

Digital Marketplace

G-Cloud 14 Framework

Service Specification Documents

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1. New Development-Children's Services Online Procedures

New Development - Children's Services Online Procedures

Schedule 1: Service Specification

Aims

To provide a Local Authority with a flexible, compliant, procedures manual that strengthens governance, supports best practice, and enables effective operational delivery.

Objectives

- To develop and maintain a core suite of adaptable procedures that can be tailored to local policy and responsibilities.
- To enable ownership through seamless integration and management of local content.

- To provide a secure, customer-controlled resource library with real-time content management.
- To support effective use of procedures through training, guidance, and usage insight.
- To enhance compliance, oversight, and continuous improvement through expert support-.

Scope of Project

The scope covers four main areas:

Development of the Procedures Manual site;
Maintenance of the Procedures Manual site;
Hosting of the Procedures Manual site;
Training and support.

Summary

- Based on a set of template procedures reflecting legislation, regulations and good practice
- 'Hosting' of Procedures Manual online 24/7
- Procedures Consultant time to advise and support in the development of the manual, collation and redrafting the content, and incorporation of Customer local material for which the customer will retain responsibility for updating such content
- 1 planned review in the first year, including virtual or on site meeting (if required)
- Online and telephone advice and support from your dedicated Procedures Consultant
- Support to launch the manual virtually, which can be recorded for future use or face to face
- Access to free online resources, including a Glossary and National Contacts, key government guidance such as Working Together to Safeguard Children, Keeping Children Safe in Education, National Minimum Standards for Fostering, Adoption, and Quality Standards for Children's Homes.
- User maintained online portal-CMS for local resources and optional reading task allocation/monitoring functionality
- Google Analytics (email account provided by customer)
- Link to Safeguarding Partnership Procedures
- Link to other customer tri.x procedures, for example Adult Social Care
- Provision for single change in the colour scheme of the manual to reflect Customer branding
- Facility for users to register to receive email notification when the manual is updated
- Archiving of each version of the Procedures Manual

- Urgent updates which are as a direct result of a Child Case Review, Inspection or serious complaint
- 2 scheduled reviews per annum, updates encompass any changes to legislation, guidance, best practice, case law or any specific requirements, required by the customer and consideration for customer requests for small updates in between scheduled publications

1. Development, Drafting and Consultation

- 1.1 On acceptance of this agreement, the Contractor will allocate a Procedures Consultant to work for the duration of the development project. The Customer will be required to identify a Project Leader and a consultative group consisting of relevant managers with authority to agree the content of procedures.
- 1.2 The starting point for the Procedures Manual will be a template set of up-to-date procedures. The standard list can be reorganised but the addition of whole new categories or sections may incur an additional cost.
- 1.3 The draft procedures will be produced in the form of a 'draft' manual, made available online for review as part of the development process.
- 1.4 The Contractor will guide in the re-drafting process to achieve procedures reflecting local practice. This agreement provides for Procedure Consultants time to support with the development process and launch of the Procedures Manual.
- 1.5 The re-drafting process will tailor the template procedures to suit specific needs in the following way:
 - a. The merging of content of up to 10 template and Customer procedures which will be formatted in the web style. Responsibility for the ongoing updating of the content of locally developed policies and procedures which are included in your manual lies with the Customer.
 - b. The inclusion of links to websites, intranet or any other material available on the internet required locally will be provided by the Customer.
 - c. The inclusion of links to underpinning documents provided by the Customer.
- 1.6 The Contractor reserves the right to review the price if additional work is required over and above and agree any additional payments with the Customer in writing.

2. Content, Layout, Style and Functionality

- 2.1 The Procedures Manual is designed for use in web-enabled format; it is not designed to be printed or published in 'hard copy'. Individual chapters can be printed for reference only.
- 2.2 If hard copies of the Procedures Manual are circulated, the Customer is responsible for version control.
- 2.3 The bulk of the procedures will be created in a web-enabled format, but the Procedures Manual will contain PDF and/or Word versions of documents provided by the Customer e.g. Protocols which can be printed in their original format.

- 2.4 Hyperlinks provided by the Customer to local intranet or external websites will be included in the manual with responsibility for the reliability of such links being the Customers. Broken link checks will be undertaken at each maintenance update. Where the Customer notifies of broken links outside of this timetable we reserve the right to quote for any additional work required to re-link these where the information has been supplied originally by the Customer.
- 2.5 The Procedures Manual will include a facility to allow users to 'Register for Updates' who will be electronically notified when the Procedures Manual is updated. Where the Customer mail server is unable to deliver this alert, it will not be resent.
- 2.6 Customers may include a 'Contact Us' facility within the manual, providing an email address for enquiries to be sent to.

3. Content provided by the Customer

- 3.1 Responsibility for the ongoing updating of the content of locally developed policies and procedures which are included in the Procedures Manual lies with the Customer.
- 3.2 Images/flowcharts provided will be included in their original format, and the Contractor will not be responsible for editing them.
- 3.3 Documents provided for inclusion in PDF/MS Word format (e.g. Guidance, Protocols, Forms), will not be edited by the Contractor.

4. Portal Area

- 4.1 Documents including PDF's uploaded to the Portal area of the manual should comply with the government web accessibility guidelines. The responsibility for meeting these standards for local documents lies with the customer.
- 4.2 All local documents uploaded to the portal area of the manual should be checked by the customer to ensure, personal and sensitive data is removed. It is the customers duty and responsibility to comply with GDPR

5. Planned Reviews

- 5.1 Following the publication of the first edition of the Procedures Manual, the contract provides for 1 planned review during the remainder of the first 12 month period. Where it is not possible to publish the first edition due to delays on the part of the Customer, the review may not be carried forward into Year 2.
- 5.2 The Contractor will endeavour to anticipate changes in relevant UK legislation and regulations so that the Procedures Manual is updated in a timely fashion, as part of planned reviews. Where this is not feasible, the Customer will be advised of a plan for alerting manual users to

the changes as quickly as possible after their implementation until they can be incorporated as part of the next planned review.

- 5.3 Meetings will be conducted in relation to each maintenance review to discuss any implications of amendments recommended by the Contractor to reflect recent legislation, court rulings and national guidance in addition to discussing amendments required by the Customer. An updated plan detailing recommendations by the Contractor will be issued in advance of any meeting. If on-site meetings are cancelled or postponed by the Customer, any non-refundable travel or accommodation expenses will still be charged.
- 5.4 Agreed dates for reviews should be adhered to. If the Customer is unable to provide us with amendments by the previously agreed date, they may lose the opportunity to include them in the review and the review will go ahead incorporating only the amendments that are ready and agreed. If the Customer wishes to delay or reschedule a review this will be subject to agreement by both parties.
- 5.5 Where the Customer submits amendments to existing procedures, the current online manual procedure should be copied into MS Word and use the 'track changes' facility to show amendments, copying the whole chapter, not just the part to be amended. Each chapter to be saved individually in a Word document.
 - 5.5.1 Any changes received which have not been applied in this way will not be processed and will be returned.
 - 5.5.2 Any changes submitted on copies of previous versions of the Procedures Manual will not be processed.
 - 5.5.3 For minor 'generic' amendments, e.g. the change of a team or post title, the change will be made without being submitted via track changes but by issuing a single clear instruction.
 - 5.5.4 Where more than one person submits edits to the same chapter, this must be co-ordinated, with one definitive submission being forwarded to for update.
 - 5.5.5 No action will be taken with regard to comment box instructions or conversations between local editors.
- 5.6 Enhancements or changes to the layout and style of the Procedures Manual are not included as part of the maintenance contract.
- 5.7 As part of an review, amendments to existing chapters will be made as required. Where new chapters are submitted for inclusion, the Contractor will advise of the most appropriate format for inclusion.

6. Unplanned Reviews

- 6.1 These are reviews required by the Customer, not relating to a change in local contact details and/or not within the definition of urgent, i.e. not resulting from a Serious Child Death Review or an Inspection. Unplanned reviews in advance of an inspection are not, for the purposes of this proposal, defined as urgent.
- 6.2 The contract does **not** provide for unplanned reviews.
- 6.3 Each request for unplanned reviews will be considered on a case by case basis and where appropriate a proposal detailing any additional cost and timescales submitted to the Customer. This will be dependent on the complexity of the request, the amount of time it will take and whether there is provision in the Contractors production schedule to accommodate the work. Any unplanned work will be by agreement in writing by both parties.

7. Technical Specification

- 7.1 Personal information is not automatically stored or captured, the only information which is automatically stored and captured is the user's IP address. This information is used to provide the Customer with data/activity on the usage of the Procedures Manual. Email addresses and other information volunteered by manual users will be captured for the purposes described in 2.5. This shall be treated as confidential but may be used for internal review and to notify registered users about updates to the Procedures Manual and Contractor services.
- 7.2 The capture, storage and use of personal information will not be made available to any third party without prior permission.
- 7.3 The content of your Procedures Manual/website will be created in HTML format and will conform to the World Wide Web Consortium XHTML 1.0 Transitional (W3C) and are WCAG Priority 2 AA compliant.
- 7.4 The average delivery time for access will be no more than two seconds when taken at as an average of at least 100 requests.
- 7.5 The Procedures Manual will deliver pages to the end user via a browser and be viewable and fully functional in:
 - Internet Explorer
 - Google Chrome
 - Mozilla Firefox
 - Opera Version
 - Safari Version
 - Microsoft Edge

- 7.6 The Procedures Manual will be secured so that only authorised users are able to effect changes to the content or look and feel of the Website, multi factor authentication is used.
- 7.7 Data is hosted with a professional and reputable UK hosting company and the Contractor assumes full responsibility for the maintenance of that relationship, including any and all payments. Business and Security Certification <https://learn.microsoft.com/en-us/azure/compliance/>

Schedule 1a: Monitoring Schedule

The Contractor will appoint a Procedures Consultant to manage the contract and supervise service delivery who will attend virtual meetings, to coincide with the Procedures Manual maintenance review cycle, which provides the opportunity to monitor the service against contractual arrangements.

2. Annual Maintenance-Children's Services Online Procedures

Annual Maintenance - Children's Services Online Procedures

Schedule 1: Service Specification

Aims

To maintain (in partnership with the customer) a flexible, compliant, procedures manual that strengthens governance, supports best practice, and enables effective operational delivery.

Objectives

- To maintain a core suite of adaptable procedures that can be tailored to local policy and responsibilities.
- To enable ownership through seamless integration and management of local content.
- To provide a secure, customer-controlled resource library with real-time content management.
- To support effective use of procedures through training, guidance, and usage insight.
- To enhance compliance, oversight, and continuous improvement through expert support.

Scope of Project

The scope covers two main areas:

Maintenance of the Procedures Manual site;
Hosting of the Procedures Manual site.

Summary

- 'Hosting' of Procedures Manual online

- Online and telephone advice and support from your dedicated Procedures Consultant
- Access to free online resources, including Glossary and National Contacts, key government guidance such as Working Together to Safeguard Children, Keeping Children Safe in Education, National Minimum Standards for Fostering, Adoption, and Quality Standards for Children's Homes.
- User maintained online portal-CMS for local resources and optional reading task allocation/monitoring functionality and compliance
- Google Analytics email account to be provided by customer
- Link to Safeguarding Partnership Procedures
- Link to other customer tri.x procedures, for example Adult Social Care
- Facility for users to register to receive email notification when the manual is updated
- Archiving of each version of the Procedures Manual
- Urgent updates which are as a direct result of a Child Death Review, Inspection or serious complaint
- Maintenance of the manual to include 2 scheduled reviews per annum and 2 meetings carried out via telephone/conference call or on site (if required).

2. Maintenance

- 2.1 The Procedures Manual is designed for use in web-enabled format; it is not designed to be printed or published in 'hard copy'. Individual chapters can be printed for reference only.
- 2.2 If hard copies of the Procedures Manual are circulated, the Customer is responsible for version control.
- 2.3 The bulk of the procedures will be created a web-enabled format, but the Procedures Manual will contain PDF and/or Word versions of documents provided by the Customer e.g. Protocols which can be printed in their original format.
- 2.4 Hyperlinks provided by the Customer to local intranet or external websites will be included in the manual with responsibility for the reliability of such links being the Customers. Broken link checks will be undertaken at each maintenance update. Where the Customer notifies of broken links outside of this timetable, we reserve the right to quote for any additional work required to re-link these where the information has been supplied originally by the Customer.
- 2.5 The Procedures Manual will include a facility to allow users to 'Register for Updates' who will be electronically notified when the Procedures Manual is updated. Where the Customer mail server is unable to deliver this alert, it will not be resent.

3. Content provided by the Customer

- 3.1 Responsibility for the ongoing updating of the content of locally developed policies and procedures which are included in the Procedures Manual lies with the Customer.

- 3.2 Images/flowcharts provided will be included in their original format, and the Contractor will not be responsible for editing them.
- 3.3 Documents provided for inclusion in PDF/MS Word format (e.g. Guidance, Protocols, Forms), will not be edited by the Contractor.

4. Portal Area

- 4.1 Documents including PDF's uploaded to the Portal areas of the manual should comply with the government web accessibility guidelines. The responsibility for meeting these standards for local documents lies with the customer.
- 4.2 All local documents uploaded to the Portal areas of the manual should be checked by the customer to ensure, personal and sensitive data is removed. It is the customers duty and responsibility to comply with UK GDPR.

5. Planned Reviews

- 5.1 The Contract provides for 2 planned reviews per year. Where, it is not possible to publish a review due to delays on the part of the Customer, the review may not be carried forward into the next year.
- 5.2 The Contractor will endeavour to anticipate changes in relevant UK legislation and regulations so that the Procedures Manual is updated in a timely fashion, as part of planned reviews. Where this is not feasible, the Customer will be advised of a plan for alerting manual users to the changes as quickly as possible after their implementation until they can be incorporated as part of the next planned review.
- 5.3 Meetings will be conducted in relation to each maintenance review to discuss any implications of amendments recommended by the Contractor to reflect recent legislation, court rulings and national guidance in addition to discussing amendments required by the Customer. An updated plan detailing recommendations by the Contractor will be issued in advance of any meeting.
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- 5.4 Agreed dates for reviews should be adhered to. If the Customer is unable to provide us with amendments by the previously agreed date, they may lose the opportunity to include them in the review and the review will go ahead incorporating only the amendments that are ready and agreed. If the Customer wishes to delay or reschedule a review this will be subject to agreement by both parties.
- 5.5 Where the Customer submits amendments to existing procedures, the current online manual procedure should be copied into MS Word and use the 'track changes' facility to show

amendments, copying the whole chapter, not just the part to be amended. Each chapter to be saved individually in a Word document.

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Google Chrome
Mozilla Firefox
Opera Version
Safari Version
Microsoft Edge

7.6 The Procedures Manual will be secured so that only authorised users are able to effect changes to the content or look and feel of the Website, multi factor authentication is used.

7.7 Data is hosted with a professional and reputable UK hosting company and the Contractor assumes full responsibility for the maintenance of that relationship, including any and all payments. Business and Security Certification <https://learn.microsoft.com/en-us/azure/compliance/>

Schedule 1a: Monitoring Schedule

The Contractor will appoint a Lead Consultant to manage the contract and supervise service delivery who will attend virtual meetings, to coincide with the Procedures Manual maintenance review cycle, which provides the opportunity to monitor the service against contractual arrangements.

3. New Development-Local Authority Children's Homes Online Procedures

New Development - Local Authority Children's Homes Online Procedures

Schedule 1: Service Specification

Aims

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Objectives

- To develop and maintain a core suite of adaptable procedures that can be tailored to local policy and responsibilities.
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The scope covers four main areas:

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Maintenance of the procedures manual site; Hosting
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- User maintained online portal-CMS for local resources and optional reading task allocation/monitoring functionality and compliance
- Google Analytics - email address to be provided by customer
- Link to Children's Services Procedures manual
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- To support effective use of procedures through training, guidance, and usage insight.
- To enhance compliance, oversight, and continuous improvement through expert support .

Scope of Project

The scope covers two main areas:

Maintenance of the procedures manual site;
Hosting of the procedures manual site.

Summary

- 'Hosting' of procedures manual online
- 2 scheduled reviews per year (to coincide with the Children's Services procedures manual maintenance update cycle, if the customer has the Children's Services Procedures manual)
- Online and telephone advice and support from your dedicated Procedures Consultant
- Access to free online resources, including Glossary and Contacts, key government guidance such as Working Together to Safeguard Children, Keeping Children Safe in Education, National Minimum Standards for Fostering, Adoption, and Quality Standards for Children's Homes.
Minimum Standards for Fostering, Adoption and Quality Standards for Children's Homes
- User maintained online portal-CMS for local resources and optional reading task allocation/monitoring functionality and compliance
- Google Analytics email account to be provided by customer
- Link to other customer tri.x procedures, for example Children's Services Procedures manual
- Link to other customer tri.x procedures, for example Safeguarding Partnership Procedures
- Facility for users to register to receive email notification when the manual is updated
- Archiving of each version of the procedures manual
- Urgent' updates which are as a direct result of a Child Death Review Inspection or serious complaint

1. Content, Layout, Style and Functionality

- 1.1 The Procedures Manual is designed for use in web-enabled format; it is not designed to be printed or published in 'hard copy'. Individual chapters can be printed for reference.
- 1.2 If hard copies of the manual are circulated, the Customer is responsible for version control.
- 1.3 The bulk of the procedures will be created a web-enabled format, but the manual will contain PDF and/or Word versions of documents provided by the Customer e.g. Protocols which can be printed in their original format.
- 1.4 Hyperlinks provided by the Customer to local intranet or external websites will be included in the manual with responsibility for the reliability of such links being the Customers. Broken link

checks will be undertaken at each maintenance update. Where the Customer notifies of broken links outside of this timetable we reserve the right to quote for any additional work required to re-link these where the information has been supplied originally by the Customer.

