

# Design thinking: input for our data & information flow; informing our business systems investment priority

## United Response Invitation to Tender

Date of issue: 28th April 2021

Responses required by 14th May 2021

The logo for United Response is a white circle with a colorful arc of dots above the text. The text 'United Response' is in a bold, sans-serif font, and the tagline 'support that changes with you' is in a smaller, lowercase font below it. The circle is partially overlaid by a blue and yellow shape.

**United  
Response**  
*support that changes with you*

# Introduction

**United Response is a top 100 charity operating in England and Wales, providing a range of support and services for more than 2,000 people with learning disabilities, mental health needs or physical disabilities.**

This tender document provides an invitation to tender for a consultancy project to work in collaboration with Executive Leaders and Non-Executive Directors to:

- Inform the wider high level organisational design and flow of data and information, and
- In turn validate the prioritisation of investment for business systems at United Response.

This assignment will facilitate United Response to implement our new strategy and Long Term Plan for the future.



# Background

United Response will initiate a new strategic long-term plan in 2021. The United Response story starts in 1973 on the south coast with the opening of residential care homes for people with a learning disability. In the intervening period we have been through different phases of development.

The golden thread running through all of these phases is our belief in person centered support – enabling each person we work with to be supported in a way individual to them. Our approach is underpinned by a way of working called ‘active support’. Instead of doing things for people or to people, we work with them, so they can take part in everyday activities, regardless of their level of disability.

The types of service through which we support people have evolved through these different phases. Our earliest services were registered care homes in larger houses. In time we moved to delivering more ‘Supported Living’, where people are tenants in their own right with more control over their income too. Housing for supported living is usually domestic scale, ordinary housing.

Over this time, we worked supporting people to move from their family home and with many people moving from institutions that were closing down. This movement of people into community settings was a powerful motivating force that drove the way we worked.

Our current phase may best be described as Supported Living Plus. We offer places for people to live and support for their daily lives. This includes a broader range of valued support for some people, including further education, employment, and engagement in their local communities. This wider offer is important but currently not universally available for everyone we

support. We need to build on and extend this way of working.

Now that most people we support are well used to living in community settings, we need a new motivating purpose to power our next phase of development. We want to strengthen our focus on people and communities. We want to ensure that people both live in local communities and are actively engaged in the life of those communities.

Our new purpose is that we offer networks of support, rooted in local communities backed by the resources of a national organisation. This is how we will support people with learning disabilities, autism, and mental health conditions to live life to the full.

As we embark on a new organisational chapter, we are seeking to ensure that technology enables those networks of support in an integrated and easy to use way. We recognise that this will be an investment for the future and are committed to getting the organisational design for the flow of information and the prioritisation of technology and business systems right.

Our **MISSION**: is to ensure that individuals with learning disabilities, mental or physical support needs have the opportunity to live their lives to the full.

Our **VISION**: is a society where everyone has equal access to the same rights and opportunities.

Our **VALUES**: we are all about people, we value our relationships with: the people we support, their families, our colleagues, delivery partners, and commissioners. In our work we aim to be: Creative, Strong, Honest, Responsive and United.

# Our IT strategic principles

United Response has not had the facility of modern cyber safe network environment until now. Our history of large system implementations has been at best patchy. In support of our new Long Term Plan our technology is:

- An intent for digital technology change.
- Inclusion, using assistive technologies.
- Technology is used to the fullest extent in both service delivery and business support.
- Literally achieving “I have access to enabling technology” for the people we support, and, “management and administrative systems support me to do my job well” for staff.

In undertaking technology engagement through our Digital Forum we define “digital” at United Response as using technology to inform, communicate and collaborate. To support this we have developed two core work-streams (1) Connectivity & Collaboration, (2) Business Systems.

These work-streams underpin our vision of what a digital environment will do at United Response:

- Regarded as a sector leader in how it enables communities and their support
- Connectivity and collaboration underpin what we do
- Staff are trained and equipped in the use of a Smart device
- People we support have smart devices that support and stimulate as well as connect them with family, friends and community.
- Paperless in all that we do
- Infrastructure that is secure and capable of supporting flexible working
- Business systems are simplified and appear integrated.

