



SARD

Service Definition

G-Cloud 15

SARD Systems:

Consult

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A joint venture with Oxleas
NHS Foundation Trust



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1. Overview of Company

Our Philosophy

We believe in creating a working environment that optimises the experience of both our clients and our team. We focus on delivering meaningful work, with integrity, and only develop solutions we genuinely believe in. The values we hold personally are reflected in everything we do professionally, guiding how we design, deliver and support our services.

Our Team

Our people are our most important asset. We place great value on building a team of skilled, motivated individuals who are aligned around a single goal: delivering high-quality systems and outstanding support for our customers. This shared focus enables us to provide reliable, responsive and consistently high-quality service. To find out more about our team members, please visit www.sardjv.co.uk.

Our Journey

SARD JV began as an idea within an NHS Trust, just like yours. In 2012, Oxleas NHS Foundation Trust identified the need for a dedicated Medical Revalidation system. The Trust's Head of Learning and Development, working with an experienced software developer, created the first version of what would become the SARD platform.

That initial solution evolved into a fully deployed system and subsequently into a formal NHS Joint Venture. More than fourteen years later, SARD JV has grown into an organisation supporting over 50 NHS and healthcare clients, with a dedicated team of 25 full-time staff.

Today, SARD systems are used by a wide range of large and complex organisations, including several Shelford Group Trusts such as Guy's and St Thomas', King's College Hospital, University College London Hospitals, Manchester University Hospitals and Oxford University Hospitals.

Over time, our product portfolio has expanded to include:

- SARD Medical Revalidation
- SARD 360 / Multi-Source Feedback
- SARD Medical Job Planning
- SARD AHP Job Planning
- SARD eLeave
- SARD eRostering
- SARD Appraisal for All Staff
- SARD Consult

As our customers' needs have evolved, so too has SARD. While our roots remain firmly in appraisal and job planning, our focus has naturally expanded into broader workforce insight. This includes supporting organisations to better understand demand, capacity, utilisation and workforce optimisation, always grounded in accurate, structured workforce data.

We have grown responsibly throughout this journey, ensuring that expansion has never come at the expense of our founding principles. Our commitment remains the same today as it was at the start: to deliver high-quality systems, supported by high-quality service.

2. Overview of Service

SARD Consult has been designed to support NHS organisations in undertaking structured, evidence-based workforce analysis in line with current NHS guidance and expectations relating to job planning maturity, demand and capacity alignment, and workforce governance. The system enables Trusts to record, store, analyse, present and report workforce planning information in a consistent, auditable and system-agnostic way.

SARD Consult provides secure, role-based access for authorised workforce, operational, analytical and managerial users. From its earliest development, the system has been designed to evolve alongside national job planning and workforce planning guidance. As expectations around workforce governance, utilisation and demand modelling have matured, the system has continued to adapt to ensure ongoing alignment with NHS policy and operational practice.

SARD Consult is fully system-agnostic and can be used with data from any job planning system. Organisations are not required to use any SARD job planning products in order to use SARD Consult.

SARD Consult currently consists of three distinct analytical modules:

Job Planning Diagnostic Assessment Toolkit, enabling organisations to assess the quality, structure and consistency of existing job plans, including activity structure, data completeness, allocation patterns and variation across individuals and specialties.

Demand and Capacity Assessment Toolkit, enabling organisations to analyse service demand alongside available workforce capacity in order to understand gaps, pressures and misalignment between service activity and clinical resource.

Job Planning Utilisation Toolkit, enabling comparison of planned job plan activity with actual delivered activity within the Trusts existing CLW Rota system to support utilisation analysis across individuals, teams and services.

Together, these modules support structured workforce governance, service planning and executive decision-making through consistent analytical outputs.

The system supports the full workforce analysis process, including:

- Upload and analysis of job planning, activity, demand and scheduling data from any job planning system
- Structured diagnostic scoring and review outputs
- Capacity and demand comparison reporting
- Planned versus actual utilisation analysis
- Specialty, team and organisational level reporting
- Governance and executive-level dashboards
- Export of outputs in standard formats for reporting and presentation
- Full audit trail of analytical activity

A key strength of SARD Consult is its flexibility and configurability. Organisational hierarchies, specialty groupings, service structures and reporting views can be aligned to local operating models. While the analytical framework and scoring logic remain consistent to preserve governance integrity and comparability, reporting outputs can be aligned to local governance formats and stakeholder requirements.

Key functional capabilities include:

- Structured upload and validation of workforce and activity data
- Automated analytical processing and scoring
- Real-time dashboards and reporting views
- Export of analytical outputs in CSV and PDF formats
- Role-based access control and audit logging
- Support for repeat analysis over time to track improvement and change

SARD Consult is provided as a software system only. Any consultancy, training, diagnostic delivery or workforce improvement services that may be undertaken using the system are separate from this service definition and are not included within this listing. They would be listed under SARD Workforce Optimisation.

