Clarity.

Services, Pricing, and Terms

G-Cloud 15

v1.0.0

1. About Clarity

Clarity is a micro consultancy, owned and operated by David and Rachel Mizon. We set up Clarity in 2017 after working with and for similar small-scale consultancies and clinical system providers. Clarity is the culmination of a broad set of experiences and skills developed within the NHS, wider public, and private sectors.

Our work has primarily focussed on supporting the NHS through some of its most challenging history in recent years. Beginning our work at the height of austerity, we sought to offer the NHS a set of services that were affordable and effective given the challenging economic climate. Working closely with our partners we provided Trusts with vital commercial support in the wake of the National Programme for IT, which left many organisations lacking vital procurement and commercial expertise. We have supported Trusts and organisations through the Covid-19 pandemic, commercial and legal disputes, cyber attacks, and the initial development of AI.

Clarity continues to provide a mixture of strategic, advisory, and practical support to Trusts and organisations undertaking major IT procurements, engaging in contract and supplier management, holding suppliers (and Trusts) to account through performance management, and protecting the NHS in commercial disputes and disagreements.

1.1. Collaboration & Self Sufficiency

Our approach has always focussed on working closely with our clients. We work to integrate into teams rather than force unnecessary change to suit our processes. Knowledge and skills transfer are taken seriously and are at the forefront of our services. We feel we have achieved significant success not only in providing practical support to our clients but in leaving them more knowledgeable and self-sufficient.

1.2. Our Approach

Between 2017 and the present day, Clarity has worked in close partnership with its clients to deliver a series of commercial managed services. This has been highly successful. Going forward, Clarity will offer a range of different services. The older managed service approach will remain available but will be supplemented by smaller, outcome focussed services.

These new directions aim to support the changing landscape of consultancy and of the NHS more broadly. Clarity will maintain its strong roots in providing affordable, high quality, and practical commercial and procurement services. However, as the challenges facing public sector organisations steadily increase, including dwindling funding for external support, Clarity will provide a greater focus on low cost, outcomes based services, knowledge management, coaching, training and mentoring, creating standards, and building open source content and projects that can be freely used and distributed.

Our aim is to focus on empowerment and delivering services that leave our clients not only with their desired outcomes but with tools to tackle the same issues if they arise in the future.

1.3. Committing to Transformation

Clarity will renew its commitment to delivering meaningful change by developing, supporting and uplifting others, particularly those within our public services. Going forward, Clarity's priority will be to ensure that our clients receive not only the best service, but also the confidence to take on greater challenges themselves, knowing that we will always be there for advice and support.

1.4. Want to say Hello?

We would like to thank you for your interest in Clarity and if there are any queries regarding our services, please do not hesitate to contact us at hello@creatingclarity.co.uk.

2. Clarity's Purpose

Clarity's purpose is to provide affordable, high-quality, evidenced, and pragmatic advisory services, practical commercial support, and documentation to NHS and other public sector bodies to support their digital innovation and transformation projects.

In meeting this purpose, Clarity shall:

- Always work closely with clients to assess Clarity's role and requirements and continually assess the value for money of any service.
- Offer full pricing transparency and commit to benchmarking against the marketplace.
- Support our clients' staff with training, advice, and knowledge transfer to improve their capability and self-sufficiency in the future.
- Fully document and audit any work undertaken and make available, at no additional charge or licence restriction, any documentation created on behalf of the client.
- Remain aligned to government standards and the latest guidance at all times. Where this requires additional training, this shall be at no additional cost to the client.
- Uphold strong moral and behavioural standards. Clarity shall embody and uphold the Seven Principles of Public Life in all its activities - https://www.gov.uk/government/publications/the-7-principles-of-public-life/the-7-principles-of-public-life--2.
- Remain impartial within the supplier marketplace showing no preference nor entering into any conflicting relationship that may otherwise impact our advice or services.
- Ensure our work is completed in a way that delivers benefit and transfers knowledge and capability to our clients. We will always complete a full handover to the client or any new third-party supplier upon the expiry of our contract. This will include providing relevant contextual information that may not be obvious from outputs or documentation.

3. Our Services

3.1. Introduction

Clarity's services are provided as part of an outcome-based statement of work. This ensures a fixed set of outcomes are achieved for a given investment. To simplify this further, Clarity offers pre-packaged services with a defined set of outcomes.

Clarity can support both short-term and long-term retained engagements e.g. over 12 months to allow an end-to end management of a procurement. Some of these longer-term services have carried into many years of support depending on the complexity and capability of the Trust.

Our pricing document provides a simple process for determining the charges for a service. Clarity remains flexible at all times and can provide an array of different services to meet a specific requirement.

Our services are broadly split into four categories:

1. Commercial Project Services - Fully bespoke outcome based solutions.
2. Contract, relationship and knowledge management services - affordable fixed services with predefined outcomes.
3. Coaching, Mentoring, and Training - Supporting individuals and teams to achieve their full potential.
4. Pulpp - Open source membership providing free to use templates, knowledge, and commercial insight within an annual membership.

Clients are free to mix these services and engage each to different extents. For example, a potential client may be wishing to undertake a commercial readiness exercise followed by a procurement. This is simple to describe and articulate in a G-Cloud call off. If a dispute arises with the chosen supplier, the client may simply include the relevant services via change control as they are clearly in-scope and dispute, as a normal part of commercial practice should not represent a material deviation.

If you have any questions about our service or your requirements, please do not hesitate to contact us for support and advice.

3.2. Commercial Projects

Introduction

The core of clarity services has traditionally been commercial projects. Every commercial requirement is different, has varied requirements, and specific outcomes. As such, Clarity does not try to ring fence commercial support for commercial projects. Our commercial project services are defined by the skills required to create a solution.

We used the Skills for the Information Age (SFIA) standard to identify the skills available for commercial projects. Clarity has spent over a decade building experience in a broad array of settings and building solutions to commercial challenges that range from simple contract reviews through to major disputes, commercial restructuring and strategic procurements.

We work with out clients to first understand their goals and build a solution around their specific needs.

> **Please note** that this service description is not exhaustive and services and not mutually exclusive. Clients can add as many of the services together to create a suite of solutions to meet their needs. Please don't hesitate to get in touch to discuss your requirements. The following services provide an indicative view of the breadth and depth of services available but are not exhaustive.

Service Overview

Purpose

To provide tailor commercial support and advice to any commercial matter faced by a client.

Outcome

This is specific to the client and their requirements. We aim to build solutions around the desired outcomes and work backwards to define the right level of support.

Deliverables

These are defined through planning with the client. All projects will be suitably documented in accordance with good industry practice. Any specific deliverables will be identified by the client and factored into the service delivery.

Pre Award Services

The following services are provided either in the early stages of a procurement or as part of day-to-day commercial management.

Contract Management Strategy

helping clients define their approach to contract management and other day-to-day commercial practices within an organisation.

Commercial Case

Managing, contributing, and advising on the commercial case (or equivalent of a Green Book business case.

Supplier Review

Reviewing supplier performance, commercial status, and financial stability and feeding back on the merits and risks of supplier's commercial approaches and models.

Contract Choice

Providing advice and support to the review and selection of different commercial models and documents.

Procurement Strategy, Architecture, and Design

Advising, managing, or supporting the early stages of procurement activities with a focus on creating organisational strategy based on desired goals and outcomes.

Procurement Services

The following services are provided as part of formal procurement activity. If you are a private sector client, Clarity is happy to support bids and tenders or provide advice on public sector practices.

Procurement Planning

Planning activities pertaining to specific procurement activities e.g. obtaining documents, building resource and project plans and assessing stakeholder engagement.

Preliminary Market Engagement

Carrying out Procurement Act 2023 compliant Preliminary Market Engagement activities.

Procurement Advice

Specific advice on any procurement matters.

Requirements gathering and creation

Supporting the gathering and creation of requirements for services and creating procurement ready formats and documentation.

Documentation development

Producing procurement documentation in line with the regulations and/or the desired procurement approach.

Procurement Process Management

Undertaking procurement activities on behalf of the client in accordance with PCR2015, PA23, or Standing Financial Instructions (as appropriate).

Bid and Tender Evaluation

Managing or supporting the evaluation of tenders and bids as part of a formal procurement activity.

Negotiation

Negotiation of contract terms on behalf of the client in alignment with desired negotiation strategy and outcomes.

Procurement Supplier Management

Managing suppliers during complex or challenging procurement. Specifically, this is related to direct supplier interactions needed to maintain supplier relationships, deliver challenging information or managing sensitive procurement processes e.g. bidder debriefs.

Contract Drafting and Award

Completing contract documentation and managing or supporting the approval process for the contract prior to signature.

Approvals and Sign Off Support

Managing or supporting the approval process to ensure the successful and timely approval. Briefing, reporting, board meeting presentations and clarification processes.

Post Award Services

The following services are predominantly related to contract management after the award of an agreement. Many of these services can be applied retrospectively or in settings where the client wishes to improvement their commercial oversight and management of a supplier.

Transition Management

Managing or supporting the transition of suppliers during the implementation of a new system.

Risk, Actions, Issues, Dependencies Management

RAID management for major projects to ensure the ongoing tracking and maintenance of key issues.