- Meaningful trend and data analysis insight available
- We can readily evidence outcomes (individually, locally, regionally and nationally)

The priority we are working to across the work-streams is currently identified as:

## Connectivity & Collaboration

1. Refreshed infrastructure & Cyber Essentials – well advanced, nearing completion
2. Enable Connectivity & Collaboration for all Services – work in progress, needs identified, equipment deal secured. MS Teams and Zoom in use.

## Business Systems

3. Digitalise Health Management & People We Support records – Remains manual with a mix of paper and digital records using MS Teams
4. Replace PSF (Finance System) & Implement Billing & Contract Management Solution – scoping and business case development stage
5. Evaluate 365 Shifts module. Staff & Payroll remains with Midland HR using iTrent – iTrent renewed for a further 3 years and Human Capital Management would become Phase 2 of the Finance replacement solution and Phase 3 would be the payroll replacement.

Other key business system development is the Support and Administration Management solution, referred to as SAM a solution developed using CRM Dynamics which is live with the final modules under development for completion this year. Business systems are currently a mix of hosted such as iTrent, cloud based such as Office 365 and on premise currently PSF and SAM. The Infrastructure is hosted from two data centres.

# Scope for the assignment

The Board at United Response recognises the risk with our technology arrangements and is open to consider all potential options with a view to invest in those solutions that will carry United Response forward to successfully deliver the Long Term Plan. Notwithstanding that United Response needs to strengthen our systems and subsequent ways of working to adapt to new and existing business environments our project brief is:

## 1 Organisation Design.

To assist us in establishing what should our high level organisation design look like to support effective data capture and conversion to a meaningful information flow in support of the delivery of the Long Term Plan?

- a. What would the organisation design at a high level look like that includes the views of operations staff, people we support and their families and support functions?
- b. How best is data to be captured, when and by whom?
- c. What will be the high level implications and requirements to be addressed based on who captures data and how it is converted to information?
- d. What considerations are there for the interconnectedness with data across core systems of Finance (a new solution), iTrent (HR/Payroll), SAM (Incidents/Support Requirements/Quality Management), and a People We Support Support & Health Plan record (new solution)?
- e. What needs to be considered for the presentation of information in a dashboard format with an ability to drill down with the high level organisation design?

## 2 Organisational Impact.

In considering the high level organisation design what are the implications for United Response's priority of focus on business systems; taking into account that two systems identified will be new (Finance and the PWS Support & Health Records solution) and the existing SAM system development?

- a. Recommend what new solution should be prioritised first – taking into account the view of the Board, operational colleagues (managers and staff), people we support and their families, and support functions?
- b. What suggestions would be made to support deployment of two business solutions whilst a third core system completes rollout; in such a way that keeps implementation costs at an acceptable investment spend level?
- c. What recommendations would be made to successfully manage the impact of change on the staff, people we support and their families, United Response's funders and the regulators such as Care Quality Commission (CQC) and the Charity Commission (CC)?

## 3 Collaboration.

Review the opportunity for United Response to work collaboratively with other sector providers in securing business solutions that meet similar needs; recommending the appropriate actions that United Response should consider to progress a collaborative procurement and implementation.

The output from this assignment will inform the business systems case for investment as well as inform the priority order in which United Response will progress.

# Constraints on the assignment

While the Board recognises the need for investment in technology it is not the only investment request that they will have to consider in supporting the delivery of the Long Term Plan.

## Constraints on this project assignment:

**Timeframes** – this assignment should be completed ahead of any submission of business cases for investment to the Board for business systems. The first business case would likely be July 2021.

**Finance Solution** – work has commenced with the support of an independent partner, CloudRock, to advise on the development and engagement of a preferred supplier and business case to replace the finance system.

**People we support health & support Plans** – recommendations from an independent review of our existing paper based system are being acted on. The paper based files will be moved to MS Teams expected to be completed by early June 2021.

**Technology rollout of smart phones, tablet devices and connectivity** – a deal has been secured with Vodafone and suppliers for devices are being procured. The devices will then be configured and rolled out to services in an agreed order. This is likely to take until the end of August 2021.

