TEC Programme

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Pathway Proposal Template

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| **Remote Health Pathways** | **Proposal Template** |
| Version | 3.0 |
| Date | 15 June 2023 |
| Owner | Morag Hearty [TEC – Connect Me Strategic Lead] |
| Author(s) | Morag Hearty [TEC – Connect Me Strategic Lead]  Nicola Robinson [TEC – Connect Me Data Lead]  Iain Trainer [TEC – Connect Me Improvement Lead] |

**Appraisal of Connect Me Pathway Proposals**

The pathway proposal process was introduced to provide a robust appraisal methodology as the basis for decisions by the Connect Me Implementation Group, ensuring decisions are open, transparent and fair.

**Objective:**

Sustainable delivery across NHSS of improved health services, person-centred care, and improved outcomes by (a) deploying remote health pathways and (b) accelerating national adoption of innovative solutions to priority healthcare challenges, on a ‘Once for Scotland’ basis.

This objective has been agreed by the RHP Implementation Group to:

1. Align the proposals with TEC RHP Programme and Centre for Sustainable Delivery (CfSD) objectives.
2. Guide the applicants in what the RHP Implementation Group are seeking to achieve and resource.
3. Guide the proposal appraisers on how they should evaluate each section in the proposal form.
4. Provide links where required to ensure proposed RHP makes a strategic contribution to this objective ‘at scale’ and on a once for Scotland basis.

**Process:**

Proposer is asked to complete the Pathway Proposal template ensuring attention to the notes for each of the sections within the form, as each section correlates to criteria within the scoring methodology and as such, will be allocated a score based on the scoring methodology. Guidance used by appraisers is attached as Appendix 2 and business analysis support is offered by the Connect Me Programme team to assist with developing the proposal.

On receipt of the proposal template, members of the Implementation Group will be asked to score each section of the proposal using the scoring guidance (appendix 2).

Where there is variation in scores applied by individuals, a review of scores will take place during the next scheduled Implementation Meeting to discuss and agree a final score, based on individuals’ rationale and justification of scores allocated.

**Approval Criteria:**

Based on the final consensus scores agreed by the group, a pathway will be approved on the basis of an overall minimum score of 40 out of possible 50 (80%). Additionally, if any of the 10 individual categories score 1, regardless of whether the overall score threshold is achieved, this would automatically require that further information is sought from the proposer in relation to that category.

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| **Applicant Details:** | |
| **Organisation/Board** |  |
| **TEC Project Lead** |  |
| **Clinical or Service Lead** (please include name, designation & email) |  |
| **Proposed Pathway Name** |  |
| **Date Submitted** |  |

