



Consumer feedback toolkit: Introduction and background



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Supporting Proactive and Informed Change
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This resource was developed on behalf of the EMR HACC Alliance, as part of the EMR HACC Consumer Feedback Project. The project was supported by the Commonwealth and Victorian governments under the HACC program.



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If you wish to cite this document, please use the following notation:

EMR HACC Alliance (2015) *Consumer feedback toolkit: Introduction and background*. Developed by Kate Pascale and Associates Pty. Ltd. on behalf of the Eastern Metropolitan Region (EMR) Home and Community Care (HACC) Alliance, Outer Eastern Health and Community Services Alliance (OEHCSA), Melbourne, Vic.

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The *EMR HACC Alliance Consumer Feedback Toolkit* is also available electronically. Microsoft word versions of some tools have also been created so they can be used electronically.

<http://www.oehcsa.org.au/special-project>

<http://www.iepcp.org.au/eastern-metropolitan-region-home-and-community-care-alliance/eastern-metropolitan-region-home-and-co>

<http://kpassoc.com.au/>

Design and print by Ideal Formats – www.idealformats.com

Acknowledgements

This toolkit was developed on behalf of the Eastern Metropolitan Region (EMR) Home and Community Care (HACC) Alliance, as part of the *EMR HACC Consumer Feedback Project*. We'd like to acknowledge the contribution of members of the Alliance, who shared their experiences and ideas throughout the design, development and implementation of the project. Your input allowed us to understand the opportunities and challenges that staff face in day to day practice. Thank you all for your enthusiasm and ideas!

The project was supported by funding from the Commonwealth and Victorian Governments under the HACC program. Thanks to the Department of Health and Human Service (DHHS) EMR Regional Office team for your ongoing leadership and support. Thanks also to the EMR HACC Alliance's Executive Group and the DHHS Central Office HACC team, who have been actively involved throughout the project.

Special thanks to the project working group members, who represented the following agencies:

- City of Monash
- Manningham City Council
- Whitehorse Community Health Service
- Care Connect Doncaster
- Polish Community Council of Victoria
- BASS Care
- Maroondah City Council
- Manningham Community Health Service
- Villa Maria
- Chinese Community Social Services Centre Inc.

We hope the tools and strategies in this toolkit will assist you to generate meaningful evidence about the value of your work and provide you with new ideas about how to continue learning from, and with your consumers.



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Understanding the way that consumers experience healthcare is vital to our ability to deliver quality services that are appropriate, effective and tailored to the needs of the local community.

People's experience of seeking, accessing and utilising health services has a significant impact on the outcomes they achieve. There is a strong body of evidence that links consumer experience of healthcare to the physical, mental and emotional health outcomes, satisfaction, service engagement, quality of life and wellbeing outcomes for clients and carers.

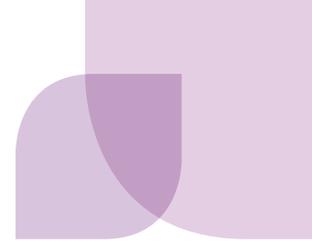
Consumers have a unique perspective and provide valuable insights into the strengths and weaknesses of the programs and services we deliver and the broader healthcare system. At an individual level, listening to consumers allows us to understand what is most important, what they want to achieve and how we can work together to support them achieve their goals. Engaging clients and carers in making decisions about their healthcare is therefore an essential part of a person centred approach to service delivery.

Agencies are required to maintain systems and processes that enable consumers to provide feedback about their experience of services and opportunities for improvement. This can be achieved in a range of ways, including:

- Client and carer surveys and interviews.
- Focus groups and discussion groups.
- Program and project evaluations.
- Informal / incidental client and carer feedback.
- Compliment and complaint systems.
- Individual care plan reviews.
- Patient or client advocates.
- Online forums and discussion boards.
- Community forums and workshops.
- Community polls.

Consumer feedback is only valuable, when it is used to inform ongoing planning and quality improvement activities. This may include revising the way an individual's care is delivered, tailoring the way a program is promoted, delivered and evaluated or creating new services that respond to consumers' needs.

Consumer feedback can be used to inform the way we work with individuals and the way we design, deliver and evaluate our services more broadly.



Consumer feedback vs. consumer participation

Providing feedback is only one of many ways that consumers can participate in the ongoing improvement of health and community services.

In recent years, there has been growing impetus for consumers, staff, service providers, funding bodies and Governments to work together to develop the systems, culture and processes that can empower consumers to:

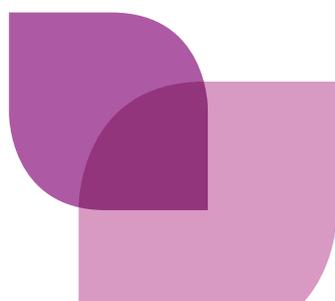
- Understand their health and the options available to manage their health.
- Make informed choices and decisions about their health and their healthcare.
- Be actively involved in the design, evaluation and planning of health and community services and the systems in place to support quality service delivery.

