Customer Contact Programme: Draft Services Description

merton

Contents

1. Introduction

The London Borough of Merton (the Council) is undertaking a procurement exercise utilising the Competitive Dialogue procedure to engage the marketplace and establish the options for electronic service delivery (eSD**)** across the organisation.

The Council may or may not procure some, all or none of the eSD components detailed in this document.

1.1.   Summary of Merton

Local elections took place on 22 May and determined the composition of the Council until 2018, and its democratic decision-making arrangements. The Council comprises 60 elected Councillors, representing 20 wards and five groups. The current composition of the Council is:

- [Conservative](#)   20   Councillors
- [Labour](#)   36   Councillors
- [Liberal Democrat](#)   1   Councillors
- [Merton Park Ward Independent Residents](#)   3   Councillors

Full Council usually meets five times a year, and is responsible for agreeing the Council tax and setting the overall direction of the Council.

A cabinet of nine Labour Councillors makes the majority of decisions throughout the year, with Overview and Scrutiny arrangements to hold Cabinet to account.

Regulatory committees are appointed by Council and carry out planning and licensing functions.

The Council had a net revenue budget of £162.5m in 2014/15 with around 42% of this being spent on social care (children and adults).

A total of 4,135 FTE or 5,449 headcount (as at May '14) employees provide a range of public services, from street cleaners and town planners to teachers and social workers, who work in the four departments listed below, and in Merton's schools:

- Children, Schools and Families (CSF)

- Environment and Regeneration (E&R)

- Community and Housing (C&H)

- Corporate Services (CS) – which includes Business Improvement and Customer Services

2. Purpose

The purpose of this document is – in conjunction with the draft Contract and its draft schedules and proposed pathfinder area information – to provide Bidders with sufficient information to develop and submit Detailed Solutions. It describes in greater detail the specific outcomes required by the London Borough of Merton for the electronic service delivery solution, which is seen as a key enabler for offering Customers self-service, giving Customers a personalised view of relevant information and achieving channel shift, as defined in Merton's Customer Contact Strategy.

In the interests of absolute clarity, we have separated the generic outcomes the Solution should deliver in terms of functionality – i.e. what it does and how it works – from the service areas in which we expect such functionality to be made available. This document deals with the former. Appendices 3-8 of the Invitation to Submit Detailed Solutions (ISDS) deal with the service areas we anticipate being part of the rollout of the Solution, or the 'Pathfinder' areas.

The Council's requirements in relation to the electronic document and record management system (EDRMS – the System) element of Solutions are more functional in their nature. These detailed functional requirements are set out in Services description part two within this document.

3. Context

Our Customer Contact Strategy provides the context for the Solution, articulating our ambition as an authority in transforming the way we interact with our Customers. This is:

"To design cost effective, efficient and user friendly means of contacting the Council and then encourage our customers to use the channels that are most effective."

The strategy sets out how we expect Customers' experience of our service to change in five key outcomes:

Outcome 1: All Customers have fair access to services

- We value diversity and will ensure that the Customer Contact programme will address (and not introduce) any barriers to individual access to services.
- In accordance with central government guidelines we aim to create web pages that comply with the W3C Web Content Accessibility Guidelines 1.0 to "AA" standard / or industry best practice guidelines for accessibility.

Outcome 2: Customers can access services in different ways

- Wherever possible, we will encourage and enable Customers to determine their interaction with the Council.
- We will work with Customers to ensure the most appropriate and efficient access to individual services.
- Wherever possible, we will provide seamless delivery across the principal access channels – face to face, telephone and online.

Outcome 3: Customers influence the design and delivery of the services available for them

- We will make sure we learn from our interaction with Customers to further improve access to services.
- We will place Customer experience and feedback at the heart of service commissioning and re-design.

Outcome 4: Customer needs are, wherever possible, resolved at the first point of contact and on time

- We will ensure we have a consistent and comprehensive understanding of our Customers and, as far as possible, anticipate their needs.
- We will ensure all access points are able to retrieve and provide consistent information,
  advice and tools to resolve queries at the first point of contact.
- All front-line staff will be trained and enabled to provide resolution at the first point of contact for as many queries as possible.