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| **1.Proposal Type (tick one only)** |
| Development of a new pathway  Local adoption/amendment of an existing National pathway  Transition of an existing digital pathway from Florence  Transition of an existing digital pathway from another system/platform |
| **2. Background** |
| *Provide detail of current situation and reason for proposal for a digital pathway*  *(‘The Why’ - Why do this? - i.e. drivers for change)*  *Evidence of success elsewhere in UK or abroad ( e.g. evaluation report)* |
| **3. Problem Statement** |
| *Is there an unmet clinical need? What is the problem with the ‘as is’ pathway that you are trying to address by redesigning and introducing a digital pathway?*  *Define the scale of the problem by providing any facts and figures (baseline data), research or analysis that you have to inform the need for a digital pathway development.* |
| **4. Aim(s) and Objective(s)** |
| *Clearly describe the strategic contribution to the overall objective (improved health services, person-centred care, and improved outcomes by (a) deploying digital pathways and (b) accelerating national adoption of innovative solutions to priority healthcare challenges, on a ‘Once for Scotland’ basis) by developing improved patient service through a digital pathway.* |
| **5. Beneficiaries** |
| *Who is affected? Who will benefit? ( define the citizen group and service area/role/organisation)*  *Also explain in what way development of the digital pathway will be better for each of the above. How will they benefit from the introduction of a digital pathway?* |
| **6. Anticipated Outcomes and Measures** |
| *Think about what benefit and impact you would expect the digital pathway to have. Which outcomes would evidence that impact for evaluation purposes?*  *How will you measure progress towards achieving identified outcomes (qualitative/quantitative)?*  *Have you identified any necessary data sources?*  *A Measurement Plan is a useful tool for aligning the outcomes and measures (a template is included as appendix 1 at the end of this document)* |
| **7. Stakeholders** |
| *List each stakeholder involved, their role and if they are engaged and supportive of the proposal*  *Should include both internal and external stakeholders, including whether they have previously had any prior national clinical or strategic engagement*  *For each stakeholder listed, state if ‘supportive’, ‘in discussion’ or ‘to be consulted’*  *Describe how patients have been engaged in identifying the need for a digital pathway and their involvement in the design, testing and evaluation processes.* |
| **8. Design - what will your digital pathway look like?** |
| *Provide as much detail as possible at this stage about what the ‘to be’ pathway might look like. What will a successful deployment look like? Consider the* [*Scottish Approach to Service Design*](https://tec.scot/programme-areas/transforming-local-systems/scottish-approach-service-design)*. Include details of number of end users (citizens), number of clinical users. If you can, include a flow diagram or illustration of the process.*  *What might be the steps in the process? Think about the Who will do What, When and How*  *(E.g. patient submits readings daily using a BP monitor and pulse oximeter and answers symptom questionnaire with a choice of using the app, online or SMS text).*  *Include indication on the design of the build/type of remote monitoring – i.e. is it PROM questionnaire, medication reminder, vital signs monitoring, combination?*  *Consider if additional resources are required, system or data integrations (PDF Output reports required?), peripheral devices (e.g. BP monitors, pulse oximeters, etc.)*  *Proposed communication method(s) for patient (e.g. App/Online/SMS Text/Automated phone call)*  *Is there likely to be an impact on NHS24 or Scottish Ambulance Service? (E.g. will pathway ask patient to call 111 or 999? Consideration in relation to out of hours)* |
| **9. Anticipated Timescale** |
| *From discovery to deployment with sufficient resources (staff, funding, infrastructure)* |
| **10. Strategic Alignment** |
| *Identify which National and/or local strategic priorities or initiatives that this proposal supports* |
| **11. Evaluation** |
| *Identify how the Test of Change will be evaluated and (if applicable) how any local evaluation activities will be fed forward to inform the Connect Me process.* |
| **12. Further information** |
| *Include anything else that you think may be relevant.* |

On behalf of the **RHP Implementation Group**:

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| **Outcome/Action/Recommendation:** |
| Approved  Further information required (see below)  Consider alternative solutions (see below)  **Comments/Actions:** |

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| **Reference No.** |  |
| **Date of Implementation Group** |  |
| **Review Date** |  |

**APPENDIX 1**

**Measurement Plan Template**

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| **Name of measure**  Specify type of measure (e.g. percentage / count / rate / variable (e.g time, volume etc) / days or cases between) and what you are measuring.  Indicate whether it’s an Outcome (O), Process (P) or Balancing (B) measure | **Concept being measured and why it’s important to look at this**  What is the purpose of this measure? i.e. what questions do you want answered in relation to your digital pathway? What goals are you trying to achieve? | **Operational definition**  Clear, precise definition of the measure and how it is calculated. What / who is included or excluded? | **Data collection**  Who is collecting it? How often and when? Where is the data coming from? | **How will you record / display the data? (e.g. run charts)** |
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**APPENDIX 2**