- 1.5 The manual will include a facility to allow users to 'Register for Updates' who will be electronically notified when the manual is updated. Where the Customer mail server is unable to deliver this alert, it will not be resent.
- 1.6 Customers may include a 'Contact Us' facility within the manual, providing an email address for enquiries to be sent to.

2. Content provided by the Customer

- 2.1 Responsibility for the ongoing updating of the content of locally developed policies and procedures which are included in the manual lies with the Customer.
 - a. Images/flowcharts provided will be included in their original format, and the Contractor will not be responsible for editing them.
 - b. Documents provided for inclusion in PDF/MS Word format (e.g. Guidance, Protocols, Forms), will not be edited by the Contractor.

3. Portal Area

- 3.1 Documents including PDF's uploaded to the Portal areas of the manual should comply with the government web accessibility guidelines. The responsibility for meeting these standards for local documents lies with the customer.
- 3.2 All local documents uploaded to the Portal-CMS areas of the manual should be checked by the customer to ensure, personal and sensitive data is removed. It is the customers duty and responsibility to comply with GDPR

4. Planned Reviews

- 4.1 The Contract provides for 2 planned reviews per year. Where, it is not possible to publish a review due to delays on the part of the Customer, the review may not be carried forward into the next year.
- 4.2 The Contractor will endeavour to anticipate changes in relevant UK legislation and regulations so that the manual is updated in a timely fashion, as part of planned reviews. Where this is not feasible, the Customer will be advised of a plan for alerting manual users to the changes as quickly as possible after their implementation until they can be incorporated as part of the next planned review.

- 4.3 Meetings may be conducted in relation to each maintenance review, providing they coincide with meetings arranged in relation to the update of the children's services procedures manual, to discuss any implications of amendments recommended by the Contractor to reflect recent legislation, court rulings and national guidance in addition to discussing amendments required by the Customer. An updated plan detailing recommendations by the Contractor will be issued in advance of any site meeting.
- 4.4 Agreed dates for reviews should be adhered to. If the Customer is unable to provide us with amendments by the previously agreed date, they may lose the opportunity to include them in the review and the review will go ahead incorporating only the amendments that are ready and agreed. If the Customer wishes to delay or reschedule an update this will be subject to agreement by both parties.
- 4.5 Where the Customer submits amendments to existing procedures, the current online manual procedure should be copied into MS Word and use the 'track changes' facility to show amendments, copying the whole chapter, not just the part to be amended. Each chapter to be saved individually in a Word document.
 - 4.5.1 Any changes received which have not been applied in this way will not be processed and will be returned.
 - 4.5.2 Any changes submitted on copies of previous versions of the manual will not be processed.
 - 4.5.3 For minor 'generic' amendments, e.g. the change of a team or post title, the change will be made without being submitted via track changes but by issuing a single clear instruction.
 - 4.5.4 Where more than one person submits edits to the same chapter, this must be co-ordinated, with one definitive submission being forwarded to for update.
 - 4.5.5 No action will be taken with regard to comment box instructions or conversations between local editors.
- 4.6 Enhancements or changes to the layout and style of the manual are not included as part of the maintenance contract.
- 4.7 As part of a review, amendments to existing chapters will be made as required. Where new chapters are submitted for inclusion, the Contractor will advise of the most appropriate format for inclusion.

5. Unplanned Reviews

- 5.1 These are reviews required by the Customer, not relating to a change in local contact details and/or not within the definition of urgent, i.e. not resulting from a Child Death Review or an Inspection. Unplanned reviews in advance of an inspection are not, for the purposes of this proposal, defined as urgent.
- 5.2 The contract does **not** provide for unplanned reviews .
- 5.3 Each request for unplanned reviews will be considered on a case by case basis and where appropriate a proposal detailing any additional cost and timescales submitted to the Customer. This will be dependent on the complexity of the request, the amount of time it will take and whether there is provision in the Contractors production schedule to accommodate the work. Any unplanned work will be by agreement in writing by both parties.

6. Technical Specification

- 6.1 Personal information is not automatically stored or captured, the only information which is automatically stored and captured is the user's IP address. This information is used to provide the Customer with data/activity on the usage of the manual. Email addresses and other information volunteered by manual users will be captured for the purposes described in 2.5. This shall be treated as confidential but may be used for internal review and to notify registered users about updates to the manual and Contractor services.
- 6.2 The capture, storage and use of personal information will not be made available to any third party without prior permission.
- 6.3 The content of your manual/website will be created in HTML format and will conform to the World Wide Web Consortium XHTML 1.0 Transitional (W3C), and are WCAG Priority 2 AA compliant.
- 6.4 The average delivery time for access will be no more than two seconds when taken at as an average of at least 100 requests.
- 6.5 The manual will deliver pages to the end user via a browser and be viewable and fully functional in:

- Internet Explorer
- Google Chrome
- Mozilla Firefox
- Opera Version
- Safari Version
- Microsoft Edge

- 6.6 The manual will be secured so that only authorised users are able to effect changes to the content or look and feel of the Website, multi factor authentication is used.
- 6.7 Data is hosted with a professional and reputable UK hosting company and the Contractor assumes full responsibility for the maintenance of that relationship, including any and all payments. Business and Security Certification <https://learn.microsoft.com/en-us/azure/compliance/>

SCHEDULE 1a: Monitoring Schedule

The Contractor will appoint a Lead Consultant to manage the contract and supervise service delivery who will attend twice yearly virtual meetings, to coincide with the children's services procedures manual maintenance review cycle, which provides the opportunity to monitor the service against contractual arrangements.

5. New Development-Foster Carer Handbook Online Procedures

New Development - Foster Carer Handbook Online Procedures

Schedule 1: Service Specification

Aims

To provide a Local Authority with a flexible, compliant, procedures manual that strengthens governance, supports best practice, and enables effective operational delivery.

Objectives

- To develop and maintain a core suite of adaptable procedures that can be tailored to local policy and responsibilities.
- To enable ownership through seamless integration and management of local content.
- To provide a secure, customer-controlled resource library with real-time content management.
- To support effective use of procedures through training, guidance, and usage insight.
- To enhance compliance, oversight, and continuous improvement through expert support .

Scope of Project

The scope covers four main areas:

Development of the Foster Carer Handbook site;
Maintenance of the Foster Carer Handbook site;
Hosting of the Foster Carer Handbook site;
Training and support.

Summary

- Provision of a template Foster Carer Handbook site
- 'Hosting' of Foster Carer Handbook online
- Procedures Consultant time to advise and support in the development, collation and redrafting the content, and incorporation of Customer material for which the customer will retain responsibility for updating such content
- 1 planned review per year, to your handbook

- Email and telephone advice and support from your dedicated Procedures Consultant
 - Access to online resources, including Glossary and National Contacts, key government guidance such as Working Together to Safeguard Children, Keeping Children Safe in Education, National Minimum Standards for Fostering, Adoption, and Quality Standards for Children's Homes.
 - Content User maintained online portal-CMS for local resources and optional reading task allocation/monitoring functionality and compliance
 - Google Analytics – email to be provided by customer
 - Link to Safeguarding Partnership Procedures
 - Provision for single change in the colour scheme of the manual to reflect Customer branding
-
- Archiving of each version of the Foster Carer Handbook
 - Ongoing maintenance (commencing at the conclusion of the first 12 months), providing continued hosting online, 1 planned review per annum with meeting carried out via telephone / conference call. Annual Maintenance of the manual is subject to contract duration.

1. Site Development

- 1.1 A draft Foster Carer Handbook site will be made available online within 5 working days of contractual agreement.
- 1.2 Localisation of content will be scheduled, allowing adequate time for completion of a questionnaire, limited to the sections of information subject to local amendment.
- 1.3 The Contractor will guide in the re-drafting process to achieve procedures reflecting local practice. This agreement provides for consultancy time to support with the development process and launch of the Procedures Manual.
- 1.4 Documents forwarded for inclusion in localised areas will not be reviewed or amended by the Contractor.
- 1.5 Responsibility for locally developed content lies with the Customer.
- 1.6 Responsibility for the reliability of external weblinks supplied by the Customer lies with the Customer.

2. Content, Layout, Style and Functionality

- 2.1 The handbook is designed for use in web-enabled format; it is not designed to be printed or published in 'hard copy'.
- 2.2 If hard copies of the manual are circulated, the Customer is responsible for version control.

- 2.3 The bulk of the handbook will be created a web-enabled format, but the handbook will contain PDF and/or Word versions of documents provided by the Customer.
- 2.4 Hyperlinks provided by the Customer to external websites will be included with responsibility for the reliability of such links being the Customers. Where the Customer notifies of broken links outside of this timetable we reserve the right to quote for any additional work required to re-link these where the information has been supplied originally by the Customer.

3. Portal Area

- 3.1 Documents including PDF's uploaded to the Portal areas of the manual should comply with the government web accessibility guidelines. The responsibility for meeting these standards for local documents lies with the customer.
- 3.2 All local documents uploaded to the Portal areas of the manual should be checked by the customer to ensure, personal and sensitive data is removed. It is the customers duty and responsibility to comply with GDPR

4. Planned Reviews

- 4.1 Responsibility for the ongoing updating of the content of locally developed policies and procedures which are included in the handbook lies with the Customer.
- 4.2 Images/flowcharts provided will be included in their original format, and the Contractor will not be responsible for editing them.
- 4.3 Documents provided for inclusion in PDF/MS Word format (e.g. Guidance, Protocols, Forms), will not be edited by the Contractor.
- 4.4 The Contractor will endeavour to anticipate changes in relevant UK legislation and regulations so that the manual is updated in a timely fashion, as part of planned reviews. Where this is not feasible, the Customer will be advised of a plan for alerting manual users to the changes as quickly as possible after their implementation until they can be incorporated as part of the next planned review.
- 4.5 Content created and owned by the Contractor is passed to the Customer 'on licence', to be used, except for your own (or other people's) commercial gain. The completed handbook is granted on a non-exclusive, non-transferrable licence, solely for the use of the handbook content, including allowing public access to the handbook. This licence does not extend to any third party and is granted in perpetuity.
- 4.6 The handbook will be the subject of one planned review per year.

- 4.7 Meetings will be conducted in relation to each maintenance review to discuss any implications of amendments recommended by the Contractor to reflect recent legislation, court rulings and national guidance in addition to discussing amendments required by the Customer. An updated plan detailing recommendations by the Contractor will be issued in advance of any meeting. The contract does not allow for on-site meetings.
- 4.8 Where the Customer submits amendments to existing procedures, the current online manual procedure should be copied into MS Word and use the 'track changes' facility to show amendments, copying the whole chapter, not just the part to be amended. Each chapter to be saved individually in a Word document.
- 4.8.1 Any changes received which have not been applied in this way will not be processed and will be returned.
- 4.8.2 Any changes submitted on copies of previous versions of the manual will not be processed.
- 4.8.3 Where more than one person submits edits to the same chapter, this must be co-ordinated, with one definitive submission being forwarded to for update.
- 4.9 Enhancements or changes to the layout and style of the handbook are not included as part of the maintenance contract.

5. Unplanned Reviews

- 5.1 The contract does **not** provide for unplanned reviews.

6. Technical Specification

- 6.1 Personal information is not automatically stored or captured, the only information which is automatically stored and captured is the user's IP address. This information is used to provide the Customer with data/activity on the usage of the manual. Any email addresses and other information volunteered by manual users will be treated as confidential but may be used for internal review and to notify registered users about updates to the manual and Contractor services.
- 6.2 The capture, storage and use of personal information will not be made available to any third party without prior permission.
- 6.3 The content of your manual/website will be created in HTML format and will conform to the World Wide Web Consortium XHTML 1.0 Transitional (W3C), and are WCAG Priority 2 AA compliant.
- 6.4 The average delivery time for access will be no more than two seconds when taken at as an average of at least 100 requests.

- 6.5 The manual will deliver pages to the end user via a browser and be viewable and fully functional in:

Internet Explorer
Google Chrome
Mozilla Firefox
Opera Version
Safari Version
Microsoft Edge

- 6.6 The manual will be secured so that only authorised users are able to effect changes to the content or look and feel of the Website, multi factor authentication is used.
- 6.7 Data is hosted with a professional and reputable UK hosting company and the Contractor assumes full responsibility for the maintenance of that relationship, including any and all payments. Business and Security Certification <https://learn.microsoft.com/en-us/azure/compliance/>

Schedule 1a: Monitoring Schedule

The Contractor will appoint a Lead Consultant to manage the contract and supervise service delivery, who will attend virtual meetings. This provides the opportunity to monitor the service against contractual arrangements.

6. Annual Maintenance-Foster Carer Handbook Online Procedures

Annual Maintenance - Foster Carer Handbook Online Procedures

Schedule 1: Service Specification

Aims

To maintain (in partnership with the customer) a flexible, compliant, procedures manual that strengthens governance, supports best practice, and enables effective operational delivery.

Objectives

- To maintain a core suite of adaptable procedures that can be tailored to local policy and responsibilities.

- To enable ownership through seamless integration and management of local content.
- To provide a secure, customer-controlled resource library with real-time content management.
- To support effective use of procedures through training, guidance, and usage insight.
- To enhance compliance, oversight, and continuous improvement through expert support .

Scope of Project

The scope covers two main areas:

Maintenance of the Foster Carer Handbook site;
Hosting of the Foster Carer Handbook site.

Summary

- 'Hosting' of Foster Carer Handbook online
- Procedures Consultant time, including 1 virtual meeting carried out via telephone / conference call
- Email and telephone advice and support from your dedicated Procedures Consultant
- Access to online resources, including Glossary and National Contacts, key government guidance such as Working Together to Safeguard Children, Keeping Children Safe in Education, National Minimum Standards for Fostering, Adoption, and Quality Standards for Children's Homes.
- Content User maintained online portal-CMS for local resources and optional reading task allocation/monitoring functionality and compliance
- Google Analytics – email to be provided by customer
- Link to other customer tri.x procedures, for example Safeguarding Partnership Procedures
- Archiving of each version of the Foster Carer Handbook

1. Content, Layout, Style and Functionality

- 1.1 The handbook is designed for use in web-enabled format; it is not designed to be printed or published in 'hard copy'.
- 1.2 If hard copies of the manual are circulated, the Customer is responsible for version control.

- 1.3 The bulk of the handbook will be created a web-enabled format, but the handbook will contain PDF and/or Word versions of documents provided by the Customer.
- 1.4 Hyperlinks provided by the Customer to external websites will be included with responsibility for the reliability of such links being the Customers. Where the Customer notifies of broken links outside of this timetable we reserve the right to quote for any additional work required to re-link these where the information has been supplied originally by the Customer.

2. Portal Area

- 2.1 Documents including PDF's uploaded to the portal areas of the manual should comply with the government web accessibility guidelines. The responsibility for meeting these standards for local documents lies with the customer.
- 2.2 All local documents uploaded to the Portal areas of the manual should be checked by the customer to ensure, personal and sensitive data is removed. It is the customers duty and responsibility to comply with GDPR.

3. Planned Reviews

- 3.1 Responsibility for the ongoing updating of the content of locally developed policies and procedures which are included in the handbook lies with the Customer.
- 3.2 Images/flowcharts provided will be included in their original format, and the Contractor will not be responsible for editing them.
- 3.3 Documents provided for inclusion in PDF/MS Word format (e.g. Guidance, Protocols, Forms), will not be edited by the Contractor.
- 3.4 The Contractor will endeavour to anticipate changes in relevant UK legislation and regulations so that the manual is updated in a timely fashion, as part of planned reviews. Where this is not feasible, the Customer will be advised of a plan for alerting manual users to the changes as quickly as possible after their implementation until they can be incorporated as part of the next planned review.
- 3.5 Content created and owned by the Contractor is passed to the Customer 'on licence', to be used, except for your own (or other people's) commercial gain. The completed handbook is granted on a non-exclusive, non-transferrable licence, solely for the use of the handbook content, including allowing public access to the handbook. This licence does not extend to any third party and is granted in perpetuity.
- 3.6 The handbook will be the subject of one planned review per year.

- 3.7 Meetings will be conducted in relation to the annual planned review to discuss any implications of amendments recommended by the Contractor to reflect recent legislation, court rulings and national guidance in addition to discussing amendments required by the Customer. An updated plan detailing recommendations by the Contractor will be issued in advance of any meeting. The Contract does not allow for on-site meetings.
- 3.8 Where the Customer submits amendments to existing procedures, the current online manual procedure should be copied into MS Word and use the 'track changes' facility to show amendments, copying the whole chapter, not just the part to be amended. Each chapter to be saved individually in a Word document.
- 3.8.1 Any changes received which have not been applied in this way will not be processed and will be returned.
- 3.8.2 Any changes submitted on copies of previous versions of the manual will not be processed.
- 3.8.3 Where more than one person submits edits to the same chapter, this must be co-ordinated, with one definitive submission being forwarded to for update.
- 3.9 Enhancements or changes to the layout and style of the handbook are not included as part of the maintenance contract.

4. Unplanned Reviews

- 4.1 The contract does **not** provide for unplanned reviews.

5. Technical Specification

- 5.1 Personal information is not automatically stored or captured, the only information which is automatically stored and captured is the user's IP address. This information is used to provide the Customer with data/activity on the usage of the manual. Email addresses and other information volunteered by manual users shall be treated as confidential but may be used for internal review and to notify registered users about updates to the manual and Contractor services.
- 5.2 The capture, storage and use of personal information will not be made available to any third party without prior permission.
- 5.3 The content of your manual/website will be created in HTML format and will conform to the World Wide Web Consortium XHTML 1.0 Transitional (W3C), and are WCAG Priority 2 AA compliant.
- 5.4 The average delivery time for access will be no more than two seconds when taken at as an average of at least 100 requests.