SARD provides open API capability to support integration with other systems. Existing integrations are available where applicable, and SARD is open to exploring additional connections where external systems provide suitable endpoints.

3. Service Accessibility

SARD Consult is a cloud-based system and is accessible on any computer (laptop or desktop), Tablet or Smart Phone that has an internet connection.

Our systems can be accessed on the following supported web browsers:

- Microsoft Edge
- Chrome
- Firefox
- Opera
- Safari

4. Information Assurances

SARD takes information governance, data protection and system security extremely seriously. Information assurance is embedded within our organisational governance, technical design and operational processes.

We operate an Information Security Management System certified to ISO/IEC 27001. This framework governs risk management, access control, incident management, supplier security, business continuity and secure system development. Certification is independently audited and maintained on an ongoing basis.

We are registered with the Information Commissioner's Office as both a data controller and data processor. Registration details can be provided on request.

All services are hosted within a secure, cloud-based environment using resilient, load-balanced infrastructure. This approach supports high availability, fault tolerance and continuity of service. Data is backed up routinely and can be restored in line with documented disaster-recovery and business-continuity procedures.

Formal policies and procedures are in place covering data protection, access management, incident response, vulnerability management, business continuity and disaster recovery. These are reviewed regularly and maintained in line with our ISO 27001 governance framework.

System maintenance is carried out outside normal working hours wherever possible to minimise user impact. All updates, fixes and enhancements are tested in controlled test environments before deployment to production. Change control and release management processes are formally governed and auditable.

SARD remains committed to maintaining high standards of information assurance, operational resilience and data protection for all customer organisations.

5. Onboarding and Offboarding

SARD JV provides a structured, fully supported onboarding process for all customers. Each implementation is managed by a dedicated Technical Project

Manager who oversees the process from initial setup through to go-live. Customers are provided with a clear implementation and onboarding guide, which explains the process, responsibilities, timelines and information requirements, ensuring transparency and shared understanding from the outset.

During onboarding, SARD works with the organisation to configure the system in line with agreed requirements, supported by administrator training delivered remotely as standard. The implementation approach is designed to be simple, low burden and proportionate to the complexity of the service being deployed. Our objective is to enable organisations to adopt the system quickly, confidently and with minimal disruption.

Offboarding is supported in a controlled and transparent manner. Where individual users leave an organisation, any associated user-level data can be exported in accessible formats such as PDF or CSV to support continuity where required, subject to organisational governance and data-protection controls.

Where an organisation chooses to terminate the service, SARD provides full data extraction in standard, non-proprietary formats. Data remains accessible to the customer for an agreed period to allow verification and transition to a new provider. Once confirmation is received that all required data has been transferred, system access is closed and data is retained or securely deleted in accordance with the Data Processor Agreement and applicable data-protection legislation.

SARD does not apply any additional charges for standard offboarding or data extraction. Our aim is to ensure that customers retain full ownership and control of their data at all times, and that any transition is handled securely, transparently and without unnecessary commercial or technical barriers.

6. Service Management Details

SARD JV places equal importance on service delivery and customer support as on the quality of its software. Our service management approach is designed to ensure customers receive consistent, reliable and responsive support throughout the full contract lifecycle, from implementation through to contract completion.

Service delivery is supported by a multidisciplinary internal team including directors, technical specialists, developers, project managers, account managers and customer support staff. This structure ensures that operational, technical and strategic aspects of the service are appropriately governed and supported.

Each customer is assigned a named account manager who acts as the primary point of contact for service oversight, escalation management and ongoing relationship governance. Technical and product specialists are available to

support configuration, troubleshooting and continuous improvement activity as required.

Service performance, support activity and customer feedback are reviewed regularly as part of our internal governance processes to ensure service quality remains consistent and to identify opportunities for improvement. Where service issues arise, they are managed in line with our documented incident, escalation and resolution procedures, supported by defined response targets within our Service Level Agreement.

Our objective is to provide a stable, transparent and professionally managed service environment that supports long-term customer confidence, operational continuity and effective system use.

7. Service levels

SARD JV is committed to providing a stable, reliable and resilient service throughout the term of each customer contract. Our systems are hosted within a load-balanced, high-availability cloud environment with automatic failover capability. This ensures that, if a server becomes unavailable, service traffic is transferred seamlessly to an alternative server without user disruption. Capacity is provisioned with resilience in mind, with infrastructure scaled to exceed normal operational demand.

