SoCaTel
A multi-stakeholder co-creation platform for better access to Long-Term Care services

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Executive Summary

The purpose of this report is to provide an update on the situation in four pilot sites (Finland, Spain, Ireland, Hungary) regarding the adoption of project results such as the online co-creation methodology, the SoCaTel platform and the co-created digital services. We report on our efforts to manage the institutional change regarding LTC services design and delivery. This report follows up on the strategies proposed in D6.3 *Pilot Site Review, 1st Round* and shows the achievements obtained in a period of six months regarding the motivation of actors to participate in the process, the leadership structure, the networks building, the capacity building, a broader learning obtained from this experience, the improvements to the platform and the process causing the positive change in attitudes of participants. We also provide a detailed commentary of several barriers to change that still exist as well as our strategies to overcome them.

This deliverable offers useful information on the management of institutional change, as follows:
- Acknowledgment of the change leader's role at each site (social services),
- Updates and improvements to the platform to ensure platform readiness and adoptability,
- Updated general key messages to encourage adoption,
- Updated table of risks and mitigation actions taken in each pilot site,
- Report on the evolution of perceptions and attitudes in each site,
- Classification and overview of obstacles and the status of their removal,
- In Appendices: the initial draft of *Guidelines for moderators and facilitators* for the management of digital co-creation on the SoCaTel platform (improving platform readiness for adoption), information about Collaboration Agreements promoting the early use of the SoCaTel platform on a national level, information on the Twinning project proposal submitted for the full adoption of the platform in the region of Veneto (Italy) and a list of institutions which expressed their interest in the uptake of the method at EU level.

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1. INTRODUCTION

1.1 About the deliverable

This document offers an update of D6.3 *Pilot Site Review, first round* and shows how certain obstacles identified six months ago have been removed as a result of activities of WP6 Change Management. Changes in attitudes result from efforts made to build clarity about the co-creation process and from obtaining concrete outcomes – the functional platform and the co-developed services.

Turning back to WP6 work plan, we want to stress that in D6.5 as in previous D6.3, we describe different types of difficulties that appeared during the implementation of the change and solutions that have been sought, while in the D6.4, which will be delivered at the end of the project (M36), we will explain the lessons learnt during the process.

This review follows up on the framework proposed in D6.3 for mitigating risks to uptake and institutionalisation of the project's results at the pilot sites: the municipalities of Tampere (Finland), Dublin (Ireland) and Vilanova (Spain) as well as by Szeged-Csanád Roman Catholic Diocese, institution in charge of social services in Szeged (Hungary).

D6.3 described several fields in which resistance to the incorporation of the SoCaTel co-creation method appeared (perceptual, organisational, financial, etc), and it offered a nuanced description of the situation in each pilot site. In D6.3, the tables of 'risks and mitigation actions' summarised these risks and offered strategies for addressing them at each site. The current report updates this information, indicating which mitigation efforts have been completed or are underway. D6.3 also included a set of tables for 'Monitoring pilot sites' level of preparation for the adoption of the SoCaTel methodology, platform and services'. Because the vast majority of the items of these tables was complete for all pilot sites in D6.3, these tables are not updated in the current report. However, all progress made is narrated and the final results (agreements and projects for SoCaTel platform adoption) are added in Appendices as an evidence of concrete accomplishments.

The first sections of this deliverable offer an overview of the evolution of pilot sites' perception during the implementation of change (joint co-creation of services by citizens and stakeholders) and an account by each pilot of the experiences and challenges encountered by the 'change leader'.

Next, we address the following issues: different kind of obstacles and how we worked to remove them, in relation to risk and mitigation table presented in D6.3

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and new challenges that appeared: unclear leadership role, interference (simultaneous processes of co-creation of the platform and co-creation of services), insufficient platform readiness at the time of first piloting, the improvements to the platform that had to be made to ensure platform adoptability, too general messages to motivate effectively the adoption and the update of key messages, budgetary concerns and the resistance to change of the way how LTC services are designed and developed.

Finally, we overview achievements in 4 pilot sites and provide conclusions about the actions taken from the perspective of change management.
In the Appendices we enclose:

 a) *Guidelines for moderators and facilitators* (draft) of the SoCaTel platform that has been required to clarify the role of managers of the co-creation process, to envision the amount of work required for embracing the co- creation approach.

 b) information on collaboration agreements and the list of institutions interested in the uptake of the platform on both national and international level (the Twinning project between URV/ VILA-Spain and ISRAA-Italy for the full adoption of the platform in the region of Veneto, amongst other).

1.2. About the change management in service innovation

The change in the way LTC services are designed and developed is changing due to the use of digital co-creation practices promoting wide participation of citizens and different kinds of stakeholders. With an online co-creation, the access and voice are given also to people with restricted mobility (for health reasons or due to lockdown situation). Although these new inclusive participatory practices are welcome as they enhance a social justice, in practice the online participation is shown to be challenging for the majority of older adults. Also in countries where the face-to-face co-creation is already used for more than a decade (as in our Finnish pilot site), a reluctance is shown towards the digitalisation of co-creation.

During the project execution, we came across a range of obstacles stemming not always from rigid attitudes, but from the complexity of the mere project consisting in several actions taken simultaneously (co-creation of the platform, co-design and co-development of digital services and the preparation of pilot sites for the uptake of results) and the confusion that has been created: lack of adequate role preparation for change leaders in pilot sites, conflict of interests in terms of leadership during the platform and service development -different leaders for different phases of the project-, concerns about the sustainability of products & services in the current socio-economical context, etc.

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To successfully manage the change consisting in the incorporation of completely new practices and the digital tool in 3 public and 1 private institutions -providers of services for older people-, we had to take over the following actions:

- to define a change leader in each pilot site (motivated and enthusiastic about the innovation),
- to identify barriers to change (attitudes, economical issues, administrative obstacles),
- to make a strategy for removing barriers (define what had to be learnt and acknowledge during the process, how to motivate the key actors to engage creatively, find out the specific interests/ needs of each stakeholder so as to be able to explain them how they can benefit from the platform and the process, enhance the self-awareness of users as fundamental change actors, determine what are the weaknesses and strengths of the current local system in each site to inform why the platform is useful for them, demonstrate the viability of the process providing evidence of created services, advance how the platform could be self-sustained and remark the effect of co-creation practice on new policies),
- to develop partnership of stakeholders in each locality for future co-creation,
- to develop a functional platform as a useful tool for co-creation,
- to produce jointly key messages that can bring understanding about the appropriateness and utility of the platform in both given localities and universally.

These actions were performed among the Consortium partners in project meetings (formal and informal), joint preparation of project deliverables and workshops, through the execution of the SoCaTel project. We could observe how the attitude of participants in pilot sites were changing from anger, denial and resistance (manifested sometimes in severe criticism of the project) to understanding, acceptance and commitment.

2. PILOT SITES' CHANGING PERCEPTION DURING THE IMPLEMENTATION OF CHANGE

2.1 Finnish pilot site

2.1.1. Risks and mitigation actions taken

In D6.3 we identified a series of risks to the uptake of the platform and services and corresponding mitigation actions to be taken. Table 1 offers an update on mitigation efforts.

Table 1. Risks and mitigation actions in Tampere

Institutional adoption	Encountered problems September- December 2019	Mitigation actions proposed September- December 2019	Status April - May 2020
Method-related	"The SoCaTel project has provided many opportunities for Tampere, to develop the system-based co-creation processes and the services for older people, as well. But to co-create successfully, it is important to be able to choose an appropriate methodology according to the needs. Thus, it makes sense to choose firstly the subject which needs to be developed and then the methodology. Thus, it makes sense to firstly choose the subject which needs to be developed and then the methodology, being the online co-creation methodology chosen only when appropriate."	Develop different variants of the SoCaTel method, taking into account the fact that not all older people can/ wish to use digital co-creation. Create tools /guidelines for different modalities of the SoCaTel method.	The lockdown caused by COVID-19 pandemic significantly changed everyone's perception of the utility of digitaliisation for advancing the creation of services in a situation when face-to-face meetings are impossible and new emerging needs has to meet rapidly. TAMPERE recognised the utility of the SoCaTel platform in this kind of situations.
Platform-related	"The platform is ready for piloting but the final product would need to be evaluated."	"Improve the platform, test, evaluate, improve, test and evaluate."	In the meanwhile, the platform was fine-tuned, 2 more steps were added, it passed the accessibility audit, the language was adapted, and the co-creation continued. Two digital services were co-designed and co-developed using all 5 steps. In the period June-September 2020 it will be newly tested, co-creating on COVID-19 -related needs. It will certainly be easier to use than in the first occasion.

| Services-related | "It is the responsibility of the City to evaluate the quality of services provided for citizens. It is not clear who will guarantee the quality of services co-created via the SoCaTel platform." | "Digital Programme of Tampere provides opportunities to pilot innovative solutions according to the Programme's criteria and financing." Services co-created with the SoCaTel infrastructure should be tested in TAMPERE in order to demonstrate they are of good quality, as a necessary step towards adoption. | The lack of accountability is a consequence of insufficiently defined change leader role and the lack of TAMPERE practitioners' leadership during the co-creation process.