- 5.5 The manual will deliver pages to the end user via a browser and be viewable and fully functional in:

Internet Explorer
Google Chrome
Mozilla Firefox
Opera Version
Safari Version

- 5.6 The manual will be secured so that only authorised users are able to effect changes to the content or look and feel of the Website, multi factor authentication is used.
- 5.7 Data is hosted with a professional and reputable UK hosting company and the Contractor assumes full responsibility for the maintenance of that relationship, including any and all payments. Business and Security Certification <https://learn.microsoft.com/en-us/azure/compliance/>

Schedule 1a: Monitoring Schedule

The Contractor will appoint a Lead Consultant to manage the contract and supervise service delivery, who will attend virtual meetings. This provides the opportunity to monitor the service against contractual arrangements.

7. New Development-Local Safeguarding Children's Partnership Online Procedures

New Development - Local Safeguarding Children's Partnership Online Procedures

Schedule 1: Service Specification

Aims

To provide a Local Authority with a flexible, compliant, procedures manual that strengthens governance, supports best practice, and enables effective operational delivery.

Objectives

- To develop and maintain a core suite of adaptable procedures that can be tailored to local policy and responsibilities.
- To enable ownership through seamless integration and management of local content.
- To provide a secure, customer-controlled resource library with real-time content management.
- To support effective use of procedures through training, guidance, and usage insight.
- To enhance compliance, oversight, and continuous improvement through expert support .

Scope of Project

The scope covers four main areas:

Development of the Procedures Manual site;
Maintenance of the Procedures Manual site;
Hosting of the Procedures Manual site;
Training and support.

Summary

- Based on a set of template procedures reflecting legislation, regulations and good practice
- 'Hosting' of Procedures Manual online

- Procedures Consultant time to advise and support in the development, collation and redrafting the content, and incorporation of Customer material for which the customer will retain responsibility for updating such content
- 1 planned review in the first year
- Online and telephone advice and support from your dedicated Procedures Consultant
- Support to launch the manual virtually which can be recorded for future use or face to face.
- Access to free online resources, including Glossary and National Contacts, key government guidance such as Working Together to Safeguard Children, Keeping Children Safe in Education, National Minimum Standards for Fostering, Adoption, and Quality Standards for Children's Homes.
- User maintained online portal-CMS for local resources and optional reading task allocation/monitoring functionality and compliance
- Google Analytics email account provided by customer
- Link to other customer tri.x procedures, for example Children's Services Procedures
- Provision for single change in the colour scheme of the manual to reflect Customer branding
- Facility for users to register to receive email notification when the manual is updated
 - Archiving of each version of the Procedures Manual
- Urgent' updates which are as a direct result of a Child Death Review, Inspection or serious complaint and changes to local contact details as required
- Ongoing Maintenance Contract (commencing at the conclusion of the first 12 months), providing continued hosting online, 2 scheduled reviews per annum including two meetings carried out via telephone / conference call

1. Development, Drafting and Consultation

- 1.1 On acceptance of this agreement, the Contractor will allocate a Procedures Consultant to work for the duration of the development project. The Customer will be required to identify a Project Leader and a consultative group consisting of relevant managers with authority to agree the content of procedures.
- 1.2 The starting point for the Procedures Manual will be a template set of up-to-date procedures. The standard list can be reorganised but the addition of whole new categories or sections may incur an additional cost.
- 1.3 The draft procedures will be produced in the form of a 'draft' manual, made available online for review as part of the development process.
- 1.4 The Contractor will guide in the re-drafting process to achieve procedures reflecting local practice. This agreement provides for Procedures Consultant time to support with the development process and launch of the Procedures Manual.

- 1.5 The re-drafting process will tailor the template procedures to suit specific needs in the following way:
- a. The merging of content of up to 10 template and Customer procedures which will be formatted in the web style. Responsibility for the ongoing updating of the content of locally developed policies and procedures which are included in your manual lies with the Customer.
 - b. The inclusion of links to websites, intranet or any other material available on the internet required locally will be provided by the Customer.
 - c. The inclusion of links to underpinning documents provided by the Customer.
- 1.6 The Contractor reserves the right to review the price if additional work is required over and above and agree any additional payments with the Customer in writing.

2. Content, Layout, Style and Functionality

- 2.1 The Procedures Manual is designed for use in web-enabled format; it is not designed to be printed or published in 'hard copy'. Individual chapters can be printed for reference only.
- 2.2 If hard copies of the Procedures Manual are circulated, the Customer is responsible for version control.
- 2.3 The bulk of the procedures will be created a web-enabled format, but the Procedures Manual will contain PDF and/or Word versions of documents provided by the Customer e.g. Protocols which can be printed in their original format.
- 2.4 Hyperlinks provided by the Customer to local intranet or external websites will be included in the manual with responsibility for the reliability of such links being the Customers. Broken link checks will be undertaken at each maintenance update. Where the Customer notifies of broken links outside of this timetable we reserve the right to quote for any additional work required to re-link these where the information has been supplied originally by the Customer.
- 2.5 The Procedures Manual will include a facility to allow users to 'Register for Updates' who will be electronically notified when the Procedures Manual is updated. Where the Customer mail server is unable to deliver this alert, it will not be resent.
- 2.6 Customers may include a 'Contact Us' facility within the manual, providing an email address for enquiries to be sent to.

3. Content provided by the Customer

- 3.1 Responsibility for the ongoing updating of the content of locally developed policies and procedures which are included in the Procedures Manual lies with the Customer.
- 3.2 Images/flowcharts provided will be included in their original format, and the Contractor will not be responsible for editing them.
- 3.3 Documents provided for inclusion in PDF/MS Word format (e.g. Guidance, Protocols, Forms), will not be edited by the Contractor.

4. Portal Area

- 4.1 Documents including PDF's uploaded to the Portal areas of the manual should comply with the government web accessibility guidelines. The responsibility for meeting these standards for local documents lies with the customer.
- 4.2 All local documents uploaded to the Portal areas of the manual should be checked by the customer to ensure, personal and sensitive data is removed. It is the customers duty and responsibility to comply with GDPR

5. Planned Reviews

- 5.1 Following the publication of the first edition of the Procedures Manual, the contract provides for 1 planned review during the remainder of the first 12 month period. Where it is not possible to publish the first edition due to delays on the part of the Customer, the review may not be carried forward into Year 2.
- 5.2 The Contractor will endeavour to anticipate changes in relevant UK legislation and regulations so that the Procedures Manual is updated in a timely fashion, as part of planned reviews. Where this is not feasible, the Customer will be advised of a plan for alerting manual users to the changes as quickly as possible after their implementation until they can be incorporated as part of the next planned review.
- 5.3 Meetings will be conducted in relation to each maintenance review to discuss any implications of amendments recommended by the Contractor to reflect recent legislation, court rulings and national guidance in addition to discussing amendments required by the Customer. An updated plan detailing recommendations by the Contractor will be issued in advance of any site meeting. If an onsite meeting is requested and agreed, the Customer will incur an additional cost at a reduced day rate, plus be charged any travel or accommodation expenses. If on-site meetings are cancelled or postponed by the Customer, any non-refundable travel or accommodation expenses will still be charged.

- 5.4 Agreed dates for reviews should be adhered to. If the Customer is unable to provide us with amendments by the previously agreed date, they may lose the opportunity to include them in the review and the review will go ahead incorporating only the amendments that are ready and agreed. If the Customer wishes to delay or reschedule a review this will be subject to agreement by both parties.
- 5.5 Where the Customer submits amendments to existing procedures, the current online manual procedure should be copied into MS Word and use the 'track changes' facility to show amendments, copying the whole chapter, not just the part to be amended. Each chapter to be saved individually in a Word document.
 - 5.5.1 Any changes received which have not been applied in this way will not be processed and will be returned.
 - 5.5.2 Any changes submitted on copies of previous versions of the Procedures Manual will not be processed.
 - 5.5.3 For minor 'generic' amendments, e.g. the change of a team or post title, the change will be made without being submitted via track changes but by issuing a single clear instruction.
 - 5.5.4 Where more than one person submits edits to the same chapter, this must be co-ordinated, with one definitive submission being forwarded to for update.
- 5.6 Enhancements or changes to the layout and style of the Procedures Manual are not included as part of the maintenance contract.
- 5.7 As part of a review, amendments to existing chapters will be made as required. Where new chapters are submitted for inclusion, the Contractor will advise of the most appropriate format for inclusion.

6. Unplanned Reviews

- 6.1 These are reviews required by the Customer, not relating to a change in local contact details and/or not within the definition of urgent, i.e. not resulting from a Child Death Review or an Inspection. Unplanned reviews in advance of an inspection are not, for the purposes of this proposal, defined as urgent.
- 6.2 The contract does **not** provide for unplanned reviews.
- 6.3 Each request for unplanned reviews will be considered on a case by case basis and where appropriate a proposal detailing any additional cost and timescales submitted to the Customer. This will be dependent on the complexity of the request, the amount of time it will take and

whether there is provision in the Contractors production schedule to accommodate the work. Any unplanned work will be by agreement in writing by both parties.

7. Technical Specification

- 7.1 Personal information is not automatically stored or captured, the only information which is automatically stored and captured is the user's IP address. This information is used to provide the Customer with data/activity on the usage of the Procedures Manual. Email addresses and other information volunteered by manual users will be captured for the purposes described in 2.5. This shall be treated as confidential but may be used for internal review and to notify registered users about updates to the Procedures Manual and Contractor services.
- 7.2 The capture, storage and use of personal information will not be made available to any third party without prior permission.
- 7.3 The content of your Procedures Manual/website will be created in HTML format and will conform to the World Wide Web Consortium XHTML 1.0 Transitional (W3C), and are WCAG Priority 2 AA compliant.
- 7.4 The average delivery time for access will be no more than two seconds when taken at as an average of at least 100 requests.
- 7.5 The Procedures Manual will deliver pages to the end user via a browser and be viewable and fully functional in:

- Internet Explorer
- Google Chrome
- Mozilla Firefox
- Opera Version
- Safari Version
- Microsoft Edge

- 7.6 The Procedures Manual will be secured so that only authorised users are able to effect changes to the content or look and feel of the Website, multi factor authentication is used.
- 7.7 Data is hosted with a professional and reputable UK hosting company and the Contractor assumes full responsibility for the maintenance of that relationship, including any and all payments. Business and Security Certification <https://learn.microsoft.com/en-us/azure/compliance/>

Schedule 1a: Monitoring Schedule

The Contractor will appoint a Procedures Consultant to manage the contract and supervise service delivery who will attend virtual meetings, to coincide with the Procedures Manual maintenance review cycle, which provides the opportunity to monitor the service against contractual arrangements.

8. Annual Maintenance-Local Safeguarding Children's Partnership Online Procedures

Annual Maintenance – Local Safeguarding Children's Partnership Online Procedures

Schedule 1: Service Specification

Aims

To maintain (in partnership with the customer) a flexible, compliant, procedures manual that strengthens governance, supports best practice, and enables effective operational delivery.

Objectives

- To maintain a core suite of adaptable procedures that can be tailored to local policy and responsibilities.
- To enable ownership through seamless integration and management of local content.
- To provide a secure, customer-controlled resource library with real-time content management.
- To support effective use of procedures through training, guidance, and usage insight.
- To enhance compliance, oversight, and continuous improvement through expert support .

Scope of Project

The scope covers two main areas:

Maintenance of the Procedures Manual site;
Hosting of the Procedures Manual site.

Summary

- 'Hosting' of Procedures Manual online
- Online and telephone advice and support from your dedicated Procedures Consultant
- Access to free online resources, including Glossary and Contacts, key government guidance such as Working Together to Safeguard Children, Keeping Children Safe in Education, National Minimum Standards for Fostering, Adoption, and Quality Standards for Children's Homes.
- User maintained online portal-CMS for local resources and optional reading task allocation/monitoring functionality and compliance
- Google Analytics email account to be provided by customer
- Link to other customer tri.x procedures, for example Children's Services Procedures
- Facility for users to register to receive email notification when the manual is updated
- Archiving of each version of the Procedures Manual
- Urgent' updates which are as a direct result of a Child Death Review Inspection or serious complaint
- Maintenance of the manual to include 2 scheduled reviews per annum including two virtual meetings carried out via telephone / conference call
- Urgent updates resulting from Inspection or Serious Case Review and changes to local contact details as required

1. Maintenance

- 1.1 The Procedures Manual is designed for use in web-enabled format; it is not designed to be printed or published in 'hard copy'. Individual chapters can be printed for reference only.
- 1.2 If hard copies of the Procedures Manual are circulated, the Customer is responsible for version control.
- 1.3 The bulk of the procedures will be created a web-enabled format, but the Procedures Manual will contain PDF and/or Word versions of documents provided by the Customer e.g. Protocols which can be printed in their original format.
- 1.4 Hyperlinks provided by the Customer to local intranet or external websites will be included in the manual with responsibility for the reliability of such links being the Customers. Broken link checks will be undertaken at each maintenance update. Where the Customer notifies of broken links outside of this timetable we reserve the right to quote for any additional work required to re-link these where the information has been supplied originally by the Customer.
- 1.5 The Procedures Manual will include a facility to allow users to 'Register for Updates' who will be electronically notified when the Procedures Manual is updated. Where the Customer mail server is unable to deliver this alert, it will not be resent.

2. Content provided by the Customer

- 2.1 Responsibility for the ongoing updating of the content of locally developed policies and procedures which are included in the Procedures Manual lies with the Customer.
- 2.2 Images/flowcharts provided will be included in their original format, and the Contractor will not be responsible for editing them.
- 2.3 Documents provided for inclusion in PDF/MS Word format (e.g. Guidance, Protocols, Forms), will not be edited by the Contractor.

3. Portal Area

- 3.1 Documents including PDF's uploaded to the Portal areas of the manual should comply with the government web accessibility guidelines. The responsibility for meeting these standards for local documents lies with the customer.
- 3.2 All local documents uploaded to the Portal areas of the manual should be checked by the customer to ensure, personal and sensitive data is removed. It is the customers duty and responsibility to comply with UK GDPR.

4. Planned Reviews

- 4.1 The contract provides for two reviews per year. Where, it is not possible to publish a review due to delays on the part of the Customer, the review may not be carried forward into the next year.
- 4.2 The Contractor will endeavour to anticipate changes in relevant UK legislation and regulations so that the Procedures Manual is updated in a timely fashion, as part of planned reviews. Where this is not feasible, the Customer will be advised of a plan for alerting manual users to the changes as quickly as possible after their implementation until they can be incorporated as part of the next planned review.
- 4.3 Meetings will be conducted in relation to each maintenance review to discuss any implications of amendments recommended by the Contractor to reflect recent legislation, court rulings and national guidance in addition to discussing amendments required by the Customer. An updated plan detailing recommendations by the Contractor will be issued in advance of any site meeting. If an onsite meeting is requested and agreed, the Customer will incur an additional cost at a reduced day rate, plus be charged any travel or accommodation expenses. If on-site meetings are cancelled or postponed by the Customer, any non-refundable travel or accommodation expenses will still be charged.
- 4.4 Agreed dates for reviews should be adhered to. If the Customer is unable to provide us with amendments by the previously agreed date, they may lose the opportunity to include them in

the review and the review will go ahead incorporating only the amendments that are ready and agreed. If the Customer wishes to delay or reschedule a review this will be subject to agreement by both parties.

- 4.5 Where the Customer submits amendments to existing procedures, the current online manual procedure should be copied into MS Word and use the 'track changes' facility to show amendments, copying the whole chapter, not just the part to be amended. Each chapter to be saved individually in a Word document.
 - 4.5.1 Any changes received which have not been applied in this way will not be processed and will be returned.
 - 4.5.2 Any changes submitted on copies of previous versions of the Procedures Manual will not be processed.
 - 4.5.3 For minor 'generic' amendments, e.g. the change of a team or post title, the change will be made without being submitted via track changes but by issuing a single clear instruction.
 - 4.5.4 Where more than one person submits edits to the same chapter, this must be co-ordinated, with one definitive submission being forwarded to for update.
- 4.6 Enhancements or changes to the layout and style of the Procedures Manual are not included as part of the maintenance contract.
- 4.7 As part of a review, amendments to existing chapters will be made as required. Where new chapters are submitted for inclusion, the Contractor will advise of the most appropriate format for inclusion.

5. Unplanned Reviews

- 5.1 These are reviews required by the Customer, not relating to a change in local contact details and/or not within the definition of urgent, i.e. not resulting from a Child Death Review or an Inspection. Unplanned reviews in advance of an inspection are not, for the purposes of this proposal, defined as urgent.
- 5.2 The contract does **not** provide for unplanned review.
- 5.3 Each request for unplanned reviews will be considered on a case by case basis and where appropriate a proposal detailing any additional cost and timescales submitted to the Customer. This will be dependent on the complexity of the request, the amount of time it will take and whether there is provision in the Contractors production schedule to accommodate the work. Any unplanned work will be by agreement in writing by both parties.

6. Technical Specification

- 6.1 Personal information is not automatically stored or captured, the only information which is automatically stored and captured is the user's IP address. This information is used to provide the Customer with data/activity on the usage of the Procedures Manual. Email addresses and other information volunteered by manual users will be captured for the purposes described in 2.5. This shall be treated as confidential but may be used for internal review and to notify registered users about updates to the Procedures Manual and Contractor services.
- 6.2 The capture, storage and use of personal information will not be made available to any third party without prior permission.
- 6.3 The content of your Procedures Manual/website will be created in HTML format and will conform to the World Wide Web Consortium XHTML 1.0 Transitional (W3C), and are WCAG Priority 2 AA compliant.
- 6.4 The average delivery time for access will be no more than two seconds when taken at as an average of at least 100 requests.
- 6.5 The Procedures Manual will deliver pages to the end user via a browser and be viewable and fully functional in:
- Internet Explorer
 - Google Chrome
 - Mozilla Firefox
 - Opera Version
 - Safari Version
 - Microsoft Edge
- 6.6 The Procedures Manual will be secured so that only authorised users are able to effect changes to the content or look and feel of the Website, multi factor authentication is used.
- 6.7 Data is hosted with a professional and reputable UK hosting company and the Contractor assumes full responsibility for the maintenance of that relationship, including any and all payments. Business and Security Certification <https://learn.microsoft.com/en-us/azure/compliance/>

Schedule 1a: Monitoring Schedule

The Contractor will appoint a Lead Consultant to manage the contract and supervise service delivery who will attend virtual meetings, to coincide with the Procedures Manual maintenance review cycle, which provides the opportunity to monitor the service against contractual arrangements.