Outcome 5: Customer feedback drives service improvement

- We will place Customer feedback at the heart of our performance management framework.
- We will place Customer feedback at the heart of our commissioning framework.
- We will publish satisfaction levels against a set of measurable Customer service standards.

3.1. Related projects and initiatives

As detailed in the Outline Requirements document and through Dialogue, the Council operates in a dynamic environment and a number of change and improvement projects are currently underway, most of which were referenced in the Outline Requirements document at ISOS stage. This section provides an update on those projects which may have an impact on the Customer Contact Programme and the chosen Solution.

- **Environment and Regeneration (E&R) –** a procurement exercise is about to commence to renew/replace the current version of CONFIRM (Pitney Bowes) utilised within the E&R Directorate. Detailed requirements gathering is underway

and a procurement route being planned. Additional information will be made available to Bidders as soon as the procurement route and timelines have been confirmed.

- **Data Labelling –** a tender exercise has just been completed to appoint an organisation to implement a data/document labelling solution. The solution will ensure that the data the Council holds and uses is securely stored and handled correctly as required by the PSN. The contract was awarded to Apperception and the Council is currently working with them to finalise the contract and develop and agree an implementation plan.

  A copy of the service specification schedule to this contract, and any other relevant project documentation, will be made available to Bidders in the London Tenders Portal.

- **Financial Management System –** the Council is about to commence a procurement exercise to renew or replace its financial systems. It is expected that the formal procurement process will commence during the 2014/15 financial year.

  The project is to include the general ledger, management accounting, "purchase to pay", accounts payable, and accounts receivable functionality with a single integrated system. It should be noted that ePayments remain outside the scope of the project and that the Council expects to retain the Civica Icon payments system.

- **Social Care Information System (SCIS) –** the Council is currently procuring a new social care information management system for both Adults' and Children's Services. It is expected that the contract will be awarded in July 2014. Additional information will be made available to Bidders once an award decision is made.

  A copy of the service specification schedule to this contact and any other relevant project documentation will be made available to Bidders in the London Tenders Portal.

  Bidders should note that it is anticipated that this project will involve the implementation of a number of new Customer-facing portals. These have not been defined within our Pathfinder areas as they are not yet in place, but Bidders will need to ensure any such additional portals are fully integrated into their Solution.

- **Flexible Working –** this programme is approaching its implementation stage. Roll-out will be in two phases, the first phase lasting the duration of the 2014/15 financial year and the second during 2015/16. This takes into account the fact

that fully implementing flexible working in certain services is dependent on other programmes and initiatives including:

- o Social Care Information System (SCIS) procurement as referred to above
- o Customer Contact programme (including the Solution that is the subject of this document and particularly the EDRMS element)
- o Environment and Regeneration (E&R) back office system procurement as referred to above

Flexible working should be considered within Solutions, in particular see the Mobile Working Section of the Draft Services Description. Any relevant project documentation will be made available to Bidders in the London Tenders Portal.

- **Planet Press –** the Council has procured Planet Press and implementation is currently being planned – additional information can be made available to Bidders on request.

- **Council Tax System –** the Council are currently working with Civica to trial a number of enhancements to the Council Tax system. This will provide eform integration into the back office using Civica's web front end. Additional information can be made available to Bidders on request.

- **Facilities Space Management System –** The Council has approved a project to introduce a new space management system to control and monitor the booking of meeting rooms and hot-desking areas. This will allow the Council to maximise use of accommodation at the Civic Centre and other locations, and manage space most effectively to support both service department office requirements and the flexible working programme. The scope also includes an automated workspace utilisation system to provide accurate occupancy and utilisation data. These elements have a linked purpose but may be delivered through separate systems. It is envisaged that the procurement process for this new system(s) will commence in August 2014. Additional information can be made available to Bidders on request.

- **Environmental Health Trading Standards and Licencing (EHTSL) Shared Service –** The Council has entered into an agreement with the neighbouring boroughs of Croydon and Richmond and is currently developing a shared service delivery model for EHTSL. Additional information can be made available to Bidders on request.