Invite TAMPERE to take part in a new testing of the process and organise on their own the service development. |

2.1.2. Dynamics of perception in Tampere

Co-creation – online pilot September 2019

From the initial point of view of Finnish practitioners working in Social Services of the City Hall of Tampere participating in the SoCaTel project, "the online co-creation pilot was a frustrating and disappointing experience for participants", who included profiles from across the quadruple helix. "The participants found it difficult to navigate the platform; they were unsure how to proceed from the home page. Some participants opted not to create an account because of privacy concerns. Of those who decided to proceed, most managed to complete the basic tasks of setting up an account, submitting a topic (Step 1), and messaging the moderator. However, during Step 2, the participants weren't interested in using the platform to vote on topics. Instead, they talked about them out loud. When asked why they didn't proceed to Step 2, numerous participants reported that the platform was boring and not user-friendly.

In the end, no digital co-creation happened at the pilot in September or in the 10-day period following it. Our participants were put off by their experience pilot and are not interested in continuing to work on the platform, despite our invitation to do so."

From the change management point of view, it is interesting that the Finnish pilot site, as a most advanced site in terms of innovation (using the co-creation method for decade or more, and highly digitalised) is at the same time showing the greatest *resistance to digitalisation*. More investigation is needed into the possible covert reasons (contextual, psychological, etc).

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Hackathon - November 2019

"Despite the major difficulties experienced at the co-creation pilot, the hackathon event was very successful. It was fully tailored to the real needs of LTC users and providers. The organization went smoothly and participants rated the experience very highly (one even reported that the event had led him/her to consider a career in LTC solutions). One problem we encountered was convincing older people to attend the hackathon; they had a hard time understanding what it was and were reluctant to attend. Because the hackathon was a stop-gap measure rather than an ongoing component of the SoCaTel approach, this is not a major obstacle."

"Because no ideas emerged from the co-creation pilot, we generated an idea to be developed at the hackathon. At the end of the hackathon, we chose a winning team and offered them a three-month, 6000 euro development contract. However, the team opted not to move forward because the 6000 euros they were offered was insufficient compensation (hackathons in Finland often offer prizes as high as 15k euros), and because the team did not contain a coding expert. Because winning teams keep the rights to develop their idea, we were left without an idea to be developed. As an alternative that will allow Tampere to continue with the project, Ozwillo is in negotiations with a Finnish ICT company to develop services for the platform".

Platform

"As mentioned above, the participants at the co-creation pilot were turned off by the platform. They found its design to be confusing; this is especially problematic for the end users we hoped would use the platform, since many of them are older people with limited digital literacy. At the time of the pilot, the platform was not finished: it had not been properly tested or evaluated. Also, it was not properly translated into Finnish.

In addition to user-friendliness, another aspect that needs improvement is the delineation between the moderator and facilitator roles, where the moderator will accept platform users and the facilitator will be an expert on the topics of interest and can therefore guide the co-creation process (for example, preventing participants from proposing services that already exist, etc.).

We also have been unconvinced by some of the platform's messaging. The home page implies that current services are poor, which is not true. The home page promises that by participating in the SoCaTel online co-creation process, a small group of people with their own backgrounds will make better long-term care services. We remain skeptical that this group of people has enough skills to accomplish this task. In order to ensure that real co-creation would occur on every topic, we would need to include moderators and facilitators in every organization to invite the right stakeholders".

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The Finnish context

"Two main socio-cultural and institutional factors explain why a lot more work would be needed to make the SoCaTel useful in Tampere.

First, we have already been using co-creation for a number of years. Experienced experts and customer councils have been involved in the development of services in Tampere during the last 10-15 years. Customer councils are already established in all health care centres and local service centres. Given these successful in-person co-creation activities and the difficulty that older people have with digital tools, we are not convinced of the benefits of online co-creation. When digital co-creation is the main focus, the end users (older adults), who should have the central role in the creation of new LTC services, are at risk of being excluded. Therefore, we believe digital co-creation cannot substitute traditional sessions based on face-to-face interaction. It could perhaps complement face-to-face co-creation, but right now there is no enthusiasm among our quadruple helix stakeholders for pursuing this possibility, because of the disappointing experience at the pilot.

Second, while we do not conduct digital co-creation, our social services system is already highly digitized. Older people can access information on existing LTC services and apply for them easily on the Kotitori service integrator (online platform). This platform already offers information both on city services and commercial services. In this sense, the informative potential of SoCaTel is already covered by Kotitori, and the two platforms cannot be integrated with each other for technical reasons. Another hurdle is that Tampere prefers to use a platform that other Finnish cities also use, rather than switching to SoCaTel on its own. Therefore, the messaging by the Finnish partners should emphasize that SoCaTel is a service involving different countries across Europe, including Finland. Improvement in Key messages in this regard is needed."

2.1.3. Conclusion

Even though Finland has the highest mark in the Digital Economy and Society Index (DESI, 2018), Finnish older adults are also resistant to using Kotitori, according to Kotitori employees (informal interview, January 2018). Older adults are not used to keeping in touch with friends and family virtually and digital services can feel to them like an imposition rather than an opportunity. Generational overturn will change this situation in a few years, and the COVID-19 pandemic may bring these changes even faster than we expected.

There are still several major hurdles to overcome in order to make the SoCaTel platform attractive to Tampere. Given the rough start at the pilot, there is considerable work to be done to implement SoCaTel broadly. Before

deliberations on adoption could continue, the platform would need to be updated and would need to create real value for local actors. They would need to be convinced that digital co-creation is useful in their context and that SoCaTel can successfully complement the informational digital platforms that are already in use.

After overcoming the first reactions of denial (as a usual psychological manifestation of the resistance to change) and the disruption phase, we expect they start to explore the advantages of the use of SoCaTel digital co-creation, especially in the COVID-19 global context. We still hope that they will finally re-assess and re-build their attitude towards the digital co-creation in the current context of lockdown and related health emergencies.

We will also offer to all pilots the opportunity to organise a new service co-creation on COVID-19-related topic from June to September 2020, without imposing a supervision of any project partner so as to avoid interferences during the co-ideation, co-design or co-development of service. This way they should be taking over the ownership.

2.2 Spanish pilot site

2.2.1. Risks and mitigation actions taken

Table 2. Risks and mitigation actions in Vilanova

Institutional adoption	Encountered problems September- December 2019	Mitigation actions proposed September- December 2019	Status April - May 2020
Method	Co-production phase is very important because it ends up with concrete, helpful services. Thus it has to be supervised by people who are most aware of the real needs of both older people and their professional and family carers/ social care public institutions. The IT or academic experts can express their ideas in the process of co-creation, but should not impose their opinion or choose unilaterally services to be developed. Little consultation of civil servants / moderators, who throughout the project reached the most complete vision of the needs of both seniors and public authorities, has been made due	The SoCaTel methodology, to be taken up, needs to be useful for the institutions who tend to adopt it. Analyse the possibility of organising the co-production of services internally, engaging the Ajuntament of Vilanova's Innovation Department with its own IT experts, instead of external IT experts recruited in Hackathons. The co-creation on the platform and the co-production phase would be led by Moderator-Facilitator/ civil servant as the most knowledgeable representative of professional carers, participating end-users and other stakeholders.	The service was developed with a little input collectedfrom the Facilitator, practitioner from VILA (change leader in the Spanish pilot). The co-developed service was published on the platform on the step 5 which requires the final validation of all stakeholders. The feedback collected showed that the service needs to be readjusted so as to meet the needs and criteria of professional service managers.

	to the attempt of democratising the process. VILANOVA's staff were practically not allowed to choose the services to be developed.		
Platform	Platform can't be adopted nor replicated without a minuciose description of how it is to be used. Several Manuals for its use should be developed. Different stakeholders' needs (related to the level of IT literacy) should be taken into account and the platform has to be fine-tuned.	To develop in the next months: *Manual for Moderators* - In D1.1, some generic instructions have been provided, but more nuanced guidelines are necessary (viewing differing situations and the way they are moderated: screenshots; when and how to expulse an offensive user, etc). The Manual has to be published jointly with the platform on the OZWILLO marketplace. *Manual and instructions for participants in co-creation* - All who want to take part have to envision the process and possibilities / tools offered on the platform. The Manual to be age-friendly. *MOOC for students* - The online course on co-creation to be prepared taking into account that the target audience are students (millennials) with a high level of IT literacy.	Accomplished. The role of Moderator and Facilitator has been defined. The *Guidelines for Moderators and Facilitators* draft is ready (see the document Appendix 1). Guidelines for users / participants (video) is currently being produced and it will appear on the platform as an audio-visual guide assisting participants in each step. The work on the MOOC has started and it will consist of 6 videos explaining different aspects of digital co-creation and its utility and procedures. One of these videos are precisely the Guidelines for users which will be ready before the second testing of the platform at the end of June.
Services	a) The winner digital service prototype in the Spanish Hackathon (App to visualise cultural & social events and for the transport of older persons) is useful for big cities like Barcelona as there are a lot of cultural and sports events organised. But it is less suitable for small cities, such as Vilanova, which have less cultural/leisure activities on offer. It should be completed with some other services that are lacking in the city/ region. b) If the real needs of older persons reported in qualitative research were taken into	a) In the case of Spanish pilot, the developed App should view the offer of cultural, sports and social events in the whole area/region and State level if possible. Also, it should contain transport offers for taking seniors to selected places and events (voluntary and purchased). It also may include some other leisure activities (e.g. tourism) so as to be really useful. b) Re-define the methodology so as to give the civil servants a voice to transmit ideas about the existing needs / uncovered services at the beginning and	a) The Spanish App is being adjusted and getting tied to different stakeholders' needs. b) Civil servants / practitioners /social service managers have re-gain voice in the process of iterative collection of stakeholders feedback during the co-development phase on the SOCATEL platform.