9. New Development-Adult Social Care Online Procedures

New Development: Adult Social Care Online Procedures (Procedures, Practice Guidance and Tools for Adult Social Care)

Schedule 1: Service Specification

Aims

To provide a Local Authority with a flexible, compliant, procedures manual that strengthens governance, supports best practice, and enables effective operational delivery.

Objectives

- To develop and maintain a core suite of adaptable procedures that can be tailored to local policy and responsibilities.
- To enable ownership through seamless integration and management of local content.
- To provide a secure, customer-controlled resource library with real-time content management.
- To support effective use of procedures through training, guidance, and usage insight.
- To enhance compliance, oversight, and continuous improvement through expert support .

Scope of Project

The scope covers four main areas:

Development of the Procedures site;
Maintenance of the Procedures site;
Hosting of the Procedures site;
Training and support.

Summary

- Based on a set of template procedures reflecting legislation, regulations and good practice
- 'Hosting' of Procedures online
- Procedures Consultant time to advise and support in the development, collation and redrafting the content, based on a template set of Procedures
- 1 planned review in the first year, including on-site meeting (if required)
- Online and telephone advice and support from your dedicated Procedures Consultant
- Support to launch the Procedures virtually, which can be recorded for future use or face to face
- Access to free online resources, including Practice Tools, Glossary, the Care Act 2014 mini-site and the Mental Capacity Act 2005 Resource and Practice Toolkit
- User maintained online portal-CMS for local resources and optional reading task allocation/monitoring functionality and compliance
- Google Analytics – email to be provided by Customer to enable set up
- Link to other customer tri.x procedures, for example Safeguarding Adult Board Procedures
- Provision for single change in the colour scheme of the site to reflect Customer branding
- Facility for users to register to receive email notification when the site is updated
- Archiving of each version of the Procedures site
- Urgent' reviews which are as a direct result of a Safeguarding Adult Review or Serious Complaint
- Ongoing Maintenance Contract (commencing at the conclusion of the first 12 months), providing continued hosting online, 2 scheduled reviews per annum including 2 meetings carried out via telephone / conference call

1. Development, Drafting and Consultation

- 1.1 On acceptance of this agreement, the Contractor will allocate a Procedures Consultant to work for the duration of the development project. The Customer will be required to identify a Project Leader and a consultative group consisting of relevant managers with authority to agree the content of Procedures.
- 1.2 The starting point for the Procedures site will be a template set of up-to-date Procedures. The standard list can be reorganised but the addition of whole new categories or sections may incur an additional cost.
- 1.3 The draft procedures will be produced in the form of a 'draft' manual, made available online for review as part of the development process.

- 1.4 The Contractor will guide in the re-drafting process to achieve Procedures reflecting local practice. This agreement provides for Procedures Consultant time to support with the development process and launch of the Procedures site.
- 1.5 The re-drafting process will tailor the template Procedures to suit specific needs in the following way:
 - a. Inclusion of local information required for core Procedures as advised by the Consultant appointed by the Contractor (including emails, telephone numbers, and processes).
 - b. The inclusion of links to websites, intranet or any other material available on the internet when requested by the Customer.
 - c. The inclusion of links to underpinning documents provided by the customer.
- 1.6 The Contractor reserves the right to review the price if additional work is required over and above this and agree any additional payments with the Customer in writing.

2. Content, Layout, Style and Functionality

- 2.1 The Procedures site is designed for use in web-enabled format; it is not designed to be printed or published in 'hard copy'. Individual Procedures can be printed for reference only.
- 2.2 If hard copies of the Procedures are circulated, the Customer is responsible for version control.
- 2.3 Hyperlinks provided by the Customer to local intranet or external websites will be included in the site upon request, with responsibility for the reliability of such links being the Customers. Broken link checks will be undertaken at each maintenance update. Where the Customer notifies of broken links outside of this timetable we reserve the right to quote for any additional work required to re-link these where the information has been supplied originally by the Customer.
- 2.4 The Procedures site will include a facility to allow users to 'Register for Updates' who will be electronically notified when the Procedures site is updated. Where the Customer mail server is unable to deliver this alert, it will not be resent.
- 2.5 Customers may include a 'Contact Us' facility within the site, providing an email address for internal enquiries to be sent to.

3. Content provided by the Customer

- 3.1 Responsibility for the ongoing updating of the content of locally developed policies and procedures which are included in the Procedures site lies with the Customer.

- 3.2 Images/flowcharts provided will be included in their original format, and the Contractor will not be responsible for editing them.

4. Portal Area

- 4.1 Documents including PDF's uploaded to the Portal areas of the manual should comply with the government web accessibility guidelines. The responsibility for meeting these standards for local documents lies with the customer.
- 4.2 All local documents uploaded to the Portal areas of the manual should be checked by the customer to ensure, personal and sensitive data is removed. It is the customers duty and responsibility to comply with GDPR.

5. Planned Reviews

- 5.1 Following the publication of the first edition of the Procedures Manual, the contract provides for 1 planned review during the remainder of the first 12 month period. Where it is not possible to publish the first edition due to delays on the part of the Customer, the review may not be carried forward into Year 2.
- 5.2 The Contractor will endeavour to anticipate changes in relevant UK legislation and regulations so that the Procedures Manual is updated in a timely fashion, as part of planned reviews. Where this is not feasible, the Customer will be advised of a plan for alerting manual users to the changes as quickly as possible after the implementation until they can be incorporated as part of the next planned review.
- 5.3 Meetings will be conducted in relation to each maintenance review to discuss any implications of amendments recommended by the Contractor to reflect recent legislation, court rulings and national guidance in addition to discussing amendments required by the Customer. An updated plan detailing recommendations by the Contractor will be issued in advance of any meeting. If an onsite meeting is requested and agreed, the Customer will incur an additional cost at a reduced day rate, plus be charged any travel or accommodation expenses. If on-site meetings are cancelled or postponed by the Customer, any non-refundable travel or accommodation expenses will still be charged.
- 5.4 Agreed dates for reviews should be adhered to. If the Customer is unable to provide us with amendments by the previously agreed date, they may lose the opportunity to include them in the review and the review will go ahead incorporating only the amendments that are ready and agreed. If the Customer wishes to delay or reschedule an review this will be subject to agreement by both parties.
- 5.5 Where the Customer submits amendments to existing procedures, the current online manual procedure should be copied into MS Word and use the 'track changes' facility to show amendments, copying the whole chapter, not just the part to be amended. Each chapter to be saved individually in a Word document.

- 5.5.1 Any changes received which have not been applied in this way will not be processed and will be returned.
 - 5.5.2 Any changes submitted on copies of previous versions of the Procedures Manual will not be processed.
 - 5.5.3 For minor 'generic' amendments, e.g. the change of a team or post title, the change will be made without being submitted via track changes but by issuing a single clear instruction.
 - 5.5.4 Where more than one person submits edits to the same chapter, this must be co-ordinated, with one definitive submission being forwarded to for update.
- 5.6 Enhancements or changes to the layout and style of the Procedures Manual are not included as part of the maintenance contract.
- 5.7 As part of a review, amendments to existing chapters will be made as required. Where new chapters are submitted for inclusion, the Contractor will advise of the most appropriate format for inclusion.

6. Unplanned Reviews

- 6.1 These are reviews required by the Customer, not relating to a change in local contact details and/or not within the definition of urgent, i.e. not resulting from a Safeguarding Adults Review or Serious Complaint.
- 6.2 The contract does **not** provide for unplanned reviews.
- 6.3 Each request for unplanned reviews will be considered on a case by case basis and where appropriate a proposal detailing any additional cost and timescales submitted to the Customer. This will be dependent on the complexity of the request, the amount of time it will take and whether there is provision in the Contractors production schedule to accommodate the work. Any unplanned work will be by agreement in writing by both parties.

7. Technical Specification

- 7.1 Personal information is not automatically stored or captured, the only information which is automatically stored and captured is the user's IP address via Google Analytics. This information is used to provide the Customer with data/activity on the usage of the Procedures Manual. Email addresses and other information volunteered by manual users will be captured for the purposes described in 2.4. This shall be treated as confidential but may be used for internal review and to notify registered users about updates to the Procedures Manual and Contractor services.

- 7.2 The capture, storage and use of personal information via Register for Alerts will not be made available to any third party without prior permission.
- 7.3 The content of your Procedures Manual/website will be created in HTML format and will conform to the World Wide Web Consortium (W3C). The manual is tested and validated against WCAG 2.1 AA compliance.
- 7.4 The average delivery time for access will be no more than two seconds when taken at as an average of at least 100 requests.
- 7.5 The Procedures Manual will deliver pages to the end user via a browser and be viewable and fully functional in:
- Internet Explorer 11
 - Google Chrome
 - Mozilla Firefox
 - Opera Version
 - Safari Version
 - Microsoft Edge
- 7.6 The Procedures Manual will be secured so that only authorised users are able to effect changes to the content or look and feel of the Website, multi factor authentication is used.
- 7.7 Data is hosted with a professional and reputable UK hosting company and the Contractor assumes full responsibility for the maintenance of that relationship, including any and all payments. Business and Security Certification <https://learn.microsoft.com/en-us/azure/compliance/>

Schedule 1a: Monitoring Schedule

The Contractor will appoint a Procedures Consultant to manage the contract and supervise service delivery who will attend virtual meetings , to coincide with the Procedures Manual maintenance review cycle, which provides the opportunity to monitor the service against contractual arrangements.

10. Annual Maintenance-Adult Social Care Online Procedures

Annual Maintenance: Adult Social Care Online Procedures (Procedures, Practice Guidance and Tools for Adult Social Care)

Schedule 1: Service Specification

Aims

To maintain (in partnership with the customer) a flexible, compliant, procedures manual that strengthens governance, supports best practice, and enables effective operational delivery.

Objectives

- To maintain a core suite of adaptable procedures that can be tailored to local policy and responsibilities.
- To enable ownership through seamless integration and management of local content.

- To provide a secure, customer-controlled resource library with real-time content management.
- To support effective use of procedures through training, guidance, and usage insight.
- To enhance compliance, oversight, and continuous improvement through expert support.

Scope of Project

The scope covers two main areas:

Maintenance of the Procedures site;
Hosting of the Procedures site.

Summary

- 'Hosting' of Procedures online
- Online and telephone advice and support from your dedicated Procedures Consultant
- Access to free online resources, including Practice Tools, Glossary, the Care Act 2014 mini-site and the Mental Capacity Act 2005 Resource and Practice Toolkit
- User maintained online portal-CMS for local resources and optional reading task allocation/monitoring functionality and compliance
- Google Analytics – email to be provided by Customer to enable set up
- Link to Safeguarding Adult Board Procedures
- Facility for users to register to receive email notification when the site is updated
- Archiving of each version of the Procedures site
- Urgent' updates which are as a direct result of a Safeguarding Adult Review or Serious Complaint
- Maintenance of the site to include 2 scheduled reviews per annum, updates encompass any changes to legislation, guidance, best practice, case law or any specific requirements, required by the customer and consideration for customer requests for small updates in between scheduled publications.

1. Maintenance

- 1.1 The Procedures site is designed for use in web-enabled format; it is not designed to be printed or published in 'hard copy'. Individual Procedures can be printed for reference only.
- 1.2 If hard copies of the Procedures are circulated, the Customer is responsible for version control.
- 1.3 Hyperlinks provided by the Customer to local intranet or external websites will be included in the site upon request with responsibility for the reliability of such links being the Customers.

Broken link checks will be undertaken at each maintenance update. Where the Customer notifies of broken links outside of this timetable, we reserve the right to quote for any additional work required to re-link these where the information has been supplied originally by the Customer.

- 1.4 The Procedures site will include a facility to allow users to 'Register for Updates' who will be electronically notified when the Procedures site is updated. Where the Customer mail server is unable to deliver this alert, it will not be resent.

2. Content provided by the Customer

- 2.1 Responsibility for the ongoing updating of the content of locally developed policies and procedures which are included in the Procedures Manual lies with the Customer.
- 2.2 Images/flowcharts provided will be included in their original format, and the Contractor will not be responsible for editing them.

3. Portal Area

- 3.1 Documents including PDF's uploaded to the Portal areas of the manual should comply with the government web accessibility guidelines. The responsibility for meeting these standards for local documents lies with the customer.
- 3.2 All local documents uploaded to the Portal areas of the manual should be checked by the customer to ensure, personal and sensitive data is removed. It is the customers duty and responsibility to comply with GDPR.

4. Planned Reviews

- 4.1 Two planned reviews will take place each annum. Where it is not possible to publish a review on time due to delays on the part of the Customer, the review may not be carried forward into the next year.
- 4.2 The Contractor will endeavour to anticipate changes in relevant UK legislation and regulations so that the Procedures site is updated in a timely fashion, as part of planned reviews. Where this is not feasible, the Customer will be advised of a plan for alerting individual users to the changes as quickly as possible after their implementation until they can be incorporated as part of the next planned review.
- 4.3 Meetings will be conducted in relation to each maintenance review to discuss any implications of amendments recommended by the Contractor to reflect recent legislation, court rulings and national guidance in addition to discussing amendments required by the Customer. An updated

plan detailing recommendations by the Contractor will be issued in advance of any meeting. If an onsite meeting is requested and agreed, the Customer will incur an additional cost at a reduced day rate, plus be charged any travel or accommodation expenses. If on-site meetings are cancelled or postponed by the Customer, any non-refundable travel or accommodation expenses will still be charged.

- 4.4 Agreed dates for reviews should be adhered to. If the Customer is unable to provide us with amendments by the previously agreed date, they may lose the opportunity to include them in the review and the review will go ahead incorporating only the amendments that are ready and agreed. If the Customer wishes to delay or reschedule a review this will be subject to agreement by both parties.
- 4.5 Where the Customer submits amendments to existing Procedures, the current online procedure should be copied into MS Word and the 'track changes' facility used to show amendments. The whole procedure should be copied, not just the section to be amended. Each procedure to be saved individually in a Word document.
 - 4.5.1 Any changes received which have not been applied in this way will not be processed and will be returned.
 - 4.5.2 Any changes submitted on copies of previous versions of the Procedures site will not be processed.
 - 4.5.3 For minor 'generic' amendments, e.g. the change of a team or post title, the change can be made without being submitted via track changes but by issuing a single clear instruction.
 - 4.5.4 Where more than one person submits edits to the same procedure, this must be co-ordinated, with one definitive submission being forwarded to for update.
- 4.8 Enhancements or changes to the layout and style of the Procedures site are only included as part of the maintenance contract when there has been an internal restructuring of adult social care services.
- 4.9 As part of a review, amendments to existing Procedures will be made as required. Where new Procedures are submitted for inclusion, the Contractor will advise of the most appropriate format for inclusion-this is usually in the user maintained Document Library.

5. Unplanned Reviews

- 5.1 These are reviews required by the Customer, not relating to a change in local contact details and/or not within the definition of urgent, i.e. not resulting from a Safeguarding Adults Review or Serious Complaint.

- 5.2 The contract does **not** provide for unplanned reviews.
- 5.3 Each request for unplanned reviews will be considered on a case by case basis and where appropriate a proposal detailing any additional cost and timescales submitted to the Customer. This will be dependent on the complexity of the request, the amount of time it will take and whether there is provision in the Contractors production schedule to accommodate the work. Any unplanned work will be by agreement in writing by both parties.

6. Technical Specification

- 6.1 Personal information is not automatically stored or captured, the only information which is automatically stored and captured is the user's IP address. This information is used to provide the Customer with data/activity on the usage of the Procedures site. Email addresses and other information volunteered by users will be captured for the purposes described in 1.4. This shall be treated as confidential but may be used for internal review and to notify registered users about updates to the Procedures site and Contractor services.
- 6.2 The capture, storage and use of personal information will not be made available to any third party without prior permission.
- 6.3 The content of your Procedures site will be created in HTML format and will conform to the World Wide Web Consortium XHTML 1.0 Transitional (W3C) and are WCAG Priority 2 AA compliant.
- 6.4 The average delivery time for access will be no more than two seconds when taken at as an average of at least 100 requests.
- 6.5 The Procedures site will deliver pages to the end user via a browser and be viewable and fully functional in:
 - Internet Explorer
 - Google Chrome
 - Mozilla Firefox
 - Opera Version
 - Safari Version
- 6.6 The Procedures site will be secured so that only authorised users are able to effect changes to the content or look and feel of the Website, multi factor authentication is used.
- 6.7 Data is hosted with a professional and reputable UK hosting company and the Contractor assumes full responsibility for the maintenance of that relationship, including any and all payments. Business and Security Certification <https://learn.microsoft.com/en-us/azure/compliance/>

Schedule 1a: Monitoring Schedule

The Contractor will appoint a Procedures Consultant to manage the contract and supervise service delivery who will attend virtual meetings, to coincide with the Procedures Manual maintenance review cycle, which provides the opportunity to monitor the service against contractual arrangements.

11. New Development-Local Safeguarding Adults Board Online Procedures

New Development: Safeguarding Adults Board Online Procedures

Schedule 1: Service Specification

Aims

To provide a Local Authority with a flexible, compliant, procedures manual that strengthens governance, supports best practice, and enables effective operational delivery.

Objectives

- To develop and maintain a core suite of adaptable procedures that can be tailored to local policy and responsibilities.
- To enable ownership through seamless integration and management of local content.
- To provide a secure, customer-controlled resource library with real-time content management.
- To support effective use of procedures through training, guidance, and usage insight.
- To enhance compliance, oversight, and continuous improvement through expert support.

Scope of Project

The scope covers four main areas:

Development of the Procedures site;
Maintenance of the Procedures site;
Hosting of the Procedures site;
Training and support.

