality.	2
Service Tree	<p>A Service Tree is list of the services each health service organisation provides in an Excel spreadsheet (template provided).</p> <p>The list is uploaded to the Care Opinion platform so that when consumers share their stories, they can link them to the specific service used. It is recommended that the are services listed align with the way they are listed on the health service organisation’s website as this is how consumers often identify the service that provided their care.</p>	1
Site Administrators	Staff responsible for managing and ensuring the accuracy and currency of member listings, liaising with Care Opinion about stories, responses and the progress of implementation, liaising with responders regarding the suitability of response content for public viewing (e.g. compassion, relational vs. transactional), and disseminating communication about the platform to internal stakeholders (e.g. training sessions, webinars, learning resources).	1

Glossary

Term	Explanation	Applicable Phase(s)
Soft Launch Services	The departments and wards where the platform will be first introduced to staff and consumers, and about which stories will be told are hereon referred to as 'soft launch services'.	1
Stakeholder Analysis	The identification and assessment of impact on each stakeholder group affected by the platform's use. Please refer to the templates provided (Stakeholder Matrix and the Summary of Change Impacts).	1
Statement of Intent	A statement that sets out the purpose of using the Care Opinion platform as a consumer engagement strategy. This statement is developed in collaboration with Care Opinion Australia.	1
Story Tags	Story tags can be created and added to any story by a staff member with appropriate access to the platform and used as a search term to draw stories together and report on them. The visibility can be tailored to be private, shared only within subscription members or public view.	4
Widgets	Care Opinion offers different widgets to enable consumers to interact with, or view data on the Care Opinion website from the health service organisation's webpage. These include: <ul style="list-style-type: none"> ○ Stories Widget - displays stories told about that health service organisation. The stories shown can be tailored to your requirements. ○ Storytelling Widget enables consumers to share their stories from the health service organisation's website. ○ Ratings Widget displays the ratings given by storytellers about a particular service. ○ Activity Widget displays the number of stories told, number of changes made and number of responses published from a particular service. 	3

Glossary

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Health service organisations will be provided with comprehensive training and support throughout the duration of the subscription.

For further information, contact the Care Opinion Australia team.

