Digital Health Communities of Excellence Toolkit

Guidebook

Improving digital health capabilities and uptake in your community

September 2021

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Welcome to the Digital Health Communities of Excellence Guidebook

Digital Health Communities of Excellence (CoE) are communities that optimise the use of digital health technologies to support better health outcomes by enhancing access to health services and improving transitions of care.

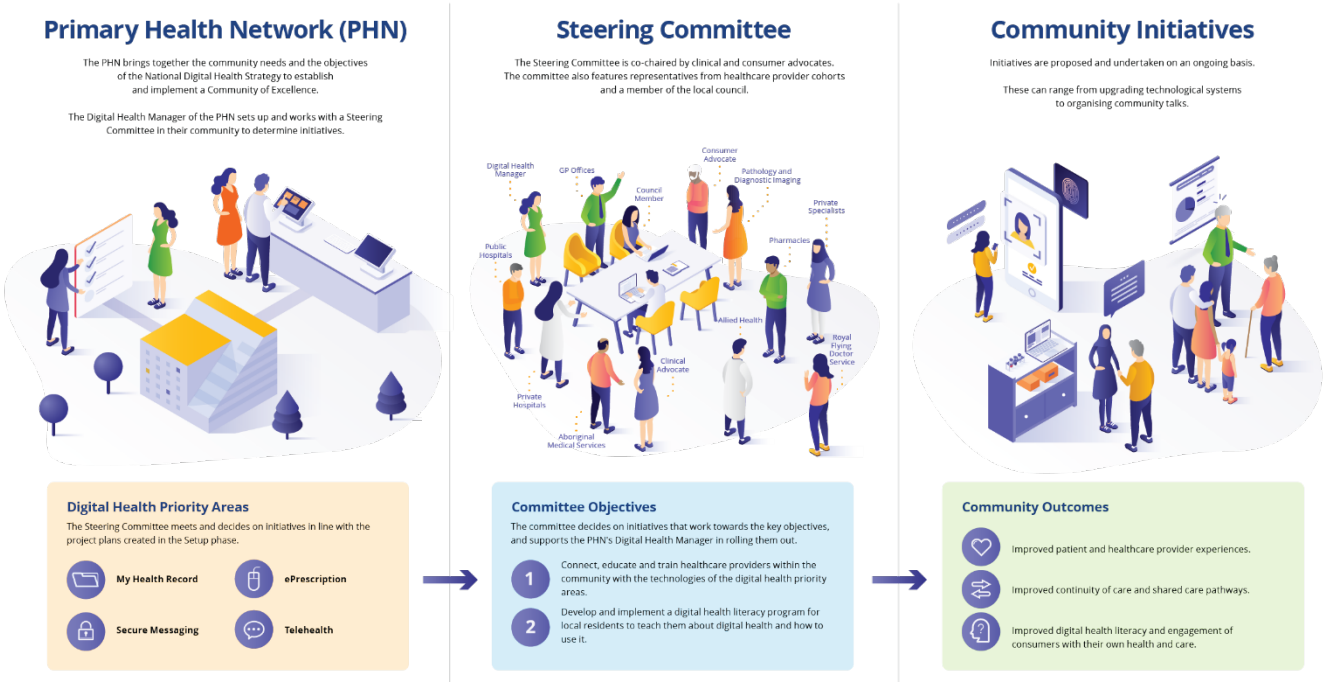
Establishing a CoE is achieved through the coordinated efforts of a range of local stakeholders who may assist the community to connect with key healthcare provider associations and consumer representative organisations. The aim is to build their digital health capabilities and improve the uptake and use of existing digital health technologies.

This Guidebook will take you through key steps for establishing a CoE. It describes the products and resources available in the CoE Toolkit that will assist in managing a CoE Project. Each product and resource is detailed below in this Guidebook, including what it is, why and when you might use it, who needs to be involved, how to access it, and how it relates to other resources.

It's important to note that the products and resources referenced in the CoE Guidebook are examples that may be used in setting up and maintaining a CoE. Users of the CoE Toolkit may choose to use all or some of the products and resources provided. Similarly, these products and resources may be updated, customised, or amended as necessary, or used as stand-alone documents to supplement existing project management resources.

The CoE Model

The CoE Model (see diagram below) gives an overview of who a CoE involves and what their roles are to achieve the desired outcomes. A CoE should connect a range of peak health bodies and consumer organisations so they may better use digital health technologies. A higher resolution version of the CoE Model is available as a PDF in the CoE Toolkit.



