

PROJECT DOCUMENTATION

WORK PACKAGE 1 DESCRIPTION & TECHNICAL OPTION EVALUATION SCOPING DOCUMENTS (in Appendix 1)

Norfolk Connect Partnership

Norfolk Councils working together to provide joined up services

Norfolk Connect Project 2003/04

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PRINCE 2

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Workpackage 1 Description

Technical Option Evaluation

Purpose of Document

- The purpose of this document is to provide a clear description and scope of this workpackage, to ensure that subsequent products will be successfully produced and will fit within the overall project scope.
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Description

From the already agreed Project Scope document, this Work Package consists of:

1) Identifying the scope for the following areas and producing associated scoping documents:

- Secure email / area option.
- Geo referenced search results including member joint data via portal and, if needed, a possible short term fix for joint member data (E-Democracy).
- Enhanced FAQ based search results rather than page list.
- E-Forms (including investigate field pre-population).
- Possible joint database for information on non partner organisations' FAQs.
- Confirm approach & identify package to support community planning by local partnerships.
- Automated population of metadata into web pages.

Scoping documents for the above areas are provided in Appendix 1 of this document and form the first Milestone from this Work Package.

2) In liaison with Team Managers, identify & evaluate technical options as well as any outputs from relevant national projects and taking into account technical fit within Partner architectures; negotiate price for list of topics above. The output from this will be costed & recommended options for each technical solution for the Project Board.

The first deliverable will be reports on technical options and specifications for negotiated procurement.

Product Description(s)

- Scoping documents for the Work Package areas listed in the description above.
 - Reports on technical options & specifications for negotiated procurement.
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Techniques / Processes / Procedures to be used

- Scoping documents
Initial documents to be written by the Project Office and QA'd by the Team Managers.
- Reports on technical options and specifications for negotiated procurement.

Reports to be written by the Project Manager (Technical & Planning) after discussions with appropriate Team Managers and other relevant people. To be QA'd by the Team Managers before approval by the Project Board.

Interfaces to be satisfied by the completed product

The interfaces will be different for each of the completed products within the workpackage.

The scoping documents will be used as inputs to further workpackages within the project. The report on technical options will also feed further workpackages within the project, but will also be used as a basis for the specifications for negotiated procurement to be produced in this workpackage.

The specifications for negotiated procurement will be used as input to the procurements to be done as part of further workpackages within the project.

Interfaces to be maintained during the work

Potential new suppliers will liaise with the Project Office who will bring in Team Managers when required.

Configuration management requirements

As defined in the Quality Plan for the project.

Stage plan extract

Work Package 1 (Technical Option Evaluation):

Milestone 1: Scoping Documents produced (End-Oct03) – Documents attached in Appendix 1.

Milestone 2 / Deliverable1: Costed & recommended options for Project Board (Incremental reports from Mid-Nov to End Dec03).

Joint agreement on effort / cost / time

The resources to be used in this workpackage will be identified as part of the wider planning task of this project, and approved by the Project Board.

Any constraints to be observed

This workpackage is the first one in the project and the outputs are vital inputs to later workpackages. Given the tight timescale on the project, it is essential that the time constraints in this workpackage are kept to.

Independent quality checking arrangements

See Quality plan.

Reporting arrangements & Sign-off requirements

All reports will be QA'd by the Team Managers and approved by the Project Board.

Problem handling and escalation

As documented in the Quality Plan.

APPENDIX 1

Technical Option Evaluation: *Scoping Documents*

The following has been produced to aid the understanding of requirements for the technical investigation in subsequent work packages.

**Workpackage 1 (Technical Option Evaluation). Requirements Scoping document for:
Secure email / Area**

Area:

Secure email / area option

Introduction & Background

The Process Mapping work being undertaken at the request of this project is scheduled to finish end-Oct03 and will identify information flows between Partners' organisations. The work will highlight possible applications for Secure email and/or Secure areas that the Partnership may wish to develop. The Secure Email / Area Technical Option Evaluation work will investigate potential products and solutions and produce a report for the Project Board on costs, options & recommendations. The subsequent procurement of a solution together with its implementation will be part of Work Package 4 (Secure Email / Area). By procuring the same solution for each Partner, joint, secure data sharing between Partners is envisaged.