RACI and Obligations Management

Clarifying and documenting roles and responsibilities including negotiations on behalf of the client. This can be provided as an internal process or between the client and a supplier.

Financial Tracking

Tracking financial positions and working with client financial teams to ensure compliance with the contract.

Compliance and Notices

Ensuring the Trust remains aligned to PA23 reporting requirements and has accurate up-to-date information available.

Skills Management (SFIA)

Managing and enforcing skill levels in suppliers and part of performance management using external standards such as SFIA.

Change Management (CCNs)

Ensuring contract changes are robust, and compliant with regulations as well as commercially sound and aligned to the clients goals and desired outcomes.

Governance

Working within the client's existing governance or advising on governance structures to ensure robust management of complex contracts.

Supplier Management (Engagement and Relationship)

Managing the relationship between a client and supplier (on behalf of the client) to achieve the client's strategic goals and maintain the organisation's reputation and perception.

Performance Management

Ensuring suppliers perform in accordance with the contract and in line with any public KPIs issued under PA23.

Breaches and Remedies

Managing the process of assessing and rectifying breaches of the contract and ensuring suitable remedy is achieved.

Supporting Legal Teams

Working with client legal teams to practically carry out legal advice and to "translate" operational challenges into a commercial and legal argument to better direct legal advisory support.

Benefits and Outcomes Tracking (not Benefits Realisation)

Ensuring that the contract is aligned to delivering the benefits identified in the client's benefits realisation plan or business case.

Exit Management

Ensuring contracts are exited fully and appropriately, particularly in critical and sensitive systems containing special category data. This includes the create of commercial binding exit plans with the client's supplier.

Notices and Renewal

Preparation of contract renewal and advance planning for future commercial activity.

Pulpp Project Services

Pulpp is a continuously growing set of documents, standards, and knowledge that may seem overwhelming. The principle behind Pulpp is to create universal and reusable documentation and processes. These may need tailoring to your specific needs or require additional training or implementation to be effective.

Clarity will provide support to any Pulpp related projects or documentation. Please be sure to check that your request won't be met by your Pulpp subscription. Generally, this service is for anyone wanting to take Pulpp templates and create bespoke documents specific to their organisation. Whatever support you require, Clarity will happily review your requirement and advise on the best next steps.

Pulpp project services use the same charges as the normal commercial projects services meaning you never pay more for working on Pulpp projects.

Wherever possible, Clarity will look to use Pulpp documentation and templates to speed up normal commercial project work.

3.3. Contract Management

Introduction

Contract management is a necessary part of managing any supplier and ensuring the delivery of transformational project on time and in budget. Contract management is the primary mechanism by which suppliers' obligations are enforced. It is a vital part of any major project. The UK government requires all contracts to be subject to contract management. Public sector bodies are required to factor in commercial support for contract from the outset and must provision the adequate level of contract management support. Clarity has designed a simple contract management service that can be purchased per contract and has clear fixed pricing and outcomes.

In contract management, Clarity is taking on the day-to-day role of supporting and managing the contract. The extent to which contracts are managed depends on their "tier". Clarity has aligned its service to the Crown Commercial Function's Contract Tiering Tool. This ensures Clarity's services are aligned to the same standards of complexity and effort used in the public sector.

Service Overview

Purpose

To provide clients with a simple, per contract contract management service that is aligned to expected public sector standards based on contract complexity.

Outcome

Each supported contract will be managed in accordance with government standards and in line with the client's requirements and strategy of the service and/or supplier.

Deliverables

A wide array of standard template reporting, managed meetings, supplier management, change control not and other documentation as may reasonable be expected in the day-to-day management of contracts.

Contract Tiering

Clarity provides three tiers of contract management support. These support levels align to the Crown Commercial Function Contract Tiering Tool:

- Simple (Bronze) - Contracts with a value less than £250,000 ex. VAT and with simple contract obligations a deliverables based on a clear, documented service standard and minimal change. e.g. basic clinical app, simple departmental IT system, non-core clinical information systems or system module.
- Intermediate (Silver) - Contracts between £250,000 and £2,499,999 ex. VAT providing more complex or critical solutions with multiple KPIs and service management activities. Services are being used to deliver core or critical functions for which there would be business disruption if issues were not resolved. e.g. service or department level clinical information systems, systems used in the front line provision of care and intrinsically linked to core systems.
- Complex (Gold) - Contracts above £2,500,000 ex VAT. providing critical and high value outcomes with complex service management requirements, ongoing review and continuous risk management. Complex contracts represent strategic solutions for a departments or organisation that would incur material impact in the event of failure or mismanagement. e.g. Core Systems, Electronic Patient Records, Major Clinical Systems.

> **Please note** that value is a poor predictor of contract management complexity. Some clinical systems are less than £250,000 but their failure

> would have a material impact on a Trust's business activities. Low value solutions can have disproportionate impacts in critical environments. Business need, reliance, and front line impact are better predictors. I will always work with you to categorise a contract and provide the most accurate definition based on your context and needs. The Crown Commercial Function Tiering Tool will serve as a baseline for all decisions regarding contract complexity and can be tailored according to specific needs.

Key Service Features

Supplier Performance Meetings

meeting with suppliers in accordance with the contract to discuss performance, contractual issues, and issues.

Supplier performance reporting

Documentation and reporting designed to control and highlight contractual and commercial matters throughout the service.

Customer and End User Satisfaction surveys

questionnaires and feedback from end users measuring the supplier's performance from a qualitative perspective.

Supplier liaison meeting (innovation/ relationship/ forward planning)

Meetings designed to collaborate and work with suppliers to improve the contract, plan for future working, and building continuous improvements and innovations into services.

Customer meetings

Meetings with the Customer to review and assess internal strategy and requirements specific to the contract.

Contract Management Plan*

Defining a clear plan and strategy for contract management for one or a number of commercial agreements.

Contract Management Scheduler*

Planning and review of upcoming contractual management requirements, including management strategies.

Contract Change controls*

Undertaking formal changes to the contract including but not limited to actioning contract mechanisms, adding new services, removing services, reflecting reality in the contract.

Budget controls*

Working with finance teams and budget controllers to understand financial implications of contracts.

Benchmarking*

Assessing the supplier's value for money in the marketplace and assessing whether additional commercial negotiations are required to address high charges.

Supplier financial and business standing review

Assessing and ensuring the financial stability of key contracts and ensuring their stability for use in critical settings.

Contingency and Business continuity plans

Working with Suppliers to ensure plans are documented, tested, and compliant with good industry practice. Also includes ensuring internal plans are aligned to supplier processes.

Benefit Realisation update*

Working with internal teams to assess the benefits realisation of the contract, particularly in-line with a managed benefits realisation plan or business case.

Issues and Risk Register

Logging and managing issues and risks pertaining to the contracts.

Exit Plan*

Working with Suppliers and client teams to understand exit obligations and plan for both natural expiry and early termination.

Soft Market Testing*

Undertaking market research or formal preliminary market engagement exercises.

Dealing with escalations, disputes and complaints (indicative, as will depend on type of provision and number of stakeholders involved)*

Managing and negotiating major contractual issues including resolutions, remedies, and mitigation prior to formal legal interventions.

*These services lines may be out of scope depending on the requirement. This service will provide business as usual support to these functions; however, where the Trust wishes to undertake additional contract management projects e.g. formal pre market engagement, exit management, change control, or disputes, they must include these via the change control process using the commercial projects services.

Breakdown of Services by Contract Tier

Task	Bronze	Silver	Gold
Supplier Performance Meeting (1 hour p/m)	x	x	x
Simple CCN with known clear scope with existing basis in contract e.g. to extend term or add licences	x	x	x
Contract feedback and next steps	x	x	x
Shadowing by client team	x	x	x
Compliance checks (DTAC, Insurances, DSPT etc.)	x	x	x
Minor change controls to add in new modules with clear definition and minimal negotiation (excluding changes to terms and conditions)		x	x
Atamis updates (or equivalent system)		x	x
Customer and end user satisfaction surveys		x	x
Issues and risk register updates		x	x
Customer meetings (1 hour p/m)		x	x
Review and manage contract management actions (Actions Log)		x	x
Annual exit management review		x	x
BCDR testing and compliance support		x	x
Cyber security testing and compliance support		x	x
Performance review and KPI tracking		x	x
Monthly finance model checks and updates		x	x

Task	Bronze	Silver	Gold
Support to information governance and data protection process e.g. DPIAs		x	x
Monthly knowledge management and information sharing with trust procurement team		x	x
Monthly updates and support to finance teams		x	x
Supplier relationship management		x	x
Procurement notice support			x
Stakeholder engagement meeting			x
Board and additional governance reporting			x
Internal risk and issues management (managing mitigations)			x
Complex financial and funding support e.g. NHSE funding, ongoing financial reviews, financial distress or supplier instability			x
Strategic planning and engagement with senior leaders			x
Supplier strategic review meetings			x
Procurement and commercial strategy advice			x
Mentoring			x

Client Responsibilities

Clients procuring these services must be aware that contract management is an organisation wide process. These services provide the front line obligations and interactions with key parties. To be effective, the client must already have the relevant governance structures and contract management processes in place to effectively handle the outputs of Clarity's services. For example, there must be a governance structure to report issues and risks into.