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	account, this app would offer not only services related to cultural or social events, but also other, such as: mobile hairdressing, pedicure, manicure, footcare, etc.	during the co-production of Apps.	

2.2.2. Dynamics of perception in Vilanova

Online co-creation pilot - September 2019

"In September we invited quadruple helix stakeholders to a co-creation pilot in Tarragona. According to the project design, stakeholders would come to an in-person workshop to try out the online platform for co-creation and then continue the co-creation at home for the following 10 days. Then, an idea emerging from this process would be chosen to be developed in the Hackathon event in Barcelona. We faced numerous difficulties before, during and after the workshop, which conditioned the outcomes.

The first difficulty we faced was in achieving the participation of end users at the workshop in Tarragona. One reason for this problem may be that the workshop was held in September, the beginning of the academic year. This may be a difficult time for a lot of older people in Spain, where seniors are often responsible for caring for their grandchildren before and after school. Furthermore, some health problems of older adults who need LTC services discouraged them from participating. The fact that the workshop was held in Tarragona may also have been a factor. We chose Tarragona because we were able to use facilities—including computer rooms—at the Universitat Rovira i Virgili. However, Tarragona is 50 km away from Vilanova, where the pilot site and its users are located. Although the team offered to provide transportation to Vilanova service users, the distance to Tarragona seemed to have discouraged them from attending. In the end, only two end users out of 20 total participants attended the workshop. Participation of people from the other profiles of quadruple helix was satisfactory.

We faced additional difficulties at the workshop itself. The users were able to log on and create an account, but they were not able to fully explore the rest of the platform and try the co-creation process, because the platform crashed partway through the workshop. This experience left many of the stakeholders frustrated and unenthusiastic about continuing to co-create at home. Despite encouragement from the moderator, there was extremely low participation in the 10 days following the workshop and only one older person participated. We feel that when the platform has been successfully debugged and fully implemented, this impediment to participation will be eliminated.

Another difficulty was caused by the fact that the IT team advanced all proposed topics to step 2, to test the functioning of the platform. The results were that by the end of the workshop, there were more than 20 proposed topics, some of which were repetitive or unclear. This meant that people who did try to continue to participate at home may have been overwhelmed and unsure where to focus their efforts. It also led to people working on topics that were not viable (for example, because they were proposing a service or app that already existed). This experience points to the importance of clear moderator/facilitator guidelines to make sure only appropriate topics are advanced to step 2."

Hackathon – November 2019

"Because of the difficulties before, during and after the workshop, we faced a problem in choosing an idea to be developed at the hackathon. Although the co-creation process had not advanced enough to provide clear candidates for a digital app that could be developed at the hackathon, we carefully studied the ideas that had emerged so that we could pass along one that would represent the interests and concerns that had begun to emerge during the co-creation process. We did a careful market study to make sure that the ideas had not already been operationalised in a digital app. This process led us to set aside several ideas. We finally settled on an app that combined two interests that emerged during and after the workshop: an app that would reveal locally available events and services and provide contact with transportation services."

This idea was developed at the hackathon and a contract was awarded to the winning team. At the hackathon, members from Vilanova social services and social work students from Rovira i Virgili University were available to answer the teams' questions. We were uncertain of how much help to provide, because we were concerned about offering an unfair advantage to one team over the others (even though the answers to the teams' questions were shared with all participants using a microphone). In this sense, the competitive nature of the hackathon may have prevented different stakeholders from maximizing their potential for collaboration (in particular, the knowledge and experience of social service professionals was not fully reflected in the resulting apps).

However, we do not see this as an impediment to adoption because the hackathons are not inherent to the co-creation process, but rather were a measure to ensure adequate IT support during the project. For example, in the future, social service's internal IT team could develop the necessary digital services, thus maximizing input from social service professionals. While social service professionals and end users were present at the hackathon, IT experts tended to take the lead, meaning that not enough attention was paid to the voices of end users and the social services professionals who understand their situation fully. We think that going forward, it is important to ensure that social service professionals play a key leadership role and that end users participate at the design and development phases (and not just at the idea stage) to ensure that

their needs are met." The internal design and development of digital services could also address this problem.

2.2.3. Conclusion

From the conversations with VILA managers and practitioners we obtained the statement that a digital co-creation platform would be useful in Vilanova and that the app to emerge from the hackathon will be helpful for its end users. We believe that the planned improvements to the platform can overcome the impediments to participation that they faced during the Hackathons and at the beginning of the post-Hackathon phase.

"Based on our experience, we are convinced that co-creation can support public administrations in offering services that are publicly available and free of charge. We think that implementing SoCaTel can help Vilanova social services to become a reference point in service innovation, both in terms of creating new services and improving existing ones. In particular, we would like to focus on how to improve our Home Care Service."

"We also think that SoCaTel could be used to encourage digitalization and reduce bureaucracy surrounding the LTC law in Spain, so that users can receive services more quickly and more efficiently. However, as a city administration, we do not have the power to make sure changes; these would have to come at the level of the regional administration of Catalonia."

In the Spanish pilot case we can observe how the perception changed from negative to positive. In Vilanova there is a mature vision of the possibilities to improve the local LTC service system using the platform, and a high level of accountability and ownership in spite of not always optimal experience of 'leadership' in service development. It is because they know that once they will be not operating under the constraints of project's timelines and work plan, the co-development will be run more smoothly. They are aware of their capacity and acquired learning, and also that they can train others to use the SoCaTel method and platform.

The only concern that remains is related to the need of upcoming governmental action in the same direction: the adaptation of legal framework and financial resources to the new practices of digital co-creation of services.

2.3 Irish pilot site

2.3.1. Risks and mitigation actions taken

Table 3. Risks and mitigation actions in Dublin

Institutional adoption	Encountered problems September- December 2019	Mitigation actions proposed September- December 2019	Status April - May 2020
Method	The methodology will be adopted only if it creates solutions to the following needs: - Improving access to information on services; - Co-ordinating day to day person-centred services in the home setting; - Integrating services at systems level.	Assure that solutions /digital services (to be co-created and co-produced especially during the Hackathons and in the post-Hackathon phase) meet the identified needs of HSE.	Accomplished. The service is being developed under the strict supervision of HSE, assuring this way that it meets the needs of both people and the public service delivery managers.
Platform	The Platform and its Knowledge Base could be adapted for use within HSE for the co-creation of other NEW services for other groups or re-design of the existing services – this would support the transition to new models of integrated care. The platform could be used in a variety of ways: to implement new services such as a model of Social Prescription (SP) which links older people to social support services, to augment existing services such as the Winter Initiative or the HSE National Clinical Programme for Older People (NCPOP) or as a routine consultation process to collect opinions on service developments. This would require that the HSE host the platform on its website and provide continuous updating and moderation of the platform. *This may not be possible if resources are not made available under the ehealth Ireland strategy.* If funding is not agreed in the HSE Service Plans or under the *ehealthireland* budget, the institutional adoption will not be possible.	Promote the SoCaTel infrastructure within the HSE and try to influence the decision makers involved in shaping the Service Plans. For the promotion to be effective, evidence is needed about the successful use of the platform (digital services co-produced as a result of co-creation). Propose to HSE the hosting of the SoCaTel platform and the development of services using it, e.g. Social Prescription, Winter Initiative, National Clinical Programme for Older People, Public Consultation. Discover how to get resources under the ehealth Ireland strategy for the uptake of SoCaTel infrastructure.	Acknowledged. The platform can't be hosted until it is ready, together with all promotional materials and Manuals for use. These have been defined, are being prepared and will be ready in several weeks.

Platform	Digital co-creation can't substitute face-to-face co-creation, physical meetings and conversations. The platform is not the right tool for fostering interaction and joint work, especially with seniors who are not skilled for the use of technology. As such it cannot engage end-users (older people) in co-creation and thus is not multi-stakeholder.	Allow a 'live chat' facility on the platform.	Acknowledged. It should be implemented.
Platform (budget)	There are financial obstacles for the adoption of SoCaTel platform. There is a budget only for commissioned services. This way, platform only can be used by private service providers to co-create services that HSE will commission later, as there is a budget for 'commissioned services' and no budget for platform maintenance.	"Cost-effective but unaffordable" paradox has to be resolved. spreading awareness about the fact that we are creating SoCaTel tool to fall service costs and not for maintaining the *status quo* of commissioning private services. Maybe tomorrow there will be budget for tools as SoCaTel platform which will be needed by local governments to whom the authority, responsibility and financial resources will be shifted… Awareness should be spread about the possibility of administrative decentralisation with the mentioned redistribution of roles and responsibilities to local governments.	The COVID-19 health care crisis created a new unprecedented context opening up the possibilities for transformation of the public sector and the whole society. The accent is being put on searching for innovative solutions. As this is an omnipresent general discourse on TV and other media, these ideas started to resonate all around. In consequence, now it became easier to look at the utility of the platform in the context of civil service reorganisation which promotes the shift of roles and accountability to localities similar to our SoCaTel pilot sites. The usefulness of the platform is being acknowledged.
Services	If digital services do not align with the goals for the HSE Older Persons services and the Integrated Framework, then they may not be exploited by public services. Findings/ digital services may not agree with HSE National Service Plans / Slaintecare or ehealth Ireland strategy. Some of the following measures need to result from the process: - Citizen friendly information exchange on services	New model of care / service may improve efficiencies of commissioned services. Assure public service is improved in a required way during the service co-production. The most aware senior managers within HSE responsible for Social Care, Strategy, etc. should guide the co-production.	This strategy is being implemented. The Irish pilot site has no doubts about the leadership of the co-creation process and it is completely clear that the ultimate decision making is up to care professionals / managers, with the participation of all stakeholders.

	spanning health and well-being to dementia and palliative care; - An app to support day to day co-ordination of services in the home across public / private agencies; - Forum for discussion of integration at systems level.	Development and implementation of model citing SoCaTel's findings to be referenced as evidence in HSE Reports, National Service Plans, Business Cases, etc.	The App will thus be tied to the needs of professionals and citizens (and HSE as institution embracing the new model of government).