Understanding this requirement

A Secure Email / Area solution is sought to facilitate the exchange and sharing of data between Partners in a secure way. The prior Process Work will identify "What" information and "Between" whom (Partner-Partner and/or Citizen-Partner etc). The solution will need to provide a sufficient technical fit with Partners' architectures and enable suitable levels of security to be maintained. The Secure email / area Technical Option evaluation will consider the following when investigating possible solutions:

- Product maturity – how mature is the product/solution, how many customers use it.
- Technical fit with Partner architectures.
- Facilities it provides.
- Applicability – the extent to which the solution applies to Partners' needs.
- Technical support available.
- Training available.
- Whether Partners are likely to use it for other purposes besides those identified by the Process Mapping work.
- The total cost of ownership to have the solution.
- The total ongoing revenue cost for having/using the solution.
- The likelihood of using the solution post the initial funding phase.
- Any risk factors in choosing the solution.
- Any Kudos factors in choosing the solution.

Investigation into the Government Gateway is being undertaken as a separately managed activity but in liaison with the project team. The Gateway aims to provide a single sign-on for Citizens and Organisations in order to provide access to government services that require authentication. Because it has the potential for use by Central and Local government, investigation into its applicability for the Partners is important. To this end, one of the Partnership members (King's Lynn & West Norfolk Borough Council) is undertaking a pilot of its use.

Related issues

- Process Mapping – identifying information flows and possible use of Secure Email / Area.
- E-Forms – providing a possible mechanism to capture data for subsequent sharing using Secure Email / Area.
- Govt Gateway (KL & W.Norfolk BC) – identifying the possible applicability of the Government Gateway's centralised authentication services for use by Local Authorities.

Summary of requirement

- Establish evaluation criteria & identify potential Secure Email / Area solutions.
- Determine suitability of particular solutions for Partners.
- Produce costed options & recommendations to the Project Board.
- Identify which Partners want to use/pilot its use.
- Procure the solution.
- Undertake training.
- Initiate development work.
- Implement/Pilot the solution & Go-Live.
- Share knowledge with other Partners and key organisations.

**Workpackage 1 (Technical Option Evaluation). Requirements Scoping document for:
Geo referenced search results & joint Member data fix**

Area:

Geo referenced search results including member joint data via portal and, if needed, a possible short term fix for joint member data (E-Democracy)

Introduction & Background

The requirement is for a citizen to be able to enter a geographical reference and to be returned their local District Councillor, County Councillor, possibly Parish Councillors, Member of Parliament and Member of the European Parliament.

This requirement was partly met when the Norfolk & Waveney Information Area was implemented some years ago, but over time the information that the councils needed to provide on their websites degraded as some councils moved their websites away from Tagish. In particular the County Council who held all the County Councillor information.

There is still a requirement to pull all this information together from the various websites on which it is held into one place, and the intention is that this should if at all possible be provided by the Portal. This does not necessarily mean physically locating the content on the Portal.

Understanding this requirement

Geo-referencing in this case could be provided by entering a postcode (although it is possible that there may be some postcodes that are divided across electoral boundaries) and/or other means such as a clickable map of Districts, Wards & Parishes and/or even via spatial coordinates. Norwich City are planning to allow referencing to be by street name using their Local Land & Property Gazetteer (LLPG), so as the various partners' LLPGs become available this could be a possibility for investigation.

"Member joint data" is data on all the elected representatives for a particular place. As a minimum this would normally include District Councillors and County Councillor. Where appropriate it should include Parish Councillors. If possible (ie, if appropriate data is available) this should also include Members of Parliament and Members of the European Parliament.

The short term fix could be needed to provide the minimum of District & County Councillors if it is not possible to provide a full solution within the timescales / finance available.

Related issues

- Metadata – defining appropriate metadata in order to categorise Member data by some form of geographic reference.
- Portal Enhancements – enhancing the existing Portal to identify Partner data with geographic references.

**Workpackage 1 (Technical Option Evaluation). Requirements Scoping document for:
Enhanced A-Z / FAQ based search**

Area:

Enhanced A-Z / FAQ based search results & automated population of metadata into web pages.

Introduction & Background

Following successful implementation of Phase 1 of the Norfolk Connect "Virtual" Portal, this work will add value to it by making use of the Portal's facilities to provide joint A – Z & FAQ information.