System updates, enhancements and maintenance are deployed using controlled release processes that do not require service downtime. All changes are tested in a separate environment prior to deployment to the live service.

To ensure that any service issues are managed effectively, SARD operates defined incident resolution targets based on priority classification. Full priority definitions and escalation procedures are documented within our supplier terms and conditions.

Resolution targets are as follows:

	Target Resolution Time	Resolution Target
Priority 1	1 Working Day	90%
Priority 2	3 Working Days	90%
Priority 3	5 Working Days	90%
Priority 4	8 Working Days	90%
Priority 5	15 Working Days	90%

Resolution times apply during core working hours, defined as Monday to Friday, 09:00 to 17:00 UK time, excluding Bank Holidays and published closure days.

In practice, the majority of reported incidents are resolved significantly faster than the stated target times. Incident handling, communication and resolution

progress are managed in accordance with our Service Level Agreement and documented support procedures.

8. Financial Recompense model

SARD JV aims to deliver the service model agreed within the Service Level Agreement and Supplier Terms and Conditions, which defines the expected level of system availability.

Where this level of service is not achieved, the customer organisation will be recompensed on a pro rata basis, in accordance with the terms and conditions of the contract.

The approach to recompense, including how any pro rata adjustment is calculated and applied, is fully defined within the contractual documentation. SARD JV applies this process consistently and transparently in line with contractual commitments.

9. Training and Support

SARD systems are designed to be intuitive and easy to use, enabling users to become confident and productive without the need for formal classroom training. Our approach is based on the principle that if a system requires extensive end-user training, it is unnecessarily complex. Instead, we focus on providing immediate, high-quality support at the point of need.

Users have access to multiple support channels, including integrated live chat within the system, telephone support, static help content, user guides and video tutorials. This blended support model has proven highly effective across our customer base in driving engagement and system proficiency.

Our average response time for live chat support is approximately eight seconds. Live chat is the most frequently used support channel, as it allows users to receive rapid assistance directly from experienced SARD support specialists without leaving the system. Telephone support is available within the same operating hours for users who prefer this option.

Full administrator training is provided as part of implementation. This is delivered at a time agreed with the organisation and covers both user-facing and administrative functionality. Refresher training can be provided when required. Administrators also retain direct access to their designated account manager for ongoing support.

The SARD help desk operates during standard business hours, Monday to Friday, 9am to 5pm. While these are our formal support hours, support requests are often responded to outside of these times when development or support staff are available.

SARD does not outsource support services. All support is delivered by our internal team, ensuring that users receive assistance from staff with direct product knowledge and system expertise. We believe this approach provides significantly higher quality and continuity of support than outsourced models.

Outside of core hours, users can continue to log queries, access the knowledge base, user guides and tutorial videos. In addition, each system includes contextual guidance throughout, which can be configured by the organisation to include local policies, processes and supporting documentation, helping users follow familiar workflows and organisational guidance.

10. Implementation and Project Management

Each customer is supported by a dedicated implementation team whose role is to guide the organisation from project initiation through to go-live and into business-as-usual operation. Implementation is managed using clear, structured project plans that reflect SARD's established delivery approach, designed to be straightforward, efficient and proportionate to the scale of the deployment.

Implementation timescales are flexible and are largely driven by the readiness of the customer organisation. Once the required information and data have been provided, typical implementations can be completed within approximately two to six weeks, although this can be adjusted to reflect organisational priorities, resource availability and internal governance processes. We work at the pace set by the customer.

From the outset, roles and responsibilities are clearly defined between SARD and the customer organisation to ensure a smooth and transparent implementation. The SARD project manager provides ongoing coordination, progress tracking and communication throughout the process, ensuring that risks, dependencies and decisions are managed in a controlled and collaborative way.

Support continues beyond go-live, with the implementation team remaining available to assist with early operational queries, configuration refinements and transition into standard support arrangements. Our objective is to ensure that each organisation moves into live use confidently, with clear ownership, strong engagement and a stable operational foundation.

11. Pilot / Trial

Where appropriate, SARD can provide access to a time-bound pilot environment to allow organisations to familiarise themselves with the system and assess suitability prior to full implementation. Pilot arrangements are

typically structured and supported, reflecting the same standards of configuration, security and governance as a live deployment.

As pilots require system setup, configuration and support resource, they are normally offered as a paid, scoped engagement. This ensures that the pilot reflects a realistic operational experience rather than a limited or unsupported demonstration environment.

In addition to any pilot activity, we actively encourage prospective customers to speak directly with existing SARD clients to gain independent feedback on system performance, implementation experience and ongoing service quality.

This combined approach enables organisations to make informed, evidence-based decisions while ensuring transparency, realism and appropriate use of project resource.