# **Self-Assessment Checklist 1-3**

## Phase 1 | Scoping the Project

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| **Progress** | **Outcome** |
|  | Leadership supports the use of the platform and have a mechanism to remain abreast of stories told, service improvements made, and activities undertaken to partner with storytellers through feedback.   |
|  | Leadership has determined the scope of the platform, and the required paperwork returned to the Care Opinion team.  |
|  | Leadership has articulated the intentions, anticipated outcomes of subscribing to Care Opinion, expectations of staff in relation to the platform and how it aligns with organizational priorities and values. |
|  | A stakeholder analysis has been conducted, with key messages developed and mapped out in a Communications Plan. |
|  | Appropriate Site Administrator(s), Project Lead(s), Executive and Operational Leads over the implementation and continued use of the platform have been identified and appointed. |
|  | Potential champions have been brought into discussions and have been granted access to receive alerts for published stories and responses. |
|  | Key messages for internal stakeholders and are ready to be disseminated within the organization.  |
| **Comments** |

## Phase 2 | Foundational Preparation

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| **Progress** | **Outcome** |
|  | The Statement of Intent around the use of the platform and its role within business priorities, clinical governance and quality processes has been developed. |
|  | Site Administrators are equipped to execute the role and its responsibilities.  |
|  | Key stakeholder within the organization understands the purpose and intent of the organization participating in the platform, the basic principles and safety of narrative, relational feedback. |
|  | Key messages and internal processes have been developed to support staff in soft launch services. |
|  | Relevant staff members have been granted access to the platform in preparation to receive story and response email alerts. |
|  | Paperwork relevant to the phase (e.g. Member Roles template) has been submitted to the Care Opinion team for uploading to the platform. |
|  | A plan has been made to raise awareness of the platform within the organization, including a strategy to engage with external stakeholders regarding the platform. |
| **Comments** |

**Phase 3 | Soft Launch**

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| **Progress** | **Outcome** |
|  | Staff in soft launch services, including responders, are engaged and supported to engage with the platform.  |
|  | Storytellers of soft launch services have been and continue to be made aware of the platform and understand their feedback is genuinely welcomed and will be responded to.   |
|  | The organization’s Marketing/Communications/Web Development team(s) have prepared an update for the website that will raise awareness of and educate storytellers on the platform and how the service will engage with them through it, along with a clearly displayed call to action button. |
|  | Key messages and internal processes have been developed to support staff in soft launch services. |
|  | Relevant staff members have been granted access to the platform in preparation to receive story and response email alerts. |
|  | Stories have been and continue to be received through the platform on a regular basis (e.g. 1 story per month without a gap longer than 1 month).  |
| **Comments** |