In order to achieve the joint A-Z facility the Portal when indexing partner sites will need to be configured to recognise content that is intended for the joint A-Z . It will also need to be able to dynamically generate the joint A - Z list. Similarly partner sites where the actual A-Z content will reside will need to have appropriate Metadata embedded into their content so that the Portal can determine what is and is not A-Z material. A precursor to these activities will be the need to jointly agree which relevant metadata standard/s to adopt and then define what metadata labels/values will be used by partners to categorise the A-Z content.

In order to achieve the joint FAQ information, enhancements to the Portal will need to be made to allow those partners that have/want FAQ information to submit the URLs for this content and have the Portal search facility highlight relevant questions in the form of a "Recommended Link". Note: The solution for joint FAQs should also apply to Life Events/Episodes content.

Understanding this requirement

Joint A-Z List of Services: Citizens will not necessarily know whether a service is a District or County function. By enhancing the Portal it should be possible to provide a joint list of A-Z services that is relevant to the Citizen no matter whether they view the list via a District or County web site.

Joint FAQs: When Citizens are searching for information via the Portal it will be possible to display related FAQs in the form of recommended links that will provide them with access to relevant key information. The Portal can "join up" the various FAQs because partners that have FAQs can submit the Questions with associated URL links centrally into the Portal. Note: The solution should also be applicable to joint information on non-partner organisations' FAQs.

Related issues

- Process Mapping – identifying areas where joint FAQs are needed for the Partnership.
- Metadata – agreeing appropriate metadata standard/s and values in order to categorise and label partners' A-Z content.
- Portal Enhancements – enhancing the existing Portal to identify Partner A-Z metadata and dynamically generate a joint A-Z list; enhancing the content available via the Portal by Partner & non-partner organisations submitting their FAQ URLs as Recommended Links.

**Workpackage 1 (Technical Option Evaluation). Requirements Scoping document for:
E-Forms**

Area:**E-Forms.****Introduction & Background**

The Process Mapping work being undertaken at the request of this project is scheduled to finish end-Oct03 and will identify information flows between and within Partners' organisations. The work will provide a prioritised list of possible uses for electronic forms that the Partnership may wish to develop. The E-Forms Technical Option Evaluation work will investigate potential E-Forms products and produce a report for the Project Board on costs, options & recommendations. The subsequent procurement of an E-Forms product and the development of actual forms identified through process mapping will be part of Work Package 3 (E-Forms). By procuring the same E-Forms product for each Partner, any forms developed by one Partner can be reused by the others and thus save development costs.

Understanding this requirement

An E-Forms product is sought to facilitate the creation of electronic forms for use on Partners' Web sites and Intranet sites. The solution will need to provide a sufficient technical fit with Partners' architectures and enable additional E-Forms functionality over and above that which is offered today by regular HTML-forms. The E-Forms Technical Option evaluation will consider the following when investigating possible products:

- Product maturity – how mature is the product, how many customers use it.
- Technical fit with Partner architectures.
- Facilities offered by the product.
- Repository size & applicability – the extent to which the product has relevant forms already created & available for reuse by the Partners.
- Technical support offered by the E-Forms vendor/supplier.
- Training available on the product.
- Whether partners are likely to use the product for Internet and/or Intranet use.
- The total cost of ownership to have the E-Forms product.
- The total ongoing revenue cost for having/using the product.
- The likelihood of the product's continued use post the initial funding phase.
- Any risk factors in choosing the product.
- Any Kudos factors in choosing the product.

Related issues

- Process Mapping – identifying information flows and a prioritised list of possible E-Forms for development.
- Secure Email / Area – providing a possible mechanism to transmit the E-Form's data in a secure way.

Summary of requirement

- Establish evaluation criteria & identify potential E-Forms products.
- Determine suitability of particular products for Partners.
- Produce costed options & recommendations to the Project Board.
- Identify which Partners want to develop which E-Forms.
- Procure the E-Forms product.

- Undertake training.
- Initiate development work.
- Implement four E-Forms (including defining support processes, doing testing & user acceptance).
- Go-live with four E-Forms on web sites.
- Offer E-Forms to other Partners for reuse on their web sites when ready.