A high-resolution image is available in the Toolkit as a PDF (see the file "CoE_Model_Diagram_A3_v2.0.pdf")

A CoE connects a range of peak health bodies and consumer organisations so they may better use digital health technologies that are key to Australia's National Digital Health Strategy. In most cases the Primary Health Network (PHN) is well-positioned to be the CoE Lead Organisation as it has many of the resources and established connections to plan, manage and administer the project. However, other entities (e.g.., Aboriginal Health Community Controlled Organisations (AHCCOs), Aboriginal Medical Services (AMSs), etc.) may want or be better positioned to create a CoE.

While each CoE is a collaboration, we recommend a Digital Health Manager or equivalent be appointed to take on the role of project manager / project lead (CoE Lead). The CoE Lead should be supported not only by the CoE Lead Organisation, but also local healthcare providers and members of the community (Steering Committee). The Steering Committee is preferably a diverse group and will be unique for each CoE. It should include a variety of healthcare providers from different sectors and professions as well as strong representation from the local community, preferably including the local council.

Why establish a Digital Health CoE?

Australia's National Digital Health Strategy (2018 - 2022) (the Strategy) details a vision for achieving a digitally mature health system that provides safe, high quality, effective health services for all Australians. Development of the CoE model is part of the strategic priority to develop digitally enabled models of care that improve accessibility, quality, safety, and efficiency[1].

The CoE model can help communities identify local opportunities to build digital health capabilities, as well as improve the integration and use of existing digital health know-how. The CoE model focuses on the use of My Health Record (MHR), ePrescriptions, Secure Messaging, and Telehealth, but uptake and development of all digital health technologies is encouraged.

The CoE model promotes collaboration within communities and enables regions to take advantage of a range of support resources. It leverages the experience of communities that have already created digital health communities.

A digital health community is an excellent opportunity for healthcare providers and the community to partner together and identify how digital health solutions could assist in addressing the health priorities in your local community.

[1] Australia's National Digital Health Strategy—Strategic Priority 5

Using this Guidebook

This Guidebook takes you through the CoE Toolkit, which will help you with project setup and initiation, planning and delivery.

You may choose to use all, some, or none of the resources available and each CoE is able to modify the resources to suit local needs. The Agency welcomes feedback regarding the content of the CoE Toolkit to assist us in continually improving existing resources and adding new tools.

CoE Toolkit

Half the work in building a CoE is in laying the right foundations.

During the project **Setup phase**, you need to:

1. Establish whether a CoE project is feasible, and if so, obtain the appropriate approval for it.
2. Assess the community and provider landscape to identify opportunities and project focus areas.
   Note: A critical component in this phase is identifying a **local clinical champion**.
3. Plan the project in detail and get stakeholder input and agreement.
4. Plan how you will engage consumers and healthcare providers in project initiatives.
5. Form a local Steering Committee to lead the initiatives, engage with the community and provide local advice and guidance.

Once you're ready to start rolling out initiatives in the **Adoption phase**, you'll also need to:

6. Promote the project within your community.
7. Monitor and evaluate your initiatives.

These steps are roughly sequential and are described in more detail—with accompanying resources—on the following pages. Use these quick links to jump to a step:

01 Establishing a project
02 Assessing the landscape
03 Planning the project
04 Engaging the community
05 Forming a Steering Committee
06 Promoting the project
07 Monitoring and evaluating initiatives

GLOSSARY

Brief definitions of key phrases used in this Guidebook.

Adoption phase	The period when you are rolling out initiatives for the CoE project.
Communities of Excellence (CoE)	Communities that optimise the use of digital health technologies to support better health outcomes by enhancing access to health services and improving transitions of care.
CoE Lead	The project manager (project lead) for a CoE project. A Digital Health Manager or equivalent would be best suited to this role.
CoE Lead Organisation	The organisation responsible for planning, managing, and administering the CoE project. This could be the local PHN, AHCCO, or AMS, depending on available resources and connections with healthcare providers and the community.
CoE Lead Organisation Executive	The Executive Officer in the CoE Lead Organisation who can commission and approve the CoE project.
CoE model	An iterative model of digitally enhanced healthcare that emphasises a collaborative, localised approach to building digital health capabilities and improving integration of digital health solutions in Australian communities.
CoE project	A planned programme of initiatives and activities to implement the CoE model within a community. It includes connecting peak health bodies and consumer organisations, building digital health capabilities, and improving the uptake and use of digital health technologies. Each CoE project will be unique to the needs and circumstances of the local community running it.
CoE Toolkit ('the Toolkit')	A collection of resources designed to assist the CoE Lead Organisation with project initiation, planning, delivery, and management/administration. The Toolkit includes examples and templates that can be used as a suite or as stand-alone documents and modified as needed.
Landscape analysis	A process of understanding your local community—its healthcare needs and gaps, the stakeholders (healthcare providers and consumers), and the priorities and limitations for your CoE project.