2.3.2. Dynamics of perception in Dublin

Co-creation – online pilot September 2019

"Our initial experience of the co-creation method was from study of the Co-creation manual and reviewing relevant literature. Co-creation is not so difficult to understand or generate in a face to face situation and the two offline workshops hosted with our stakeholders confirmed this. However, we are having difficulty understanding how offline co-creation translates into an online environment and more than two years into the project we are not convinced that we have experience of the actual online co-creation method.

A workshop was held on 17/9/2019 in a local University campus with access to a computer room to facilitate the online format of co-creation – our first real experience. The initial workshop went well with 100% turnout from stakeholders representing the quadruple helix. All stakeholders successfully logged onto the platform at separate computers and commenced the co-creation process, provided feedback on their experience, and completed evaluation forms. However, there were many technical problems during the day some of which were immediately resolved and some of which were due to the immaturity of the platform – the 3rd phase of the co-creation process was not operational. Stakeholders (and ourselves) did not get to experience the complete online co-creation cycle at this time and this is a concern that we have identified at recent PMB meetings flagging it as a barrier to any honest exploitation plan. Over the following 10 days of the online pilot there was very little activity on the platform and not all of the daily diaries were completed / returned. In conclusion we do not believe that we have seen evidence that online co-creation took place during the pilot."

It was agreed that the most relevant topics that had been discussed across two of the pilot forums during the online pilot and which had been identified in previous focus group sessions would be progressed to the November Hackathon.

Hackathon - November 2019

"It is understood that the Hackathon is not part of the life cycle of the co-creation platform but was implemented as a way of demonstrating how an idea can be turned into a digital solution and how the digital solution emerging out of the Hackathon could be co-designed /co-produced using the platform. Though extensive efforts were made to advertise the Irish Hackathon (and over 20 people did register on Eventbright), on the Friday of the first day of the Hackathon only 4 people turned up. On the day efforts were made to contact other participants and one further person arrived on the Saturday. In agreement with Ozwillo, it was decided to form the 5 people into one team and to continue to have the competition in the absence of other competing teams. A judging panel was established and once the team produced a solution that met the standard required by the panel a prize would be awarded. The team worked well together over the 2 days and presented a solution that met the judging criteria and the winning prize was duly awarded.

Unfortunately, the Hackathon winners (4 IT students and 1 employee of a voluntary organisation in Dublin) have dropped out of the project. We believe that if the prototype presented at the Hackathon had been transformed into an easy-to-use application and to a high standard that it would have had significant benefits for older people and their families and all those involved in providing health and social care services. It is unfortunate that the team has withdrawn; because the idea belongs to them, we cannot move forward with development."

Platform

"We feel that a co-creation platform would be useful to health and social care services here in Ireland as described in the SoCaTel documents. It is difficult for us and our stakeholders to make a decision (despite the fact that copious amounts of feedback were forwarded after the live testing) on the actual SoCaTel platform that is available when we have not experienced how online co-creation happens. There is also an absence of any detailed guidance document for us / our stakeholders to go through the online process in a step by step manner. The platform itself is not intuitive and the homepage is not welcoming. There is some guidance provided for the post co-creation process when the web application is being designed as it was necessary to have some information to provide to the Hackathon teams but this in itself is not an online 'co-creation' manual as such and should not be considered as one."

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2.3.3. Conclusion

"In principle, a co-creation platform undoubtedly has a role to play in the Irish context. In particular, it could be of benefit within our healthcare system given that we are progressing with substantial reform to shift care from acute settings to closer to the home. The platform could be hosted by our government or by the Health Service Executive, the state body tasked with delivering health services in Ireland. Over the next number of years, we have a substantial reorganisation of our health service that is required to integrate care to achieve better outcomes and greater efficiencies. Furthermore, we have a national strategy to implement significant digital solutions into the Irish healthcare system, there is no doubt that a co-creation platform could have a significant role to play. However, substantial improvements are still required to the platform before we can engage with senior managers in these important stakeholder organisation."

At the time these declarations were made (January-February 2020) the Irish partner was not feeling responsible yet for the creation of the platform. They state they would be motivated to adopt it *if it proved to be useful*, as if it does not depend on them. There are several possible reasons for that: the lack of clarity, the mentality (social/cultural context) and/or the tension caused by the incipient state of platform development. In the last few months, the platform has been significantly improved, the Moderator / Facilitator role was defined and we asked HSE practitioners to contribute providing their expert feedback and take the active role in the betterment of this content. From that moment, their accountability is growing exponentially. In the post-project period, once difficulties resulting from parallel co-creation of the platform and the services, as well as the pressure to be productive during the corona-virus pandemic, come to an end, it will be much easier to plan the upscaling.

Regarding the development of the App after the Hackathon winners disappeared in the COVID-19 pandemic fog, a solution has been sought. They confirmed a company they collaborate usually with will co-develop the App. There will be no conflict of interests regarding the IPR nor financial as the Hackathons winners have not signed any agreement. After this experience of total engagement in finding solution, we hope that the HSE Dublin will acquire all necessary capacity and motivation for upscaling later the method and platform to a national level.

The probability is high also because of the contextual factor, a reform already in progress in Ireland. The decentralisation of public administration is prepared with the Sláintecare strategy, a plan to radically transform Irish healthcare. The upcoming assignment of responsibilities and financial resources to local municipalities is likely to occur soon. The SoCaTel tool is entirely in line with a strategy for the reform of health care and health policy in Ireland implemented from 2017 on (10 year strategy).

2.4 Hungarian Pilot site

2.4.1. Risks and mitigation actions taken

Table 4. Risks and mitigation actions in Szeged

Institutional adoption	Encountered problems September- December 2019	Mitigation actions proposed September- December 2019	Status April - May 2020
Method	The Co-production methodology in Central and Eastern Europe is a relatively unusual method for historical and social reasons. It is no longer unusual for young age groups to be involved in the development of products and services they consume, but for older people it is unusual and even strange.	Prepare a detailed and understandable description of the goals, processes and benefits of co-creation on the SoCaTel platform.	The promotional materials (MOOC, videos, website update) are currently being produced using the updated key messages that are presented in this deliverable and are the result of the work of change management.
Platform	Older people (receivers of the elderly care) cannot and don't want to connect digitally or participate in activities that take place in modern digital spaces. Old people use computer only for communication with family and friends.	Define well, the benefits for younger generations of older people. Improve the usability of the platform, so it can be stated that this platform is easy-to-use and suited also for old people and disabled.	The identification of benefits for different groups of stakeholders is finished and the key messages are set up. Usability and accessibility of the platform is being improved.
Services	Without active marketing, the services created will not necessarily be utilised (e.g. without promotion).	Maintaining a permanent management / marketing team in the post-implementation period.	The marketing of the platform is tackled in several project deliverables of WP8 (Exploitation) and WP9 (Dissemination & Communication) that are in progress.

2.4.2. Dynamics of perception in Szeged

Co-creation pilot – September 2019

"The workshops required the participation of different age groups and people with different social backgrounds. It was not possible to have a workshop for all participants at the same place and time (because of mobility problems and cognitive problems of senior citizens). Therefore, in Hungary we had three workshops instead of one:

one for elderly people living in an old people's home – because they needed much more attention and a different schedule (they needed much more time to understand the tasks). Moreover, it was not possible to some of them to leave the nursing home: Workshop 1 (6 elderly people) - Szent Erzsébet nursing home. Újkígyós, Hungary, 17.09.2019.

one for nurses in old people's home, because they could attend the workshop during their working hours and there was no time to traavel from the old people's home and back: Workshop 2 (6 nurses) - Szent Erzsébet nursing home. Újkígyós, Hungary, 17.09.2019

and one for every other attendant in the GFC: Workshop 3 (8 participants)- Gál Ferenc College. Gyula, Hungary 20.09.2019

Participants were happy to participate in the testing; they liked the idea of having a platform to share problems and ideas. They created numerous topics discussing relevant problems, and they were able to describe the problems very well, even for those who are not familiar with elderly care. Most participants contributed to at least one of the topics. They shared ideas and voted.

Older participants had serious problems with computer use and understanding social media (not only elderly people living in old people's home, but even policy makers and researchers over 50 years old).

At the time of the workshops, the platform did not provide enough information/education about co-creation, so the co-created ideas were not suitable for developing at the hackathon. As a substitute, we collected all relevant thoughts on the selected topic and created an idea for a service.