Summary

- Based on a set of template procedures reflecting legislation, regulations and good practice
- 'Hosting' of Procedures online
- Procedures Consultant time to advise and support in the development (localisation of core template Procedures, inclusion of local Procedures and materials)
- 1 planned review in the first year, including virtual or on site meeting (if required)
- Online and telephone advice and support from your dedicated Procedures Consultant

- Support to launch the manual virtually , which can be recorded for future use or face to face.
- Access to free online resources; The Care Act 2014 mini-site, The Mental Capacity Act 2005 Resource and Practice Toolkit, Glossary
- User maintained online portal-CMS for local resources and optional reading task allocation/monitoring functionality and compliance
- Link to Safeguarding Adults Board website
- Link to/from tri.x Procedures, Practice Guidance and Tools for Adult Social Care site (where applicable)
- Google Analytics-email to be provided by Customer to enable set up
- Provision for single change in the colour scheme of the site to reflect Customer branding
- Facility for users to register to receive email notification when the site is updated
- Archiving of each version of the Procedures site
- Urgent updates which are as a direct result of a Safeguarding Adult Review or Serious Complaint
- Ongoing Maintenance Contract (commencing at the conclusion of the first 12 months), providing continued hosting online, 2 scheduled reviews per annum including one virtual meeting (if required)

1. Development, Drafting and Consultation

- 1.1 On acceptance of this agreement, the Contractor will allocate a Procedures Consultant to work for the duration of the development project. The Customer will be required to identify a Project Leader with authority to agree the local content of the Procedures.
- 1.2 The starting point for the Procedures site will be a core template set of up-to-date Procedures.
- 1.3 The Contractor will guide in the appropriate and proportionate localisation of the core template Procedures, and how best to incorporate any additional Procedures of the Customer into the site.
- 1.4 The development process will tailor the core template Procedures to suit specific needs in the following way:
 - a. The formatting of locally developed policies and Procedures where core template procedures do not already exist.
 - b. The inclusion of local information (e.g. emails, telephone numbers) and links to websites, intranet or any other material available on the internet when requested by the Customer.

- c. The inclusion of links to underpinning documents provided by the Customer.
- 1.5 The Contractor reserves the right to review the price if additional work is required over and above this and agree any additional payments with the Customer in writing.

2. Content, Layout, Style and Functionality

- 2.1 The Safeguarding Adults Board Procedures site is designed for use in web-enabled format; it is not designed to be printed or published in 'hard copy'. Individual Procedures can be printed for reference only.
- 2.2 If hard copies of the Procedures are circulated, the Customer is responsible for version control.
- 2.3 Hyperlinks provided by the Customer to local intranet or external websites will be included in the site upon request with responsibility for the reliability of such links being the Customers. Broken link checks will be undertaken at each maintenance review. Where the Customer notifies of broken links outside of this timetable we reserve the right to quote for any additional work required to re-link these where the information has been supplied originally by the Customer.
- 2.4 The Procedures site will include a facility to allow users to 'Register for Updates' who will be electronically notified when the Procedures site is updated. Where the Customer mail server is unable to deliver this alert, it will not be resent.
- 2.5 Customers may include a 'Contact Us' facility within the site, providing an email address for internal enquiries to be sent to.

3. Content provided by the Customer

- 3.1 Images/flowcharts provided will be included in their original format, and the Contractor will not be responsible for editing them.
- 3.2 Responsibility for the review and updating of local Policies or Procedures formatted into the site lies solely with the Customer. They will not be edited by the Contractor.
- 3.3 Responsibility for the updating of local information (e.g. emails, telephone numbers) and links to websites, intranet or any other material available on the internet which is embedded into the core template Procedures lies solely with the Customer.
- 3.4 All local supporting documents included in the user maintained Documents Library will not be edited by the Contractor.

4. Portal Area

- 4.1 Documents uploaded to the Portal area should comply with the government's web accessibility guidelines. This includes PDF documents. The responsibility for meeting these standards for local documents lies with the Customer.
- 4.2 The Customer must ensure that all documents uploaded to the Portal area do not breach GDPR/Data Protection legislation. Documents should be checked by the Customer to ensure all personal and sensitive data is removed. The Contractor will not undertake such checks nor take responsibility should a breach occur.

5. Planned Reviews

- 5.1 Following the first publication of the Procedures site, the contract provides for 1 planned review during the remainder of the first 12 month period. Where it is not possible to publish the first edition due to delays on the part of the Customer, the review may not be carried forward into Year 2.
- 5.2 The Contractor will be responsible for updating the generic content of the core template Procedures only. The Contractor will endeavour to anticipate changes in relevant UK legislation and regulations so that the Procedures site is updated in a timely fashion, as part of planned reviews. Where this is not feasible, the Customer will be advised of a plan for alerting individual users to the changes as quickly as possible after their implementation until they can be incorporated as part of the next planned review.
- 5.3 Meetings will be conducted when requested by the Customer in relation to maintenance review (to discuss any implications of amendments to be made by the Contractor to reflect recent legislation, court rulings and national guidance in addition to discussing amendments required by the Customer). An update plan detailing amendments to be made by the Contractor will be issued in advance of any virtual meeting.
- 5.4 Agreed dates for reviews should be adhered to. If the Customer is unable to provide us with amendments by the previously agreed date, they may lose the opportunity to include them in the review and the review will go ahead incorporating only the amendments that are ready and agreed. If the Customer wishes to delay or reschedule a review this will be subject to agreement by both parties.
- 5.5 Where the Customer submits amendments to existing Procedures, the current online procedure should be copied into MS Word and the 'track changes' facility used to show amendments. The whole procedure should be copied, not just the section to be amended. Each procedure to be saved individually in a Word document.
 - 5.5.1 Any changes received which have not been applied in this way will not be processed and will be returned.

- 5.5.2 Any changes submitted on copies of previous versions of the Procedures site will not be processed.
- 5.5.3 For minor 'generic' amendments, e.g. the change of a team or post title, the change can be made without being submitted via track changes but by issuing a single clear instruction.
- 5.5.4 Where more than one person submits edits to the same procedure, this must be co-ordinated, with one definitive submission being forwarded to for update.
- 5.6 Enhancements or changes to the layout and style of the Procedures site are not included as part of the maintenance contract.
- 5.7 As part of a review, amendments to existing Procedures will be made as required. Where new Procedures are submitted for inclusion, the Contractor will advise of the most appropriate format for inclusion-this is usually in the user maintained Document Library.

6. Unplanned Reviews

- 6.1 These are reviews required by the Customer, not relating to a change in local contact details and/or not within the definition of urgent, i.e. not resulting from a Safeguarding Adults Review or Serious Complaint.
- 6.2 The contract does **not** provide for unplanned reviews.
- 6.3 Each request for unplanned reviews will be considered on a case by case basis and where appropriate a proposal detailing any additional cost and timescales submitted to the Customer. This will be dependent on the complexity of the request, the amount of time it will take and whether there is provision in the Contractors production schedule to accommodate the work. Any unplanned work will be by agreement in writing by both parties.

7. Technical Specification

- 7.1 Personal information is not automatically stored or captured, the only information which is automatically stored and captured is the user's IP address. This information is used to provide the Customer with data/activity on the usage of the Procedures site. Email addresses and other information volunteered by users will be captured for the purposes described in 2.4. This shall be treated as confidential but may be used for internal review and to notify registered users about updates to the Procedures site and Contractor services.
- 7.2 The capture, storage and use of information will not be made available to any third party without prior permission.
- 7.3 The content of your Procedures site will be created in HTML format and will conform to the World Wide Web Consortium XHTML 1.0 Transitional (W3C), and are WCAG Priority 2 AA compliant.

- 7.4 The average delivery time for access will be no more than two seconds when taken at as an average of at least 100 requests.
- 7.5 The Procedures will deliver pages to the end user via a browser and be viewable and fully functional in:
- Internet Explorer
 - Google Chrome
 - Mozilla Firefox
 - Opera Version
 - Safari Version
 - Microsoft Edge
- 7.6 The Procedures site will be secured so that only authorised users are able to effect changes to the content of the Website, multi factor authentication is used.
- 7.7 Data is hosted with a professional and reputable UK hosting company and the Contractor assumes full responsibility for the maintenance of that relationship, including any and all payments. Business and Security Certification
<https://learn.microsoft.com/en-us/azure/compliance/>

Schedule 1a: Monitoring Schedule

The Contractor will appoint a Procedures Consultant to manage the contract and supervise service delivery who will attend virtual meetings, to coincide with the Procedures Manual maintenance review cycle, which provides the opportunity to monitor the service against contractual arrangements.

12. Annual Maintenance-Local Safeguarding Adults Board Online Procedures

Annual Maintenance: Safeguarding Adults Board Online Procedures

Schedule 1: Service Specification

Aims

To maintain (in partnership with the customer) a flexible, compliant, procedures manual that strengthens governance, supports best practice, and enables effective operational delivery.

Objectives

- To maintain a core suite of adaptable procedures that can be tailored to local policy and responsibilities.
- To enable ownership through seamless integration and management of local content.
- To provide a secure, customer-controlled resource library with real-time content management.
- To support effective use of procedures through training, guidance, and usage insight.
- To enhance compliance, oversight, and continuous improvement through expert support.

Scope of Project

The scope covers two main areas:

Maintenance of the Procedures site;
Hosting of the Procedures site.

Summary

- 'Hosting' of Procedures online
- Online and telephone advice and support from your dedicated Procedures Consultant
- Link to Safeguarding Adults Board website
- Link to/from tri.x Procedures, Practice Guidance and Tools for Adult Social Care site (where applicable)
- User maintained online portal-CMS for local resources and optional reading task allocation/monitoring functionality and compliance
- Access to free online resources; The Care Act 2014 mini-site, The Mental Capacity Act 2005 Resource and Practice Toolkit, Glossary
- Google Analytics-email to be provided by Customer to enable set up
- Facility for users to register to receive email notification when the site is updated
- Archiving of each version of the Procedures site
- Urgent updates which are as a direct result of a Safeguarding Adult Review or Serious Complaint
- 2 scheduled reviews per annum, updates encompass any changes to legislation, guidance, best practice, case law or any specific requirements, required by the customer and consideration for customer requests for small updates in between scheduled publications.

1. Maintenance

- 1.1 The Safeguarding Adults Board Procedures site is designed for use in web-enabled format; it is not designed to be printed or published in 'hard copy'. Individual Procedures can be printed for reference only.
- 1.2 If hard copies of the Procedures are circulated, the Customer is responsible for version control.
- 1.3 Hyperlinks provided by the Customer to local intranet or external websites will be included in the site upon request with responsibility for the reliability of such links being the Customers. Broken link checks will be undertaken at each maintenance update. Where the Customer notifies of broken links outside of this timetable, we reserve the right to quote for any

additional work required to re-link these where the information has been supplied originally by the Customer.

- 1.4 The Procedures site will include a facility to allow users to 'Register for Updates' who will be electronically notified when the Procedures site is updated. Where the Customer mail server is unable to deliver this alert, it will not be resent.
- 1.5 Customers may include a 'Contact Us' facility within the site, providing an email address for internal enquiries to be sent to.

2. Content provided by the Customer

- 2.1 Images/flowcharts provided will be included in their original format, and the Contractor will not be responsible for editing them.
- 2.2 Responsibility for the review and updating of local Policies or Procedures formatted into the site lies solely with the Customer. They will not be edited by the Contractor.
- 2.3 Responsibility for the updating of local information (e.g. emails, telephone numbers) and links to websites, intranet or any other material available on the internet which is embedded into the core template Procedures lies solely with the Customer.
- 2.4 All local supporting documents included in the user maintained Documents Library will not be edited by the Contractor.

3. Portal Area

- 3.1 Documents uploaded to the portal should comply with the government's web accessibility guidelines. This includes PDF documents. The responsibility for meeting these standards for local documents lies with the Customer.
- 3.2 The Customer must ensure that all documents uploaded to the portal do not breach GDPR/Data Protection legislation. Documents should be checked by the Customer to ensure all personal and sensitive data is removed. The Contractor will not undertake such checks, nor take responsibility should a breach occur.

4. Planned Reviews

- 4.1 Two reviews will be scheduled per annum. Where it is not possible to publish the review on time due to delays on the part of the Customer, the update may not be carried forward into the following year.
- 4.2 The Contractor will be responsible for updating the generic content of the core template Procedures only. The Contractor will endeavour to anticipate changes in relevant UK legislation and regulations so that the Procedures site is updated in a timely fashion, as part of planned reviews. Where this is not feasible, the Customer will be advised of a plan for alerting individual

users to the changes as quickly as possible after their implementation until they can be incorporated as part of the next planned review.

- 4.3 One 'virtual' meeting per annum can be conducted when requested by the Customer in relation to maintenance review (to discuss any implications of amendments to be made by the Contractor to reflect recent legislation, court rulings and national guidance in addition to discussing amendments required by the Customer). An update plan detailing amendments to be made by the Contractor will be issued in advance of any virtual meeting.
- 4.4 Agreed dates for reviews should be adhered to. If the Customer is unable to provide us with amendments by the previously agreed date, they may lose the opportunity to include them in the review and the update will go ahead incorporating only the amendments that are ready and agreed. If the Customer wishes to delay or reschedule a review this will be subject to agreement by both parties.
- 4.5 Where the Customer submits amendments to existing Procedures, the current online procedure should be copied into MS Word and the 'track changes' facility used to show amendments. The whole procedure should be copied, not just the section to be amended. Each procedure to be saved individually in a Word document.
 - 4.5.1 Any changes received which have not been applied in this way will not be processed and will be returned.
 - 4.5.2 Any changes submitted on copies of previous versions of the Procedures site will not be processed.
 - 4.5.3 For minor 'generic' amendments, e.g. the change of a team or post title, the change can be made without being submitted via track changes but by issuing a single clear instruction.
 - 4.5.4 Where more than one person submits edits to the same procedure, this must be co-ordinated, with one definitive submission being forwarded to for update.
- 4.6 Enhancements or changes to the layout and style of the Procedures site are not included as part of the maintenance contract.
- 4.7 As part of a review, amendments to existing Procedures will be made as required. Where new Procedures are submitted for inclusion, the Contractor will advise of the most appropriate format for inclusion-this is usually in the user maintained Document Library.

5. Unplanned Reviews

- 5.1 These are reviews required by the Customer, not relating to a change in local contact details and/or not within the definition of urgent, i.e. not resulting from a Serious Case Review or an Inspection.

5.2 The contract does **not** provide for unplanned reviews.

5.3 Each request for unplanned reviews will be considered on a case by case basis and where appropriate a proposal detailing any additional cost and timescales submitted to the Customer. This will be dependent on the complexity of the request, the amount of time it will take and whether there is provision in the Contractors production schedule to accommodate the work. Any unplanned work will be by agreement in writing by both parties.

6. Technical Specification

6.1 Personal information is not automatically stored or captured, the only information which is automatically stored and captured is the user's IP address. This information is used to provide the Customer with data/activity on the usage of the Procedures site. Email addresses and other information volunteered by users will be captured for the purposes described in 1.4. This shall be treated as confidential but may be used for internal review and to notify registered users about updates to the Procedures site and Contractor services.

6.2 The capture, storage and use of information will not be made available to any third party without prior permission.

6.3 The content of your Procedures site will be created in HTML format and will conform to the World Wide Web Consortium XHTML 1.0 Transitional (W3C) and are WCAG Priority 2 AA compliant.

6.4 The average delivery time for access will be no more than two seconds when taken at as an average of at least 100 requests.

6.5 The Procedures will deliver pages to the end user via a browser and be viewable and fully functional in:

- Internet Explorer
- Google Chrome
- Mozilla Firefox
- Opera Version
- Safari Version
- Microsoft Edge

6.6 The Procedures site will be secured so that only authorised users are able to effect changes to the content of the Website, multi factor authentication is used.

6.7 Data is hosted with a professional and reputable UK hosting company and the Contractor assumes full responsibility for the maintenance of that relationship, including any and all

payments. Business and Security Certification <https://learn.microsoft.com/en-us/azure/compliance/>

Schedule 1a: Monitoring Schedule

The Contractor will appoint a Procedures Consultant to manage the contract and supervise service delivery who will attend virtual meetings, to coincide with the Procedures Manual maintenance review cycle, which provides the opportunity to monitor the service against contractual arrangements.

13. New Development-Adult Care Providers Handbook

New Development: Adult Care Providers Handbook

Schedule 1 Service Specification

Aims

To provide a Local Authority with a flexible, compliant, procedures manual that strengthens governance, supports best practice, and enables effective operational delivery.

Objectives

- To develop and maintain a core suite of adaptable procedures that can be tailored to local policy and responsibilities.
- To enable ownership through seamless integration and management of local content.
- To provide a secure, customer-controlled resource library with real-time content management.
- To support effective use of procedures through training, guidance, and usage insight.
- To enhance compliance, oversight, and continuous improvement through expert support.

Scope of Project

The scope covers four main areas:

Development of the Provider Handbook site;
Maintenance of the Provider Handbook site;
Hosting of the Provider Handbook site;
Training and support.

Summary

- Based on a set of template procedures reflecting legislation, regulations and good practice
- Facility for logo and primary colour choice to reflect brand identity
- Optional secure login facility
- 'Hosting' of the provider handbook online
- User maintained online portal-CMS for local resources and optional reading task allocation/monitoring functionality and compliance
- Access to free tri.x online resources; The Care Act 2014 mini-site, The Mental Capacity Act 2005 Resource and Practice Toolkit, Glossary
- Direct links to a range of Skills for Care and Care Quality Commission online resources
- Chapters centrally updated by tri.x as set out in clause 5
- Updated chapters automatically added as a reading task to registered users
- Archiving after each update
- Google Analytics-subject to email being provided by Customer.