Local clinical champion	A healthcare provider in the local community, such as a GP or pharmacist, who can be the advocate for healthcare providers and clinicians throughout the CoE project.
Setup phase	The period when you are planning the CoE project, including assessing feasibility, obtaining approval, identifying opportunities, planning details of project initiatives and engagement activities, gaining stakeholder input and agreement, and forming the Steering Committee.
Steering Committee	A group of representatives who speak for the interests of the community and assist with community engagement activities. The Steering Committee should be a diverse group of representatives from healthcare provider cohorts, consumers, and the local council.
The Agency	The Australian Digital Health Agency (the Agency) was established in 2016 by the governments of Australia to evolve country's digital health capability through innovation, collaboration, and leadership to facilitate digital health integration in the health system.
The Strategy	Australia's National Digital Health Strategy (2018–2022) (the Strategy) aims to effectively use digital information to help deliver safe, high quality, effective health services for all Australians. The Agency leads the development of the Strategy and its implementation. Read the Strategy in full here [PDF opens in web browser].

01 Establishing a project

Before you begin a CoE project, you'll need to determine if it's feasible to implement it in your community. Take the time to thoroughly profile your community—this also helps with planning your project later. If your analysis shows that a CoE project is feasible, then develop a project brief for formal approval. This is when you'll first get written agreement from the CoE Lead Organisation Executive on the key aspects of the proposed project, such as the objectives and major deliverables.

The Agency has provided several documents to support this process. You can use these as they are, modify them to suit yourself, or create/source your own.

Resources

0101 Community Profile

COMMUNITY FEASIBILITY

You will need a detailed assessment of the community to help decide if a CoE project is feasible. This (feasibility assessment) will assist you to plan and prioritise project activities including engagement, communications, education and evaluating the effect of your project within the community itself. This Community Profile template will help you gather the relevant data needed to establish feasibility and decide on which consumer and provider cohorts your project should focus on.

Owner: CoE Lead

When: Before project planning. The Community Profile feeds into the Project Brief and the detailed project plan, which is covered in the Project Initiation Document and Project Schedule.

Example: 0101E_Community_Profile_Example

Template: 0101T_Community_Profile_Template

0102 Project Brief

PROJECT MANAGEMENT

The project brief is where all the key aspects of a project are agreed upon and signed off by the appropriate parties. It outlines the "who, what, when, where, and why" of a project, but leaves the details of "how" to be covered in the Project Initiation Document. That said, it still needs enough information to be clear about the approach and scope of the project, so that stakeholders and the project team know what to expect.

Owner: CoE Lead; CoE Lead Organisation Executive (approval)

When: After feasibility is confirmed, the Program Brief forms the basis for the detailed project plan (covered in the Project Initiation Document and Project Schedule) and the Benefits Realisation Plan.

Template: 0102T_Project_Brief_Template

02 Assessing the landscape (landscape analysis)

Once the project has been found to be feasible and approved, the next step is to undertake a landscape analysis to work out what your CoE project should focus on. A landscape analysis means understanding your local community—both consumers and providers. The resources in this section will help you to conduct a thorough landscape analysis to help you identify the priorities and limitations of your project.

Resources

0202 Priority Group Landscape Mapping

LANDSCAPE ANALYSIS

Landscape mapping is a way to identify key priority groups in the community who you will engage with. Priority groups ensure communities that are underserved or more vulnerable are included, engaged, and supported so they can benefit from project initiatives.

The mapping is a starting point that should be continuously refined using feedback from consumer peaks and consultation with the health sector and grassroots community representatives. It should help inform the development of digital health initiatives for consumers throughout the CoE project.

Owner: CoE Lead

When: After project approval, before the Project Initiation Document.