**Workpackage 1 (Technical Option Evaluation). Requirements Scoping document for:
Possible joint database of non-partner FAQs**

Area:

Possible joint database for information on non partner organisations' FAQs

Introduction & Background

The Councils are working together to develop a common set of FAQs for the Portal, which can be held centrally or on Council websites (see Work Package 6, A-Z/FAQs). The Councils' websites (and therefore the Norfolk Portal) hold information about non-partner organisations, such as the Citizens' Advice Bureau, pointing to their websites, if they have one. These external organisations may or may not have FAQs on their websites. It is the intention that external organisations should be offered the facility to make FAQs available through the portal, and therefore it will be necessary to develop a facility to hold FAQs centrally.

Understanding this requirement

Non-partner organisations

It is intended that external organisations will be invited to make their website information available through the Norfolk Portal, when the Engagement Pack has been developed giving them instructions about what action they need to take. A dependency for delivery of the FAQ central "database" will be availability of the Engagement Pack, marketing of the Norfolk Portal concept and take up by external organisations.

Partners of the Norfolk Connect Partnership project are the seven Norfolk District Councils and the County Council. Non-partner organisations are those organisations that do not form the actual partners but which will be invited (via the Engagement Pack) to utilise the Portal Search facility. The criteria for what constitutes a "non-partner" organisation will be formally defined as part of Work Package 2's Engagement Pack activity. Examples could be public & voluntary organisations that have a presence in Norfolk and so might include police, emergency services, health, voluntary organisations, etc. In parallel with Engagement Pack development, NCP Team Managers will be asked to:

- Identify partners who they would like to contribute to the Portal.
- Develop criteria for deciding who are the priority partners to be contacted first.
- Agree list of prioritised potential partners.

Joint database

The term "database" has been used in documents to describe a possible technology solution to store non-partner organisations' FAQs centrally, however, a database solution may not necessarily be used, instead the Portal might be used to provide a "Virtual" centralised set of these FAQs. Work Package 6 (A-Z/FAQs) will identify the solution for this as there may be benefit in using the same solution as that used by the Partners for their FAQs.

Related issues

- Portal Enhancements – Engagement Pack development & enhancing the existing Portal by introduction of Recommended Links for use by Partners to highlight FAQs where they exist.

Summary of requirement

- [In parallel to this requirement: development of Engagement Pack].
- Identify with Team Managers a prioritised list of possible external organisations to target.
- Establish the mechanism by which non-partner organisations' FAQs can be hosted.
- Offer the FAQ facility to an initial set of non-partner organisations.
- Assist organisations in providing their FAQs.
- Implement FAQs, including testing, user acceptance, etc.
- Assist in the maintenance of FAQs for external organisations eg, via the Portal.

**Workpackage 1 (Technical Option Evaluation). Requirements Scoping document for:
Confirm approach & identify package for Community Planning**

Area:

Confirm approach and identify package to support community planning by local partnerships (linked to Work Package 7, e-Democracy)

Introduction & Background

The document 'Norfolk Ambition, A Community Strategy for Norfolk 2003 – 2023' paints a vision for improving the quality of life for people in Norfolk. The Community Strategy suggests that 'Community planning transcends recognised organisational boundaries and allows everyone with a stake in an area to think outside their box'. Therefore a community in this context can be viewed as a geographically defined group of people who will have one or more common interests relating to the geographic area. These communities have not been defined in terms of names on a list, and in fact communities may be dynamic in terms of being formed due to a common need, membership continually changing and being disbanded when no longer required.

The above mentioned Strategy sets out a challenge to develop a system to share knowledge and experience between organisations, and within this context organisations can be communities as described above. The Norfolk Knowledge Network (N3) is tasked with addressing this challenge. The Norfolk Connect partnership project can potentially support N3 and in turn the Community Strategy, through the development and implementation of technology and services which facilitate sharing of relevant information (which in broad terms could be stretched to knowledge and experience, if it can be documented).

Understanding this requirement

It is possibly useful to break down the above single line statement of requirement into a number of topics as follows, so that each can be examined, before attempting to pull together an holistic requirement:

- Confirm approach
- Identify package
- Community
- Planning by Local Partnerships.

Confirm approach

It is unclear how this requirement may be tackled, therefore once the subject matter of the requirement is agreed it will be useful to consider a number of options for implementation. For example different features of the Norfolk Portal may be used to support communities by:

- Providing useful information to the community
- Indexing relevant information beyond the boundaries of local government
- Enabling discussion groups
- Advertising community events, meetings
- Enabling the storage of information specific to the community, etc.