The outcomes provided under these services do not represent an exhaustive contract management function. This requires cross-organisation functions collaborating under agreed processes. The Crown Commercial Function's Contract Tiering Tool sets out contract management resource requirements.

Clarity is happy to review a client's existing contract management functions and assess any gaps in service. These can be picked up through uplifting standard contract management services with additional days from the commercial projects service.

For indicative purposes, the Crown Commercial Function recommends the following average resource utilisation per contract per annum (the number of days covered by the Clarity services is provided in brackets):

- Gold Contract – 81.5 days (24 days)
- Silver – 43.5 days (12 days)
- Bronze – 9.75 days (4 days)

3.4. Proactive Relationship Management

- Per contract pricing
- Fixed service with fixed outcomes and deliverables
- A detailed breakdown of the Proactive Relationship Management service can be found on https://creatingclarity.co.uk.

Introduction

Proactive Relationship Management is an approach to managing commercial relationships that focusses on positively and constructively managing disagreement and change. The process facilitates open discourse about both existing and potential areas of conflict or disagreement within a commercial relationship. With awareness of these issues, the parties can proactively mitigate their impacts. The aim of this approach is to develop conflict positivity and improve complex projects by accepting dispute as as an unavoidable reality that should be managed creatively as an opportunity to better define positive outcomes.

Clarity acts as an impartial facilitator to work with parties as part of a shared agreement. The facilitator provides guidance on the process and oversees communication and discussions about existing and potential disputes offering coaching where appropriate.

The service is achieved through a set of regular private and joint meetings following the principles of mediation. The parties to the contract remain in control and responsible for developing solutions to meet their needs and mitigate dispute. Private meetings are entirely confidential and not shared, allowing the parties to highlight sensitive internal context that may not be provided in normal contract management meetings. Joint meetings allow the parties to co-create solutions and highlight risks to one another in an open and collaborative forum.

The service uses existing governance and documentation to limit overheads and seeks to focus on clear, mutually beneficial, problem solving. The aim of the service is to make solving complex relationships and unforeseen conflicts easier to engage with and therefore sustainable to manage. Whilst it requires engagement in meetings, the process does not require significant documentation or reporting. The focus is on openness, transparency, and collaboration to use existing tools to deliver innovative solutions to challenging relationship problems.

For a detailed breakdown of how the service operates and worked examples please visit https://creatingclarity.co.uk.

Service Overview

Purpose

To provide a shared commercial space for the proactive and transparent management of disputes facilitated by an external and impartial organisation. By creating a conflict positive approach to contract management the parties can collaborate on challenges for mutual benefit.

Outcome

A lower level of dispute impacting the project, external validation of contract management processes on key contracts, and increased transparency between organisations as a result of a collaborative and transparent approach to disputes.

Deliverables

The service provides a mutually agreed process (through the Proactive Relationship Management Agreement), monthly private and shared meetings following a mediation style model that allows parties to work together in a controlled way. The service also provides monthly feedback on the risk, as observed by an impartial external party, of potential disputes and recommendations for the parties to mitigate future disputes.

Key Service Features

Existing commercial process review

Clarity can review existing commercial and contract management processes and provide a gap analysis for the parties aligned to public sector best practice. This ensures that the basic challenges of contract management are fixed before the start of the service and that disputes reflect genuine issues and not shortcomings in processes.

Proactive Relationship Management Agreement

PRM is a shared service. Its costs are split between the two parties to ensure it remains fully impartial. Every PRM service is initiated with a PRM agreement. This follows the principles of a mediation agreement. It ensures the parties fully understand the purpose and rules of the service. It gives each party confidence that they are working to the same approach.

Private preparation meetings

Each party to the PRM agreement will have a monthly private meeting before the joint meeting. This allows key points to be shared and discussed without the other party present. This is useful to prioritise issues, identify relevant context that impacts the issues and allows the facilitator opportunity to reality test and coach the party's chosen approach.

Joint meeting management

The joint meeting is managed and facilitated by Clarity to ensure it remains balanced and fair. The parties can discuss possible sources of dispute, follow up on existing disputes and agree plans to mitigate future challenges.

Follow up meeting

Each party will receive a follow up meeting that allows a private space to decompress and react to the joint meeting. This ensures that challenging joint meetings are not left to fester until the next session and that positive and pragmatic forward-focus can be maintained.

Reporting and Feedback

Clarity will provide regular updates and recommendations from the perspective of an external party on the commercial actions parties should be considered. These will be aligned to best practice with clear justifications. Clarity will provide private reports to each party and a joint report to allow sensitive and private matters to be considered and actioned.

Mutual commercial support

Clarity will provide hands-on support to both parties subject to mutual agreement and provided that the requirements are impartial and do not unduly benefit one party. This is useful where parties may lack knowledge or be new to implementing certain processes and require ad-hoc support.

3.5. Knowledge Management

Introduction

The NHS and its suppliers generate a large amount of useful content and knowledge ever day. Within a Trust there can often be vital updates and useful context siloed in individuals or teams. Information useful to commercial teams or decisions makers may be stuck in operational teams. Important cyber security information may not make it from Trust to Supplier. To combat this, many organisations create CRMs or purchase project management, or knowledge base software. Each of these systems has its merits but suffers from the same challenge, the systems require input. This means time taken out of every day or week to complete and update the relevant solution. To do this accurately inputs may need to follow certain formats, be stored in the correct location, and be readily understood. All this can often take a significant time out of already full diaries. Furthermore, if you aren't comfortable writing or articulating complex issues simply, you may feel that your inputs are low quality and of no use. The outcome of this… the expensive project management platform, bespoke Sharepoint site, feature rich CRM, and complex knowledge base are replaced by a simple phone call, chat message, coffee break chat, or post it note.

Knowledge management systems need to have a low barrier to input (just like a quick chat or post-it note) but also be:

- Persistent - so that we can come back at a later date and find the same information
- Structured - so that we can find information in a logical location, and related information will be located in a similar location.
- Future proof - so that information is not vendor locked, can be moved to new locations with ease, and will last over technological trends.

Clarity's knowledge management system provides a simple online wiki to store knowledge in a consistent and repeatable way. Wikis are not new technology but they work and are stable. They're also very cheap, easy to manage, and are portable. Wikis still suffer from the same issue of input. Clarity's service offers regular drop-meetings and targeted interviews to ensure that the knowledge base is updated with up-to-date information. We will do all the drafting, organising, tagging, and linking. This allows us to make sharing information as easy as turning up to a call for 5 minutes, providing your update and leaving. We pick up the work of turning that information into useful knowledge. The Clarity knowledge base service has a low barrier to input, is persistent, structured, and future proof.

Service Overview

Purpose

To provide a managed knowledge base service that is open, secure, structured, persistent, and future proof. The service shall offer low barriers to input that ensures the knowledge base is easy to grow, access, and rely upon.

Outcome

A continually updated and managed knowledge base that can be used by multiple teams and projects. Better informed teams engaging in a culture of transparency, knowledge sharing, and collaboration.

Deliverables

A secure, managed wiki solution. Structured content using the Pulpp Knowledge Management Template. Regular interviews and drop in sessions to allow user to submit information. Technical drafting, editing, and curating of knowledge. Training, support, and handover and support if the client wishes to take control of the wiki.

Key Service Features

Open source wiki solution

Clarity's Knowledge Management service uses DokuWiki, and open source, lightweight wiki software that operates without a database (it works on plain text files). This is a simple but well rounded solution that offers all the features of a modern wiki solution such as linking, categorising, tagging, user management, access control, view control, and other similar features. It is built on robust and prevalent technologies and has a strong community. This ensures that clients can rely on the solution but also use its open source nature to develop and manage the solution themselves.

Plain text data

The stores data as plain text files. There is no database. For everyday use this is inconsequential; however, for portability and stability this is a positive feature. Backing up the solution is as simple as making a copy of the files. Setting up a new instance is as easy as copying files from one instance to another. Even if the solution breaks, the underlying data is still in human readable text files. This ensures that no matter how much a client invests in the knowledge base, their data will always be safe, easy to move, and available forever.

Pulpp Knowledge Management Template

Clarity uses the Pulpp (see below) template for knowledge management systems. This is an opinionated template that structures the wiki so that clients do not have to think about how they want to store data. We have done that hard work so that all a client has to worry about is creating high quality content.

Future proof

Technology trends change, cloud services increase in cost or deprecate features. Moving data between systems requires complex transformation and data migration. Clarity's solution is not designed around locking users in. We see the value in this service as being the quality of content that is in the system not the software itself. Wikis manage some of the largest repository's of digital knowledge in the world in free and transparent formats. The plain text, open source nature of this solution means that the system can be continually developed, improved, or transferred somewhere else with ease. As mentioned above, moving to a new system is as easy as copy/paste.

Regular Interviews

The service provides a regular structured interview. This operates as a drop in session where users can join a call, provide their information and drop off again. We use some standard checks and questions to allow use to more accurately structure and file data away. This also allows users to prepare their knowledge in advance. Clients can have as many or as few interviews as they see fit.

Written responses

Clarity also provides a written response template that can be filled in. Each interview includes a set number of forms that will also be processed. Written responses are great for those that cannot make the drop-in or have more sensitive information. They are also perfect for external parties e.g. a supplier. Clients are free to send a response sheet to anyone they want to feed into the knowledge base. These are then uploaded along with all data from the interviews.