1. Development and Consultation

- 1.1 On acceptance of this agreement, and subject to the required information set out in 1.5 being provided by the Customer, a Provider Handbook will be made available online within 10 working days.
- 1.2 Instructions for the use of the locally managed Hub Portal - CMS and reading tasks will be forwarded with the link to the live Provider Handbook site.
- 1.3 There is no facility for the inclusion of local additions or amendments to the template material, other than the formatting of the Customer's Statement/s of Purpose.
- 1.4 The Provider Handbook will be a template set of up-to-date guidance.
- 1.5 Required information:
 - Statement/s of Purpose
 - Customer logo
 - Customer's primary Colour Choice (RGB/Hex or 'match to logo')
 - Name and email of Customer's System Administrator/s
 - Whether the Handbook is to be private (password protected)
 - Links to any online Multi-Agency Safeguarding Adults Board Procedures
 - Google email for analytics (if required by Customer).

2. Content, Layout, Style and Functionality

- 2.1 The Provider Handbook is designed for use in web-enabled format; it is not designed to be printed or published in 'hard copy'.
- 2.2 Any hard copies of the site or individual chapters made are the responsibility of the Customer who is responsible for version control. The Contractor recommends hard copies should not be retained longer than 72 hours after printing.
- 2.3 Hyperlinks uploaded to the Portal-CMS function by the Customer to external websites will be the responsibility of the Customer with reference to reliability and suitability.

3. Content provided by the Customer

- 3.1 The Statement/s of Purpose will be formatted as provided by the Customer. The Customer should ensure specific formatting requirements are clear and that grammar and spelling are correct.
- 3.2 The Statement/s of Purpose will not be edited by the Contractor.

4. Portal Area

- 4.1 At all stages responsibility for updating of the content of local portal inclusions lies with the Customer.
- 4.2 Documents including PDF's uploaded to the portal areas of the site should comply with the government web accessibility guidelines. The responsibility for meeting these standards for local documents lies with the Customer.
- 4.3 All local documents uploaded to the portal-CMS areas of the Provider Handbook should be checked by the Customer to ensure, personal and sensitive data is removed. It is the Customers duty and responsibility to comply with GDPR.

5. Reviews

- 5.1 The Customer is responsible for **reviewing** and maintaining the portal areas and any local resources.
- 5.2 The Contractor will endeavour to anticipate changes in relevant UK legislation and regulations so that the Provider Handbook is updated when it needs to be, in a timely fashion.

6. Technical Specification

- 6.1 Personal information is not automatically stored or captured, the only information which is automatically stored and captured is the user's IP address via Google Analytics. This information is used to provide the Customer with data/activity on the usage of the Provider Handbook.
- 6.2 The content of your website will be created in HTML format and will conform to the World Wide Web Consortium (W3C). The website and is tested and validated against WCAG 2.1 AA compliance.
- 6.3 The average delivery time for access will be no more than two seconds when taken at as an average of at least 100 requests.
- 6.4 The website will deliver pages to the end user via a browser and be viewable and fully functional in:

- Internet Explorer 11
- Google Chrome
- Mozilla Firefox
- Opera Version
- Safari Version

Microsoft Edge

- 6.5 The website will be secured so that only authorised users are able to effect changes to the content of the website, multi factor authentication is used.
- 6.6 Data is hosted with a professional and reputable UK hosting company and the Contractor assumes full responsibility for the maintenance of that relationship, including any and all payments. Business and Security Certification <https://learn.microsoft.com/en-us/azure/compliance/>

Schedule 1a: Monitoring Schedule

The Contractor will appoint a Lead Consultant to manage the contract and supervise service delivery.

14. Annual Maintenance-Adult Care Providers Handbook

Annual Maintenance: Adult Care Providers Handbook

Schedule 1 Service Specification

Aims

To maintain (in partnership with the customer) a flexible, compliant, procedures manual that strengthens governance, supports best practice, and enables effective operational delivery.

Objectives

- To maintain a core suite of adaptable procedures that can be tailored to local policy and responsibilities.
- To enable ownership through seamless integration and management of local content.
- To provide a secure, customer-controlled resource library with real-time content management.
- To support effective use of procedures through training, guidance, and usage insight.
- To enhance compliance, oversight, and continuous improvement through expert support.

Scope of Project

The scope covers two main areas:

Maintenance of the Provider Handbook site;
Hosting of the Provider Handbook site.

Summary

- Optional secure login facility
- 'Hosting' of the provider handbook online
- User maintained online portal-CMS for local resources and optional reading task allocation/monitoring functionality and compliance
- Access to free tri.x online resources; The Care Act 2014 mini-site, The Mental Capacity Act 2005 Resource and Practice Toolkit, Glossary
- Direct links to a range of Skills for Care and Care Quality Commission online resources
- Chapters centrally updated by tri.x as set out in clause 4

- Updated chapters automatically added as a reading task to registered users
- Archiving after each review
- Google Analytics-subject to email being provided by Customer.

1. Content, Layout, Style and Functionality

- 1.1 The Provider Handbook is designed for use in web-enabled format; it is not designed to be printed or published in 'hard copy'.
- 1.2 Any hard copies of the site or individual chapters made are the responsibility of the Customer who is responsible for version control. The Contractor recommends hard copies should not be retained longer than 72 hours after printing.
- 1.3 Hyperlinks uploaded to the portal-CMS function by the Customer to external websites will be the responsibility of the Customer with reference to reliability and suitability.

2. Content provided by the Customer

- 2.1 There is no facility for the inclusion of local additions or amendments to the template material, other than the formatting of the Customer's Statement/s of Purpose.
- 2.2 Revised or additional Statement/s of Purpose will be formatted as provided by the Customer. The Customer should ensure specific formatting requirements are clear and that grammar and spelling are correct.
- 2.3 The Statement/s of Purpose will not be edited by the Contractor.

3. Portal Area

- 3.1 At all stages responsibility for updating of the content of local portal inclusions lies with the Customer.
- 3.2 Documents including PDF's uploaded to the portal areas of the site should comply with the government web accessibility guidelines. The responsibility for meeting these standards for local documents lies with the Customer.
- 3.3 All local documents uploaded to the portal areas of the Provider Handbook should be checked by the Customer to ensure, personal and sensitive data is removed. It is the Customers duty and responsibility to comply with GDPR.

4. Reviews

- 4.1 The Customer is responsible for [reviewing](#) and maintaining the portal-CMS areas and any local resources.

- 4.2 The Contractor will endeavour to anticipate changes in relevant UK legislation and regulations so that the Provider Handbook is updated when it needs to be, in a timely fashion.

5. Technical Specification

- 5.1 Personal information is not automatically stored or captured, the only information which is automatically stored and captured is the user's IP address via Google Analytics. This information is used to provide the Customer with data/activity on the usage of the Provider Handbook.
- 5.2 The content of your website will be created in HTML format and will conform to the World Wide Web Consortium (W3C). The website and is tested and validated against WCAG 2.1 AA compliance.
- 5.3 The average delivery time for access will be no more than two seconds when taken at as an average of at least 100 requests.
- 5.4 The website will deliver pages to the end user via a browser and be viewable and fully functional in:
- Internet Explorer 11
 - Google Chrome
 - Mozilla Firefox
 - Opera Version
 - Safari Version
 - Microsoft Edge
- 5.5 The website will be secured so that only authorised users are able to effect changes to the content of the website, multi factor authentication is used.
- 5.6 Data is hosted with a professional and reputable UK hosting company and the Contractor assumes full responsibility for the maintenance of that relationship, including any and all payments. Business and Security Certification <https://learn.microsoft.com/en-us/azure/compliance/>

SCHEDULE 1a

Monitoring Schedule

The Contractor will appoint a Lead Consultant to manage the contract and supervise service delivery.

15. New Development-Regional Adoption Agency Online Procedures

New Development: Regional Adoption Agency Online Procedures

Schedule 1 Service Specification

Aims

To provide a Local Authority with a flexible, compliant, procedures manual that strengthens governance, supports best practice, and enables effective operational delivery.

Objectives

- To develop and maintain a core suite of adaptable procedures that can be tailored to local policy and responsibilities.
- To enable ownership through seamless integration and management of local content.
- To provide a secure, customer-controlled resource library with real-time content management.
- To support effective use of procedures through training, guidance, and usage insight.
- To enhance compliance, oversight, and continuous improvement through expert support.

Scope of Project

The scope covers four main areas:

Development of the procedures manual site;
Maintenance of the procedures manual site;
Hosting of the procedures manual site;
Training and support.

Summary

- Based on a set of template procedures reflecting legislation, regulations and good practice
- 'Hosting' of Regional Adoption Agency procedures manual online
- Allocated Lead Procedures Consultant to advise and support in the development, collation and redrafting the content, and incorporation of Customer material for which the customer will retain responsibility for updating such content
- 1 planned review in the first year. Reviews will be conducted via email and telephone
- Online and telephone advice and support from your dedicated Procedures Consultant
- Access to free online resources, including Glossary and National Contacts, key government guidance such as Working Together to Safeguard Children, Keeping Children Safe in Education, National Minimum Standards for Fostering, Adoption, and Quality Standards for Children's Homes.
- Content User maintained online portal-CMS for local resources and optional reading task allocation/monitoring functionality and compliance
- Google Analytics – email to be supplied by customer
- Link to other customer tri.x procedures, for example Adult Social Care (if available online)
- Facility for users to register to receive email notification when the manual is updated
- Archiving of each version of the procedures manual
- Urgent' updates which are as a direct result of a Child Death Review, Inspection or serious complaint
- Ongoing Maintenance Contract (commencing at the conclusion of the first 12 months), providing continued hosting online, 2 planned reviews per annum, updates encompass any changes to legislation, guidance, best practice, case law or any specific requirements, required by the customer and consideration for customer requests for small updates in between scheduled publications.

1. Content, Layout, Style and Functionality

- 1.1 The manual is designed for use in web-enabled format; it is not designed to be printed or published in 'hard copy'. Individual chapters can be printed for reference only and will contain a watermark indicating to the user that it is valid for a time-limited period.
- 1.2 If hard copies of the manual are circulated, the Customer is responsible for version control.
- 1.3 The bulk of the procedures will be created a web-enabled format, but the manual will contain PDF and/or Word versions of documents provided by the Customer e.g. Protocols which can be printed in their original format.

- 1.4 Hyperlinks provided by the Customer to local intranet or external websites will be included in the manual with responsibility for the reliability of such links being the Customers. Broken link checks will be undertaken at each maintenance update. Where the Customer notifies of broken links outside of this timetable, we reserve the right to quote for any additional work required to re-link these where the information has been supplied originally by the Customer.
- 1.5 The manual will include a facility to allow users to 'Register for Updates' who will be electronically notified when the manual is updated. Where the Customer mail server is unable to deliver this alert, it will not be resent.

2. Content provided by the Customer

- 2.1 Responsibility for the ongoing updating of the content of locally developed policies and procedures which are included in the manual lies with the Customer.
- 2.2 Images/flowcharts provided will be included in their original format, and the Contractor will not be responsible for editing them.
- 2.3 Documents provided for inclusion in PDF/MS Word format (e.g. Guidance, Protocols, Forms), will not be edited by the Contractor.

3. Portal Area

- 3.1 Documents including PDF's uploaded to the portal areas of the manual should comply with the government web accessibility guidelines. The responsibility for meeting these standards for local documents lies with the customer.
- 3.2 All local documents uploaded to the portal areas of the manual should be checked by the customer to ensure, personal and sensitive data is removed. It is the customers duty and responsibility to comply with GDPR

4. Planned Reviews

- 4.1 Two planned reviews will be scheduled each year and undertaken by the Contractor in conjunction with the Customer. Where it is not possible to publish two updates as a result of delays on the part of the Customer, reviews will not carry forward to subsequent annual periods.
- 4.2 The Contractor will endeavour to anticipate changes in relevant UK legislation and regulations so that the manual is reviewed in a timely fashion, as part of planned updates. Where this is not feasible, the Customer will be advised of a plan for alerting manual users to the changes as

quickly as possible after their implementation until they can be incorporated as part of the next planned review.

- 4.3 Reviews will be conducted via email, virtual meeting and telephone to discuss any implications of amendments you plan to make and recommend any changes we believe are needed to your manual to reflect recent legislation, court rulings and national guidance. We will provide you with a review plan detailing our recommendations in advance of the update.
- 4.4 A virtual meeting will be conducted in relation to each maintenance review to discuss any implications of amendments recommended by the Contractor to reflect recent legislation, court rulings and national guidance in addition to discussing amendments required by the Customer.
- 4.5 Agreed dates for reviews should be adhered to. If the Customer is unable to provide us with amendments by the previously agreed date, they may lose the opportunity to include them in the review and the update will go ahead incorporating only the amendments that are ready and agreed. If the Customer wishes to delay or reschedule a review this will be subject to agreement by both parties.
- 4.6 Where the Customer submits amendments to existing procedures, the current online manual procedure should be copied into MS Word and use the 'track changes' facility to show amendments, copying the whole chapter, not just the part to be amended. Each chapter to be saved individually in a Word document.
 - 4.6.1 Any changes received which have not been applied in this way will not be processed and will be returned.
 - 4.6.2 Any changes submitted on copies of previous versions of the manual will not be processed.
 - 4.6.3 For minor 'generic' amendments, e.g. the change of a team or post title, the change will be made without being submitted via track changes but by issuing a single clear instruction.
 - 4.6.4 Where more than one person submits edits to the same chapter, this must be co-ordinated, with one definitive submission being forwarded to for update.
- 4.7 Enhancements or changes to the layout and style of the manual are not included as part of the maintenance contract.
- 4.8 As part of a review, amendments to existing chapters will be made as required. Where new chapters are submitted for inclusion, the Contractor will advise of the most appropriate format for inclusion.

5. Unplanned Reviews

- 5.1 These are reviews required by the Customer, not relating to a change in local contact details and/or not within the definition of urgent, i.e. not resulting from a Serious Case Review or an Inspection. Unplanned reviews in advance of an inspection are not, for the purposes of this proposal, defined as urgent.
- 5.2 The contract does **not** provide for unplanned reviews.
- 5.3 Each request for unplanned reviews will be considered on a case by case basis and where appropriate a proposal detailing any additional cost and timescales submitted to the Customer. This will be dependent on the complexity of the request, the amount of time it will take and whether there is provision in the Contractors production schedule to accommodate the work. Any unplanned work will be by agreement in writing by both parties.

6. Technical Specification

- 6.1 Personal information is not automatically stored or captured, the only information which is automatically stored and captured is the user's IP address via Google Analytics. This information is used to provide the Customer with data/activity on the usage of the manual. Email addresses and other information volunteered by manual users will be captured for the purposes described in 1.5. This shall be treated as confidential but may be used for internal review and to notify registered users about updates to the manual and Contractor services.
- 6.2 The capture, storage and use of personal information via Register for Alerts will not be made available to any third party without prior permission.
- 6.3 The content of your Procedures Manual/website will be created in HTML format and will conform to the World Wide Web Consortium (W3C). The Manual is tested and validated against WCAG 2.1 AA compliance.
- 6.4 The average delivery time for access will be no more than two seconds when taken at as an average of at least 100 requests.
- 6.5 The manual will deliver pages to the end user via a browser and be viewable and fully functional in:

- Internet Explorer 11
- Google Chrome
- Mozilla Firefox
- Opera Version
- Safari Version
- Microsoft Edge

- 6.6 The manual will be secured so that only authorised users are able to effect changes to the content or look and feel of the Website, multi factor authentication is used.
- 6.7 Data is hosted with a professional and reputable UK hosting company and the Contractor assumes full responsibility for the maintenance of that relationship, including any and all payments. Business and Security Certification <https://learn.microsoft.com/en-us/azure/compliance/>

Schedule 1a: Monitoring Schedule

The Contractor will appoint a Lead Consultant to manage the contract and supervise service delivery.

16. Annual Maintenance-Regional Adoption Agency Online Procedures

Annual Maintenance: Regional Adoption Agency Online Procedures

Schedule 1 Service Specification

Aims

To maintain (in partnership with the customer) a flexible, compliant, procedures manual that strengthens governance, supports best practice, and enables effective operational delivery.

Objectives

- To maintain a core suite of adaptable procedures that can be tailored to local policy and responsibilities.
- To enable ownership through seamless integration and management of local content.
- To provide a secure, customer-controlled resource library with real-time content management.
- To support effective use of procedures through training, guidance, and usage insight.
- To enhance compliance, oversight, and continuous improvement through expert support.

Scope of Project

The scope covers two main areas:

Maintenance of the procedures manual site;
Hosting of the procedures manual site.

Summary

- 'Hosting' of Regional Adoption Agency procedures manual online

- Based on a template set of chapters and incorporation of Customer material for which the customer will retain responsibility for updating such content
- 2 planned reviews per year. Reviews will be conducted via email, virtual meeting (if requested) and telephone
- Online and telephone advice and support from your dedicated Procedures Consultant
- Access to free online resources, including Glossary and National Contacts, key government guidance such as Working Together to Safeguard Children, Keeping Children Safe in Education, National Minimum Standards for Fostering, Adoption, and Quality Standards for Children's Homes.
- User maintained online portal-CMS for local resources and optional reading task allocation/monitoring functionality and compliance
- Google Analytics – email to be supplied by customer
- Link to other customer tri.x procedures, for example Safeguarding Partnership Procedures (if available online)
- Facility for users to register to receive email notification when the manual is updated
- Archiving of each version of the procedures manual
- Urgent' updates which are as a direct result of a Child Death Review, Inspection or serious complaint

1. Content, Layout, Style and Functionality

- 1.1 The manual is designed for use in web-enabled format; it is not designed to be printed or published in 'hard copy'. Individual chapters can be printed for reference only.
- 1.2 If hard copies of the manual are circulated, the Customer is responsible for version control.
- 1.3 The bulk of the procedures will be created a web-enabled format, but the manual will contain PDF and/or Word versions of documents provided by the Customer e.g. Protocols which can be printed in their original format.
- 1.4 Hyperlinks provided by the Customer to local intranet or external websites will be included in the manual with responsibility for the reliability of such links being the Customers. Broken link checks will be undertaken at each maintenance update. Where the Customer notifies of broken links outside of this timetable, we reserve the right to quote for any additional work required to re-link these where the information has been supplied originally by the Customer.
- 1.5 The manual will include a facility to allow users to 'Register for Updates' who will be electronically notified when the manual is updated. Where the Customer mail server is unable to deliver this alert, it will not be resent.