**Cyber Essentials accreditation** – is anticipated to be achieved by the end of September 2021.

**MS Teams** – rollout and use of the collaborative tool is underway and Teams Supporters (champions/super users) will have been trained and supporting teams by the end of June 2021.

**Resources available from United Response** – will be limited due to the range of ongoing work and the emergence from lockdown. Access to staff and managers for input to the assignment will be supported.

A final presentation session with the Directors Team and with the Trustees of the Finance and Resources Committee will be required.



# Outline of approach

It is anticipated that this work will be carried out during May and June 2021 with final presentations in early July. Given the timescale and the current Covid-19 restrictions it is expected that most of the work will be undertaken virtually.

Given the scope of the assignment we would be particularly interested in how you will approach the work, what models you will deploy and what resources you would put forward as part of the team working on the assignment. A clear timeline of when you would undertake agreed stages of work and what input you will require from United Response would be welcomed.

We anticipate that the work will require engagement with a range of stakeholders and this we anticipate will be via interviews, workshops and/or surveys to gather an informed view.

Stakeholder groups we envisage are:

- Trustees
- Directors Team
- Managers from Operations North and South
- Supervisory Staff such as Lead Senior Support Workers and Team Managers
- Support Workers
- People we support and their families
- Finance, Quality & Practice, Human Resources and Information Technology staff and managers
- Access to Voluntary Organisations Disability Group and other such providers
- Other stakeholders that may have a perspective include CQC, CC, Commissioners and external specialist teams who will require access to health and support information.



# Deliverables

The deliverables expected from this assignment following synthesis and analysis of the findings from the data gathering stage are:

- 1** A high level design schematic overview with recommendations, benefits and risk mitigations.
- 2** A framework for approaching the change management considerations of the high level design and implementation of business systems.
- 3** An overview of data flow from access, capture, conversion to output with recommendations for improvement and to managing risks.

**4** Recommendations for the approach to prioritising business system implementations and identification of risks and suggested mitigations.

**5** A sector overview and suggested business arrangement in support of a framework of pro and cons of any possible sector partners to work and share costs collaboratively with.

**6** Facilitate a presentation of the findings and recommendations with the Directors and Trustees.





# Timetable and costs

The timeframe for this assignment is envisaged as May and June with presentations in July. This assignment is sponsored by the CEO, Director of Finance and Director of Corporate Services. The budget available for this project is £20,000 plus VAT and expenses as they are incurred.

## Quality criteria

The quality criteria that United Response will judge the success of this assignment are:

- 1** A strong methodology that reflects inclusion for gathering insight and views from the stakeholder groups.
- 2** A track record of delivering similar sector design thinking assignments and access to references to support that record.
- 3** An approach that facilitates a strategic overview and supports United Response to present strategic options for the Board to take investment decisions on.

# Selection criteria

The selection criteria that United Response will use for selecting a partner for this assignment are:

- 1 Knowledge and experience of the adult social care sector and sub sectors that United Response operates within.
- 2 Understanding and respect to the ethos of United Response.
- 3 Evidence of ability to achieve the deliverables within the designated budget.
- 4 Evidence of capacity to mobilise and undertake the work during the period as set out.

5 Experience in facilitating high level design flow thinking and strategic conversations.

6 Ability to work collaboratively with stakeholders whilst offering constructive challenge to inform final proposals.

7 Evidence of two examples of having undertaken comparable assignments with successful outcomes.



# Form of proposal

Proposals should be no more than the equivalent of 6 pages of A4 detailing how the consultant would deliver the scope of the assignment as set out above within time and cost framework. Please provide a breakdown of costing.

Proposals must be sent to: Mark Ospedale at [mark.ospedale@unitedresponse.org.uk](mailto:mark.ospedale@unitedresponse.org.uk) by 12 noon on the 14th May 2021. Potential providers are welcome to contact Mark Ospedale or Tim Cooper via email on [tim.cooper@unitedresponse.org.uk](mailto:tim.cooper@unitedresponse.org.uk) in the first instance to discuss the aims of the assignment in more detail.

Documents that set out the strategic long term plan for United Response will be shared with the appointed consultants. This will be to further an understanding of the strategic context in which this piece of work is being undertaken.