While collecting and using consumer feedback is important, it is only one element of consumer participation. Organisations need to think more broadly, and consider a range of ways to engage consumers and develop effective consumer participation strategies.

Benefits of consumer participation

Evidence demonstrates that working collaboratively with consumers can achieve a range of benefits for clients, services and the health and community services system more broadly. A very brief summary of some of these carers benefits is included in the table below.

Stakeholder group	Benefits of consumer participation
Consumers	<ul style="list-style-type: none"> • Improved health and wellbeing outcomes for clients and carers. • Enhanced experience of healthcare including increased client satisfaction, trust and confidence in service providers.
Staff	<ul style="list-style-type: none"> • Increased role satisfaction associated with the ability to adopt flexible approaches and tailor service delivery to meet the needs of individual clients.
Service providers/system	<ul style="list-style-type: none"> • Improved service quality and safety, including: <ul style="list-style-type: none"> – The provision of more effective, accessible and appropriate services for the community. – Reduced number of complaints from consumers and staff. – More effective services that are tailored to meet the needs of their consumers. – Enhanced service efficiency.



Policy and practice context

Expectations to embed meaningful consumer participation strategies are now included in the legislation, charters, policy and quality standards that guide health and community services. Key principles and practice standards are outlined in a range of documents. At the broadest level, these include:

- *Australian Charter of Healthcare Rights*¹.
- *Health Services Act 1988*².
- *National Safety and Quality Framework*³ and *Health Service Standards*⁴.

The Victorian Government recognised the need for a strategic policy to guide a collaborative and consistent approach to consumer participation across the Victorian public health system. *Doing it with us not for us*⁵ was therefore introduced in 2006 and provides a comprehensive set of participation standards and indicators to guide and monitor implementation. This is an overarching policy that is relevant to all publicly funded health and community services in Victoria including acute, subacute, mental health, community and residential services. Consumer participation is also identified as a priority in the *Victorian Health Priorities Framework 2012–22*⁶ and a range of whole-of-Government and sector specific frameworks and initiatives.

Current practice in the Victorian HACC sector

Expectations regarding consumer participation are embedded within the Home and Community Care (HACC) sector's quality standards, the *Home Care Standards*⁷. In Victoria, the introduction of the *Active Service Model*⁸ (ASM) and *Diversity Planning and Practice*⁹ have also reinforced the need for staff to work collaboratively with consumers to deliver effective and appropriate services. HACC service are therefore encouraged to think about how they can embed processes and systems in everyday activities that:

- Promote client autonomy and independence.
- Enable clients and carers to make informed decisions about their care.
- Adopt a strengths based approach to assessment, planning and services delivery that recognises and builds on the person's skills and resources.
- Provide flexible, individualised care that is reflective of the individual's needs, goals and priorities.

This has required a significant shift in practice for many HACC agencies and they have been working hard to embed this approach.

1 ACSQHC (2008) *Australian Charter of Healthcare Rights*. Australian Commission on Safety and Quality in Health Care (ACSQHC), Canberra

2 Parliament of Victoria (1988) *Health Services Act 1988*. (No 49 of 1988)

3 ACSQHC (2009) *National Safety and Quality Framework – A National Framework for Improving Safety and Quality of Health Care*. Australian Commission on Safety and Quality in Health Care (ACSQHC), Canberra

4 ACSQHC (2008) *National Safety and Quality Health Service Standards*. Australian Commission on Safety and Quality in Health Care (ACSQHC), Canberra

5 DH (2011) *Doing it with us not for us: Strategic direction 2010–13*. Victorian Government Department of Health, Melbourne

6 DH (2012) *The Victorian Health Priorities Framework 2012–22*. Victorian Government Department of Health Melbourne

7 DOHA (2013) *Home Care Standards (formerly the Community Care Common Standards)* Australian Government Department of Health and Ageing (DOHA), Canberra

8 Please refer to http://www.health.vic.gov.au/hacc/projects/asm_project.htm for additional information about the Active Service Model.

9 Please refer to http://www.health.vic.gov.au/hacc/projects/diversity_framework.htm for additional information about Diversity Planning and Practice.

The EMR HACC Consumer Feedback Project

In Melbourne's Eastern Metropolitan Region (EMR), the EMR HACC Alliance¹⁰ provides a platform for staff working in local HACC agencies to come together, share ideas, resources and knowledge. The Alliance also supports a range of regional projects and events to address common challenges and priorities.