2. Content provided by the Customer

- 2.1 Responsibility for the ongoing updating of the content of locally developed policies and procedures which are included in the manual lies with the Customer.
- 2.2 Images/flowcharts provided will be included in their original format, and the Contractor will not be responsible for editing them.
- 2.3 Documents provided for inclusion in PDF/MS Word format (e.g. Guidance, Protocols, Forms), will not be edited by the Contractor.

3. Portal Area

- 3.1 Documents including PDF's uploaded to the Portal areas of the manual should comply with the government web accessibility guidelines. The responsibility for meeting these standards for local documents lies with the customer.
- 3.2 All local documents uploaded to the Portal areas of the manual should be checked by the customer to ensure, personal and sensitive data is removed. It is the customers duty and responsibility to comply with GDPR

4. Planned Reviews

- 4.1 Two planned updates will be scheduled each year and undertaken by the Contractor in conjunction with the Customer. Where it is not possible to publish two reviews as a result of delays on the part of the Customer, reviews will not carry forward to subsequent annual periods.
- 4.2 The Contractor will endeavour to anticipate changes in relevant UK legislation and regulations so that the manual is updated in a timely fashion, as part of planned updates. Where this is not feasible, the Customer will be advised of a plan for alerting manual users to the changes as quickly as possible after their implementation until they can be incorporated as part of the next planned update.
- 4.3 Updates will be conducted via email, virtual meeting and telephone to discuss any implications of amendments you plan to make and recommend any changes we believe are needed to your manual to reflect recent legislation, court rulings and national guidance. We will provide you with an update plan detailing our recommendations in advance of the update.
- 4.4 A virtual meeting will be conducted in relation to each maintenance review to discuss any implications of amendments recommended by the Contractor to reflect recent legislation, court rulings and national guidance in addition to discussing amendments required by the Customer.

- 4.5 Agreed dates for reviews should be adhered to. If the Customer is unable to provide us with amendments by the previously agreed date, they may lose the opportunity to include them in the review and the review will go ahead incorporating only the amendments that are ready and agreed. If the Customer wishes to delay or reschedule a review this will be subject to agreement by both parties.
- 4.6 Where the Customer submits amendments to existing procedures, the current online manual procedure should be copied into MS Word and use the 'track changes' facility to show amendments, copying the whole chapter, not just the part to be amended. Each chapter to be saved individually in a Word document.
 - 4.6.1 Any changes received which have not been applied in this way will not be processed and will be returned.
 - 4.6.2 Any changes submitted on copies of previous versions of the manual will not be processed.
 - 4.6.3 For minor 'generic' amendments, e.g. the change of a team or post title, the change will be made without being submitted via track changes but by issuing a single clear instruction.
 - 4.6.4 Where more than one person submits edits to the same chapter, this must be co-ordinated, with one definitive submission being forwarded to for update.
- 4.7 Enhancements or changes to the layout and style of the manual are not included as part of the maintenance contract.
- 4.8 As part of a review, amendments to existing chapters will be made as required. Where new chapters are submitted for inclusion, the Contractor will advise of the most appropriate format for inclusion.

5. Unplanned Reviews

- 5.1 These are reviews required by the Customer, not relating to a change in local contact details and/or not within the definition of urgent, i.e. not resulting from a Serious Case Review or an Inspection. Unplanned reviews in advance of an inspection are not, for the purposes of this proposal, defined as urgent.
- 5.2 The contract does **not** provide for unplanned reviews.
- 5.3 Each request for unplanned reviews will be considered on a case by case basis and where appropriate a proposal detailing any additional cost and timescales submitted to the Customer.

This will be dependent on the complexity of the request, the amount of time it will take and whether there is provision in the Contractors production schedule to accommodate the work. Any unplanned work will be by agreement in writing by both parties.

6. Technical Specification

- 6.1 Personal information is not automatically stored or captured, the only information which is automatically stored and captured is the user's IP address via Google Analytics. This information is used to provide the Customer with data/activity on the usage of the manual. Email addresses and other information volunteered by manual users will be captured for the purposes described in 1.5. This shall be treated as confidential but may be used for internal review and to notify registered users about updates to the manual and Contractor services.
- 6.2 The capture, storage and use of personal information via Register for Alerts will not be made available to any third party without prior permission.
- 6.3 The content of your Procedures Manual/website will be created in HTML format and will conform to the World Wide Web Consortium (W3C). The Manual is tested and validated against WCAG 2.1 AA compliance.
- 6.4 The average delivery time for access will be no more than two seconds when taken at as an average of at least 100 requests.
- 6.5 The manual will deliver pages to the end user via a browser and be viewable and fully functional in:

- Internet Explorer 11
- Google Chrome
- Mozilla Firefox
- Opera Version
- Safari Version
- Microsoft Edge

- 6.6 The manual will be secured so that only authorised users are able to effect changes to the content or look and feel of the Website, multi factor authentication is used.
- 6.7 Data is hosted with a professional and reputable UK hosting company and the Contractor assumes full responsibility for the maintenance of that relationship, including any and all payments. Business and Security Certification <https://learn.microsoft.com/en-us/azure/compliance/>

SCHEDULE 1a

Monitoring Schedule

The Contractor will appoint a Lead Consultant to manage the contract and supervise service delivery.

17. New Development Supported Accommodation Online Procedures

Aims

To provide a Local Authority with a flexible, compliant, procedures manual that strengthens governance, supports best practice, and enables effective operational delivery.

Objectives

- To develop and maintain a core suite of adaptable procedures that can be tailored to local policy and responsibilities.
- To enable ownership through seamless integration and management of local content.
- To provide a secure, customer-controlled resource library with real-time content management.
- To support effective use of procedures through training, guidance, and usage insight.
- To enhance compliance, oversight, and continuous improvement through expert support.

Scope of Project

The scope covers four main areas:

Development of the procedures manual site;
Maintenance of the procedures manual site;
Hosting of the procedures manual site;
Training and support.

Summary

- Based on a set of template procedures reflecting legislation, regulations and good practice
- 'Hosting' of procedures manual online
- Procedures Consultant time to advise and support in the development, collation and redrafting the content and incorporation of Customer material for which the customer will retain responsibility for updating such content
- 1 planned review in the first year
- Online and telephone advice and support from your dedicated Procedures Consultant
- Access to online free resources, including Glossary, National Contacts, key government guidance such as Working Together to Safeguard Children, Keeping Children Safe in Education, National Minimum Standards for Fostering, Adoption, and Quality Standards for Children's Homes.
- Link to other customer tri.x procedures, for example Safeguarding Partnership Procedures (if available online)
- Facility for users to register to receive email notification when the manual is updated
- Archiving of each version of the procedures manual
- Annual Maintenance (commencing at the conclusion of the first 12 months), providing continued hosting online, 2 scheduled reviews per annum, virtual meeting to discuss update.

1. Development, Drafting and Consultation

- 1.1 On acceptance of this agreement, and provision of the Customers company logo, a draft procedures manual will be made available online within 10 working days. A tri.x Lead Procedures Consultant will be available via email and telephone.
- 1.2 The starting point for the manual will be a template set of up-to-date procedures. The standard list can be reorganised but the addition of whole new categories or sections may incur an additional cost.
- 1.3 The draft procedures will be produced in the form of a 'draft' manual, made available online for review as part of the development process.
- 1.4 In order for the first operational manual to be launched the contractor requires the customer to provide their own local information for inclusion.

- 1.5 The Contractor will guide in the re-drafting process to achieve procedures reflecting local practice. The Lead Procedure Consultant will support remotely with the development process and launch of the manual.

2. Content, Layout, Style and Functionality

- 2.1 The manual is designed for use in web-enabled format; it is not designed to be printed or published in 'hard copy'. Individual chapters can be printed for reference only and will contain a reference indicating to the user that it is valid for a time-limited period.
- 2.2 If hard copies of the manual are circulated, the Customer is responsible for version control.
- 2.3 The bulk of the procedures will be created a web-enabled format, but the manual will contain PDF and/or Word versions of documents provided by the Customer e.g. statements of purpose which can be printed in their original format.
- 2.4 Hyperlinks provided by the Customer to local intranet or external websites will be included in the manual with responsibility for the reliability of such links being the Customers. Broken link checks will be undertaken at each maintenance update. Where the Customer notifies of broken links outside of this timetable we reserve the right to quote for any additional work required to re-link these where the information has been supplied originally by the Customer.
- 2.5 The manual will include a button to allow users to 'Register for Updates' who will be electronically notified when the manual is updated. Where the Customer mail server is unable to deliver this alert, it will not be resent.

3. Content provided by the Customer

- 3.1 Responsibility for the ongoing updating of the content of locally developed policies and procedures which are included in the manual lies with the Customer.
- 3.2 Images/flowcharts provided will be included in their original format, and the Contractor will not be responsible for editing them.
- 3.3 Documents provided for inclusion in PDF/MS Word format (e.g. Guidance, Protocols, Forms), will not be edited by the Contractor.

4. Portal Area

- 4.1 Documents including PDF's uploaded to the portal areas of the manual should comply with the government web accessibility guidelines. The responsibility for meeting these standards for local documents lies with the customer.
- 4.2 All local documents uploaded to the portal areas of the manual should be checked by the customer to ensure, personal and sensitive data is removed. It is the customers duty and responsibility to comply with UK GDPR

5. Planned Reviews

- 5.1 Following the publication of the first edition of the manual, the contract provides for 1 planned review during the remainder of the first 12 month period. Where it is not possible to publish the first edition due to delays on the part of the Customer, the review may not be carried forward into Year 2.
- 5.2 The Contractor will endeavour to anticipate changes in relevant UK legislation and regulations so that the manual is updated in a timely fashion, as part of planned reviews. Where this is not feasible, the Customer will be advised of a plan for alerting manual users to the changes as quickly as possible after their implementation until they can be incorporated as part of the next planned reviews.
- 5.3 Meetings will be conducted in relation to each maintenance review to discuss any implications of amendments recommended by the Contractor to reflect recent legislation, court rulings and national guidance in addition to discussing amendments required by the Customer. An Update Plan detailing recommendations by the Contractor will be issued in advance of any site meeting.
- 5.4 Agreed dates for reviews should be adhered to. If the Customer is unable to provide us with amendments by the previously agreed date, they may lose the opportunity to include them in the review and the review will go ahead incorporating only the amendments that are ready and agreed. If the Customer wishes to delay or reschedule a review this will be subject to agreement by both parties.
- 5.5 Where the Customer submits amendments to existing procedures, the current online manual procedure should be copied into MS Word and use the 'track changes' facility to show amendments, copying the whole chapter, not just the part to be amended. Each chapter to be saved individually in a Word document.
 - 5.5.1 Any changes received which have not been applied in this way will not be processed and will be returned.
 - 5.5.2 Any changes submitted on copies of previous versions of the manual will not be processed.
 - 5.5.3 For minor 'generic' amendments, e.g. the change of a team or post title, the change will be made without being submitted via track changes but by issuing a single clear instruction.
 - 5.5.4 Where more than one person submits edits to the same chapter, this must be co-ordinated, with one definitive submission being forwarded to for update.
- 5.6 Enhancements or changes to the layout and style of the manual are not included as part of the maintenance contract.

- 5.7 As part of a review, amendments to existing chapters will be made as required. Where new chapters are submitted for inclusion, the Contractor will advise of the most appropriate format for inclusion.

6. Unplanned Reviews

- 6.1 The contract does **not** provide for unplanned reviews.
- 6.2 Each request for unplanned reviews will be considered on a case by case basis and where appropriate a proposal detailing any additional cost and timescales submitted to the Customer. This will be dependent on the complexity of the request, the amount of time it will take and whether there is provision in the Contractors production schedule to accommodate the work. Any unplanned work will be by agreement in writing by both parties.

7. Technical Specification

- 7.1 Personal information is not automatically stored or captured, the only information which is automatically stored and captured is the user's IP address via Google Analytics. This information is used to provide the Customer with data/activity on the usage of the manual. Email addresses and other information volunteered by manual users will be captured for the purposes described in 2.5. This shall be treated as confidential but may be used for internal review and to notify registered users about updates to the manual and Contractor services.
- 7.2 The capture, storage and use of personal information via Register for Alerts will not be made available to any third party without prior permission.
- 7.3 The content of your Procedures Manual/website will be created in HTML format and will conform to the World Wide Web Consortium (W3C). The Manual is tested and validated against WCAG 2.1 AA compliance.
- 7.4 The average delivery time for access will be no more than two seconds when taken at as an average of at least 100 requests.
- 7.5 The manual will deliver pages to the end user via a browser and be viewable and fully functional in:

Internet Explorer 11
Google Chrome
Mozilla Firefox
Opera Version
Safari Version

Microsoft Edge

- 7.6 The manual will be secured so that only authorised users are able to effect changes to the content or look and feel of the Website, multi factor authentication is used.
- 7.7 Data is hosted with a professional and reputable UK hosting company and the Contractor assumes full responsibility for the maintenance of that relationship, including any and all payments. Business and Security Certification <https://learn.microsoft.com/en-us/azure/compliance/>

18. Annual Maintenance Supported Accommodation Online Procedures

Aims

To maintain (in partnership with the customer) a flexible, compliant, procedures manual that strengthens governance, supports best practice, and enables effective operational delivery.

Objectives

- To maintain a core suite of adaptable procedures that can be tailored to local policy and responsibilities.
- To enable ownership through seamless integration and management of local content.
- To provide a secure, customer-controlled resource library with real-time content management.
- To support effective use of procedures through training, guidance, and usage insight.
- To enhance compliance, oversight, and continuous improvement through expert support.

Scope of Project

The scope covers two main areas:

Maintenance of the procedures manual site;
Hosting of the procedures manual site.

Summary

- 'Hosting' of procedures manual online
- 2 Planned reviews
- Online and telephone advice and support from your dedicated Procedures Consultant
- Access to free resources, including Glossary, National Contacts, Working Together to Safeguard Children, Keeping Children Safe in Education and links to Supported Accommodation (England) Regulations
- Link to Safeguarding Partnership Procedures (if available online)
- Facility for users to register to receive email notification when the manual is updated
- Archiving of each version of the procedures manual
- Virtual meeting for each scheduled update to discuss Update Plan detailing amendments and suggestions for the scheduled publication.

1. Development Drafting and Consultation

- 1.1 On acceptance of this agreement, and provision of the Customers company logo, a draft procedures manual will be made available online within 10 working days. A tri.x Lead Consultant will be available via email and telephone.

- 1.2 The starting point for the manual will be a template set of up-to-date procedures. The standard list can be reorganised but the addition of whole new categories or sections may incur an additional cost.
- 1.3 The draft procedures will be produced in the form of a 'draft' manual, made available online for review as part of the development process.
- 1.4 In order for the first operational manual to be launched the contractor requires the customer to provide their own local information for inclusion.
- 1.5 The Contractor will guide in the re-drafting process to achieve procedures reflecting local practice. The Lead Consultant will support remotely with the development process and launch of the manual.

2. Content, Layout, Style and Functionality

- 2.1 The manual is designed for use in web-enabled format; it is not designed to be printed or published in 'hard copy'. Individual chapters can be printed for reference only and will contain a reference indicating to the user that it is valid for a time-limited period.
- 2.2 If hard copies of the manual are circulated, the Customer is responsible for version control.
- 2.3 The bulk of the procedures will be created a web-enabled format, but the manual will contain PDF and/or Word versions of documents provided by the Customer e.g. statements of purpose which can be printed in their original format.
- 2.4 Hyperlinks provided by the Customer to local intranet or external websites will be included in the manual with responsibility for the reliability of such links being the Customers. Broken link checks will be undertaken at each maintenance update. Where the Customer notifies of broken links outside of this timetable we reserve the right to quote for any additional work required to re-link these where the information has been supplied originally by the Customer.
- 2.5 The manual will include a button to allow users to 'Register for Updates' who will be electronically notified when the manual is updated. Where the Customer mail server is unable to deliver this alert, it will not be resent.

3. Content provided by the Customer

- 3.1 Responsibility for the ongoing updating of the content of locally developed policies and procedures which are included in the manual lies with the Customer.
- 3.2 Images/flowcharts provided will be included in their original format, and the Contractor will not be responsible for editing them.

- 3.3 Documents provided for inclusion in PDF/MS Word format (e.g. Guidance, Protocols, Forms), will not be edited by the Contractor.

4. Portal Area

- 4.1 Documents including PDF's uploaded to the portal areas of the manual should comply with the government web accessibility guidelines. The responsibility for meeting these standards for local documents lies with the customer.
- 4.2 All local documents uploaded to the Portal areas of the manual should be checked by the customer to ensure, personal and sensitive data is removed. It is the customers duty and responsibility to comply with UK GDPR

4. Planned Reviews

- 5.1 Following the publication of the first edition of the manual, the contract provides for 1 planned review during the remainder of the first 12 month period. Where it is not possible to publish the first edition due to delays on the part of the Customer, the review may not be carried forward into Year 2.
- 5.2 The Contractor will endeavour to anticipate changes in relevant UK legislation and regulations so that the manual is updated in a timely fashion, as part of planned reviews. Where this is not feasible, the Customer will be advised of a plan for alerting manual users to the changes as quickly as possible after their implementation until they can be incorporated as part of the next planned review.
- 5.3 A virtual meeting will be conducted in relation to each maintenance review to discuss any implications of amendments recommended by the Contractor to reflect recent legislation, court rulings and national guidance in addition to discussing amendments required by the Customer. An Update Plan detailing recommendations by the Contractor will be issued in advance of any site meeting.
- 5.4 Agreed dates for reviews should be adhered to. If the Customer is unable to provide us with amendments by the previously agreed date, they may lose the opportunity to include them in the review and the review will go ahead incorporating only the amendments that are ready and agreed. If the Customer wishes to delay or reschedule a review this will be subject to agreement by both parties.
- 5.5 Where the Customer submits amendments to existing procedures, the current online manual procedure should be copied into MS Word and use the 'track changes' facility to show amendments, copying the whole chapter, not just the part to be amended. Each chapter to be saved individually in a Word document.