Hackathon - November 2019

"At the Hackathon in November we had 32 participants in 6 teams. The number of members per team varied, because participants applied in teams and refused to work with others. Before the start of the Hackathon the teams approved the

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number of members of the other teams; a larger team did not represent a competitive advantage because the extra team members were mostly students (non-IT).

The 6 teams developed a solution for the same problem and they all met the strict criteria. We expected that the presentations would be very similar, but that's not what happened. At least 2 or 3 ideas were really good, and they were different from each other. They all had unique valuable features! The hackathon proved that the platform can help to discover new needs, which has numerous creative possibilities.

The winning team has already completed the 1st phase of the 3-month programming project. We think that if the developed app is advertised and promoted, it could be popular and useful."

Platform

"At the time of the workshops, the platform did not provide enough information/education about co-creation. After receiving this feedback, we created an educational video. Probably other developments to improve accessibility will be needed: e.g. videos showing the co-creation process / features step-by-step, development of help page, pop-up messages helping users find what to do next. In order for our site to decide to adopt the platform, the platform would have to offer clear benefits to every user, be easy to use, and be widely used by other social service providers, for example, in Ireland."

2.4.3. Conclusion

Although at the beginning of the project GFC reported fear of seniors' reluctance to use technology, later this pilot site changed to a more positive attitude: "Older people today and in the coming years are unlikely to be able to use the platform due to their limited digital skills and access to computers (today, only professionals and relatives of elderly people can use the platform). However, this will change over time as people who have grown up with digital technology become senior citizens +65". Furthermore, in general there is a positive attitude towards the implementation of digital technologies seen as a sign of modernity and progress. This discourse is systematically offered in the TV and media, so the digitalisation is mostly perceived in Hungary as necessary and welcome, which eases the uptake of digital co-creation.

In Hungary, the probability of using the SoCaTel platform for co-creation of services is huge as the pilot site GFC in Szeged is aware of its potential. They are also aware of the need for previous learning and sensitisation (capacity building) about the digital co-creation method and the platform so as to prepare

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local communities for the uptake of SoCaTel results. It is also necessary to raise awareness among citizens and civil servants about the agency they get from this tool, and about the increased social, occupational, educational and cultural opportunities it provides for local municipalities.

Another specific trait of the Hungarian pilot is a quality network of enterprises, college, volunteers, citizens, civil servants, specialised personnel and local politicians (human resources) that can be mobilised when necessary for the successful management of social care in the city of Szeged. They are belonging altogether to the Szeged Csanád Roman Catholic Diocese. They successfully managed the co-design and co-development of the App, showing a latent capacity for analysing and solving local problems and the ability to contract out due to strong network of alliances between private and public sector. The relationships between stakeholders are good and there is a prominent collaborative spirit among them.

Lastly, one more factor need to be highlighted: the managers in charge of projects' implementation are younger, technologically skilled and motivated people.

3. OVERCOMING OBSTACLES

3.1 Unclear leadership

The effect of leadership role on change management is well known. The responsibility of the success of a change initiative lies on the shoulders of the leaders. The role of the leaders is important for several reasons. The level of commitment that they exhibit to any change decides the level of success to follow. A high level of commitment to the change process from the leadership ensures the success of the process. Leaders do not have to just watch when the change process is on; they are the leaders, the advocates, the sponsors, the guides, the role models and the motivators in the process of change. All these roles demand deep commitment and intense focus.

Problems appeared with a leadership role in the post-Hackathon phase, because from the Hackathon event on, the ICT experts and engaged developers were assigned to lead the co-development of services, while the pilot sites' original 'change leaders' (social field) were almost silenced. It was due to the project DoW and the existing task distribution in WP5.

Project agenda was mandatory and change leaders could not make their own agenda in pilot sites, which would probably lead to better scenarios. This has been acknowledged in the framework of change management activities (better late than never) and now the pilot sites' original change leaders are encouraged to take the lead and engage fully in the last phase of co-development.

How we solved this problem?

We empowered the change leaders (practitioners representatives of public institutions) to give their input in the step 5 (the last step of co-creation). The apps were turned back to the step 4 as they didn't succeed to get the final validation of professionals in the step 5.

We will report on all barriers we encountered in the post-Hackathons phase: the conflict of interests that occurred during the Hackathon events and in the phase of co-development, the need to protect the leadership role of the practitioner change leader through the whole process, etc. in the next deliverable D6.4 *Lessons learnt*.

We still need to build clarity about the role of leader during the digital co-creation in 5 steps, which is to say, the role of the Facilitator/moderator in the co-development of service. From the perspective of change management we can conclude that clarity in responsibility and role assignment is essential.

3.2 Platform non-readiness

The pilots were concerned with the fact that, according to the project work plan, they had to invite stakeholders to participate in co-creation when the platform was not completely ready. Also, to start to think about the adoption of the platform without having created before evidence of its successful use, was conceived by the majority of pilots as too rushed. For some of them, it seemed unimaginable (northern countries, Ireland and Finland) while for others, it was possible (southern and central European countries: Spain and Hungary).

In any case, from the change management perspective, a considerable effort had to be put on **clearing up** the process of digital co-creation. And that was not an easy task as there were different visions of the process in the SoCaTel team and also changes in the WP3 leadership and among the personnel with decision-making role. After re-exploring the possibilities of a more radical digitalisation of service co-development process on the platform, URV, EVERIS and OZWILLO succeeded to assemble a new vision of the platform and the process in 5 steps (instead of 3). The platform needed to be re-adjusted. That took several months of joint work and mutual sensitisation of ICT and design experts, co-creation specialists, care practitioners, accessibility experts from the SoCaTel Consortium and beyond. Change management activities consisted in **facilitating understanding** (asking deeper questions, highlighting and informing about key concepts, important assumptions and decisions to be taken, providing tables and images to visualise the issues relevant for the clarification of the process). Interpretative endeavor was crucial for aligning the Consortium. Finally, all three levels of co-creation were put in place on the platform: co-ideation, co-design and co-development.

This way, **building clarity** about the platform and the process of digital co-creation was crucial to make the change happen: the Consortium (composed of 5 universities, 3 public administration, 1 private LTC service provider, 1 NGO and 3 SMEs) successfully co-created the SoCaTel platform.

The result of this clarifying endevour is the following explanation about the platform:

"The SoCaTel platform is an innovative technological tool aiming to facilitate the online co-creation of services. It connects service users (demand) and service providers (supply) who participate together in the design and development of new services, assuring the end-users' voices are iteratively heard and taken into account throughout the whole process, and not only during the ideation phase as in other co-creation platforms.

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The digital co-creation process is broken down in the following steps, all of them taking place on the platform:

- **Step 0: Exploring** – Overview the existing services. Users can explore the state-of-the-art of service provision via Knowledge Base and obtain lists of already offered (or being developed) services in the municipality/ region/ country/ EU, collected from: a) Open Data, b) manually incorporated data, as well as c) bank of services that have been co-created on the SoCaTel platform.

- **Step 1: Co-ideation** – Creation of topics for online discussion and contribution of ideas about how the mentioned problems can be solved. Different stakeholders contribute here commenting from their point of view their unmet needs (insufficient access to information, lack of communication with other professionals / family carers, difficulties in the organisation of service provision and in the everyday life of older adults).

- **Step 2: Co-definition -** Joint review of selected service idea(s) in order to define their utility and eventual risks for their successful development and use. Open dialogue contrasting opinions of different stakeholders. The usefulness of service idea is being checked before continuing with the design of service(s).

- **Step 3: Co-design** – Business model generation, inspired in value proposition CANVAS. Specific and generic questions are asked so as to define the type of service, its potential customers, channels to delivery, prize to pay and to offer. A complete commercial vision is generated here, and the service idea has got a shape. On this basis, a document brief or a beta software can be developed.

- **Step 4: Co-development** - User experience and usability testing. Mediator/ Facilitator looks for the appropriate service provider and invites it to co-creation. The Service Provider uploads different mock-ups of the service and a new discussion is started collecting users' (old persons' and practitioners') feedback on the offered solutions / mock-ups / demos (commenting which version of digital service / mock-up seems more useful or appealing, and why).

- **Step 5. Co-validation** - joint co-validation of the developed service. The service (App, web app or similar) is available to be downloaded and tested. The last feedback about the eventual dysfunctionality and necessary improvement of some element is collected from end-users.

Also, to build clarity about this product with a great potential to change values and believes of our society, the main features of the platform needed to be highlighted, aiming at creating the **value proposition not only for the market but also for citizens**. This still has to be spread out among all Consortium members and among institutions interested in upscaling.

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Here is the summary:

"Although several other platforms for co-creation of public services are in use nowadays (CONSUL, Citizen Lab, Mimedellin) connecting citizens and public authorities, they mainly provide assistance for sharing proposals and voting the best ideas. Until SoCaTel, there was no evidence of technological assistance during the overall co-design and co-development of services. Also, SoCaTel is gathering ideas and insights not only from end-users but is a multi-stakeholder platform, which means that also professionals from private and public service provider organisations, social workers, officers from government administrations and academics take part in the process. Importantly, the process ends up in the real implementation (materialisation) of new solutions (digital services)."

