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GCloud 14

‘Cloud Software’

Service Definition

Place-based Directory of Service

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PBDoS

Digital Marketplace Lot	GCloud Software
Name of Service	Place-based Directory of Service – Open Referral Compliant (PBDoS)
Description	An Open Referral (HSDS 3.0) compliant software application which has five main elements: **1, Aggregator (or Open Referral Transformer)** Information about local services can be collected in four different ways: a, Bulk CSV – fields from a spreadsheet can be mapped (by the local administrator roles) against the data standard and the locally agreed taxonomies; the system then imports the data and aligns / conforms it to the data standard and local taxonomies. The UUIDs generated are passed back to the source in the same CSV format. As part of implementation, one bulk upload will be supported. Local administrators will be trained as part of implementation on enabling other data uploads. b, JSON endpoint – JSON files that are compliant with the data standard (Open Referral UK, which is now also referred to as Human Services Data Standard3 HSDS) can be imported into the database. During implementation, local administrators will be trained on enabling and supporting uploads through this route. c, Registered Provider user interface - providers can enter their main details and then the information relating to their services, sessions and venues. The solution relies on a local administrator (that is referred to as an assurer) who reviews and approves the information. d), Assurer User Interface – the local administrators / assurers can enter information about services and provider organisations into the User Interface. The solution then aggregates the different sources in to the main repository and provides semi-automatic de-duplication capabilities and assurance steps. All information from one repository is then available to be published / exported through the routes and tools outlined in the section below. Data loading is an ongoing process – and allows new service information to be uploaded and maintained on an ongoing basis – both as bulk or individual updates. Support is available as part of implementation to consider and agree the approach to assurance to be adopted locally by the client and any partners. **2, Data sharing** Once the data has been de-duplicated and assured then it is ready for applications to consume the data. There are three methods available.

	a, Application Programming Interface (API) – data can be consumed through a GET all services or through a GET specific service. The critical API is the GET all providers/organisations and a GET all venues/locations with a specific call for all services within an organisation or location. b, Links Generator – information (about a single service, about all services from one provider (or at one venue) or all services returned against locally defined search criteria) can be "tagged" from the database, to be re-used to be linked to any external resource. Thus sets of service information can re-used to be linked into other web-pages, attached to emails, messenger or SMS text for example. In particular this allows other stand-alone web-pages that wish to signpost to accurate service information can embed these links into their website. The tool allows users to include a logo and colour options to create alignment with the external websites that are being linked. c, CSV export –keyword search and filters can be used to identify a set of results and then export to a CSV. Note this will be flat structure with a row for each session of a service. This function can be made available to all users, but it is preferable to encourage users to adopt the API or Links Generator. The API and Links Generator re-use the same dataset and hence this information whenever it is published / accessed will always be the most up to date record. However, a CSV file allows the information to then be copied as stand-alone data and hence requires a stand-alone process to maintain the accuracy of it. **3, Citizen Find Services tool** The annual £32,00 licence price includes one instance of the Citizen version, but without the facility for citizens to be able to create their own "accounts". This version allows public access for users to search for services and share information via whats'app, messenger, email or sms. The tool is simplified compared to the Frontline Worker tool – with a focus on one-button searches (for locally defined and agreed issues – such as loneliness or depression or anxiety or new parent for example), alongside simple postcode, age and personalisation filters (structured around Open Referral – allowing searches for things like on-line or venue-based services). All of the one-button search options (above) are set up and maintained by local administrators, where each "issue" above is linked to the chosen search "taxonomies". This allows each client group (new parent or Adult or Youth) to then have access to one click searches that are most relevant to them. The tool is branded to the client requirements. This can be stand-alone against the Find.Services url or can be embedded into client webpages.

There are two options (which it is recommended should be seen as mutually exclusive – the client should only pick one) for the client to extend the functionality. However, this is not necessarily recommended because the real purpose and benefit of adopting a data standard, like Open Referral (HSDS3.0) is that the information can be re-used into other tools – so other Directory products, chatbots, other "citizen accounts", other phone apps (that are another form of account), integration also for example into the NHS App.

- Option one is that additional instances can be created with a separate branding (so if a local District council, as well as the NHS Trust and the County Council all want to enable access to search for local services from their own web-pages and want it to branded visibly for the Public). Additional instances can be set up for £2,000

- Option two, is to allow citizens to be able to create their own accounts. It is not advisable to allow citizens to be able to have a separate account with the County Council and the District Council and the VCFSE sector and the NHS Trust and Primary Care etc – as this confuses the public. The philosophy of a data standard is about integration / joining up and creating one "local public sector account".

  The citizen account allows citizens to set their own filters, to have favourites and to be able to have different personas set up (one for their mum, one for their disabled child, one for themselves, for friends etc).

  The account version also creates the opportunity for local people to receive direct updates from local services that they have "favourited", subject to them providing those permissions. It creates the potential for households to receive updates from services near them, offering the sorts of support that they are seeking.

4, Frontline worker Professional Find Services tool
This tool is similar to the citizen version but designed for use by frontline workers to support them in helping their clients.

Each team can decide which of the categories/taxonomies are relevant to their client groups which makes it easier to use – offering that one click option to search for relevant services. It also makes monthly and reporting more meaningful – to understand the key issues that are being researched by each team, across varying locations.