**Scoring Guidance for appraisal of Connect Me Pathway proposals**

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| **Category** | **Guidance notes for Proposal Applicant as provided on the Proposal Template** | **Appraisal Criteria for Scorers** | **Scores available** |
| **Background** | Provide detail of current situation and reason for proposal for a digital pathway  (‘The Why’ - Why do this? - i.e. drivers for change) | Rate the impetus and environment for the proposed change | **1** = no obvious drivers & poor environment  **5** = immediate, compelling need for change with strong environmental support (skills, infrastructure, leadership etc) |
| **Problem Statement** | Is there an unmet clinical need?  What is the problem with the ‘as is’ pathway that you are trying to address by redesigning and introducing a digital pathway?  Define the scale of the problem by providing any facts and figures (baseline data), research or analysis that you have to inform the need for a digital pathway development. | Has sufficient citizen/patient engagement and analysis/research been carried out to understand current landscape/issues? | **1** = Poor  **3** = Acceptable  **5** = Excellent |
| **Aims & Objectives** | Clearly describe the strategic contribution to the Objective (improved health services, person-centred care, and improved outcomes by (a) deploying digital pathways and (b) accelerating national adoption of innovative solutions to priority healthcare challenges, on a ‘Once for Scotland’ basis) by developing improved patient service through a digital pathway | Clear aim & SMART objectives defined? | **1** = Poor  **3** = Acceptable  **5** = Excellent |
| **Beneficiaries** | Who is affected? Who will benefit? ( define the citizen group and service area/role/organisation)  Also explain in what way development of the RHP will be better for each of the above. How will they benefit from introduction of a digital pathway? | Are the beneficiaries clearly defined (citizen group(s) and service area/role/organisation), with detail of the intended benefits for each beneficiary stated and clear/credible/valuable? | **1** = Poor  **3** = Acceptable  **5** = Excellent |
| **Anticipated Outcomes and Measures** | Think about what benefits and impact you would expect the digital pathway to have. Which outcomes would evidence that impact?  How will you measure progress towards achieving identified outcomes (qualitative/quantitative)?  Have you identified any necessary data sources?  A Measurement Plan is a useful tool for aligning the outcomes and measures (refer to the guidance for a suggested template) | Does this submission offer sufficient evidence, or stages to do so, to give confidence in its potential to realise benefits at scale on a 'once for Scotland' basis?  Are the measures clearly defined?  Is it clear how these measures will monitor progress towards achieving the aim? | **1** = Poor  **3** = Acceptable  **5** = Excellent |
| **Stakeholders** | List each stakeholder involved, their role and if they are engaged and supportive of the proposal  Should include both internal and external stakeholders, including whether they have previously had any prior national clinical or strategic engagement  For each stakeholder listed, state if ‘supportive’, ‘in discussion’ or ‘to be consulted  Describe how patients have been engaged in identifying the need for a digital pathway and their involvement in the design, testing and evaluation processes. | Is there adequate buy-in/support? Does the submission include evidence from one or more Health Boards? | **1** = All ‘To Be Consulted’ or not stated  **3** = Combination of some 'To be Consulted and 'Supportive' or 'In discussion'  **5** = All ‘Supportive’ and no obvious omissions |
| **Design** | Provide as much detail as possible at this stage about what the ‘to be’ pathway will look like. What will a successful deployment look like? Consider the Scottish Approach to Service Design Include details of number of end users (citizens), number of clinical users. If you can, include a flow diagram or illustration of the process.  What are the steps in the process? Think about the Who will do What, When and How (e.g patient submits readings daily using a BP monitor and pulse oximeter and answers symptom questionnaire with a choice of using the app, online or SMS text) Include indication on complexity of the build – i.e is it PROM questionnaire, medication reminder, vital signs monitoring, combination?  PDF Output reports required? Proposed communication method(s) for patient (e.g App/Online/SMS Text/Automated phone call) Consider impact on NHS24 and Scottish Ambulance Service. | Does the description provided give a sufficiently clear picture of the proposed service? (Detail of complexity of build may be included in response on proposal form, but also to be considered and scored separately)  Is the definition of success defined?  Does the applicant commit to following the Scottish Approach to Service Design? Is the SAtSD embedded in the design detail? | **1 =** Not at all  **3=** Partially  **5 =** Adequately |
| **Timescales** | From discovery to deployment with sufficient resources (staff, funding, infrastructure) | Are proposed timescales staged, realistic and achievable? | **1 =** Not at al**l**  **3=** Partially  **5 =** Adequately |
| **Strategic Alignment** | Identify which National and/or local strategic priorities or initiatives that this proposal supports | Does the proposed pathway align to strategic priorities? | **1 =** No  **5 =** Yes |
| **Evaluation** | Identify how the Test of Change will be evaluated and (if applicable) how any local evaluation activities will be fed forward to inform the Connect Me process. | Does the proposal clearly identify the evaluation methods and how the results will be made available to enable consideration of the Project Outcome Report by the Implementation Group. | **1** =Not at all  **3** = Partially  **5** = Adequately |
| **Proposal Evaluation Score** |  |  | **Sum of all scores**  **(maximum possible score = 50)** |
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| **Build Complexity Score** | Refer to development model diagram - this criteria will be considered separately from the overall evaluation criteria score | Is this a complex pathway? Who will build? (consider need to involve NSS integration team, supplier's development team) | **1** = Simple (Connect Me team can build)  **3** = Blended model (input from supplier developer needed)  **5** = Complex (Full build by supplier) |