Confirmation of the approach will determine whether existing packages can meet the requirement or whether different/additional technology is needed.

Identify package

It is assumed at this early stage that some additional technology may be needed to implement the

requirement. Until the requirement and approach is confirmed this will remain unclear. If new technology is needed, the general approach to evaluating technical options (specify selection criteria, long list potential products, assess products, make recommendation) will be adopted.

Community

In this context community refers to the people in a geographic area which could be as small as a neighbourhood or as large as the whole of Norfolk, with a range of in-between sizes such as towns, villages, districts, etc. It is assumed that any community will have some common interests and the need to share information (knowledge and experiences), for example a neighbourhood may be concerned with a neighbourhood watch scheme, local dumping of rubbish or local transport.

For the Norfolk Connect Partnership project it will be necessary to identify a community or communities for which information sharing facilities can be provided, therefore an existing community should be found, it is not intended that the project should cause new communities to be set up. It will be desirable to develop a list of criteria for selecting one or more communities for involvement in the Norfolk Connect Partnership project.

Planning by Local Partnerships

Local Strategic Partnerships (LSPs) are non-statutory bodies intended to bring together the public, private, voluntary and community sectors at a local level. These partnerships should aim to improve the quality of life and delivery of services locally.

(http://www.go-east.gov.uk/Partnerships/Local_Strategic_Partnerships//index.cfm?textVersion=1)

Local partners working through a LSP will be expected to take many of the major decisions about priorities and funding for their local area. However, a lack of joint working at local level has been one of the key reasons for lack of progress in delivering sustainable economic, social and physical regeneration; or improved public services, that meets the needs of local people. LSPs will give communities a greater say in the running and delivery of public services by drawing the key service providers into a single partnership with which the community is actively engaged. A combination of organisations, and the community, working co-operatively has a far greater chance of success.

(<http://www.neighbourhood.gov.uk/partnerships.asp>)

For the Norfolk Connect Partnership project it will be necessary to identify one or more Local Partnerships which have already identified requirements for supporting communities and are planning to rollout some form of information sharing. Again, it may be desirable to develop criteria for selecting which Local Partnerships should be supported first.

Related issues

Community engagement

As part of Work Package 7, e-Democracy, it is essential to bring about community engagement, that is to say, it will not be sufficient to provide passive information, but instead some mechanisms need to be put in place to encourage the community to be active. For example two-way dialogues may need to be supported so that the community can debate issues amongst themselves, provide views and feedback to the Partnership or create/update their own information.

For the Norfolk Connect Partnership project it will be necessary to identify some functionality required to demonstrate that the Local Partnership has engaged a community and a subject area in which to implement the functionality. For example, provide a mechanism for a community to comment on planning applications.

Re-use of existing resources

It is desirable that this requirement makes use of technical functionality developed for other parts of the Norfolk Connect Partnership project or any procured package can be more widely used, such as by other communities or to meet other Councils' requirements.

Significant effort is being expended on information provision on Council websites, therefore it may be helpful to make sure that this information is provided to communities, wherever it is applicable. This could be used as the driver behind selection of a Local Partnership, a Community and the subject matter of the relationship.

Summary of requirement

- Select one or more Local Partnerships for which support will be developed
 - Identify Local Partnerships
 - Draw up selection criteria
 - Prioritise
 - Recommendation
- Select one or more Communities linked to Local Partnerships (this is likely to be done in parallel with the above)
 - Identify Communities
 - Draw up selection criteria
 - Prioritise
 - Recommendation
- Scope the information to be provided and functionality to be supported (approach), which should be replicable for other communities
 - Analyse requirement with local Partnership and Community
 - Design a solution
- Determine the most suitable technology for meeting the above requirement
 - Investigate technical solutions for the design
 - Apply technical evaluation
 - Recommendation
- Procure packages as required
 - Procure
 - Install
- Implement the support required including testing, etc
 - Develop prototype to meet the requirement
 - Identify possible further development beyond 31st March 2004.
- Market/publicise what has been done to other Local Partnerships and Communities (the timescales are such that this is likely to be beyond 31st March 2004 as should be done after the initial "bedding in" period of the system)
 - Write articles for in-house bulletins, Intranets, etc
 - Write articles for web, external publications, etc
 - Undertake presentations to targetted groups
- Implementation by other Local Partnerships and Communities (beyond 31st March 2004)

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