Knowledge base update and formatting

Once information has been collected it is then formatted, structured, and linked to existing information in the knowledge base giving users access to information soon after it has been provided. Importantly, the cross linking of information ensures that people can organically "stumble" across relevant information from areas of interest outside of the original information.

Bespoke solutions

Clarity can work with clients to create bespoke solutions. DokuWiki can be tailored in many ways and can even be extended and developed. Even if clients simply want additional structure or a new format, this can be easily implemented.

User access

All wikis offer user access and view management. Our solution allows clients to set up different teams and silos within the main knowledge base. This allow clients to set up general areas and more specific areas of knowledge that are restricted to general users or those from other teams.

Hosting and maintenance

Clarity will host and maintain the DokuWiki solution. The beauty of a simple, lightweight solution is that hosting is equally lightweight and therefore very affordable. This is also a major benefit is the client want to run the system themselves. DokuWiki is so resource efficient if could even run locally on any normal laptop with near zero impact on the device's performance.

Handover and Training

Knowledge shouldn't belong to a software vendor or external service. It belongs to the client. Clarity are more than happy to handover the entire wiki solution to our clients. This will include training on how to manage the solution. We truly believe the value of this service is in helping user to create high quality content and not in deliberately locking up vital information and making it hard to leave the service.

3.6. Coaching, Mentoring, and Training

Introduction

Clarity provides coaching, mentoring, and training services that specifically aim to support those in transformational IT roles. We have worked for a long time supporting NHS organisations and suppliers to the NHS. This services looks to support individuals directly and take a human-centred approach to problem solving. By empowering and supporting the individuals delivering services, Clarity hopes to be able to up skill and develop talent within the healthcare sector.

As the NHS enters a new era of seeking to achieve greater efficiencies, improved performance from existing resources, and transformation of services to meet modern needs, it must focus on how it supports the people and teams that make these changes possible. Coaching, mentoring and training, are proven, low-cost options for helping teams and individuals to increase their performance and be empowered to make the changes necessary to meet the challenges ahead.

Service Overview

Purpose

To support the empowerment of individuals and teams within the healthcare sector to ensure they have the personal tools and ability to meet the significant transformations needed to meet long-term strategic goals of both the NHS and its Suppliers.

Outcome

Empowered teams and individuals with improved performance.

Deliverables

A series of coaching sessions for resources in the organisation and associated reporting (in the case of organisational coaching).

Key Service Features

BSC qualified services

All coaching and mentoring will be provided by a British School of Coaching Qualified coach. This ensures all coaching is high quality, ethical, and aligned to best practice.

Organisational coaching

Coaching can be provided under an organisational structure. This means that the coaching is provided to a specific team or department with oversight and engagement with senior leaders. Coaching remains private and confidential for the coachees but the organisation will receive reports on progress and can set priorities and goals from an organisational perspective.

Independent coaching

Clarity can also provide coaching to individuals with no organisational oversight. This can provide coachees with specific focus and align to their own personal goals and development aims.

Group or one-to-one

Coaching sessions can be provided to teams (multiple coachees at once) or individually, based on the needs of the client.

Free to use resources

Clarity will provide all resources and make recommendations for useful third party resources if appropriate.

Reporting and feedback

Whether coaching is independent or organisational, Clarity will provide continuous feedback and reporting to the client. This ensures the coaching relationship is continually reviewed and kept relevant and also ensure that senior leaders are kept up to date on the progress of larger organisational coaching projects.

Building internal capability

Clarity aims to build internal capability and skills through coaching, mentoring and training. Coaching is proven to increase performance and in turn cultivates a coaching culture that can sustain itself after coaching has finished.

Chemistry testing

Clarity is happy to provide chemistry testing sessions to ensure the "fit" between Clarity and coachees, and the wider organisation is conducive to high quality coaching. Coaching is an inter-personal discipline that relies on a strong and compatible coach-coachee relationship. Chemistry sessions ensure both parties are a good fit for one another before committing to any of our services.

3.7. SFIA Overview

Introduction

The following table sets out all SFIA skills covered by the Clarity services. Each skill applies to specific services (the the key in the previous section.

- All skills are assumed to be Level 5.
- It is anticipated that each service will use a blend of skills at different levels. Clarity shall manage the application and prioritisation of skills with each client.
- Clarity is aligned to SFIA version 9 (https://sfia-online.org/en/sfia-9/skills/all-skills-a-z).
- Skills are not services. Clarity has created services that rely on the following skills. These skill definitions are included for the purpose of transparency and, if required, the assessment of Clarity's performance. The performance of services will be judged on the basis of their achievement of the client's requirements and outcomes.

SFIA Table Key

The following table provides a key to the Master SFIA table in the next section.

Code	Related Service
C	Commercial Projects
CM	Contract Management
PRM	Proactive Relationship Management
KM	Knowledge Management
CMT	Coaching, Mentoring and Training

Master SFIA Table

Skill	Service Applicability	SFIA Description	Link
Audit	C,CM,PRM	Delivering independent, risk-based assessments of the effectiveness of processes, the controls, and the	https://sfia-online.org/en/sfia-9/skills/audit

Skill	Service Applicability	SFIA Description	Link
		compliance environment of an organisation.	
Benefits management	C,CM	Forecasting, planning and monitoring the emergence and effective realisation of anticipated benefits from projects and programmes.	https://sfia-online.org/en/sfia-9/skills/bid-proposal-management
Business Administration	C,CM,KM	Managing and performing administrative services and tasks to enable individuals, teams and organisations to succeed in their objectives.	https://sfia-online.org/en/sfia-9/skills/business-administration
Business situation analysis	C,CM,PRM, KM	Investigating business situations to define recommendations for improvement action.	https://sfia-online.org/en/sfia-9/skills/business-situation-analysis
Change Control (Commercial)	C,CM,PRM	Assessing risks associated with proposed changes and ensuring changes to products, services or systems are controlled and coordinated.	https://sfia-online.org/en/sfia-9/skills/change-control
Consultancy	C,KM,CMT	Providing advice and recommendations, based on expertise and experience, to address client needs.	https://sfia-online.org/en/sfia-9/skills/consultancy
Content Authoring	C,KM	Planning, designing and creating textual information, supported where necessary by graphical content.	https://sfia-online.org/en/sfia-9/skills/content-authoring
Content design	C,KM	Planning, designing and creating	https://sfia-online.org/

Skill	Service Applicability	SFIA Description	Link
and authoring		content that meets user-centred and organisational needs, encompassing textual information, graphical content and multimedia elements.	en/sfia-9/skills/content-design-and-authoring
Content publishing	C,KM	Managing processes to collect, assemble and publish content across various channels to meet organisational and audience needs.	https://sfia-online.org/en/sfia-9/skills/content-publishing
Contract Management	C,CM,PRM	Managing and controlling the operation of formal contracts for the supply of products and services.	https://sfia-online.org/en/sfia-9/skills/contract-management
Cost management	C,CM,PRM	Planning, controlling and analysing costs to enable the effective use of financial resources.	https://sfia-online.org/en/sfia-9/skills/cost-management
Governance	C,CM,PRM	Defining and operating a framework for making decisions, managing stakeholder relationships, and identifying legitimate authority.	https://sfia-online.org/en/sfia-9/skills/governance
Information and data compliance	C,CM,PRM	Implementing and promoting compliance with information and data management legislation.	https://sfia-online.org/en/sfia-9/skills/information-and-data-compliance
Innovation management	C,KM	Identifying, prioritising, incubating and exploiting opportunities provided by information, communication and digital technologies.	https://sfia-online.org/en/sfia-9/skills/innovation-management

Skill	Service Applicability	SFIA Description	Link
Knowledge Management	C,KM	Managing vital knowledge to create value for the organisation.	https://sfia-online.org/en/sfia-9/skills/knowledge-management
Learning & Development Management	C,KM,CMT	Delivering management, advisory and administrative services to support the development of knowledge, skills and competencies.	https://sfia-online.org/en/sfia-9/skills/learning-and-development-management
Learning Delivery	C,KM,CMT	Transferring knowledge, developing skills and changing behaviours using a range of techniques, resources and media.	https://sfia-online.org/en/sfia-9/skills/learning-delivery
Learning Design and Development	C,KM,CMT	Designing and developing resources to transfer knowledge, develop skills and change behaviours.	https://sfia-online.org/en/sfia-9/skills/learning-design-and-development
Market research	C,KM	Gathering, analysing and interpreting data about markets, customers and competitors to inform business decisions and strategies.	https://sfia-online.org/en/sfia-9/skills/market-research
Organisational change enablement	C,KM,CMT	Facilitates cultural and behavioural change by enabling individuals and teams to embed new ways of working and adapt to changes.	https://sfia-online.org/en/sfia-9/skills/organisational-change-enablement
Organisational facilitation	C,KM,CMT	Supporting workgroups to implement principles and practices for effective teamwork across organisational boundaries and professional specialisms.	https://sfia-online.org/en/sfia-9/skills/organisational-facilitation