The above provides a summary update on key projects which may impact on Solutions. In some cases, there will be interdependencies between these projects and the implementation of the Solution that Bidders will need to plan for and manage. For example, the SCIS project will incorporate the development of a

number of additional portals that will need to be integrated within the Solution. Both the SCIS and Financial Management System projects will also potentially incorporate document management solutions that will need to interface and even overlap with Bidders' Solutions. Perhaps most critically, the planned procurement exercise within E&R will determine the system with which the Solution will need to interface in order to deliver the outcomes set out below under the Pathfinder areas.

It is critical, therefore, that Bidders satisfy themselves that they are familiar with these projects and consider, in developing their Solutions, the following:

- How they will plan for and manage interdependencies;
- How they will develop proposals that are sufficiently flexible to deal with the uncertainties where the outcome of related projects is unknown (e.g. the system to be procured within E&R, or the document management capability that might be included in individual systems);
- Where they can exploit opportunities presented by these parallel projects to deliver synergies and reduce duplication of system functionality.

This latter point is particularly important, since the Council will be looking, both during Dialogue and when assessing proposals, for Bidders to exploit potential opportunities and synergies and support the strategic aim of the Council to rationalise and streamline systems.

4. Definition of Customers

We use the term 'Customer' to describe a person, business or other organisation receiving or seeking information about Council services or other public services. Our Customers, then, are those people for whom we work to commission, contract, deliver, and enable services. They are also local citizens, or people coming into the Merton area to work or visit. They may be direct service users, employees of the Council, employees of partner organisations, such as the Police or GPs, or employees of other organisations, or elected Members.

In many cases our Customers may be better defined as those who derive secondary benefit from the way we organise and deliver our services and not just those who are in direct receipt of them. We know that 'Customers' are not always willing recipients of Council services, for example when in receipt of a parking penalty notice or anti-social behaviour order. In these and other instances, the Council is delivering its regulatory responsibilities that reflect its broader role in influencing and improving civic life in the borough and, in some cases, protecting our most vulnerable residents.

5. Definition of e-Service delivery

The traditional government based definition of electronic service delivery is the provision of government services to the Customer through the internet or other electronic means. This can either be through direct provision to the Customer (self-service) or mediation where an officer acts on behalf of the Customer.

There is an implied requirement that, where possible, electronic service delivery is automated.

6. Compliance

It will be a requirement of any Solution that the following principles in relation to data security and confidentiality are adhered to:

- All Customer data will be kept secure at all times in accordance with the requirements of the Data Protection Act 1998.

- Any collation of Customer data into a master 'client index' should only present specific service 'flags' relating to that Customer, (e.g. previous or current interactions with services – existing cases, potentially violent people, etc.)

- All aspects of the proposed eSD platform should be compliant to ISO/IEC 27001 (Information Security Management standard) and should support IT security best practices.

- The eSD platform should also facilitate sharing of data and information across organisational boundaries – i.e. in order that the Council is able to accommodate shared services (such as the 4 borough shared legal service hosted by Merton (SLLp) and the Sutton hosted HR function which is currently shared with Merton and may be expanded to cover other neighbouring boroughs, and any other new shared services that are introduced) as well as for operational and joint work purposes with NHS, GPs, Public Health, Police etc. This functionality will need to enable not just sharing of standard data, but also highly sensitive data with relevant security.

- The eSD platform should also support Open Data standards and increased transparency and public access to Council data.

- The eSD platform needs to respect and work with 'labelled documents and content' and meta data as appropriate.

- The Solution will comply with the W3C Web Content Accessibility Guidelines 1.0 to "AA" standard or industry best practice guidelines for accessibility.

The above highlights some of the key compliance areas, for a more detailed explanation of the required standards please refer to Schedule 2.3 of the draft Contract.

7. Solution Design Principles

The Council has set out within its refreshed (draft) IT Strategy the principles that guide development of its systems architecture and technical infrastructure. The range and complexity of Council businesses means it is essential that we are controlled and disciplined in our approach to IT development and management. Operating in an ever decreasing financial envelope also requires that we rationalise technology as far as possible and acquire technology that provides best value in relation to the overall cost of purchase, implementation, support and maintenance.