A number of projects and workshops have been completed to support ASM and Diversity implementation and promote effective consumer engagement. In the EMR, a key focus of this work has been around refining assessment and Goal Directed Care Planning practices to ensure that clients and carers are actively involved in making decisions about their care.

As ASM and Diversity implementation has progressed, many agencies have prioritised the need to collect tangible evidence about the strengths and weaknesses of their new approaches and the difference they make for clients and carers. While staff recognised the importance of collecting feedback from consumers to support this, agencies continue to experience challenges collecting and using meaningful feedback.

Alliance members were therefore keen to learn more about how to setup or refine consumer feedback systems that are appropriate for the diverse group of HACC clients and able to provide the information required to inform broader planning and quality improvement activities.

In October 2013, the *EMR HACC Consumer Feedback Project* was therefore established to support local HACC agencies develop and implement effective and efficient consumer feedback systems.

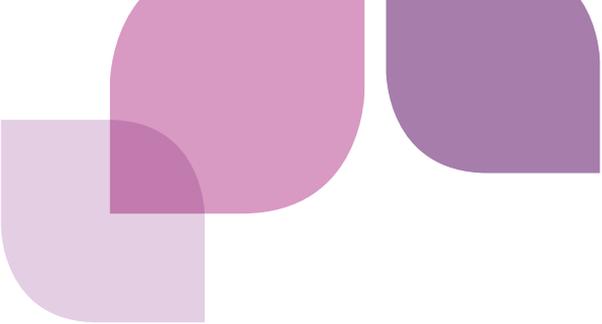
A range of strategies were used to achieve this, including:

- A comprehensive review of relevant policy, guidelines and best practice literature.
- Exploration and analysis of current practice and tools across a number of local HACC services that represented the breadth of HACC service types and consumer groups.
- Ongoing consultation with HACC staff to understand current practice, establish priorities, collect feedback and share learnings.
- Creation of a project working group to lead the development, testing and evaluation of project resources.

Engaging local HACC staff, through a project working group, in the project design and implementation was essential to ensure that the resources developed in the project would be relevant and appropriate for staff across a broad range of HACC funded agencies and programs.



¹⁰ Additional information about the EMR HACC Alliance can be accessed via the Alliance pages on the local Inner and Outer Eastern PCP websites. Please refer to <http://www.oehcsa.org.au/special-project> for more information.



Key project learnings

Staff within and beyond the project working group, consistently reiterated the benefits of collecting consumer feedback and their commitment to using consumer feedback to improve their services. While a range of strategies were used to collect feedback, many agencies relied heavily on written surveys, often presented as an ‘annual client satisfaction survey’.

Limitations and challenges of current practice

Initially, feedback about current practice was collected via consultation with the project working group and a review of their existing consumer feedback tools, strategies and policies. Staff described a range of practical challenges they experienced in relation to collecting and using consumer feedback, including:

- Poor response rates to consumer surveys.
- Difficulties collecting meaningful information that can drive service improvements (e.g. many consumers only provide positive feedback, vague responses, or feedback about issues that are beyond the staff member’s control).
- A lack of confidence about how to collect feedback in ways other than surveys (e.g. their ability to facilitate focus groups or conduct interviews).
- Perception that written surveys are the only way to collect valid and meaningful evidence.
- Concern about the amount of time required to collect and collate consumer feedback (and the subsequent impact on client care).

Priorities for ongoing improvement

The review identified remarkable consistency in the strengths and weaknesses of current approaches and identified the need to:

- Adopt a more comprehensive and consistent approach to planning consumer feedback strategies and tools.
- Improve the design, content and format of the tools being used to collect feedback.

Consultation with a broader group of HACC agencies (via the EMR HACC Alliance) indicated that the findings were representative of the trends in practice across the local sector.

The project therefore prioritised the development of practical resources and opportunities for further training to build staff’s knowledge and confidence about how to design and implement effective consumer feedback systems. Staff also reinforced the need to focus on strategies that are meaningful for consumers, efficient and don’t require advanced evaluation skills or experience.



The EMR HACC Alliance Consumer feedback toolkit

The *Consumer feedback toolkit* was created to support agencies address these challenges by providing practical advice, tools and strategies that can help to maximise the value of consumer feedback. It includes information about how to design evidence based consumer feedback tools and strategies that are:

- ‘Fit for purpose’
- Appropriate and meaningful for consumers (acknowledging the diversity of the HACC target group).
- Efficient and appropriate for staff to apply without advanced evaluation skills or experience.

Within the scope of the project, it was not possible to create an entirely new set of tools and resources. The project therefore focused on creating practical tools and templates that agencies could integrate into their practice. A number of existing resources have also been included in the toolkit that will assist agencies to put those tools into practice.