On the other hand, the role of **Facilitator** and **Moderator** had to be clarified. This way, a type of workers needed for running the SoCaTel platform and the digital co-creation has been defined. We worked a lot with pilot sites to define these profiles. There was also a suggestion the two roles to be assigned to one single person, but finally it was decided to distinguish between 2 different profiles, remaining the possibility to be merged in one if the institution that adopts the platform decides so. The outcomes of the joint work on the definition (which will be incorporated into the MOOC) are the following:

IDENTITY CARD
MODERATOR

Moderators are internally sourced or independently contracted by, and accountable to, platform proprietors. They have access to specialist accounts to facilitate their role function which is to moderate or control participants' online behaviour. Moderators are required to have technical, ICT and legal expertise in line with their role function and in order to provide assistance to participants however, the Moderator does not participate in online co-creation conversations.

Duties include:
- Verifying user profiles
- Liaising with the Facilitator
- Removing duplicate content
- Deleting content / messages
- Sending Spam warning messages
- Banning / unbanning users
- Permanently de-activating accounts

IDENTITY CARD
FACILITATOR

Facilitators are internally sourced or independently contracted by, and accountable to, platform proprietors. They have access to specialist accounts to support their role function which is to facilitate the online co-creation process. Facilitators are required to have extensive experience of co-creation methodologies and their online configuration, ICT and group facilitation skills, and a good working knowledge of topics submitted for co-creation for example Long Term Care care services. Ideally a Facilitator will have strong links to a wider network of relevant stakeholders including policy makers from which they can mobilise support. The Facilitator is an active participant in online co-creation conversations and liaises closely with the Moderator to maintain online standards.

Duties include:
- Knowledge Base search / screen
- Signposting information on services
- Topic justification
- Inviting and encouraging active participation by multi-stakeholder group
- Supporting / clarifying / correcting co-creation processes and conversations
- Matching evidence to, and summarizing, ideas and comments
- Managing time frames and moving the process between steps
- Decision making as to overall fidelity of the co-creation structure, process, outcome
- Reporting inappropriate behaviour / content to Moderator

Moderator

Moderators are internally sourced or independently contracted by, and accountable to, platform proprietors. They have access to specialist accounts to facilitate their role function which is to moderate or control participants' online behaviour. Moderators are required to have technical, ICT and legal expertise in line with their role function and in order to provide assistance to participants however, the Moderator does not participate in online co-creation conversations.

Duties include:

- Verifying user profiles
- Liaising with the Facilitator
- Removing duplicate content
- Deleting content / messages
- Sending Spam warning messages

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- Banning / unbanning users
- Permanently de-activating accounts

Facilitator

Facilitators are internally sourced or independently contracted by, and accountable to, platform proprietors. They have access to specialist accounts to support their role function which is to facilitate the online co-creation process. Facilitators are required to have extensive experience of co-creation methodologies and their online configuration, ICT and group facilitation skills, and a good working knowledge of topics submitted for co-creation for example Long Term Care care services. Ideally a Facilitator will have strong links to a wider network of relevant stakeholders including policy makers from which they can mobilise support. The Facilitator is an active participant in online co-creation conversations and liaises closely with the Moderator to maintain online standards.

Duties include:

- Knowledge Base search / screen
- Signposting information on services
- Topic justification
- Inviting and encouraging active participation by multi-stakeholder group
- Supporting / clarifying / correcting co-creation processes and conversations
- Matching evidence to, and summarizing, ideas and comments
- Managing time frames and moving the process between steps
- Decision making as to overall fidelity of the co-creation structure, process, outcome
- Reporting inappropriate behavior / content to Moderator.

Other updates and improvements to the platform to ensure platform readiness and adoptability

The problems with the platform crashing are being resolved. The error that made the side portal fail occasionally was corrected (now is stable).

The IT team has been working to provide the platform with a comprehensive set of features within a unified, user-friendly environment.

Notification systems are added. The various functions of the knowledge base into the side portal are included.

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The appearance of Step 1 and Step 2 is improved. Steps 3, Step 4 and a Step 5 in which the co-created service is shown to the discussion group.

The behavior in each step of users, service providers, moderator and facilitator is clarified.
The video which will guide users through the steps is being produced this summer as a part of the MOOC.

3.3 Unclear value proposition, too general key messages

In D6.3 we described four key messages for encouraging the adoption of the SoCaTel platform. At our Madrid meeting in January 2020, we agreed with the SoCaTel Consortium that these messages need to be adjusted and tied to the needs of entities that would be the adopters of the platform (public authorities and one private service provider). In the current deliverable, we adjust these messages, at a general level. From this point, each pilot site will adapt these general messages to its own context.

This is the question to be answered: *Why should institutions adopt the SoCaTel platform?* For the following reasons:

   a) Current practices are not meeting all people's needs.
   b) It is a right tool to support a social service reform.
   c) SoCaTel's approach to digital co-creation benefits all stakeholders.
   d) It is cost-efficient.

In the following subsections, we provide updated general messaging.

a) Current practices are not meeting all people's needs

To reach the change of values and believes, first question that need to be answered is: **Why do we need change**? The traditional way of designing and developing LTC services needs to be transformed. Top-down approaches shut out input from the ordinary people who use the services. We need bottom-up, collaborative methods for designing services to reflect end users' real needs. In other words, we need co-creation. (An important note: Social services in Tampere has been using co-creation for years, and therefore this message does not apply to their site.)

Why digital co-creation? Of course, co-creation can happen face-to-face, when people meet in small groups and workshops to collaborate in solving a problem. In fact, we have used lots of face-to-face co-creation in developing the SoCaTel platform. One of the innovations of SoCaTel is that our platform sets into motion digital co-creation processes that will continue long after our grant has come to a

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close. Digital co-creation has multiple advantages. For one thing, it is a low-cost way of fostering collaboration among people located in different places and with different degrees of physical mobility. It also makes it possible for interaction to be more constant than in face-to-face co-creation and for more citizens from a diverse range of profiles to be included. Finally, digital co-creation means that participants can co-create wherever and whenever, in a way that is more spontaneous and democratic.

b) It is a right tool to support a social service reform.

What will happen when public administration service providers implement SoCaTel?

Changing how LTC services are designed and developed will significantly improve the satisfaction of older people and their carers. This change will also influence the whole system, leading to a more sustainable, equitable and cohesive society. *The SoCaTel project is contributing to a transformation of service and society.*

Practical examples of expected benefits include:

− meet the real needs of users and their families by involving these stakeholders directly in service design;
− facilitate large-scale discussion to tackle the problem of how best to integrate LTC;
− democratise access to information by providing a knowledge base of services available in real time across the public and private sectors that would be easily consultable by users, families and professionals;
− provide a model for other social fields, beyond LTC. For example, the SoCaTel approach could also be used to rethink poverty reduction and to improve services for youth, families, people with disabilities and/or people at risk of social exclusion;
− co-create a virtual community where participants can exchange thoughts, express their needs and offer each other support:
− it is cost-efficient (see d).

SoCaTel is an important social innovation endevour which consists in using digital co-creation among stakeholders to design, develop, test and market solutions in the field of LTC. We are creating an infrastructure of methods and solutions for a completely new way of developing and consuming LTC services. With SoCaTel, we are taking part in a broader societal transformation, as Europe moves from an economy based on the consumption of mass-produced products towards an economy based on the consumption of services. In this new economy, consumer satisfaction and the efficient use of resources are key. SoCaTel is joining this

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transformation by focusing on creating value through solutions (*services rather than products*). We use co-creation to make sure the services offered address people's real needs, thus increasing consumer satisfaction and ensuring a better use of limited resources to better meet the needs of all citizens.

In particular, SoCaTel's contribution to this transformation is its digital co-creation method. The 4th Revolution is also bringing a technological transformation in all economic and social spheres. SoCaTel is advancing this change by engaging citizens in co-creating LTC services digitally. The current health emergency caused by COVID-19 has starkly illuminated the need to use new technologies to connect people virtually and for teleworking.

c) SoCaTel's approach to digital co-creation benefits all stakeholders

Co-creation benefits all stakeholders by allowing people of different profiles to pool their knowledge and resources to solve difficult problems. A collaborative approach is essential in tackling a problem as complex as LTC.

Who are the stakeholders in the co-creation of LTC services? The stakeholders who come together to co-create using the SoCaTel platform include end users (patients and families), policy makers, public and non-profit service providers, for-profit service providers, and researchers.

How does each stakeholder group benefit?