When assessing how proposed Solutions meet the requirements set out in this document, the Council will be taking into account not only the extent to which these are met, but also the way in which they are met. There are a number of design principles that we will apply to evaluate whether Solutions are designed in a way that corresponds to the Council's approach to technology. These are:

- Solutions and services provided must be efficient in delivering the requirements of the Council whilst ensuring that they are cost effective and value for money to both implement and to operate and do not rely on bespoke elements.
- Solution providers must be responsive to the Council in terms of the provision of services as well as resolution to all disruptions to the Solution and service provided.
- Solutions must be aligned to the Council's vision for the standardisation of hardware wherever possible.
- Solution providers should work collaboratively with the Council to fully understand the parties' priorities and constraints in order to provide best fit solutions and services.
- Solutions should take into account existing systems and interfaces whilst not limiting potential future interfaces, systems and services.
- Solutions should be designed so that they do not build significant reliance on the supplier, that is to say that the Council can configure and deploy them without the need for significant support.
- Solution providers must comply with the strategic design principles as stated in the Council's (draft) IT Strategy, whilst not restricting innovation and creativeness.

8. Services description part one

In the remainder of this document, we set out more detailed requirements for the Solution. Building on the outline requirements provided at ISOS stage, and in line with the evaluation framework (full details are included within ISDS section 6), these are set out in the following categories:

- e-Service Delivery
- Customer Management
- Corporate Systems
- System Integration
- Document Management
- Mobile working

In addition, we provide a summary at the outset under a 'general' heading of the wider outcomes we expect from the Solution.

We believe that our requirements are best organised into two broad streams of outcomes:
- those we expect in terms of the experience of the Customer; and
- those we expect in terms of the experience of the Solution User.

8.1. General Outcomes

Customers will…

1. be presented with a consistent, integrated view of Merton services across all appropriate access channels

2. be able to complete their transaction in full on a single access to the Council

3. be able to access services electronically 24 hours-a-day, 7 days-a-week irrespective of any accessibility constraints or disabilities

4. be required to think only of their needs, not the structure of the organisations delivering the services

5. be impressed by the efficiency and effectiveness of how we meet often complex, multi discipline needs

6. appreciate our proactive, coordinated early interventions to avert the escalation of potential issues.

Solution users will…

7. experience a reduction in operating costs in real terms

8. be less constrained by organisation, and much more flexible and agile

9. be enabled to make faster and better informed decisions driven by timely and accurate Customer insight and demand information

10. be able to build better data gathering and analysis processes into business-as-usual operations management

11. be able to use information held about Customers to optimise services and processes, including pre-emptive outbound communications

12. be able to use the Solution irrespective of any accessibility constraints or disabilities

8.2. e-Service Delivery Outcomes

Customers will…

13. be presented with a website that encourages self-service through good design, is intuitive and easily identified as Merton's through its visual identity, and allows navigation with the minimal number of clicks

14. be able to view information from many sources in one place through their self-service portal using RSS Feeds

15. be able to book and pay for services, report problems and request services without having to have an Account or – where appropriate to the service – provide any personal details

16. be encouraged – where appropriate – to open and maintain an Account that is managed through an intuitive, interactive interface (or 'portal') that is easily configurable to offer personalised access and proactively encourages them – through effective design – to self-serve

17. be able to book and pay for services, report problems and request services through their Account quickly and easily and in real time

18. be able to manage both household Account (relevant to multiple residents of a single address) and individual Account (relevant to individuals at a single address) simultaneously and with minimal duplication

19. be able to book and pay for services, report problems and request services quickly and easily and in real time on behalf of others through the other person's Account where they have been expressly granted permission to do so

20. require just one user identity (user name, password) to access all services electronically, via their personalised interface, including where provision through existing public access modules by other suppliers persists; they will not need to access several different Accounts for different services or remember several passwords, or visit different 'portals'

