Birdie for Home Care

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1. About Birdie's Offering

Birdie's offering is made up of four parts:

1. **Subscription Plan:** our innovative and industry leading software solution, including the Birdie agency hub, Carer App and Care Circle App. Required for all Birdie customers.
2. **Software Add-Ons:** Optional add-ons based on your needs, enabling you to access additional value from Birdie.
3. **Professional Services:** Packages designed to support your implementation and help set you up for success with Birdie. Required for all customers with over 140 care recipients.
4. **Success and Support:** Ongoing engagement packages to support your journey once you are live with Birdie. Required for all customers with over 140 care recipients.

Birdie's commercial philosophy:

- Fair and usage-based: reflect value provided from the service.
- Encourage transparency and audit trails for all users.
- Easy to understand; easy to budget and assess growth impact on cost.
- Costs stay proportional to your business expenses as you scale.

2. Subscription plan

Whether you're taking your first steps towards going digital or you're flying high and want to grow at a faster pace, we're here to help.

I. Bundled packages

a. About

- **Who are they for?** Providers that want an all-in-one solution including functionality across all of Birdie's product areas (Care Management, Auditing, Rostering, Finance).
- **What do they include?** See appendix for a full breakdown of package feature inclusions.
- **How are they billed?** Based on the number of hours you schedule on the Birdie system. If required, we can bill these packages on a per Active Care Recipient basis (assessed on a case by case basis). Definitions for Scheduled Hours and Active Care Recipients can be found in our terms.

b. Packages

- **Starter** has been designed to provide just the right amount of functionality for providers at the start of their digital journey.
- **Core** is the perfect package for providers looking to run all of their core operations digitally and in one place.
- **Advanced** is our most popular package and is for providers looking to double down on evidencing high quality care, accelerate growth and make significant time savings in their operations. This package includes our recently launched and much loved Message Centre, enabling our partners to quickly send updates to Care Professionals throughout the day.
- **Plus** is for providers looking to take their digital operations to the next level, enabling customisation of automated workflows to suit exactly how they want their business to be run.

c. Pricing

i. Per Scheduled Hour

All prices are per month.

Package	Starter	Core	Advanced	Plus
Unit Rate	£0.20	£0.25	£0.35	£0.40

Volume-based discounts:

- For GCloud Local Authority customers with 2,500 or more Scheduled Hours, our Sales team can discount the Core or Advanced package to £0.21 or £0.30 per Scheduled Hour for Core or Advanced respectively
- For GCloud Local Authority customers with 5,000 or more Scheduled Hours, our Sales team can discount the Core or Advanced package to £0.19 or £0.26 per Scheduled Hour for Core or Advanced respectively
- For GCloud Local Authority customers with 7,500 or more Scheduled Hours, our Sales team can discount the Core or Advanced package to £0.17 or £0.23 per Scheduled Hour for Core or Advanced respectively
- For GCloud Local Authority customers with 10,000 or more Scheduled Hours, our Sales team can discount the Core or Advanced package to £0.15 or £0.20 per Scheduled hour for Core or Advanced respectively

ii. Per Active Care Recipient

All prices are per month.

Package	Starter	Core	Advanced	Plus

Unit Rate	£9.00	£12.00	£17.00	£21.00

Volume-based discounts:

- For GCloud Local Authority customers with 50 or more Care Recipients, our Sales team can discount the Core or Advanced package to £10.20 or £15 per Active Care Recipient for Core or Advanced respectively
- For GCloud Local Authority customers with 100 or more Care Recipients, our Sales team can discount the Core or Advanced package to £9 or £14.45 per Active Care Recipient for Core or Advanced respectively
- For GCloud Local Authority customers with 200 or more Care Recipients, our Sales team can discount the Core or Advanced package to £8 or £13 per Active Care Recipient for Core or Advanced respectively
- For GCloud Local Authority customers with 300 or more Care Recipients, our Sales team can discount the Core or Advanced package to £7.20 or £12.50 per Active Care Recipient for Core or Advanced respectively