Skill	Service Applicability	SFIA Description	Link
Performance Management	C,CM,PRM	Improving organisational performance by developing the performance of individuals and workgroups to meet agreed objectives with measurable results.	https://sfia-online.org/en/sfia-9/skills/performance-management
Personal Data Protection	C,CM,PRM	Implementing and operating a framework of controls and management strategies to promote compliance with personal data legislation.	https://sfia-online.org/en/sfia-9/skills/personal-data-protection
Portfolio Programme and Project Management	C,CM,PRM, KM	Providing support and guidance on portfolio, programme and project management processes, procedures, tools and techniques.	https://sfia-online.org/en/sfia-9/skills/portfolio-programme-and-project-support
Professional Development	C,CMT	Facilitating the professional development of individuals in line with their career goals and organisational requirements.	https://sfia-online.org/en/sfia-9/skills/professional-development
Requirements definition and management	C,KM	Managing requirements through the entire delivery and operational life cycle.	https://sfia-online.org/en/sfia-9/skills/requirements-definition-and-management
Service Level Management	C,CM,PRM	Agreeing targets for service levels and assessing, monitoring, and managing the delivery of services against the targets.	https://sfia-online.org/en/sfia-9/skills/service-level-management
Sourcing	C	Managing, or providing advice on, the procurement or commissioning of products and services.	https://sfia-online.org/en/sfia-9/skills/sourcing

Skill	Service Applicability	SFIA Description	Link
Specialist Advice	C,CM,PRM, KM,CMT	Providing authoritative advice and direction in a specialist area.	https://sfia-online.org/en/sfia-9/skills/specialist-advice
Stakeholder relationship management	C,CM,PRM, KM	Systematically analysing, managing and influencing stakeholder relationships to achieve mutually beneficial outcomes through structured engagement.	https://sfia-online.org/en/sfia-9/skills/stakeholder-relationship-management
Strategic planning	C,PRM	Creating and maintaining organisational-level strategies to align overall business plans, actions and resources with high-level business objectives.	https://sfia-online.org/en/sfia-9/skills/strategic-planning
Subject Formation	C,KM	Specifying, designing and developing curricula within a structured and systematic education environment.	https://sfia-online.org/en/sfia-9/skills/subject-formation
Supplier Management	C,CM,PRM	Aligning the organisation's supplier performance objectives and activities with sourcing strategies and plans, balancing costs, efficiencies and service quality.	https://sfia-online.org/en/sfia-9/skills/supplier-management
Teaching	C,CMT	Delivering and assessing curricula in a structured and systematic education environment.	https://sfia-online.org/en/sfia-9/skills/teaching
User experience analysis	C,KM	Understanding the context of use for systems, products and services and specifying user experience requirements and design goals.	https://sfia-online.org/en/sfia-9/skills/user-experience-analysis

Skill	Service Applicability	SFIA Description	Link
User experience evaluation	C,CM,PRM, KM	Validating systems, products or services against user experience goals, metrics and targets.	https://sfia-online.org/en/sfia-9/skills/user-experience-evaluation
User research	C,KM	Identifying users' behaviours, needs and motivations using observational research methods.	https://sfia-online.org/en/sfia-9/skills/user-research

3.8. Pulpp

Introduction

Pulpp is a project that was set up to provide a new way for both private and public sector clients to access and share open source knowledge. It is built on the principle of lowering the duplication of effort for suppliers and NHS Trusts when working together. If a problem has been solved before the knowledge should be readily available and used again.

Pulpp is a toolbox offering a wide range of different projects that provide guidance, advice, support, templates, and useful data that can underpin successful projects. At the core of Pulpp is a knowledge base built using open source tools to support public, private, and academic organisations engaged in healthcare digital transformation. It provides access to curated, open source knowledge. This knowledge base is created and maintained by Clarity.

Pulpp provides answers to questions, builds template documents, curates publicly available information, provides tutorials and guidance, defines reusable processes, offers advice, helps its community gather and share knowledge, and builds tools that can be accessed and practised, passed on, and even developed commercially by its community.

What does open source mean?

"Open source" refers to the legal (under licence) ability to use a product or output that has been specifically designed to be publicly accessible. Users can inspect an output, modify it, enhance it, and distribute it freely (as in freedom, not necessarily at no charge). For software, this means being able to access the source code (the building blocks of the code). For Pulpp, this means having access to editable versions of all outputs in open formats so that you can use, change, or pass on the documents without technical restrictions.

Clarity, like most companies, has traditionally been a proprietary organisation. Its knowledge is locked into a contractual arrangement. Knowledge provided to one client cannot be given to another without a contract. Whilst we would share all our documentation with our clients, it wasn't freely available or licensed as such. All our knowledge was transferred by contracts and projects for specific clients. This is the way most professional services and consultancy work. The knowledge and outcomes they generate are for their clients only.

Open source licences legally bake certain rights into a document or output (diagram, podcast, video). Pulpp will be using Creative Commons licences that will allow anyone to use any Pulpp knowledge and output, change it, pass it on, or even sell it, providing they too make their versions available under the same licence. This creates an ecosystem of knowledge that legally cannot be locked away and is freely available to use for everyone.

Doesn't open source mean free?

Open source doesn't mean free (Pulpp costs money), but it offers freedom to its users. The freedom to choose how documents are used and passed on. The freedom to tailor templates to their own needs. Even the freedom to sell their own improvements to the template.

Pulpp disrupts the standard model of knowledge based services. Instead of trying to resell the same knowledge to lots of customers, Clarity will be continually looking to improve and expand the outputs of Pulpp. The more users engage with Pulpp, the larger the repository of free-to-use documentation becomes, the lower the reliance on external knowledge services and consultants.

Does Pulpp replace consultancy?

Not at all. Professional services, subject matter experts, and consultancy are vital to the growth of knowledge and capability of the public and private sectors. That being said, there is no need for two NHS Trust's to pay a significant sum of money for a basic template driven document.

Templates, public knowledge, simple documents, standard processes should be freely available. The skills to implement and use them are where external knowledge services should shine. Pulpp isn't against consultancy, its against duplication of effort, and wasted charges on simple outcomes.

Pulpp is a open source knowledge sharing solution. It allows clients to ask commercial questions and receive answers not only to all their queries but all those of other clients. In this way I can multiply the benefit of the service to clients. For anyone that is familiar with clarification questions in a procurement, its exactly the same principle. It is designed to create a library and toolkit for clients to access and use for their own purposes.

Service Overview

Purpose

To provide an open source knowledge base that supports knowledge and solution sharing, reduces duplication of efforts, and fosters collaboration.

Outcome

A one year membership to the knowledge base, all its tools, clarifications, documents, and learning materials.

Deliverables

Access to the knowledge base, 12 clarifications, a minimum of 120 clarification responses, regular updates to the knowledge base, training materials, document templates, and downloads of Plain Text Pulpp and the Pulpp Knowledge Base to create your own instances. (membership type dependent)

Key Service Features

Knowledge base

Pulpp is centred around a curated DokuWiki knowledge base that serves as the main source of organisation. The wiki is predominantly closed at present; however, if the community develops it will be open not only to Clarity's inputs but those of the community. DokuWiki is simple, lightweight, free, stable, open source, and continually developed. This makes is a perfect solution as Clarity can keep costs down and create a flexible, portable solution that can be replicated anywhere. It can even be run on a personal device, offline, making it useful anywhere.

Clarifications

Pulpp membership offers subscribers 12 commercial clarifications per year. The clarifications process works just like a procurement clarification process. Each subscriber receives all responses to clarifications. This ensure Pulpp continues to build useful content that does not duplicate effort. If you duplicate a clarification, Pulpp will simply link to a previous answer and you won't lose you clarification. To ensure the clarification process remains value for money Pulpp will commit to answer 120 clarification per year irrespective of the number of subscribers. Pulpp will select clarifications to generate these responses. Pulpp is a multimedia solution so responses are not always written. Sometimes video tutorials, podcasts, interviews, or screen share demonstrations are more appropriate and ensure Pulpp remains practical and useful.

Plain text Pulpp

Pulpp is built from the ground up on extremely simple technologies. These are robust, functional, vendor neutral, portable, future proof, and will outlast proprietary formats and services. The primary language of Pulpp's content is plain text (that right! files like .txt, .md, and .org). Plain text is lightweight and easy to convert into lots of different formats. Every month, subscribers will be sent the entirety of Pulpp's content in its raw format. This allows subscribers to create their own solutions, or feed Pulpp's content into their own AI assistant. If you think of Pulpp as a simple software based encyclopaedia, this feature is your monthly update.

Wiki downloads

One step further on from Plain Text Pulpp, each month subscribers will receive a full download of the Pulpp knowledge base in its wiki form. DokuWiki is based on plain text and has no database. This means that users can run their own instance of the wiki on their own device or organisations can maintain their own version of the wiki on their internal hosting. This allows organisations to create their own entries and build their own internal knowledge management system directly into Pulpp – its like a jump start for your own internal knowledge base. All the benefits of Pulpp but with no limitations.

Document templates

One of the most useful features of Pulpp are the open source documents. Pulpp creates document templates that can be used in your day to day work. Pulpp is powered by community needs allowing subscribers to request templates, suggest ideas, or provide their own ideas. These will be generated and placed into the knowledge base in standard formats, ready for the whole community to use.