21. see only service information that is relevant to their level of authentication, with tiered authentication in place to control access to more sensitive information and services

22. be provided, through this personalised interface, with a secure environment to access their services; others will not be able to access their data or details of their interactions and/or service provision without their express permission, and access to information about more sensitive services will be on the basis of rigorous authentication that provides assurance that personal data are appropriately managed and privacy is maintained

23. experience quick and convenient authentication and validation in order to access more secure areas of their Account with the Council; they will not be

inconvenienced by the Council's need to ensure that access to the system is controlled

24. be able, and encouraged, to complete single and multiple transactions across multiple services in full in a single visit, with intuitive, interactive interfaces that prompt and guide users to provide required information for each available service

25. provide information once only; they will not be required to repeatedly enter information that has already been provided (e.g. name, address, date of birth etc.)

26. find it easier and more effective to submit and manage their transactions online than via e-mail

27. be prevented from making inappropriate requests or payments for services (e.g. paying for a parking fine from, or requesting a permit for a space in, another borough)

28. be able to 'transport' their Account and details quickly and easily when changing address within the borough

29. be able to unsubscribe and close down their Account easily when moving out of the borough

30. have access to online services via The Solution 24-hours-a-day, 7-days-a-week with an uptime target of 99.95%

31. be able to navigate the website easily and intuitively, using familiar navigation tools

32. not be frustrated by delays and interruptions as a consequence of their own digital connection limitations as The Solution will cater for a range of different download/access arrangements

Solution Users will…

33. be presented with an integrated, intuitive interface that is easy to use and allows the Solution User to navigate around The Solution with minimal number of clicks

34. see only service information that is relevant to their level of authentication, with tiered authentication in place to control access to more sensitive information/services

35. be able to establish and manage tiered, authenticated access to The Solution for Customers so that Customers' access to sensitive data is controlled and carefully managed

36. be able to access The Solution with the username and password used for other Council systems

37. easily ascertain where individual Customers have granted access rights to other third parties

38. easily ascertain where individual Customers belong to certain categories determined by them (e.g. a potentially violent person)

39. have confidence that the Customers' details are correct, their identity having been validated through appropriate external data sources at a level appropriate to their tier of access

40. have minimal interaction with the Customer authentication process by virtue of automation

41. be able to extend the Solution – and Customer interfaces – to any organisation working with the Council to deliver, facilitate, audit or inspect services, including private sector contractors, other local authorities, NHS Trusts, other public sector agencies, voluntary and community bodies (Partner Organisations) to offer a completely integrated Customer experience without duplicated authentication, document tracking and checking etc.

42. be able to add relevant signposting options for customer segments, but only to approved and safe sites

43. be able to control content of the website and portals through a hierarchy of access permissions for multiple authors within the organisation

44. be able to track changes to content, including when they were made and by whom, and recover previous content

45. be able to design quickly and easily – and with minimal technical expertise and knowledge – Customer interfaces, web pages and forms, including the ability to apply branding and sub-branding

46. not be required to input the same data multiple times, or rekey data provided through the Solution into other line-of-business systems

47. be able to access, review and amend content through any channel, any device and at any time

48. be able to train additional users easily in-house

49. benefit from a single, integrated flow of requests from all channels

50. benefit from a website that operates in the most effective way, without fragmented portals and interfaces.

8.3. Customer Management

Customers will…

51. be able to view – through the personalised interface – all their contact history and transactional information with the Council at any time, as well as any information relevant to them including services provided by not just the Council but also by Partner Organisations

52. be able to access their Account and the website from any web enabled device and using any browser

53. be able to register for any service updates or any marketing that they wish to receive through any digital channel of their choice

54. be able to choose their preferred method of and channel for receiving alerts, responses and notifications

55. be able to book and pay for services, report problems and request services through any channel, irrespective of whether they have an Account

56. be able to interact with their personalised interface/Account or any channel where this is physically possible

57. be able to track progress of their request – via any channel – through a UTRN that relates to the entire end-to-end transaction they wish to undertake, with a separate Unique Reference Number (URN) held within the Solution to distinguish between discrete contacts relevant to any given transaction