Example: 0202E_Priority_Group_Landscape_Mapping_Example

Template: 0202T_Priority_Group_Landscape_Mapping_Template

03 Planning the project

Once you have received approval from the CoE Lead Organisation Executive, it's time to expand on the project brief and plan implementation in more detail. This doesn't have to be a complicated or overly detailed process. We suggest that you create a clear plan with written agreement from all stakeholders on:

- Who is responsible
- Desired outcomes
- How you will manage risks and issues
- How you will measure success

This will help set stakeholders' expectations and minimise "scope creep" (increasing requirements) as the project progresses.

Resources

0301 Project Initiation Document

PROJECT MANAGEMENT

The Project Initiation Document is a central reference for project team members, the Steering Committee, and other stakeholders—a 'source of truth' for the project. It's an extension of the Project Brief, and also informed by the community profile, the findings from your landscape analysis, and your Benefits Realisation Plan.

The Project Initiation Document keeps the team and stakeholders on the same page throughout the project, which can help keep things on track and resolve issues that come up during implementation.

Owner: CoE Lead

When: After project approval, before the Steering Committee is formally established. May be completed in parallel with or after the Benefits Realisation Plan.

Example: 0301E_Project_Initiation_Document_Example

Template: 0301T_Project_Initiation_Document_Template

0302 Project Schedule

PROJECT MANAGEMENT

A detailed timeline (Gantt chart) of all planned project activities to help track progress. It allows you to see at a glance which activities are running, when milestones and deadlines are coming up, and record percentage completed against each activity. A Gantt chart is a visual aid that is easily interpreted by project team members and stakeholders.

The template has been prefilled with some example project activities to demonstrate how it works.

Owner: CoE Lead

When: Start in parallel with or after the Project Initiation Document. The Project Schedule is a living document that should be regularly updated to reflect the status of project activities.

Template: 0302T_Project_Schedule_Template

0303 Benefits Realisation Plan

BENEFITS REALISATION

A benefits realisation plan captures the benefits you want to produce in your community and defines how to measure those benefits. This helps you to know when you have achieved them. It also sets out who is responsible for delivering the benefits, potential difficulties, and other key details for clearly identifying, monitoring, and evaluating the project's benefits.

The Project Brief would have outlined key benefits you expect to achieve, which can be fleshed out here, and the Community Profile and landscape analysis may inform additional benefits that your project can realise.

Owner: CoE Lead

When: After project approval, before the Steering Committee is established. May be completed before or in parallel with the Project Initiation Document.

Example: 0303E_Benefits_Realisation_Plan_Example

Template: 0303T_Benefits_Realisation_Plan_Template

0304 Project Logic Model

PROJECT LOGIC

A project logic model (a.k.a. change logic model) maps your project from end to end, from inputs through to impacts. It lays out how you think the project will work and lets you, team members, and stakeholders interrogate this logic. It's also a useful onboarding tool to help people understand how your project works.

Owner: CoE Lead

When: After project approval, before the Steering Committee is established. May be completed before or in parallel with the Project Initiation Document.

Example: 0304E_Project_Logic_Model_Example [PDF]

Template: 0304T_Project_Logic_Model_Template [PPT]

0305 Project Evaluation Plan

PROJECT EVALUATION

A project evaluation plan details how you will evaluate the success of your project, both in terms of whether it achieved its intended results and whether it was delivered effectively. The Project Evaluation Plan focuses on the immediate outputs and short- to medium-term outcomes that you expect to achieve within the project timeframe. An evaluation plan also includes the measures and data sources you will use to assess the performance and success of your project.

Owner: CoE Lead

When: After project approval, before the Steering Committee is established. May be completed before or in parallel with the Project Initiation Document.

Example: 0305E_Project_Evaluation_Plan_Example

Template: 0305T_Project_Evaluation_Plan_Template

0306 Project Controls and Governance Framework

Benefits Realisation and project management

Good governance and project management guides the direction of the project and ensures that outcomes are achieved, and benefits are realised. The templates included in the Toolkit are consistent with project governance requirements at the Agency and are provided as a guide. Your organisation may already have a framework and suite of documents in place for these purposes.

Project deliverables should be subject to a formal change control procedure. This means that any proposed change should be documented in a Change Request Log, with an impact statement and endorsement of the change by the Steering Committee. The Project Initiation Document describes the change management process, but essentially, any proposed changes to the scope, schedule, or budget that exceed established tolerances would require a change request to be raised by the CoE Lead.

Risks and Issues

The objective of risk management is to maximise successful delivery by identifying and managing risks to project outcomes. The Project Initiation Document describes the risk management strategy and processes. Essentially:

- Risk assessment / reassessment reviews should be scheduled regularly.
- Risk audits to determine the effectiveness of treatment plans should be completed regularly.
- Risk workshops should be scheduled regularly; however new risks can be raised when identified.