They also have the ability to group favourites and share as HTML or weblinks.

5, Management Information Dashboard
Once all the local support information is collected into one single source of truth then management information provides evidence for a focus for infrastructure organisations support and the commissioning of services based on lack of provision or demand.

	There are therefore two broad types of reporting • Demand – what searches are being carried out, by which teams / users in relation to what geographical areas? This identifies the key needs. This demand information will be valuable both for "commissioners" and also for providers, who can be provided reports about the searches that relate to their organisation and the types of support that they provide. • Supply – what is the breadth of service support against identified needs / issues and across different geographies. Again these are valuable for commissioners and providers to identify gaps and duplication in certain areas and issues.
Applicable to	The application is designed for use across areas covered by an Integrated Care Partnership, an Integrated Care System, NHS Hospital Trusts or a Council. The tool is most beneficial where there is multi-agency buy-in locally to work collaboratively to maintain one set of information across multiple partners, where that information is then re-used via the API model into other software tools. The above Service Finder tools are made available as part of the solution, but the expectation / recommendation is that the single set of information is used to populate data that can be re-used into other locally commissioned tools such as chat-bots, triage tools, other Directory solutions and even stand-alone mobile phone apps. There is no restriction on who or how many users can contribute data, but the software is licensed across defined areas, using the agreed locally relevant public sector boundary and its population. The post code of residents must be in the defined area. The system can include areas on its boundaries in a secondary search.
Technical requirements	The application is cloud based. Any of the latest browsers will allow a user to administer the system modules, view and amend the data but it is specifically tested on MS Edge and Chrome.
On-boarding	We provide 5 x half day on-site implementation support. This support will cover definition of the taxonomies to be used, training local administrators, training people locally to provide wider train-the-trainer where necessary and a set of engagement workshops across local partners, We will also configure the local reporting that is requested. We support / help inform the local decision on the approach to "assurance" in terms of the frequency of the checks and the level of detail that the checks include. We will provide sets of procedures that reflect the local decisions taken. We strongly recommend that information is checked at a minimum twice per year.

	There are also online training manuals available. Additional on-line or face-to-face meetings can be organised. These will be charged based on the SFIA rates to provide any consultancy support you require. On average this tends to be £550 per day for advice and £600 for any bespoke development.
Exiting	The subscription is for a minimum of 12 months. After the first year, the tool can be renewed on a quarterly basis. Where a client decides to exit, the tool will remain live until the contract end date. The quarterly subscriptions are the normal price divided by 4. The data is always readily available to the client through the APIs and a CSV export. However, at contract end, if the client wants a stand-alone copy of the data at that point, then this will be made available in the format requested.
Data	The data used is collected from various sources and stored in the Open Referral Data Standard format. It is possible to export data as CSV or Json at any point.
New releases	There will be two releases per year to improve this product as agreed by the user group. These will be released to every instance and will be free without any charge above the subscription price. Every client can apply to join the user group but there will only be a couple from each type of organisation. The licence fees are subject to annual RPI increases.
Performance and availability	The application is hosted and provides a 99.99% availability guarantee. It is, therefore, expected that the application will be available 24/7 but if the software does go down, then depending on the issues, our target service level is resolve the most serious issues within 2 hours. Non-essential issues will be dealt with within either 2 or 7 days depending on the nature of the issue raised. The performance of the tools is our primary responsibility to you. We welcome any feedback to improve users' experiences.
Support and after sales	This application is supported by a ticketing system which aims to provide a useful response within two working days and an expected solution timing. The support is second-line and we expect you to provide first line support to your end users.
Training	The application includes contextual help with an online user manual and online user videos. Face to face training for place administrators is included during the set up. Face-to-face "train-the-trainer" training for frontline users using the Professional Service Finder tool is also included during implementation. All new releases include a user guide which is then included in the online user manual.

Price	£32,000 for a “place-based” implementation. More detailed information is included in the GCloud pricing document.
Options	The client can request further implementation support which is priced using the SFIA model. Additional Citizen instances can be set up for £2,000 with the client providing an appropriate logo and colours. This will allow local organisations to have their own-branded Directory tool. Clients can include the option for “citizen accounts”. These are charged at 1.5p (£0.015) per head of population in the licensed geographical area.
Invoicing	The client will be invoiced up front on a quarterly basis. The subscription is for a minimum of four quarters although a client can purchase any number of quarters up front, from there it is renewed quarterly. The costs are subject to annual price increases in line of RPI.
Features	1. Can POST and GET data through OR compliant APIs 2. Can import data from a spreadsheet 3. Can enter data through a user interface 4. Can assure and de-duplicate services 5. Separate Service Finder tools for Citizens/Carers and Professionals 6. Report on demand (searches) and supply (gaps in provision) 7. Maintain updates to any webpage - maintaining accurate relevant links
Benefits	1. All organisations and volunteers contribute to service information collection 2. Co-ordinates data collection to make it more efficient 3. Ensures service information accuracy can be trusted 4. Frontline staff research more productive with single source of truth 5. Allows any application to access any data they need 6. Prevents duplication of service information causing confusion 7. Citizens and carers can "self-care" and access local support