58. where relevant be attached to an address that is validated by and linked to the appropriate and current Gazetteer in real time – for both in-borough and out-of-borough Customers; Customers will not be linked to PAF addresses

59. be asked to provide meaningful Customer satisfaction data as part of the Council's continuous improvement of Service Provision

60. determine and drive, through their interactions and feedback, improvements to the Solution

61. be able to submit, track, escalate and receive updates on formal complaints in line with the Council's complaints procedure and policy

62. experience a comparable level of service irrespective of the channel they use to make contact via within the limitations of that channel, i.e. telephone, IVR, e-mail, face-to-face, SMS, social media – with the exception of self-serve, online services which will offer an easier, more intuitive experience

Solution Users will…

63. have a single, live and accurate view of the Customer across multiple line-of-business systems through the Solution interface, and be able to update this in real time without duplicated data entry

64. be able to quickly and easily search for, view and interrogate previous and live Customer interactions with the Council, organised in the most appropriate way to their query

65. be provided with, through the Solution, accurate, dynamically updated Customer data that are fully integrated with the Council's other systems in real time to avoid re-keying and duplication

66. be able to locate and view transaction and Customer information across multiple services using a single URN, both in the Solution and in other line-of-business systems

67. be able to receive, process, monitor, manage, provide updates on and respond to formal complaints in line with the Council's complaints procedure and policy through an automated process that requires minimal user interference

68. be able to amend and make changes to Customer data easily, without rekeying several times.

69. be able to access pre-defined performance management information and also configure performance management information for their business needs using intuitive, efficient and effective management information dashboards

70. be able, for all performance analysis and reporting, to view data at multiple levels: at the level of the organisation, the department, the service area or individual service, or by a geographical location or channel, or by team or individual worker, or any other configuration that provides meaningful performance and management information

71. have access to meaningful data on the extent to which Customers are satisfied about the fulfilment of their requests and their experience in making and, where relevant, tracking their request

72. be able to track and report on the volume and proportion of end-to-end transactions completed online

73. be able to track and report on the volume and proportion of end-to-end transactions completed online in a single visit – or 'done in one'

74. be able to track and report on the volume of contacts required to complete an end-to-end transaction that fulfils the Customer's request entirely, with trend analysis available to identify failure demand

75. be able to track and report on the volume and proportion of take up of services where self-serve is enabled, analysed by channel

76. be able to track and report on avoidable contact, broken down by channel, service, customer segment or any other configuration that provides meaningful performance and management information

77. be able to identify Customer trends and patterns in order to identify measures to improve Customer satisfaction and service delivery

78. not need highly skilled technicians to improve interfaces and use of the Solution locally

79. be able to provide information to and contact individual Customers and groups of Customers via all available channels, including – but not limited to – email, SMS and social media

8.4. Corporate Systems

Customers will…

80. be able to view and interact with maps (incorporating geospatial information on individual assets and boundary areas) on any web enabled device to quickly and easily locate information and services, report issues and raise requests in real time, with or without an Account and from both the website and within a personalised interface

81. be provided, where appropriate, with text or lists of information related to a current or given location where maps are not appropriate to the device or channel being used

82. be able to report issues and request services quickly using their current location obtained by a digital device

83. be able to define accurate location information relevant to the request that obviates the need for further contact in order to fulfil the request

84. be proactively alerted to issues within their geographical location (e.g. residents parking bay suspensions)

85. be able to access and use GPS enabled apps on mobile devices for interactions with the Council

86. be able to book services for a specific date/time quickly and easily using an intuitive interface whether or not they have an Account

87. view, amend cancel existing 'live' bookings quickly and easily whether or not they have an Account, with relevant line-of-business systems updated in real time

88. receive a Customer confirmation of booking, amendment or cancellation by digital medium and/or channel of their choice

89. quickly and easily pay for services and bookings electronically either in part or in full, whether or not they have an Account, with payments made in real time and automatically entered in the Council's income management system

90. easily view payment history and check balances on their Account through their personalised interface