The CoE Lead should be responsible for the overall maintenance of the Project Risk Register—i.e., logging risks and ensuring appropriate actions are taken to escalate or resolve risks with the Project Sponsor. The local Steering Committee can decide the tolerances for reporting and escalating risks.

The CoE Lead should be responsible for logging issues in the project's issue register and ensuring appropriate actions are taken to escalate or resolve issues within timeframes. The Issue Register should be kept up to date and the CoE Lead should discuss issues with the Project Sponsor. The local Steering Committee can decide the tolerances for reporting and escalating issues.

Owner: CoE Lead

When: In parallel with or after the Project Initiation Document. The project controls and governance documents are living documents that should be regularly updated to reflect the status of project activities.

Template: 0306T_Change_Request_Template

Template: 0306T_Action_Decision_Register_Template

Template: 0306T_Issues_Register_Template

Template: 0306T_Risk_Register_Template

0307 Provider Engagement Plan

PROVIDER ENGAGEMENT

A plan for the delivery and implementation of healthcare provider engagement and communications activities to build digital health adoption. The Provider Engagement Plan should include activities to promote My Health Record and other services throughout the CoE project and be updated as required over time.

Owner: CoE Lead

When: In parallel with or after the Project Initiation Document, before project activities/initiatives commence. You may wish to wait for the Steering Committee to be formed to include their input.

Example: 0307E_Provider_Engagement_Plan_Example

Template: 0307T_Provider_Engagement_Plan_Template

04 Engaging the community

Educating and informing community members on new technologies can be challenging. Some populations may be disproportionately impacted or left behind when initiatives are rolled out, as identified in the Community Profile or Priority Group Landscape Mapping. You can use the resources in this section to help you plan appropriate engagement activities for your community.

It's essential to start planning community engagement prior to implementing initiatives. Community and consumer peaks can guide you on how to best navigate this space. Social inclusion and engagement activities tend to evolve based on constant learnings and feedback, and the Steering Committee may also want to raise initiatives that address gaps in community engagement or support for people who experience increased risk of vulnerability or being overlooked.

Resources

0401 Community Engagement Plan

SOCIAL INCLUSION & ENGAGEMENT

A plan for how to engage with consumers in your local community to promote adoption of digital health technologies such as MHR and other services.

Owner: CoE Lead; community engagement/communications team or similar

When: In parallel with or after the Project Initiation Document, before project initiatives/activities commence. You may wish to wait for the Steering Committee to be formed to include their input.

Example: 0401E_Community_Engagement_Plan_Example

Template: 0401T_Community_Engagement_Plan_Template

05 Forming a Steering Committee

The local Steering Committee represents the interests of the community, deciding on project initiatives and supporting the CoE Lead to roll them out. It is recommended that the committee be co-chaired by key community members such as influential clinical and consumer advocates, and feature representatives from various healthcare provider cohorts as well as a member of the local council. The committee also plays a key role in community engagement, particularly getting buy-in from consumers, providers, and local organisations.

Resources

0502 Terms of Reference

PROJECT MANAGEMENT

A written agreement to formalise the Steering Committee's scope and limitations, including what their purpose is, their roles and responsibilities, membership guidelines, effective dates, and meeting guidelines.

Owner: CoE Lead; Steering Committee

When: Establishing a Steering Committee.

Example: 0502E_Terms_Of_Reference_Example

Template: 0502T_Terms_Of_Reference_Template

0503 Standing Agenda

PROJECT MANAGEMENT

A template for meeting agendas to effective track and manage discussion points and time during meetings.

Owner: Steering Committee

When: Once the Steering Committee has been formed and is ready to meet.

Template: 0503T_Standing_Agenda_Template

Example: 0503E_Meeting_Agenda_Example

0504 Meeting Minutes

PROJECT MANAGEMENT

A template for meeting minutes to effectively note information, decisions and actions coming out of the meeting.

Owner: Steering Committee

When: Once the Steering Committee has been formed and is ready to meet.

Template: 0504T_Meeting_Minutes_Template

06 Promoting the project

Building a CoE requires strong community engagement and buy-in from consumers, healthcare providers and other community organisations to support project initiatives. A quality promotional campaign helps spread

awareness and gives people reasons and motivation to participate. These resources can help guide or supplement the work of your organisation's communications team, or you may choose to develop your own material to best suit your community and needs.