II. Care Management packages

a. About

- **Who are they for?** Providers wanting the industry's best Care Management and Auditing features, while **using Rostering and Finance solutions external to Birdie**.
- **What do they include?** See appendix for a full breakdown of package feature inclusions.
- **How are they billed?** Based on the number of Active Care Recipients you have on the Birdie system. A definition of Active Care Recipients can be found in our terms.

b. Packages

- **Care Management** includes Birdie's core Care Management and Auditing products and provides just the right level of functionality for a provider just getting started.
- **Advanced Care Management** includes the best of Birdie's Care Management and Auditing products, giving providers the market's best toolkit to deliver and evidence quality care.

c. Pricing

Based on the number of Active Care Recipients a provider has.
All prices are per month.

Package	Care Management	Advanced Care Management
Unit Rate	£8.00	£11.00

3. Software Add-Ons

Optional add-ons based on your needs, enabling you to access additional value from Birdie. The below add-ons are compatible with all Birdie packages.

Add-On	Description	Pricing
Clinical Care	• Access a suite of Clinical Assessments • Record structured Clinical Observations	£0.02 / scheduled hour / month £1 / Active Care Recipient / month
Birdie Analytics	Birdie Analytics enables you to harness your data, enabling you to: • Understand how your performance compares with peers • Understand key business metrics through ready-made dashboards • Access digestible performance insights that make it clear how to improve and grow Birdie Analytics is delivered through Looker	**Viewer:** Access all standard dashboards and download results, £30 / licence / month. 1 license included in Core package. **Viewer+:** All in Viewer, plus schedule regular email updates and create automatic alerts, £45 / licence / month. 1 license included in Advanced package. **Explorer:** All in Viewer+, plus create custom dashboards from our extensive suite of datapoints, £200 / licence / month
Message Centre Add-On	• Ensure carers always have the most recent details of their visits • Inform your team immediately about urgent rota changes and client updates	Included in Advanced or Plus Packages or: £0.02 / scheduled hour / month £1 / Active Care Recipient / month
Single Sign-On	• Streamline login by using Microsoft Azure • Meet enterprise security requirements including Cyber Essentials Plus certification	£2 / user / month User = all admins and carers For GCloud Local Authority customers with 100 or more users, our Sales Team can discount SSO to £1 / user /

		month

4. Professional Services

A package designed to support your implementation of Birdie. The Professional Services team will work with you to make the transition to a new system as smooth as possible and help set you up for long-term success. **Purchase of an implementation package is mandatory for providers with 141 or more Care Recipients.** Additional training (online or in person) can be purchased for a fee.

I. Soar

a. About

- Assigned Implementation Manager to co-create your implementation plan and support you every step of the way
- Environments for training & testing
- 1x Training Pathway per 5 product areas (delivered for each roll-out cohort)
- Customised Workflow Guidance: Once your Implementation Manager has grasped your organisation's nuances, they'll lead you through a tailored walkthrough. This ensures you harness Birdie's full potential, optimising your processes to deliver exceptional care for your clients.
- Pre-designed training plan with defined success metrics and practice scenarios
- Hands-on project management of your co-created implementation plan
  Change Management activities, resources as part of implementation plan
- Product Trainer to design a training plan that meets the needs of your organisation and its learners; Custom training resources dedicated to your organisation and processes
- Ongoing Feature release update workshops during implementation phase

b. Pricing

Pricing is either on a per Active Care Recipient or per Scheduled Hour basis. The chosen rate depends on the rate chosen for the buyer’s Subscription plan. Professional Services fees are charged as a one-off fee and are due and payable upon contract signature.

Rate	Soar
Per Care Recipient	£28
Per Scheduled Hour	£0.60

For GCloud Local Authority customers with 100 or more Care Recipients or 4,500 or more Scheduled Hours per month, our Sales team can discount implementation fees by 25%.

For GCloud Local Authority customers with 300 or more Care Recipients or 12,500 or more Scheduled Hours per month, our Sales team can discount implementation fees by 33.33%.