End users
Have their needs met more fully
Have the opportunity to make a difference in LTC for themselves and the people around them (it is especially important for older people to be able to contribute to society)
Feel empowered
Combat loneliness

Policy makers
Promote citizen involvement and community building
Improve trust in government
Facilitate innovation in government
Lower costs through careful targeting of services
Shorten wait times for citizens to be evaluated for and to receive LTC
Drive the digitalization of social services
Create jobs in LTC
Reduce reliance on paper-based documents

Public and non-profit service providers
Quickly identify users' real needs (time efficiency)

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Tailor programs to users' real needs (cost efficiency)
Integrate care across different services (cost and time efficiency)
Do more with less (cost efficiency)
Allow public and non-profit services to create services internally, without involving for profit contractors (cost efficiency and time efficiency)
Learn to "speak in the language" of users
Foster the empowerment of users
Increase user satisfaction
Reduce stress for service employees by streamlining processes and improving user satisfaction
Increase job satisfaction for service employees by offering them new ways to use their expertise to solve problems and contribute to users' wellbeing
Cost/efficiency to cope with the increase of information and service needs

For-profit service providers
The same as for public and non-profit service providers, plus:
Strengthen brand
Increase brand loyalty
Increase brand recognition
Foster positive word-of-mouth among customers
Differentiate themselves from the competition
Engage in low-cost market research
Engage in low-cost innovation

Academic researchers
Transfer knowledge to society
Engage in collaborative research
Discover opportunities for new research
Use their data analysis to inform LTC policy
Speak up about the needs of citizens

The pilot sites are currently working from this list of messages to develop the ones that will be most likely to be convincing and lead to adoption in their particular socio-cultural and institutional contexts. The Tampere site is using this list to explain why ultimately SoCaTel is not practical for them.

d) it is cost-efficient

If co-creation proved to be efficient because it facilitates quick identifying of end users' needs without expensive research actions, a digital co-creation is even more cost-effective as it engages people in the process organising an online events.

The exploitation of co-creation results becomes even more money-saving: quality programmes are tailored to the needs of both practitioners and senior citizens,

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the care starts to be integrated across different services, public and non-profit sectors are creating services internally without involving for-profit contractors, etc.

Apart from supporting co-creation, the platform collects and registers all information gathered at any moment regarding LTC services, avoiding repeated information and dispersion of efforts and resources. The issues necessary to be tackled regarding LTC delivery are being solved in group, not individually, creating faster and better responses and tailored services.

It is true that the platform maintenance and the moderation/ facilitation of the process involves some costs (for example, 0,5 PM), but the gain is huge: the immediate picture of social needs in the area, region and /or country is provided, a tool for co-creation of new services and community building is available and the access to services is improved.

3.4 Budgetary concerns

In all pilot sites concerns have been stated in relation to the budget available for co-creation in Municipalities.

The work that still remains to be done with pilots is to raise their awareness about the possibility of legal and policy changes and the consequent implementation of new measures. The healthcare reform is already taking part in different EU countries. In Ireland, for example, a new model of healthcare is shifting care out of hospitals and into the primary and community setting, so a devolution of responsibility to local communities is probably near. This 10 years project may be accelerated in a post-COVID-19 context. Policy changes, changes in financing and new regulations implemented by central governments (often by EU regulation in European countries) are common drivers of reorganisation and the implementation of change on a micro-level.

3.5 Overview of obstacles and the status of their removal

Table showing a list of obstacles, what has been accomplished to overcome them, the results obtained and per-pilot overview of remaining change management actions to take.

Table 5. Change management activities accomplished and remaining

Nº	Type of obstacle	Change Management activities accomplished	Change Management remaining activities

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1	Unclear leadership	Acknowledged. Local change leader to be in charge of guiding the overall co-creation process in a given institution / municipality, a social work professional / practitioner experienced in LTC service management. Empowered finally in M30 (Spanish, Finnish and Irish pilot).	A second chance for their uninterrupted engagement in service design and development will be given in pilot sites from M31-M33.
2	Platform non-readiness	Clarity is built about what has to be done using the platform, making the digital co-creation process comprehensible. New steps on the platform are added to cover co-ideation, co-design and co-development phases. The roles of Moderator and Facilitator are defined in detail and clarified Platform features are improved covering all phases of co-creation.	Improved platform (in a more advanced stage of development) will be newly tested in the context of pandemic in several pilot sites from June to September, 2020.
3	Unclear communication	Deeper questions are asked in pilot sites and new key messages are set -up focusing on the separate specific benefits for each single group of stakeholders.	Within the work on WP9 tasks (dissemination and communication), a promotional material is to be made and, in this occasion,, key messages for public authorities will still become more fine-tuned. Effort will be made to understand specific local contexts and tie the messages to it. Build even more clarity about what we are doing, what is the purpose, in what consists our action in each pilot site.
4	Budgetary concerns	Practitioners in pilot sites are challenged to think 'outside the box' and envision the possible policy changes which could bring financial resources for co-creation. The self-management capacity of the platform got partially envisioned through the work of WP8 Exploitation, shaping the business cases and sustainability plans in each pilot site.	More awareness needs to be raised on the cost-efficiency of the platform, especially the value gained for society. More learning is needed to acquire full awareness of the self-sustainability of the platform.

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4. CONCLUSION

To monitor and ease the change process in SoCaTel pilot sites, we have taken several strategical initiatives, as follows:

- putting in place clear messages regarding the institutional change process (this will be reached specially in the last 6 months of the project through a joint production of WP9 deliverables for the promotion of the platform: videos, finishing the website, MOOC),

- organising regular consultations to pilot sites, airing of grievances, exercising active listening (this was done in face-to-face and online Consortium, PMB and other meetings, as well as through e-mail discussions).

- putting in place different feedback and learning mechanisms to enable partners' adaptation during the course of the change process (preparation of the D6.3 and D6.5 by e-mail, Teams meetings and telephone calls),

- measuring and celebrating early progress and wins (in face-to-face and online consortium meetings),

- commenting 'learning by doing' experiences and allowing for corrections (on project meetings, via e-mail discussions).

This way, through project meetings (formal) and joint preparation of deliverables with pilot sites (informal), the change management activities have been applied.

Process and context-related conclusions

What we observe is that the criticism received and the negative attitudes during the first sessions of co-creation do not mean a full rejection of change. The partners' attitudes and behaviour have rather been ambivalent with a tendency to change over time. The critical thinking is a better reaction than the uncritical acceptation of innovations and we hope that all pilot sites will end up developing digital services as a result of co-creation. We expect that, on the one hand, because the utility of digital tools to combat isolation of old people during the lockdown has been recently demonstrated and, on the other hand, because the SoCaTel platform is now considerably improved. We still expect that the Finnish partners drop their differences and join hands in planning the recovery phase in COVID-19 and post-COVID period using the SoCaTel platform.
Factors that contributed to resistance to change were the following:

- the lack of consistent role preparation for change leader in each pilot site,

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- tension caused by time constraints to accomplish the project tasks,
- interference by the higher levels of project management and SoCatel project workplan that impeded variations and influenced decision making
- time constraints related to other responsibilities of engaged stakeholders.

We did not find excessively rigid systems and structures in organisations in any of pilot sites, probably because the macro-level discourse (present in all four contexts) has been *announcing change* caused by the 4th Industrial Revolution ('technological boom') for the near future. All pilot sites, except the Finnish one, showed instead curiosity and willingness to innovate and give voice to citizens transforming their local service systems. On the other hand, the use of digital technologies has increased significantly in the last months, in the period of COVID-19 crisis. Our way of living and of working has fundamentally changed and that will have a long-term impact on our society and economy, making the SoCaTel platform more and more necessary for a sustainable service design and delivery.

Some pilot sites showed reluctance, not so much to embrace digitalisation, but to push/ force older people to co-create online when they are not keen on technology. Even thou, they accept that new generations of older adults are increasingly getting familiar with digitalisation. Moreover, there is a solution for the current context of digital illiteracy of older seniors: they can be assisted by a buddy during the co-creation process.

Leadership-related conclusion

The core problem (which reflected on other forces of resistance to change) appeared in connection with the 'frustrated leadership' of pilot sites'. Pilot sites' care practitioners, members of the SoCaTel consortium, natural change leaders in their localities, organised a network of stakeholders, the research into end users' needs (interviews and Focus Groups), they actively participated in the co-creation of the platform, organised online and offline co-creation sessions to co-ideate new services, but then, at one point of the project, their leadership and enthusiasm was interrupted - the point of the Hackathon event.

According to the SoCaTel project workplan, Hackathon winners were invited to lead the co-design and co-development of services. The power of decision-making was passed from HSE, VILA, TAMPERE and GFC (pilot sites' public service provider partners) to OZWILLO (ICT partner) who leaded the related T5.3 of WP5. Instead of pilots, OZWILLO took the responsibility for financial & managerial support in organising the rest of the co-creation process (co-development of services) in their localities. The responsibility for service development was transferred to Hackathon winners (developers, a majority of them ICT students) and the pilot sites felt frustrated (only GFC did not report on this problem).

From the SoCaTel project point of view, it was logical that OZWILLO as an ICT partner account for the organisation of service co-development. But from the change management perspective, *the leadership of pilot sites during the overall co-creation process should not have been interrupted*. Regarding the implementation of change, this shifting leadership caused several related problems: Hackathon events were experienced by HSE, VILA and TAMPERE as disrupting: "Who will account for created services?", public authorities (pilots) lost the necessary power to continue with the lead of the co-creation process, the outputs (service prototypes) do not respond fully to pilots' needs (there is a risk of not being adoptable), Hackathon winners disappeared because of the COVID-19 turbulences and are unable to implement the changes required by end-users and care practitioners during the last phase of co-creation. Their feedback has been collected, but the developers are not yet willing to continue co-developing or disappeared in COVID-19 pandemic circumstances.

In pilot sites in which the Hackathon winners are not yet present (Spanish and Irish) we will implement the following strategy: to empower public authorities, original change leaders, to continue their leadership accounting for the co-development of services. They will be able to recruit on their own (without the project management intervention) entities / their own ICT departments/ free-lance developer from the local network for service production. This decision is taken due to the evidence gathered from the Hungarian case of successful local management.