91. set up, manage and cancel direct debits (DD) online, whether or not they have an Account with the Council

92. arrange an automatic refund in cases where a refund is due, but only to the payment card or bank or building society account originally used

93. be able to pay for services using chip-and-pin/customer present technology in real time in any face-to-face interaction

94. as far a possible be prevented from making payments in error, for example by using invalid reference numbers

95. be able to make gift aid payments where relevant

96. be able to utilise the telephone securely as a channel of access irrespective of any specific accessibility needs they may have

97. be able to request, book and pay for services and obtain information via the telephone, including accessing their Account

98. be able to provide information via IVR that will be automatically entered into The Solution and other line-of-business systems

99. be able to access information, report issues and request services entirely via IVR wherever possible, either with or without an Account

100. not have to repeat information provided via IVR when utilising other channels

101. be automatically routed via telephone through to an Solution User with the information and skills to respond to their request first time

102. be able to provide information to aid the swift resolution of their request via IVR before speaking to an Solution User, with such information being automatically made available to the Solution User handling their call

103. have a single, efficient route for initial telephone contact

104. be able to 'chat' with Solution Users online or via video-conferencing

*** Solution users will… ***

105. be able to view and interact with maps (incorporating geospatial information on individual assets and boundaried areas) on any web enabled device to quickly and easily locate information and services, report issues and raise requests in real time

106. be able to report issues and raise requests quickly using their current location obtained by a digital device

107. be able to define accurate location information relevant to the request that obviates the need for further contact in order to fulfil the request

108. be able to track in real-time the location of vehicles on maps

109. be able to optimise routes for vehicles using map interfaces

110. be alerted to issues within their geographical location and relevant to their service area

111. not need to enter into the Solution geospatial information that already exists in line-of-business systems or the corporate spatial database

112. not need to geocode requests relating to addresses since geocoding will be automated at point of contact through the appropriate Gazetteer

113. be able to access and use GPS enabled apps on mobile web enabled devices

114. be able to track the location of mobile officers with web enabled devices, in real time and historically

115. be able to administer bookings for services and facilities through the Solution with minimal interaction

116. be able to book facilities for a specific date/time quickly and easily

117. be able to view, amend, cancel existing bookings for a specific date/time quickly and easily, with relevant line-of-business systems updated in real time

118. be able to view, amend and cancel existing 'live' bookings on behalf of Customers quickly and easily, with relevant line-of-business systems updated in real time

119. not have to rekey information in multiple systems for service and utility bookings

120. not need to manually intervene in the payment and refund process; payments and refunds will be made automatically via the Council's financial systems and processes; they will be visible via the Solution and appear in relevant line of business systems in real time – all the necessary controls will be automated and actioned via the Solution in the Council's financial and line of business systems

121. be able to receive and process payment for services and refunds using chip-and-pin/customer present technology in real time

122. make payments to Customers, Partner Organisations, volunteers etc. via the relevant financial systems and processes

123. have an holistic view of all incoming telephone calls (first response telephone team only)

124. be able to contact Customers whose details are held within the Solution via telephone without having to dial numbers

125. be able to track and report on all elements of telephone activity and performance, including (but not limited to) volume of calls, nature of calls, origin of calls, abandoned calls, outgoing calls, response times, completed end-to-end transactions, avoidable contact etc.

126. design, introduce and manage voice recorded menu options and messages

127. be able to record telephone interactions with Customers and utilise these for training or other purposes

8.5.   Systems Integration

Customers will…

128. experience a seamless journey when completing transactions in real time without having to navigate or access other systems

129. be able to extract, amend and input data into other related systems (e.g. request, book and pay for services and report issues) through the website and their personalised interface in real time

Solution Users will…

130. be able to extract, amend and input data into the Solution from other related systems in real time; they will not have to rekey data in multiple systems

131. be able to extract, amend and input data into other related systems from the Solution in real time; they will not have to rekey data in multiple systems

132. be able, on behalf of Customers, to request, book and pay for services and report issues through the Solution in real time without having to access any other systems

133. not be prevented by virtue of unreasonable costs from integrating the Solution with existing systems in order to enable and extend self-service

134. have a single view of Customers' data and information that is maintained in a uniform and consistent format eliminating errors and duplication and improving data quality

135. be proactively notified by the Solution of data inconsistencies in order that a single, accurate record of Customers and addresses is dynamically maintained and improved

136. be prevented from breaching data protection legislation, principles and requirements.