5. Success and Support

Ongoing engagement packages to support your journey once you are live with Birdie. Purchase of a Success and Support package is mandatory for providers with 141 Care Recipients or more.

I. Soar

a. About

- Assigned Customer Success Manager
- 1 dedicated coaching session on preferred product area per month
- Access to our monthly webinars
- Quarterly business optimisation review aligned around your agency's personal growth and development goals
- Priority Support via Live Chat (10 min first response time)
- Alert and care quality monitoring report by branches
- 1 Birdie Analytics explorer licence
- 1 Birdie training environment

b. Pricing

Pricing is either on a per Active Care Recipient or per Scheduled Hour basis. The chosen rate depends on the rate chosen for the buyer's Subscription plan.All prices are per month.

Rate	Soar
Per Care Recipient	£1.30
Per Scheduled Hour	£0.03

For GCloud Local Authority customers with 250 or more Active Care Recipients, our Sales team can discount Success and Support fees to £0.98 per Active Care Recipient.

For GCloud Local Authority customers with 10,000 or more Scheduled Hours per month, our Sales team can discount Success and Support fees to £0.02 per Scheduled Hour.

II. Premium Support

a. About

For providers who need total peace of mind, Premium Support offers ultra-responsive access to our most experienced team members.

- **Ultra-fast response:** First response time of 5 minutes or less (Mon–Fri, 9am–5pm).
- **Expert handling:** Queries are handled by a dedicated team of our most senior support associates.
- **Hands-on help:** Scheduled outbound calls and screen-sharing sessions available at the support team's discretion to resolve complex issues quickly.

b. Pricing

- **Rate:** £120 per branch / month

Appendix: Package Feature Inclusions (Bundled and Care Management Packages)

See below for a full breakdown of feature inclusions per subscription plan.

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	Starter	Core	Advanced	Plus
Care Circle				
Keep loved ones informed with the Family app	✓	✓	✓	✓
Share information with third party access	✓	✓	✓	✓
Care Quality and Compliance				
View an audit trail of changes	✓	✓	✓	✓
Receive real time alerts	✓	✓	✓	✓
Get email and SMS notifications	✓	✓	✓	✓
Benchmark performance against CQC with our 'Q Score'	✓	✓	✓	✓
Identify care trends in the 'Client Feed'	✓	✓	✓	✓
Record compliments, complaints with 'Notes'		✓	✓	✓
Assign 'Actions' to others		✓	✓	✓
Schedule recurring 'Actions'		✓	✓	✓
Monitor quality with auditing forms		✓	✓	✓
Collect and 'Tag' evidence			✓	✓
Use pre-set automated workflows			✓	✓
Customise your automated workflows				✓
Client Experience				
Create digital assessments	✓	✓	✓	✓
Build person-centred care profiles	✓	✓	✓	✓
Upload documents to care profiles	✓	✓	✓	✓
Review assessments	✓	✓	✓	✓
Manage medication administration	✓	✓	✓	✓
Create E-signatures		✓	✓	✓

Client Experience continued, Visit Planning and Data and Reporting on the next page

	Starter	Core	Advanced	Plus
View personalised assessment recommendations			✓	✓
Set and monitor outcomes			✓	✓
Visit Planning and Delivery				
Work offline with our easy to use app	✓	✓	✓	✓
Personalise visit tasks	✓	✓	✓	✓
View and record tasks in the app	✓	✓	✓	✓
Record observations	✓	✓	✓	✓
Raise concerns instantly in the app	✓	✓	✓	✓
Create double-up visits	✓	✓	✓	✓
Check into visits with multiple clients	✓	✓	✓	✓
Schedule periods of inactivity	✓	✓	✓	✓
View and record medication administration	✓	✓	✓	✓
Create PRN protocols	✓	✓	✓	✓
Use digital body maps		✓	✓	✓
Mark tasks as ‘Essential’		✓	✓	✓
Data and Reporting				
Access prebuilt reports and insights		✓	✓	✓