- 5.5.1 Any changes received which have not been applied in this way will not be processed and will be returned.
 - 5.5.2 Any changes submitted on copies of previous versions of the manual will not be processed.
 - 5.5.3 For minor 'generic' amendments, e.g. the change of a team or post title, the change will be made without being submitted via track changes but by issuing a single clear instruction.
 - 5.5.4 Where more than one person submits edits to the same chapter, this must be co-ordinated, with one definitive submission being forwarded to for update.
- 5.6 Enhancements or changes to the layout and style of the manual are not included as part of the maintenance contract.
- 5.7 As part of a review, amendments to existing chapters will be made as required. Where new chapters are submitted for inclusion, the Contractor will advise of the most appropriate format for inclusion.

6. Unplanned Reviews

- 6.1 The contract does **not** provide for unplanned reviews.
- 6.2 Each request for unplanned reviews will be considered on a case by case basis and where appropriate a proposal detailing any additional cost and timescales submitted to the Customer. This will be dependent on the complexity of the request, the amount of time it will take and whether there is provision in the Contractors production schedule to accommodate the work. Any unplanned work will be by agreement in writing by both parties.

7. Technical Specification

- 7.1 Personal information is not automatically stored or captured, the only information which is automatically stored and captured is the user's IP address via Google Analytics. This information is used to provide the Customer with data/activity on the usage of the manual. Email addresses and other information volunteered by manual users will be captured for the purposes described in 2.5. This shall be treated as confidential but may be used for internal review and to notify registered users about updates to the manual and Contractor services.
- 7.2 The capture, storage and use of personal information via Register for Alerts will not be made available to any third party without prior permission.

- 7.3 The content of your Procedures Manual/website will be created in HTML format and will conform to the World Wide Web Consortium (W3C). The Manual is tested and validated against WCAG 2.1 AA compliance.
- 7.4 The average delivery time for access will be no more than two seconds when taken at as an average of at least 100 requests.
- 7.5 The manual will deliver pages to the end user via a browser and be viewable and fully functional in:
- Internet Explorer 11
 - Google Chrome
 - Mozilla Firefox
 - Opera Version
 - Safari Version
 - Microsoft Edge
- 7.6 The manual will be secured so that only authorised users are able to effect changes to the content or look and feel of the Website, multi factor authentication is used.
- 7.7 Data is hosted with a professional and reputable UK hosting company and the Contractor assumes full responsibility for the maintenance of that relationship, including any and all payments. Business and Security Certification <https://learn.microsoft.com/en-us/azure/compliance/>

19. New Development Supported Lodgings Online Procedures

Aims and Objectives

To provide a Local Authority with a flexible, compliant, procedures manual that strengthens governance, supports best practice, and enables effective operational delivery.

Objectives

- To develop and maintain a core suite of adaptable procedures that can be tailored to local policy and responsibilities.
- To enable ownership through seamless integration and management of local content.
- To provide a secure, customer-controlled resource library with real-time content management.
- To support effective use of procedures through training, guidance, and usage insight.
- To enhance compliance, oversight, and continuous improvement through expert support .

Scope of Project

The scope covers four main areas:

Development of the procedures manual site;
Maintenance of the procedures manual site;
Hosting of the procedures manual site;
Training and Support.

Summary

- Based on a set of template procedures reflecting legislation, regulations and good practice
- 'Hosting' of Procedures Manual online 24/7
- Procedures Consultant time to advise and support in the development, collation and redrafting the content, and incorporation of Customer material for which the customer will retain responsibility for updating such content
- 1 planned review in the first year
- Online and telephone advice and support from your dedicated Procedures Consultant
- Access to free resources, including Glossary, National Contacts, Working Together to Safeguard Children, Keeping Children Safe in Education and links to Supported Lodgings (England) Regulations
- Link to Safeguarding Partnership Procedures (if available online)
- Facility for users to register to receive email notification when the manual is updated
- Archiving of each version of the procedures manual
- Annual Maintenance (commencing at the conclusion of the first 12 months), providing continued hosting online, 2 scheduled reviews per annum, virtual meeting to discuss update.

1. Development, Drafting and Consultation

- 1.1 On acceptance of this agreement, and provision of the Customers company logo, a draft procedures manual will be made available online within 10 working days. A tri.x Procedures Consultant will be available via email and telephone.
- 1.2 The starting point for the manual will be a template set of up-to-date procedures. The standard list can be reorganised but the addition of whole new categories or sections may incur an additional cost.
- 1.3 The draft procedures will be produced in the form of a 'draft' manual, made available online for review as part of the development process.
- 1.4 In order for the first operational manual to be launched the contractor requires the customer to provide their own local information for inclusion.
- 1.5 The Contractor will guide in the re-drafting process to achieve procedures reflecting local practice. The Procedure Consultants will support remotely with the development process and launch of the manual.

2. Content, Layout, Style and Functionality

- 2.1 The manual is designed for use in web-enabled format; it is not designed to be printed or published in 'hard copy'. Individual chapters can be printed for reference only and will contain a reference indicating to the user that it is valid for a time-limited period.
- 2.2 If hard copies of the manual are circulated, the Customer is responsible for version control.
- 2.3 The bulk of the procedures will be created a web-enabled format, but the manual will contain PDF and/or Word versions of documents provided by the Customer e.g. statements of purpose which can be printed in their original format.
- 2.4 Hyperlinks provided by the Customer to local intranet or external websites will be included in the manual with responsibility for the reliability of such links being the Customers. Broken link checks will be undertaken at each maintenance update. Where the Customer notifies of broken links outside of this timetable we reserve the right to quote for any additional work required to re-link these where the information has been supplied originally by the Customer.
- 2.5 The manual will include a button to allow users to 'Register for Updates' who will be electronically notified when the manual is updated. Where the Customer mail server is unable to deliver this alert, it will not be resent.

3. Content provided by the Customer

- 3.1 Responsibility for the ongoing updating of the content of locally developed policies and procedures which are included in the manual lies with the Customer.
- 3.2 Images/flowcharts provided will be included in their original format, and the Contractor will not be responsible for editing them.
- 3.3 Documents provided for inclusion in PDF/MS Word format (e.g. Guidance, Protocols, Forms), will not be edited by the Contractor.

4. Portal Area

- 4.1 Documents including PDF's uploaded to the portal areas of the manual should comply with the government web accessibility guidelines. The responsibility for meeting these standards for local documents lies with the customer.
- 4.2 All local documents uploaded to the portal areas of the manual should be checked by the customer to ensure, personal and sensitive data is removed. It is the customers duty and responsibility to comply with UK GDPR

5. Planned Reviews

- 5.1 Following the publication of the first edition of the manual, the contract provides for 1 planned review during the remainder of the first 12 month period. Where it is not possible to publish the first edition due to delays on the part of the Customer, the review may not be carried forward into Year 2.
- 5.2 The Contractor will endeavour to anticipate changes in relevant UK legislation and regulations so that the manual is updated in a timely fashion, as part of planned reviews. Where this is not feasible, the Customer will be advised of a plan for alerting manual users to the changes as quickly as possible after their implementation until they can be incorporated as part of the next planned review.
- 5.3 Meetings will be conducted in relation to each maintenance review to discuss any implications of amendments recommended by the Contractor to reflect recent legislation, court rulings and national guidance in addition to discussing amendments required by the Customer. An Update Plan detailing recommendations by the Contractor will be issued in advance of any site meeting.
- 5.4 Agreed dates for reviews should be adhered to. If the Customer is unable to provide us with amendments by the previously agreed date, they may lose the opportunity to include them in the review and the review will go ahead incorporating only the amendments that are ready and agreed. If the Customer wishes to delay or reschedule a review this will be subject to agreement by both parties.
- 5.5 Where the Customer submits amendments to existing procedures, the current online manual procedure should be copied into MS Word and use the 'track changes' facility to show amendments, copying the whole chapter, not just the part to be amended. Each chapter to be saved individually in a Word document.
 - 5.5.1 Any changes received which have not been applied in this way will not be processed and will be returned.
 - 5.5.2 Any changes submitted on copies of previous versions of the manual will not be processed.
 - 5.5.3 For minor 'generic' amendments, e.g. the change of a team or post title, the change will be made without being submitted via track changes but by issuing a single clear instruction.
 - 5.5.4 Where more than one person submits edits to the same chapter, this must be co-ordinated, with one definitive submission being forwarded to for update.

- 5.6 Enhancements or changes to the layout and style of the manual are not included as part of the maintenance contract.
- 5.7 As part of a review, amendments to existing chapters will be made as required. Where new chapters are submitted for inclusion, the Contractor will advise of the most appropriate format for inclusion.

6. Unplanned Reviews

- 6.1 The contract does **not** provide for unplanned reviews.
- 6.2 Each request for unplanned reviews will be considered on a case by case basis and where appropriate a proposal detailing any additional cost and timescales submitted to the Customer. This will be dependent on the complexity of the request, the amount of time it will take and whether there is provision in the Contractors production schedule to accommodate the work. Any unplanned work will be by agreement in writing by both parties.

7. Technical Specification

- 7.1 Personal information is not automatically stored or captured, the only information which is automatically stored and captured is the user's IP address via Google Analytics. This information is used to provide the Customer with data/activity on the usage of the manual. Email addresses and other information volunteered by manual users will be captured for the purposes described in 2.5. This shall be treated as confidential but may be used for internal review and to notify registered users about updates to the manual and Contractor services.
- 7.2 The capture, storage and use of personal information via Register for Alerts will not be made available to any third party without prior permission.
- 7.3 The content of your Procedures Manual/website will be created in HTML format and will conform to the World Wide Web Consortium (W3C). The Manual is tested and validated against WCAG 2.1 AA compliance.
- 7.4 The average delivery time for access will be no more than two seconds when taken at as an average of at least 100 requests.
- 7.5 The manual will deliver pages to the end user via a browser and be viewable and fully functional in:
 - Internet Explorer 11
 - Google Chrome
 - Mozilla Firefox

Opera Version

Safari Version

Microsoft Edge

- 7.6 The manual will be secured so that only authorised users are able to effect changes to the content or look and feel of the Website, multi factor authentication is used.
- 7.7 Data is hosted with a professional and reputable UK hosting company and the Contractor assumes full responsibility for the maintenance of that relationship, including any and all payments. Business and Security Certification <https://learn.microsoft.com/en-us/azure/compliance/>

20. Annual Maintenance Supported Lodgings Online Procedures

Aims

To maintain (in partnership with the customer) a flexible, compliant, procedures manual that strengthens governance, supports best practice, and enables effective operational delivery.

Objectives

- To maintain a core suite of adaptable procedures that can be tailored to local policy and responsibilities.
- To enable ownership through seamless integration and management of local content.
- To provide a secure, customer-controlled resource library with real-time content management.
- To support effective use of procedures through training, guidance, and usage insight.
- To enhance compliance, oversight, and continuous improvement through expert support.

Scope of Project

The scope covers two main areas:

Maintenance of the procedures manual site;
Hosting of the procedures manual site.

Summary

- 'Hosting' of procedures manual online
- 2 Planned Updates
- Online and telephone advice and support from your dedicated Procedures Consultant

- Access to free resources, including Glossary, National Contacts, Working Together to Safeguard Children, Keeping Children Safe in Education and links to Supported Lodgings (England) Regulations
- Link to Safeguarding Partnership Procedures (if available online)
- Facility for users to register to receive email notification when the manual is updated
- Archiving of each version of the procedures manual
- Virtual meeting for each scheduled update to discuss Update Plan detailing amendments and suggestions for the scheduled publication.

1. Development, Drafting and Consultation

- 1.1 On acceptance of this agreement, and provision of the Customers company logo, a draft procedures manual will be made available online within 10 working days. A tri.x Procedures Consultant will be available via email and telephone.
- 1.2 The starting point for the manual will be a template set of up-to-date procedures. The standard list can be reorganised but the addition of whole new categories or sections may incur an additional cost.
- 1.3 The draft procedures will be produced in the form of a 'draft' manual, made available online for review as part of the development process.
- 1.4 In order for the first operational manual to be launched the contractor requires the customer to provide their own local information for inclusion.
- 1.5 The Contractor will guide in the re-drafting process to achieve procedures reflecting local practice. The Procedure Consultants will support remotely with the development process and launch of the manual.

2. Content, Layout, Style and Functionality

- 2.1 The manual is designed for use in web-enabled format; it is not designed to be printed or published in 'hard copy'. Individual chapters can be printed for reference only and will contain a reference indicating to the user that it is valid for a time-limited period.
- 2.2 If hard copies of the manual are circulated, the Customer is responsible for version control.
- 2.3 The bulk of the procedures will be created a web-enabled format, but the manual will contain PDF and/or Word versions of documents provided by the Customer e.g. statements of purpose which can be printed in their original format.
- 2.4 Hyperlinks provided by the Customer to local intranet or external websites will be included in the manual with responsibility for the reliability of such links being the Customers. Broken link checks will be undertaken at each maintenance update. Where the Customer notifies of broken

links outside of this timetable we reserve the right to quote for any additional work required to re-link these where the information has been supplied originally by the Customer.

- 2.5 The manual will include a button to allow users to 'Register for Updates' who will be electronically notified when the manual is updated. Where the Customer mail server is unable to deliver this alert, it will not be resent.

3. Content provided by the Customer

- 3.1 Responsibility for the ongoing updating of the content of locally developed policies and procedures which are included in the manual lies with the Customer.
- 3.2 Images/flowcharts provided will be included in their original format, and the Contractor will not be responsible for editing them.
- 3.3 Documents provided for inclusion in PDF/MS Word format (e.g. Guidance, Protocols, Forms), will not be edited by the Contractor.

4. Portal Area

- 4.1 Documents including PDF's uploaded to the portal areas of the manual should comply with the government web accessibility guidelines. The responsibility for meeting these standards for local documents lies with the customer.
- 4.2 All local documents uploaded to the portal areas of the manual should be checked by the customer to ensure, personal and sensitive data is removed. It is the customers duty and responsibility to comply with UK GDPR

5. Planned Reviews

- 5.1 Following the publication of the first edition of the manual, the contract provides for 1 planned review during the remainder of the first 12 month period. Where it is not possible to publish the first edition due to delays on the part of the Customer, the review may not be carried forward into Year 2.
- 5.2 The Contractor will endeavour to anticipate changes in relevant UK legislation and regulations so that the manual is updated in a timely fashion, as part of planned reviews. Where this is not feasible, the Customer will be advised of a plan for alerting manual users to the changes as quickly as possible after their implementation until they can be incorporated as part of the next planned review.
- 5.3 A virtual meeting will be conducted in relation to each maintenance review to discuss any implications of amendments recommended by the Contractor to reflect recent legislation, court

rulings and national guidance in addition to discussing amendments required by the Customer. An Update Plan detailing recommendations by the Contractor will be issued in advance of any site meeting.

- 5.4 Agreed dates for reviews should be adhered to. If the Customer is unable to provide us with amendments by the previously agreed date, they may lose the opportunity to include them in the review and the review will go ahead incorporating only the amendments that are ready and agreed. If the Customer wishes to delay or reschedule a review this will be subject to agreement by both parties.
- 5.5 Where the Customer submits amendments to existing procedures, the current online manual procedure should be copied into MS Word and use the 'track changes' facility to show amendments, copying the whole chapter, not just the part to be amended. Each chapter to be saved individually in a Word document.
 - 5.5.1 Any changes received which have not been applied in this way will not be processed and will be returned.
 - 5.5.2 Any changes submitted on copies of previous versions of the manual will not be processed.
 - 5.5.3 For minor 'generic' amendments, e.g. the change of a team or post title, the change will be made without being submitted via track changes but by issuing a single clear instruction.
 - 5.5.4 Where more than one person submits edits to the same chapter, this must be co-ordinated, with one definitive submission being forwarded to for update.
- 5.6 Enhancements or changes to the layout and style of the manual are not included as part of the maintenance contract.
- 5.7 As part of a review, amendments to existing chapters will be made as required. Where new chapters are submitted for inclusion, the Contractor will advise of the most appropriate format for inclusion.

6. Unplanned Reviews

- 6.1 The contract does **not** provide for unplanned reviews.
- 6.2 Each request for unplanned reviews will be considered on a case by case basis and where appropriate a proposal detailing any additional cost and timescales submitted to the Customer. This will be dependent on the complexity of the request, the amount of time it will take and whether there is provision in the Contractors production schedule to accommodate the work. Any unplanned work will be by agreement in writing by both parties.

7. Technical Specification

- 7.1 Personal information is not automatically stored or captured, the only information which is automatically stored and captured is the user's IP address via Google Analytics. This information is used to provide the Customer with data/activity on the usage of the manual. Email addresses and other information volunteered by manual users will be captured for the purposes described in 2.5. This shall be treated as confidential but may be used for internal review and to notify registered users about updates to the manual and Contractor services.
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- 7.4 The average delivery time for access will be no more than two seconds when taken at as an average of at least 100 requests.
- 7.5 The manual will deliver pages to the end user via a browser and be viewable and fully functional in:
- Internet Explorer 11
 - Google Chrome
 - Mozilla Firefox
 - Opera Version
 - Safari Version
 - Microsoft Edge
- 7.6 The manual will be secured so that only authorised users are able to effect changes to the content or look and feel of the Website.
- 7.8 Data is hosted with a professional and reputable UK hosting company and the Contractor assumes full responsibility for the maintenance of that relationship, including any and all payments. Business and Security Certification <https://learn.microsoft.com/en-us/azure/compliance/>