8.6. Document Management

Customers will…

137. be able to view and amend electronic documents relevant to them, their service history and their interactions securely via the website in a range of formats and, where they have an Account, their personalised interface, where such access is authorised in line with relevant standards, legislation and policy

138. be able to submit electronic documents in a range of formats including hard copy documents that they have scanned themselves, via the website and, where they have an Account, via their personalised interface

139. be able to scan hard copy documents directly into their Customer Account using scanning equipment provided by the Council

140. not be at risk of having their personal data shared with or accessed by others inappropriately or illegally

Solution Users will…

141. be able to add, view and amend relevant electronic documents in a range of formats relevant to individual Customers as part of their Account view through The Solution, with such documents being available through related systems for real time single view of the Customer

142. be able to scan documents into the Solution in a range of formats, with the functionality available for barcoding, automated indexing, automatic redaction

143. be able to utilise scanned documents as legally admissible

144. be able to view and export Customer requests as electronic documents

145. be able to quickly locate files and documents held within the Solution and be able to search all document types utilising Optical Character Recognition (OCR) and meta tagging

146. have the ability to custom search including on content/conceptual content, fuzzy matching (wild carding), related searching and metadata searching

147. only be able to access those confidential documents that they are authorised to view

148. save vital time and see a reduction in administrative activity with the Solution being able to collect metadata from scanned documents

149. have improved workflow processes within EDRMS by allowing outgoing post to be directed to the Post and Print Room and collated by address.

[Type text]

8.7. Mobile Working

Customers will…

150. be able to have enquiries and requests dealt with by mobile Solution Users in real time at the first point of contact, irrespective of location

151. be able to submit enquiries and requests to mobile Solution Users who are 'offline' for automatic integration when connectivity is available so that their request is dealt with at the first point of contact, irrespective of location

152. benefit from a streamlined experience when in contact with mobile Solution Users and a reduction in the number of information requests

153. be able to access relevant services with any web enabled device via the internet

Solution Users will…

154. be able to locate, view, add and amend Customer requests via any web enabled device and from any location in real time

155. be able to add and amend Customer requests via any web enabled device when they are 'offline' for automatic processing and integration when connectivity is available

9. Glossary

DRAFTING NOTE

The definitions below are relevant specifically to this Schedule 1. They need review and alignment with the rest of the Contract documents, They will be reviewed in consultation with the Bidders during the dialogue phase.

eSD	Electronic Service Delivery
Solution	Any and all of the services to be provided by the Contractor under this Agreement including those set out in the Draft Conditions of Contract schedule 2.1 (Services Description)
Solution User	Individual person authorised by the Council or by a Partner Organisation specifically delegated by the Council for the purposes of such authorisation as a Solution User, including employees, agency and interim staff, and consultants engaged by the Council or by any of its Partner Organisations
System Administrator	A Solution User specifically authorised for the purposes of making administrative changes to the System
System	The EDRMS element of The Solution
Customer	We use the term 'Customer' to describe a person, business or other organisation receiving or seeking information about Council or other public services – a fuller definition is provided in section 4 of this document
Account	A personalised data set, including authentication, established within The Solution, that enables a Customer to securely access all information about them, the services they receive from the Council or a Partner Organisation, and the transactions they have with the Council or a Partner Organisation via The Solution
Profile	This refers to the permissions and security settings of a Solution User
eform	Electronic form
FTE	Full Time Equivalent
UTRN	Unique Transfer Reference Number
PAF	Postcode Address Finder
IVR	Interactive Voice Response

EDRMS	Electron Document and Records Management System
Open Data	Principles that define "openness" in relation to data and content
RSS feeds	Rich Site Summary
PSN	Public Sector Network
ePayments	Electronic payments