We learnt from this experience that it is fundamental to empower change leaders to organise a whole digital co-creation process from the beginning to the end. They should arrange the co-development of services according to human and financial resources available in their locality. It is essential to avoid interruptions and shifting leadership during the co-creation process.

Change outcomes-related

During the implementation of the SoCaTel project, within WP5 and WP6, several transformative actions and products/ services have been created to assure the institutional change in pilot sites happens:

   a) a tool for digital co-creation as a channel for stakeholders' communication,

   b) a network of stakeholders (combining citizens, civil servants and policy makers, private companies, third sector organisations and researchers),

   c) capacity-building in digital co-creation is pioneered,

   d) new roles and accountabilities in pilot sites are defined.

This way, the enabling environment as well as the right infrastructure for the implementation of change is built.

We all learnt a lot in this process. Change management team will continue making efforts to nurture in the last 6 months the change environment in pilot sites and will report about last outcomes summing up lessons learnt in the next deliverable 6.4.

5. APPENDICES

5.1 Appendix 1 - Guidelines for moderators and facilitators (to ensure successful digital co-creation on the SoCaTel platform)

SoCaTel platform digital co-creation
MODERATOR & FACILITATOR - Tasks

Main tasks / ideal profile	Moderator	Facilitator	Comments
Accept or reject topics		X	
Deactivate users, ban or unban	X		
Spam warning messages	X	Report	This means that the facilitator is the person who is inside the topic. When facilitator detects possible SPAM, it will inform the moderator who will send a warning message to the user. That is possible with the current options and tools developed by now.
Control participants' behaviour		X	
Duplicate content	X	Report	
Edit inappropriate content		X	
Delete content / messages	X	Report	
Legal and technical assistance of users	X		The idea is that moderator helps users via internal notifications. Moderator also reads e-mails sent to the platform (via contact form) and helps future users to sign-up into the platform.
Verify provider's profile	X		Manual operation. This task is to be discussed. If the exploitation plan seeks paid features for providers, the verification is manual. Consider if to implement a verification image over the nickname for validated accounts (the moderator will mark the validated accounts).
Inform users about similar existing services		X	This is a manual task, as a part of a discussion. This task was written only as an example of energizing tasks. Great!
Clariy and ask users		X	This is a manual task. The idea is to develop an option like "Send a massive message to all participants of this topic", not selecting one by one to recall for their participation.
Revitalize topic discussion		X	
Close step 1		X	
Close step 2		X	
Close step 3		X	
Move hot topics		X	It is important that the facilitator is able to move topics before the deadline; regular time for each step is 30 days, but some topics could reach high participation before the deadline.
Summary of the ideas and comments		X	
Send messages to engage and energize the participation on the		X	

|			
platform: how to keep alive the topics and people engaged			
Profile: expertise on social services		X	
Profile: knowledge in all platform tools and options	X		
Grey zone: make decisions about something	Shared		
Sharing and clarifying the content with users		X	

5.2 Appendix 2 - National adoption-related documents

List of Collaboration Agreements for using the SoCaTel platform

Catalonia and Spain

Entity	Type of activity	Status
Organisme Municipal Assistència Integral Social i Sanitària (AISSA), Vilanova i la Geltrú Integrated Social and Health Assistance	Public LTC service provider operating at local level, city of Vilanova I la Geltrú, Catalonia, Spain	Signed.
Institut de Robòtica, Sitges Institut of Robotics for Dependency	Private sector (NGO), LTC service research, regional level	Signed.
Associació per a la Vida Independent (AVI), Barcelona Association for Autonomous life	Private sector (NGO), Digital innovation for autonomous life/ accessibility, international level	In progress.
Diputació de Barcelona, Barcelona Barcelona Provincial Council	Public Welfare Department, policy makers, regional level	In progress.
Consorci d'Acció Social de la Garrotxa, Olot Garotxa Social Council	Public LTC service manager, policy makers, regional level	In progress.
Departament de Treball, Afers Socials i Famílies, Generalitat de Catalunya, Barcelona Welfare Department of the Catalan Government	Public governmental body, policy makers, regional level	Signed.
Fundació Campus Arnau d'Escala, Girona Arnau d'Escala Campus Foundation	Private entity (Foundation), Research and Innovation of public healthcare, regional level	Signed.
Col·legi Oficial de Treball Social de Catalunya, Barcelona Official Association for Social Work professionals of Catalonia	Public institution (professional body), regional level	Signed.

5.3 Appendix 3 - International adoption-related documents
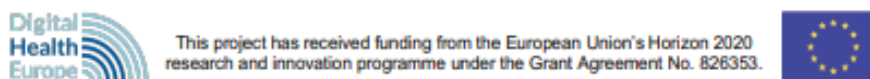
HORIZON 2020
The Framework Programme for Research and Innovation

Digital Health Europe

Project acronym: DigitalHealthEurope
Grant Agreement Number: 826353
Project full title: Support to a Digital Health and Care Innovation initiative
in the context of Digital Single Market strategy
Call identifier: SC1-HCC-05-2018

Response to the DigitalHealthEurope Request for Twinning Tenders

ADMINISTRATIVE SECTION

No.	Participant organistion name	Country	Twinning role*
1	Rovira I Virgili University	Spain	Originator
2	Istituto per Servizi di Ricovero e Assistenza agli Anziani	Italy	Adopter

*Twinning role is originator, adopter, originator/tenderer, or adopter/tenderer

Twinning project for the full adoption of SoCaTel in the region of Veneto (Italy) has been presented on the Twinning tender of Digital Health Europe project (H2020, SC1-HCC-05-2018).

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Introduction

In the current context of the COVID-19 pandemic, the digital transformation of health and care across Europe is of utmost importance. The priorities included in the EC Communication on "*enabling the digital transformation of health and care in the Digital Single Market; empowering citizens and building a healthier society*" have become even more relevant and there is now a certain urgency to invest and make progress in these areas.

The SoCaTel platform will be the subject of this Twinning programme. SoCaTel enables the online co-creation of long-term care (LTC) services through a digital platform, involving a variety of stakeholders (service providers, end users and family, care professionals and researchers). It contributes to the transformation and innovation of long-term care services, leading to a more sustainable, balanced, health care system and a more cohesive society.

The region with the innovative method and tool for digital co-creation of LTC services (SoCaTel), a Twinning Originator, is the Catalonian academic institution Rovira i Virgily University (URV) working closely with the City Hall of Vilanova i la Geltru (VILA) and the implementing region is the Italian Veneto via ISRAA, a Public Service Institution for recovering and assisting older persons, as a Twinning Adopter. It will be the first attempt to scale up the SoCaTel project's outputs (the SoCaTel method and co-creation platform) facilitating the piloting of its real uptake in Italy, during the last months of the SoCaTel project execution and the immediate post-project period.

Executive summary of the Twinning project

The SoCaTel co-creation platform and its five-step method for digital co-creation of long-term care (LTC) services, developed within the SoCaTel project (H2020, 2017-2020) coordinated by URV (Spain), will be fully adopted by ISRAA (public health care provider in Veneto region, Italy) in the framework of this Twinning project. The piloting of the platform will engage senior citizens and their family carers (informal carers), health care professionals (formal carers and care managers), other health practitioners as well as policy makers and academic researchers in a joint effort to find the best solutions for existing gaps in the LTC service design and delivery. It will result in a development (materialisation) of concrete service(s) addressing the unmet needs of both older adults and care practitioners in the current COVID-19 pandemic context (isolation, lack of integrated care, amongst others).

The main outputs of this initiative are: a functional network of stakeholders experienced in digital co-creation of services in the region of Veneto, guidelines for uptake of the SoCaTel digital co-creation tool and method, as well as the co-developed digital services.

Benefits for end-users, professionals and health care systems are huge, ranging from enhanced citizens' participation in decision making about the new and better services, community building, a more efficient organisation of service delivery, improved policies addressing people's real needs and an obviation of the waste of economic and human resources (cost-effectiveness). This Twinning initiative substantially fosters the capacity building of health care institutions in the region of Veneto providing at the same time significant evidence for EU policy making.

The Full adoption experience gathered in this Twinning initiative, disseminated and communicated in the post-project period, facilitates the further scaling-up of SoCaTel digital co-creation to other European Regions.

Finally, we offer a list of institutions that expressed their interest to adopt SoCaTel platform.

Table 6. TWINNING project search for partner: Institutions that expressed their interest in adopting SoCaTel

ORGANISATION	NETWORKING	CITY / REGION	COUNTRY
Porto Reference site	EIP on AHA	Porto	Portugal
Greek Carers Network EPIONI	EIP on AHA	Athens	Greece
Health Department	EIP on AHA and Spanish Ministry	Merida/ Extremadura	Spain
AFEdemy	EIP on AHA	Bask Country	Spain
OuluHealth	EIP on AHA	Helsinki	Finland
ISRAA Istituto per Servizi di Ricovero e Assistenza agli Anziani	EIP on AHA	Treviso/ Veneto	Italia
Euro Mediterranean Scientific Biomedical Institute, ISBEM	EIP on AHA	Brindisi	Italia
H2CI	EIP on AHA	Maceio	Brazil
International Affairs at the General Pharmaceutical Council of Spain	EIP on AHA	Seville	Spain
Innovation Centre	EIP on AHA	Usti	Czech Republic
Primary Care Research Unit	EIP on AHA	Zaragoza	Spain