Training materials

Pulpp doesn't want to provide outputs that have no context or instructions for use. Pulpp will create resources with each document template or output to instruct users on how to use the various tools. This makes Pulpp a valuable resource for upskilling and for working with tools in context.

New standards and innovations

Clarity has developed a lot of experience and insight over the years. Pulpp can bring best practices to the community in the form of standards that can be adopted. This standardises approaches between community members and makes it easier to develop new integrated approaches knowing they will work across members.

Pulpp knowledge management template

Pulpp is built in accordance with its own open standard template – the Pulpp knowledge management template. This is an opinionated knowledge base structure that can be implemented in many different systems and allows members to set up their own blank knowledge bases without needing to create a brand new structure. This is the same template used to provide Clarity's knowledge base service.

Pulpp bookmarks

Pulpp bookmarks is a curated list of web bookmarks maintained as as part of the knowledge base. Finding useful and related websites is easy when you know what you're looking for and more difficult when you don't know what questions to ask. Pulpp Bookmarks gives you a head start by putting all the most important links in one place. Simply upload the monthly version of the file into your browser and you'll have the very latest "Yellow Pages" of useful web content.

Freedom to reuse, adapt, and sell

This is arguably the most important "feature" of the Pulpp service. All Pulpp's content is licensed under the creative commons. That means you can take any of the materials and pass them on, make them better, adapt them to your needs or even sell them. It may not seem that valuable but ask yourself, when was the last time you could take a piece of content created by a consultancy or advisor and pass it on freely (and legally), or make changes and sell then document on?

Clarity and Pulpp

Clarity and Pulpp work hand in hand, but the distinction is important. Generally speaking, Pulpp will replace the bulk of our generic commercial advice. This ensures the NHS is only paying once for generic commercial advice from me. If a similar question is raised by a Pulpp client I will simply link back to the original response and update where necessary. Clarity is where personalised, private services will be delivered to individuals and organisations. This allows me to take my generic advice, templates, or processes and tailor them to my client's needs.

Open source knowledge is extremely empowering but it doesn't work everywhere. For example, in contract management or dispute resolution, it is simply not appropriate for everyone to know everything. That transparency cannot exist. Likewise in coaching where discussions are highly personal and personalised. Clarity is the organisation through which my private work is carried out for clients. I use the output and work from Pulpp to support Clarity. This is particularly useful for my clients because if there is a template I am using it is mostly likely available through Pulpp under an open source licence and is provided freely.

4. Our Pricing Approach

4.1. Introduction

This document must be read in conjunction with the Clarity Service Description which sets out what is in scope of these charges.

Due to our size, it is impractical to offer a wide array of different day rates and pricing options for various skills and roles. In the past we have found this to hinder organisations as it created additional complexity and poorly reflected reality.

Some Services are built on volume usage models e.g. commercial projects, others have a one off charge e.g. contract management.

Our standard commercial project services offer a simple blended day rate and discounting mechanism so that Buyer's can clearly understand how charges are calculated.

Clarity is happy to work on a time and materials, capped time and materials or fixed price model, subject to the requirements and scope of work. Fixed price models are reserved for longer bodies of work (generally more than 30 working days) and will come with additional caveats particularly around the management and changing of scope. Our fixed price models work very well over longer periods.

Clarity is also happy to offer variable or fixed invoicing. This allows Buyer's to plan expenditure and incur charges in a manner that best suits their organisation. The only caveat to this that Clarity will not work greater than twenty (20) working days in arrears.

We have found that most clients opt for either:

- Short term (1 week to 3 months) Time and Materials arrangements.
- Medium term (3 months to 6 months) capped time and materials or fixed price (subject to requirements).
- Long term (6+ months) fixed monthly price. (Time and materials not permitted).

We hope that our pricing approach is transparent and simple to understand. If you have any questions or need any help understanding the charges, please do not hesitate to get in touch at hello@creatingclarity.co.uk.

4.2. Commercial Project Charges

Standard Blended Day Rate

Clarity maintain a single blended day rate for all commercial projects of £900 ex. VAT.

- All skills provided under this rate shall be at a minimum of SFIA level 5.

- This rate includes a public sector discount of 10% on our Standard Commercial Rate (£1,000).
- Clarity operates an 8-hour working day which can be flexed to accommodate Buyer requirements.
- All effort is provided remotely.
- If the Buyer requires Clarity to travel, expenses will be agreed as part of the clarification process.
- Clarity will always build expenses into charges and be transparent about the charges being applied.
- To maximise value for money, Clarity does not automatically include these charges as they are rarely required.

Standard Hourly Rate

For smaller requirements, Clarity permits the use of hourly pricing. The blended clarity hourly rate is £125 ex. VAT.

- Clarity's hourly rates are only available for small projects and ad-hoc requirements only. Use of the hourly rate is at Clarity's discretion.
- Hourly rates are capped at 12 hours per week accruing not more than 72 hours in any rolling 8-week period.
- Hourly rates are normally be applied in situations requiring 2-6 hours effort per week on an ad-hoc basis or for a very short period of time (maximum 8 weeks).

Volume Discount

Commercial project charges are subject to a volume based discount.

- Discounts are applied to the Standard Blended Day Rate based on initial level of commitment at contract signature.
- It shall be at Clarity's discretion to incorporate additional discounts in line with the table below if additional days are procured.
- Discounts shall not be applied retroactively.
- There is no volume discount for hourly rates.

Days Committed	Percentage Discount
>10 days	2%
>30 days	4%
>60 days	6%
>100 days	8%
240+ days	10%

Alternative Commercial Models

Clarity's services are based on time and materials. For larger requirements, Clarity will consider alternative models to equally share the risk with the client. Capped T&M can be considered for longer engagements of 30 or more days. This is subject to mutual agreement and requires a clear statement of requirements and clarity of scope.

> **Please note** different commercial models represent different balances of risk and liability. Clarity will always aim for a fair and balanced approach to risk management and will work with clients to ensure a suitable model is achieved for a given project. Clear requirements and fixed scope are key to transparency and balanced risk. Clarity will not accept risk on behalf of clients wishing to forgo detailed requirements and scope definition.

4.3. Contract Management Charges

Standard Contract Management Charges

Contract management charges are subject to a fixed pricing that is based on the complexity of the contract. A contract's complexity shall be defined by the Crown Commercial Function's Contact Tiering tool. The table below sets out the standard pricing for the three levels of supported contracts.

Description	Days Per Month	Days per Year	Total Charges
Simple (Bronze)	0.3	4	£3,600
Intermediate (Silver)	1	12	£10,000
Complex (Gold)	2	24	£20,000

> **Please note** This service is intended for service based contracts. Commodity based agreements should not be considered for these services as they fall below the "Bronze" category on the Tiering Tool.
>
> Potential clients must understand the limitations of these services as they are not designed to provide a turn-key solution. Organisations must have suitable governance structures and processes for contract management.

Commitment Discount

Contract management charges are subject to a volume based discount.

- Discounts are available for multi year commitments to manage a single contract e.g. engaging Clarity to provide contract management for a single contract for three years.
- Clients will be offered a 5% reduction per year of commitment (after the first year) up to 15%.
- Discounts do not apply to 'Simple' Contracts.
- Discounts are not applied for multiple contracts as each contract is self contained and does not share any resources or cross over.

Years Commitment	Discount
1	0%
2	5%
3	10%
4*	15%

*If using a framework with a maximum initial term e.g. G-Cloud 15 (3 years) then this discount will be applied at the contract signature but may be retroactively removed if the fourth extension year is not undertaken (see termination below).

> **Please note** that contracts can go through peaks and troughs of effort e.g. during a major change control process or a dispute. The charges above cover standard business as usual support and are subject to a fair usage policy (see the service description above). Significant change control activities, disputes, or non-business as usual commercial activity are subject to additional charges using the commercial project charges and incorporated via the change control procedure.

4.4. Proactive Relationship Management

Core Charges

The service is based on a simple fixed fee structure covering the initial onboarding, and 12 months of regular meetings. Proactive Relationship Management is only available for Intermediate (Silver) and Complex (Gold) contracts. The charges for these services are as follows:

Description	Intermediate (Silver)	Complex (Gold)
Onboarding and Due Diligence	£1,000	£2,500
Commercial Practices Review	Optional	Optional
Monthly meeting cycle (12 p/a)*	£10,000	£15,000
Bi-monthly meeting cycle (6 p/a)*	£6,000	£8,000
Quarterly meeting cycle (4 p/a)*	£3,600	£5,500
Offboarding and handover	£1,000	£1,500
Additional Party Premiums	+25% per party	+25% per party

*select one - clients can pick the frequency of meetings to align with existing governance or new structures.

- Charges cover a single commercial agreement. If multiple agreements apply to the relationship this can be reviewed.
- The charges above are total charges. The costs must be equally shared by the parties to ensure impartiality.
- Onboarding and offboarding are mandatory services for all engagements.
- The parties shall agree the frequency of meetings as part of onboarding.
- The 25% discount is calculated from the total charges i.e. onboarding + meeting cycles + offboarding.