Resources

Trademark License Agreement

PROJECT MANAGEMENT

You'll need trademark licence agreements with partner/stakeholder organisations to use their trademarks or logos, or if they want to use your trademark / logo—e.g., for co-branding promotional materials. A trademark licence agreement grants the Licensee authorisation to use the Licensor's trademark/logo for the permitted purpose described in the terms.

The Agency cannot provide legal advice on your project. As such, there is no template or example for this document. Consult your organisation's legal team—your organisation already have existing trademark licence agreement templates.

Owner: CoE Lead; Steering Committee

When: When using an organisation's trademark/logo or providing your trademarks to other parties to use. This is relevant for any co-branded resources, such as promotional and educational materials.

0601 Localisable Promotional Materials Guide

COMMUNICATIONS

This guide introduces each of the localisable promotional materials provided in this pack, explaining the intended target audience and when/where the materials are best utilised.

Guide: 0601_Localisable_Promotional_Materials_Guide

0602 Localisable Promotional Materials

COMMUNICATIONS

A kit of promotional materials (posters, brochures, etc.) that explain what a CoE is and what it means for the community. Some resources explain specific priority areas (e.g., My Health Record) in more detail. The templates can be customised for your local community, e.g., using local photography and branding. Be sure to obtain Trademark Licence Agreements from any organisations whose logos you need to use as part of these materials.

Owner: CoE Lead; Steering Committee; Comms team

When: As needed.

Template: 0602T_CoE_Your_Community_Flyer_Template

Example: 0602E_CoE_Your_Community_Flyer_Example_A

0603 Media Engagement Guide

COMMUNICATIONS

Tips for conducting media outreach and examples of talking points that can be used for media engagements and PR.

Guide: 0603_Media_Engagement_Guide

0604 Media Briefing

COMMUNICATIONS

When you schedule a media engagement—e.g., an interview on radio or TV—the presenter of the segment will usually ask for a briefing that covers your main talking points and some background context for the project. We have collated some background information about CoE to help get you started.

Owner: CoE Lead; Comms team

When: As needed.

Example: 0604E_Media_Briefing_Example

Template: 0604T_Media_Briefing_Template

07 Monitoring and evaluating initiatives

Once your project gets going, you'll need to check in regularly to make sure activities are on track and initiatives are delivering the outcomes you intended. Surveys given before, during, and after initiatives can track changes in attitudes towards digital health. Progress reports keep everyone informed about how closely aligned the project is to its intended benefits and outcomes, and whether any changes need to be made.

Resources

0701 Provider Survey

BENEFITS REALISATION

A survey to conduct with healthcare providers to measure indicators such as their perceptions of and attitudes towards digital health, their confidence in using digital health tools, and to what degree their practice is digital vs. paper based. Consider incentivising your survey to improve response rates, and avoid distributing around the same time as other surveys to minimise 'survey fatigue'.

Owner: CoE Lead

When: Prior to an initiative (baseline) and at regular intervals or post-initiative.

Template: 0701T_Provider_Survey_Template

0702 Progress Report

BENEFITS REALISATION

Regular reporting on the project's status keeps stakeholders informed and the project team accountable. A progress report captures a snapshot of the status/progress for each deliverable and provides updates on current risks and issues for a CoE project.

Owner: CoE Lead

When: At regular intervals as determined during project planning.

Template: 0702T_Progress_Report_Template

0703 Lessons Learnt Report

BENEFITS REALISATION

It's important to evaluate the success of the CoE project, not only in terms of whether targets and outcomes were achieved, but also in terms of how effectively the project was managed and delivered. Explore what worked well, what didn't work well, where there were gaps or confusion, and think about ways to improve next time. Lessons learnt help to inform and improve future work/initiatives.

Owner: CoE Lead

When: Quarterly / annually / end of phase

Template: 0703T_Lessons_Learnt_Report _Template

Adoption: Additional Resources

Your project has been planned out and you have a Steering Committee established. Now it's time to start rolling out initiatives. The as-needed Adoption resources are designed to support initiatives through education and change management, focusing on the strategic priority areas of My Health Record, Electronic Prescriptions, Secure Messaging, and Telehealth, plus general digital health literacy. Within each priority area, there are resources tailored to specific cohorts—e.g., consumers and patients, GPs, allied health professionals, hospitals, etc.

For more information, visit www.digitalhealth.gov.au