Finance and Rostering on the next page



	Starter	Core	Advanced	Plus
Finance				
Add rates for payroll and invoicing	✓	✓	✓	✓
Add rates for travel and holiday	✓	✓	✓	✓
Create single, fixed, banded and service-specific rates	✓	✓	✓	✓
Apply uplifts to rates	✓	✓	✓	✓
Create pay runs for Care Professionals	✓	✓	✓	✓
Generate and share invoices	✓	✓	✓	✓
Choose from different invoice formats	✓	✓	✓	✓
Add National Living Wage top ups	✓	✓	✓	✓
View Holiday pay and accrual reports	✓	✓	✓	✓
Split invoices to accommodate multi-payer contracts		✓	✓	✓
Set up advanced mileage rules for payroll		✓	✓	✓
Manage ad-hoc expenses		✓	✓	✓
Charge for recurring visit subscriptions; add visit fees		✓	✓	✓
Rostering				
Create rota templates	✓	✓	✓	✓
Use drag and drop tools	✓	✓	✓	✓
View real time travel estimates	✓	✓	✓	✓
Download and print rotas	✓	✓	✓	✓
Schedule introductions, supervisions and shadowing	✓	✓	✓	✓
Confirm visits in bulk	✓	✓	✓	✓
Scale your rota with runs and groups		✓	✓	✓
Get a full week's view of visits		✓	✓	✓
Auto-assign unallocated visits			✓	✓

Rostering continued, Workforce Experience on the next page

	Starter	Core	Advanced	Plus
Utilise skills matching tools			✓	✓
View team capacity and utilisation			✓	✓
Workforce Experience				
Create care team profiles	✓	✓	✓	✓
Store and manage onboarding documents	✓	✓	✓	✓
Store skills and training records	✓	✓	✓	✓
Identify performance trends in the 'Carer Feed'	✓	✓	✓	✓
View and set team availability and absences	✓	✓	✓	✓
View team termination dates and reasons	✓	✓	✓	✓
Customise in-app banner messages	✓	✓	✓	✓
Automatically remove visits after a termination date		✓	✓	✓
View upcoming training expiry dates		✓	✓	✓
Access timesheets in app		✓	✓	✓
Message and send updates to Care Professionals			✓	✓
Premium Support				
Premium support for total peace of mind				✓



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	Care Management	Advanced Care Management
Care Circle		
Keep loved ones informed with the Family app	✓	✓
Share information with third party access	✓	✓
Care Quality and Compliance		
View an audit trail of changes	✓	✓
Receive real time alerts	✓	✓
Get email and SMS notifications	✓	✓
Benchmark performance against CQC with our 'Q Score'	✓	✓
Identify care trends in the 'Client Feed'	✓	✓
Record compliments, complaints with 'Notes'		✓
Collect and 'Tag' evidence		✓
Assign 'Actions' to others		✓
Schedule recurring 'Actions'		✓
Use pre-set automated workflows		✓
Monitor the quality of your service with Auditing Forms		✓
Client Experience		
Create digital assessments	✓	✓
Build person-centred care profiles	✓	✓
Upload documents to care profiles	✓	✓
Create E-signatures	✓	✓
Review assessments	✓	✓
Manage medication administration	✓	✓
View personalised assessment recommendations		✓
Set and monitor outcomes		✓

Visit Planning and Delivery, Workforce Experience on the next page

Technology that helps agencies work smarter, not just harder

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	Care Management	Advanced Care Management
Visit Planning and Delivery		
Work offline with our easy to use app	✓	✓
Personalise visit tasks	✓	✓
View and record tasks in the app	✓	✓
Record observations	✓	✓
Raise concerns instantly in the app	✓	✓
Create double-up visits	✓	✓
View and record medication administration	✓	✓
Create PRN protocols	✓	✓
Use digital body maps	✓	✓
Mark care recipients as inactive	✓	✓
Mark tasks as ‘Essential’		✓
Workforce Experience		
Create care team profiles	✓	✓
Identify performance trends in the ‘Carer Feed’	✓	✓
Customise in-app banner messages	✓	✓



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