Proactive Relationship Management Agreement

This service shall be governed by a shared agreement known as the Proactive Relationship Management Agreement. This is a separate binding agreement, similar to a mediation agreement, that clarifies the mutual nature of the services and the parties shared commitment to transparency and the principles of the service. For the avoidance of doubt, this agreement may be embedding within a framework call off e.g. G-Cloud 15.

Clarity has developed its own mutual agreement which can be found at https://creatingclarity.co.uk

Meeting Frequency

Services can be provided on a monthly, bi-monthly (every other month), or quarterly basis based on the requirements of the parties. Larger gaps between meetings require greater preparation times due to the extended periods in between meetings. As such charges don't reduce in a linear fashion with fewer meetings.

Termination

Services can be terminated at the parties' convenience. Termination charges will apply based on when the services are terminated.

Point of Termination	Termination Charge
During Onboarding	Remaining onboarding charge (max. £3,000)
At the completion of Onboarding	Offboarding and handover charge (£1,000)
During standard meeting cycles	£2,000 + Offboarding (£1,000)
Agreement Anniversary	Offboarding only (£1,000)

Additional Services

Clarity can provide ad-hoc shared advisory services, coaching, or workshops using the commercial project charges. Please note that these services are reviewed on a case-by-case basis. Additional services **must** be mutually beneficial and transparent to all parties. Clarity will not breach its obligations of impartiality or transparency to the parties as set out in the shared Proactive Relationship Management agreement.

4.5. Knowledge Management Charges

Core Charges

The knowledge management service is made up of a catalogue of services. The charges for these services are included below.

Service	Charge	Description
Solution Implementation (Standard Template)	£1,800	The technical setup of the hosting and environment, including the PKM standard template structure.
Initial Knowledge Base Creation (Standard Template)	£3,600	Eight one-hour interviews. Structured interview and up to ten written responses (per session) with team members over one month to populate the knowledge base with pre-existing information and refine the standard structure.
Annual Support (Hosting and Maintenance)	£1,200	Payable annually after the first year. This charge cover the hosting and maintenance fees for the knowledge base e.g. upgrades and administration.
Additional Knowledge Management Interviews	£450	1 hour structured interview and up to ten written responses including a full knowledge base update with all new information in line with the service description.
Additional Written Response Update	£50 per response	additional processing of written response forms (over the 10 provided per interview).
Additional Basic Training	£450	Repeat of initial training included in setup and videos are provided for self learning.
Handover Training	£450	Training to support handover of the knowledge base to the client and provide instructions on how to continue managing and administering the solution (includes reference videos).
Solution Tailoring and Support	£125 per hour	For any additional development, or support to the knowledge base that deviates from the PKM Template standard.

Standard Templates

Clarity uses standard template for both the knowledge management system structure and the documents used to collect information to be inserted into the system. These are open source templates from the Pulpp project. Clients can structure the knowledge management system as they see fit; however, bespoke documentation and structuring shall be subject to additional charges.

Knowledge Management Discounts

Knowledge Management Blocks

To make procuring a standard knowledge management solution simpler, Clarity offer block procurement of weekly meetings. The table below sets out charges for blocks. If you wish to procure more or less meetings than one per week, please see the Volume Interview discount below.

Block Size (Months)	Charge
1	£1,800
3	£5,000
6	£10,000
12	£20,000

Volume Interviews

Clients may wish to increase the number of interviews provided in a block or create a bespoke cadence of interview. The following table sets out the volume discounting when buying additional interviews.

No. of Interviews	Cost of Interviews	Discount	Discounted Rate
1	£450	0%	-
3	£1,350	5%	£1,282.50
6	£2,700	10%	£2,430.00
12	£5,400	15%	£4,590.00

Clients may procure any number of interviews. The total discount is capped at 15%. All interviews must be used within 12 months of purchase or the end of the contract whichever is the sooner.

One Year Starter Package

Clarity offers a simplified one-year starter package for this service for £21,500. This service includes the setup of the knowledge base and its initial creation and a 12-month block of weekly interviews (52 interviews included).

The total combined price of this service using the standard charges is £25,400. The bundled package charge represents a discount of 15% over services purchased separately.

4.6. Coaching, Mentoring, and Training

Standard Coaching Rate

Coaching is subject to a standard blended hourly rate of **£200 per hour**.

This charge includes prep time, contracting, and organisational reporting. It is for this reason that the charge is higher than standard commercial project rates which do not include such overheads.

Block booking

Coaching is carried out subject to a fixed-term agreement and with clear succinct goals in mind.

Under normal circumstances, Clarity coaching is subject to a:

- **6 session minimum** (min. £1,200) delivered over standard 12 weeks programme. Timescales can be adapted to suit the coachee although capped at a maximum of 20 weeks.
- **12 session maximum** (max. £2,400) delivered in a maximum of 30 weeks. Over such a long time period, such an engagement is at the limits of what is deemed to be coaching and may be better supported by mentoring (see below).

Short term engagements with clear goals and targets e.g. interview prep, will be considered and charged on an hourly basis.

Coaching Discounts

Clarity offers a simple discount model for coaching based on the number of coachees committed at signature.

Number of Coachees at Signature	Discount
1	0%
2	5%
3	10%
4	15%

- Discounts are calculated on the total charges of all coachees.
- The discount only applies to coachees signed up at one time.
- Discounts will not be applied retroactively.
- Discounts may be reclaimed if coachees drop out or the client removes coachees from the service.

4.7. Commercial & Procurement Mentoring

Standard Mentoring Retainer

Mentoring is provided on a retained basis of £5,000 - **0.5 days per week for a minimum of 3 months**

Mentoring takes place over a longer time period and involves more shadowing and engagement in day-to-day activities. To ensure mentees have the flexibility of support they need for success this service is operated on a retainer fee with activities agreed with the mentee on an ongoing basis.

- The retainer is based on the commercial project rates.
- Minimum initial retainer of three months.
- Mentoring retainers are per mentee and subject to a volume discount.
- Discounts are pre-calculated in the block commitments including the initial 3 month block.

Additional Mentoring Blocks

Most mentoring engagements are longer term to allow support for mentees as they develop through their career. Blocks can be purchased in a variety of terms and called off as required. This ensures value for money and flexibility.

Block Size (Months)	Charge
1	£1,800
3	£5,000
6	£10,000
12	£20,000

Mentoring Discounts

Clients will receive a discount on the total charges based on the number of mentees committed to at contract signature.

No. of Coachees at Signature	Discount
1	0%
2	5%
3	10%
4	15%

- Discounts are calculated on the total charges of all mentees.
- The discount only applies to mentees signed up at one time.
- Discounts will not be applied retroactively.
- Discounts may be reclaimed if mentees drop out or the client removes mentees from the service.

4.8. Coaching and Mentoring Chemistry Sessions

Clarity will provide free "chemistry" sessions to prospective clients of coaching and mentoring services. These are key features of the coaching or mentoring processes and ensure that the client is comfortable with the coach/mentor before committing to a formal engagement. Chemistry sessions will be free of charge and there is no obligation to commit to a coaching or mentoring engagement after the session.

4.9. Training

All training courses are charged at £1,200.

- Training courses are standardised to take one day to complete – larger topics are broken into separate modules.
- Courses are provided remotely and include resources.

Clarity is currently developing specific training courses. Current course under development include:

- ComSemVer Training – This training course walks trainees through how to use the ComSemVer standard to control and manage documents.
- Open Contract Scoring Standard – This course introduces trainees to the OCSS model, how to apply it, and how it can be used in the creation and management of commercial agreements.

Additional courses will be developed over time. For an up to date list of courses please visit https://creatingclarity.co.uk

4.10. Pulpp

At present Pulpp remains available to organisations only. Individual memberships are being developed. Please visit https://pulpp.co.uk to get updates on memberships.

Pulpp pricing is very simple. There is a single flat rate for all subscribers. There are discounted rates for micro organisations and students.

Enterprise Subscription

Pulpp costs an annual fee of £10,000 ex.VAT for an organisation-wide subscription. This applies equally to public, private, and academic sectors.

- The subscription permits 25 active users on the wiki and forum.
- Enterprise subscribers will be allowed 12 Pulpp Clarifications annually.
- Enterprise licences permit organisations to tailor aspects of the Pulpp services e.g. automated uploads or tailored formatting.
- Both Plain Text Pulpp and Pulpp Wiki files are included to allow internal hosting of the Pulpp Wiki.

Other Subscription Types

Currently, Pulpp is not available for all individuals but there are discounts for students and micro business users.

- **Micro business** – is one with ten (10) or fewer employees. Please note, there are additional restrictions for micro businesses.
- **Student** – is someone who is in full or part time education at a formally recognised institution undertaking either undergraduate or postgraduate qualification. Please note that those undergoing ongoing training or continuing professional development (CPD) are not considered students. Please note, there are additional restrictions for student subscriptions. Students should check to see whether their Institution already has a subscription where they may obtain full rights.

Micro Business Charges

A micro business restricted annual subscription costs £3,000 ex. VAT

- Micro business may pay the full charge and be subject to no restrictions as per the full enterprise subscription.
- Micro businesses will only be allowed 4 active users on the wiki and forum.
- Pulpp Clarifications are reduced to 6 per year (12 for full membership).
- Micro business will not have access to any additional tailoring of Pulpp resources e.g. automated uploads or tailored formatting. They will still receive the full Pulpp Plain Text output but not the wiki files.