The toolkit has been designed as a set of separate resources, so that you can ‘dip in’ and use different sections that are relevant to you.

The Consumer feedback toolkit includes the following resources	
Resources developed within the EMR HACC Consumer Feedback Project	Existing resources adapted for the toolkit (developed by Kate Pascale and Associates)
<p>Introduction and background (this resource).</p> <p>Provides an overview of the context and rationale for the EMR HACC Alliance Consumer feedback project and this toolkit.</p>	<p><i>Collecting and using consumer feedback effectively: Designing your approach.</i></p> <p>Outlines key concepts and considerations to assist your to design appropriate and effective consumer feedback strategies.</p>
<p>Consumer survey tools and templates</p> <p>Includes the <i>Survey design guide</i> and a <i>Survey checklist</i> to assist you to design and evaluate consumer surveys.</p>	<p><i>Developing consumer surveys.</i></p> <p>Provides guidelines about how to plan and develop effective consumer surveys using a range of approaches.</p>
<p>Consumer focus group tools and templates</p> <p>Includes a set of templates that can be used to create a <i>Facilitator’s guide</i> to plan and deliver focus groups effectively.</p>	<p><i>Conducting focus groups with consumers.</i></p> <p>Contains practical advice about when focus groups are most effective and strategies to plan, set up and conduct the focus groups with consumers.</p>
<p>Consumer interview tools and templates</p> <p>Includes a set of <i>Interview protocol</i> templates that can be used to plan and deliver in-depth interviews with consumers.</p>	<p><i>Conducting in-depth interviews with consumers.</i></p> <p>Outlines strategies to set up for success when conducting face to face or phone based interviews.</p>

Consumer feedback systems are most effective when a range of strategies are in place and consumers have the opportunity to provide feedback in a way that’s appropriate for them. Not every tool or approach included in this toolkit will be relevant for every consumer. You need to use your professional judgement to determine what is appropriate for your consumers.

Other relevant projects and resources

The ASM Client and Carer Outcomes Project

As HACC agencies have been working towards implementing an Active Service Model (ASM) approach, many agencies have sought advice about how to measure the impact that an ASM approach has for their clients and carers. Therefore, in 2013, the Department of Health and Human Services engaged The Australian Institute for Primary Health and Ageing at La Trobe University to undertake the *ASM Client and Carer outcomes project*. The project aims to develop and pilot a set of outcome measures and tools that agencies can use to measure the impact of implementing the ASM approach. We anticipate that the resources developed within the *ASM Client and Carer outcomes project* will complement the *Consumer feedback toolkit* and allow agencies to tailor their evaluation approach to meet their individual needs and resources.

Consumer participation resources and research

The *Health Issues Centre* and the *Centre for Health Communication and Participation* lead a range of innovative practice and research initiatives related to consumer participation in Victoria. They also publish practical resources and guides to support effective health communication, consumer engagement and participation in health service development, delivery and planning.

Health Issues Centre: <http://www.healthissuescentre.org.au/>

Centre for Health Communication and Participation: <http://www.latrobe.edu.au/chcp>

Resources:

Australian Commission on Safety and Quality in Health Care (2011) *Patient-Centred Care: Improving quality and safety through partnerships with patients and consumers*.

Available from: http://www.safetyandquality.gov.au/wp-content/uploads/2012/03/PCC_Paper_August.pdf

Victorian Attorney General's Office (2013) *Consumer Participation in the Health System (2012-13:06)*.

Available from: <http://www.audit.vic.gov.au/publications/20121010-Consumer-Health/20121010-Consumer-Health.pdf>

Sarrami Froushani P, Travaglia J, Eikli M, Braithwaite J. (2012) *Consumer and community engagement: A review of the literature*.

Available from: http://www.aci.health.nsw.gov.au/_data/assets/pdf_file/0010/165592/Consumer-and-community-engagement-literature-review.pdf

Cook, A. and Miller, E. (2012) *Talking Points: Personal Outcomes Approach*.

Available from: <http://www.jitscotland.org.uk/wp-content/uploads/2014/01/Talking-Points-Practical-Guide-21-June-2012.pdf>

Health Issues Centre (2014) *Guide to consumer engagement*

Available from: <http://www.healthissuescentre.org.au/health-services/consumer-engagement-guide/>

Tasmanian Council of Social Service (2014) *TasCOSS HACC Consumer Engagement Program: What consumers, staff and managers tell us. Program Participant Experiences and Stories*.

Available from: <http://healthissuescentre.org.au/images/uploads/resources/TasCOSS-home-and-community-care-consumer-engagement-program.pdf>