Student Charges

A student restricted annual subscription costs £50 ex. VAT

- Students receive restricted access to the wiki and forum.
- No Pulpp clarifications are included but Pulpp will be looking to run student events.

- Students will not have access to Plain Text Pulpp.

4.11. Who is covered by the Subscription?

A subscription applies to your whole organisation, so please ensure your organisation doesn't already have a subscription. Some aspects of the subscription are subject to fair use. This includes access to the forum and wiki.

Initially, organisations will be allowed **25 active users on both the wiki and forum** (further restrictions apply on micro and student accounts). These limits will increase over time but I want to ensure that no single organisation can 'take over' the community with sheer volume of users.

Users with wiki and forum access can be switched at any time.

Whilst write access (the ability to change the wiki) to the Pulpp hosted wiki and other features will be limited, all content is made accessible to the purchasing organisation. You are more than welcome to create your own repository on an internal Intranet or even install your own version of the wiki. This is the beauty of open source! Full details of the Pulpp service can be found on https://pulpp.co.uk.

5. Clarifications

Clarity has not sought to provide an exhaustive list of all possible services and charges in this document. The document only sets out a model for calculating charges and does not include any final charges.

Final charges will only be calculable on the clarification and mutual agreement of the Buyer's requirements and scope of work. This allows for the accurate calculation of effort and therefore the correct charges to be evaluated.

Clarity would expect any potential client to clarify its requirements with us as part of any call off process. To ensure value for money and accurate initial advice, Clarity would recommend a potential client to undertake pre-market engagement in which we would be only too happy to take part.

We understand that to accurately clarify our services you may need to share confidential information. Clarity is more than happy to sign a non-disclosure agreement to cover any such information.

If you have any questions about our services, pricing, or terms, please do not hesitate to reach out to hello@creatingclarity.co.uk

6. Terms

6.1. Alignment to G-Cloud 15

- Clarity are happy to accept the G-Cloud Call Off Contract. We will work with our clients during any call off process to review the order form and define any project specific terms.
- The following terms are in addition to G-Cloud terms and conditions and specific to Clarity's operations.
- If you have any questions about the terms below, please do not hesitate to reach out to hello@creatingclarity.co.uk.

6.2. Service Principles

- Clarity shall operate according to its own own set of transparent and publicly available principles. These can be found at https://creatingclarity.co.uk/principles.html. Clarity will always act in accordance with these principles.
- Clarity reserves the right to update these principles from time to time; however, the principles will not impact the commercial positions set out in the contract.
- Clarity's principles set out our approach, ethics, and standard positions. They provide additional context to our working practices.

6.3. Use of SFIA

- When discussing skills and capabilities of either party, the parties agree to use SFIA-9 - https://sfia-online.org/en/sfia-9/skills/all-skills-a-z

6.4. Client Responsibilities

- All services will include client responsibilities.
- Client responsibilities will be agreed on a case-by-case basis and included in the contract.
- Clients must accept that they remain responsible for a significant portion of the roles and responsibilities in Clarity services. for example, in contract management, clients must have suitable governance structures for the proper functioning of the services.
- The parties shall agree a RACI table as part of any call off.

6.5. Signing Off Additional Work

- Given the complexity and effort required for the identified projects, Clarity must require the client to sign off any additional works identified during the course of a service.
- Changes and additional work must be accepted by mutual written agreement (by email is acceptable) of the capability and availability of the Supplier to complete the work.

6.6. Setting Priorities

- The client shall be responsible for setting the priorities and expectations of any work carried out by Clarity.
- Where the client changes the priority of work or adds in new deliverables, they must clearly identify which deliverables will be delayed or removed to accommodate the alterations.

6.7. Changing Requirements

- The Client accepts and acknowledges that the completion of the projects identified in the call off is subject to no material alteration and addition of new projects.
- Whilst new projects are permitted the Client accepts that previous commitments may need to be updated, particularly if the client requires additional outcomes to be achieved.
- The parties shall agree limits on the amount of engagement that Clarity can provide at the project call off.
- In general, Clarity sets a 20% limit on the increase in required effort under a specific call off.

6.8. Notice Periods

- The notice periods for new project and additional effort must be adhered to at all times as set out in the order form.
- Clarity will adjust notice periods according to the project length.
- Notice periods will be discussed as part of call off.

6.9. Excluded Requirements

- The Supplier reserves the right to reject (without causing a breach under any Call Off Contract), or complete on a reasonable endeavours basis only, projects that meet the following criteria:
    - Any new project or requirement to be completed in less than 72 hours and with less than 5 working days notice, irrespective of size.

- Any new procurement in which the Client mandates a specific named supplier.
- Any competitive procurement process (non-framework e.g. Open or Restricted) requiring completion in less than 4 months*
- Any simple framework procurement for a new minor clinical system (e.g. IAPT service) or IT solution in less than 3 months.
- Any procurement for a major clinical system or IT service with significant business process change, high risk, potential impact to patients, or otherwise transformative effect in less than 6 months.*

*This scenario assumes that no preparatory work has been completed. Where a full set of requirements, governance structure, fully resourced team, and executive sponsorship is in place these timescales may be revised by mutual written agreement.

6.10. Reputational Impact of Rejecting Requests

- For the avoidance of doubt, Clarity shall be free to reject any requests for additional or altered efforts that meet the criteria above without prejudice to the rest its contract, Clarity's rights, and/or the perception of the Clarity's performance.
- Where Clarity rejects a project on the grounds that it complies with the aforementioned criteria, there shall be no negative perception of its performance reported within the client's governance structure and Clarity shall not be liable performance failures.
- Such a refusal shall not constitute a valid reason for a drop in client satisfaction.

6.11. Indexation

- Any amounts or sums in this document may be adjusted to reflect the effects of inflation. Where Indexation is applied the relevant adjustment shall be:
    - Applied on the first day of April following the Effective Date and on the first day of April in each subsequent year; and
    - Determined by multiplying the relevant amount or sum by the percentage increase or changes in the Consumer Price Index published for the 12 months ended on the 31 January immediately preceding the relevant adjustment date.
- It shall be at Clarity's discretion to fix indexation for any contract.

6.12. Notice Periods

- Given the significant investment and effort in projects required to achieve the necessary high standards and compliance with regulations, Clarity insists on a termination notice period which shall be aligned to the contract length.

Days Committed	Notice Period
>10 days	2 working days
>30 days	4 working days
>60 days	10 working days
>100 days	20 working days
240+ days	40 working days

- For the avoidance of doubt, these notice periods will be subject to continued charges at the rate already agreed with the client e.g. A two days per week commitment with 60 days committed requires 10 working days' notice (2 weeks) which will continue to incur the two days per week charges until the termination of the agreement.

6.13. Immediate Termination for Convenience

- Should the client wish to terminate services immediately and without notice, Clarity will accept this subject to a Termination payment.
- The termination payment for a contract shall be equivalent to the charges incurred during the standard notice period had it been adhered to.

6.14. Refunding Discounts

- Clarity aims to ensure our clients receive the benefit of volume discounts upon their commitment to a given volume of work; however, Clarity also wish to honour the termination for convenience clauses of G-Cloud 15, which provides the client with the opportunity to cancel work as they see fit given proper notice.
- When agreeing the scope of work, Clarity and its client shall agree an indicative effort to complete the desired outcomes.
- Clarity shall then agree the volume discount band and confirm final pricing for the project(s).
- The client will receive the benefit of discounted day rates upon contract signature and all invoices shall be calculated in accordance with the agreed discounted rate.
- If a client chooses to terminate the agreement earlier than the agreed effort, then Clarity shall adjust the volume discounting accordingly and the client shall be liable for the difference between the discounted rates and the appropriate rate for the actuals volumes consumed.
- Clarity shall issue a final invoice for this amount as part of closing down the contract.

6.15. Handover

- At the end of a service, Clarity will possess a lot of useful material including reports, documents prepared for the Trust, board papers, strategy guides etc.
- This will all be stored on our Office 365 workspace.
- If a client does not wish to renew the service, you may wish us to undertake a full knowledge transfer and handover, in which case Clarity will require:
    - 2 weeks for all agreements up to 6 months; or,
    - 3 weeks for all agreements from 6-12 months; or,
    - 4 weeks for all agreement longer than 12 months.
- These timescales are indicative
- The parties shall agree exit strategy as part of the contract and ongoing operational management of the agreement.
- A detailed exit plan shall be created once the scope of the Clarity service has been defined in the G-Cloud 15 order form. However, as a guide, an exit plan shall include, but not be limited to:
    - Packaging and preparation of all data from our office 365 portal
    - Secure transfer of all data to a client specified location.
    - Handover meeting with Trust management staff.
    - Briefing of new supplier (if any).

6.16. Handover Charges

- Handover services will be included in the charges provided the parties have an agreed exit plan at signature.
- Exit services will disrupt business as usual deliverables. The extent to which services are disrupted shall depend on the size and scope of services and the extent of handover required.
- If the parties do not agree an exit plan at signature then a detailed plan including associated charges will be provided under the change control procedure.
- Where a client does not wish for exit to disrupt business as usual services but wishes to maintain the benefits of formal handover, a separate block of services may be added via change control to commence on the expiry of business as usual services.