

PROJECT DOCUMENTATION

WORK PACKAGES 2, 5 and 6 DESCRIPTION AND PRODUCT DESCRIPTIONS

Existing Portal Rollout (WP2)
Meta-data (WP5)
A-Z / FAQ (WP6)

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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Work Packages 2, 5 and 6 Description and Product Descriptions

1. Title

Existing Portal Rollout, Metadata and A-Z/FAQ.

2. Purpose of Document

The purpose of this document is to provide a clear description and scope of these Work Packages, to ensure that its products will be successfully produced and will fit precisely within the overall project.

3. Purpose of the Work Packages (2, 5 and 6)

The purpose of Work Package 2 is to complete the development, testing and implementation of Phase 1 of the Portal and then to enhance the Portal in terms of features, facilities, etc for existing partners (eight Councils in Norfolk). Additionally, further organisations will be sought, such as Police, Ambulances, relevant charities, other partnership projects, etc in Norfolk, to provide an expanded information base to be accessed through the Portal.

Work Packages 5 and 6, Metadata and A-Z/FAQ respectively, are subsets of the work needed to enhance the Portal and are therefore intrinsically linked with Work Package 2, hence the common description provided here.

4. Description of Work Packages

Considerable time and effort has been put into finding a suitable Portal supplier for the Norfolk Connect Partnership (NCP). There was a delay in starting development of the Portal as procurement followed the OJEC route that takes a minimum of 9 months.

When the NCP project was re-scoped to include new developments (work packages) following successful bidding for ODPM funding in round 2, the Phase 1 Portal was under development. Work package 2 includes all activities necessary to take this development through to implementation and provision of a live system, including:

- The existing Search facility & undertaking the training
- Information received on embedding search into web pages
- Information received on the Portal's XML interface
- Instructions received for the Engagement Pack
- Adding an initial sites file for testing
- Adding an initial questions file for testing
- Adding any noticeable missing words/abbreviations to the spellchecker

- Fixing/tidying as much content metatags on the individual websites as individual Partners want to do & resources/time will allow
- Performance Tests (6th Nov)
- Citizen's Panel overview (4th Nov)
- Acceptance Testing of Phase 1 functionality (by 11th Nov).

A Managed Service will be put in place to maintain the Phase 1 Portal and it is planned that further features and functionality will be added to the Portal, (some of which will be developed as part of Work Packages 5 and 6), as follows:

- Additions as necessary to the spelling, sites, & questions files
- Addition of a thesaurus file
- Refinements to Metadata/tags to enhance the search (Work Package 5)
- Use of the portal for A-Z content (Work Package 6)
- Use of the portal for FAQ content (by those Partners that want FAQs and by additional non-Partner organisations) and for joint FAQs on life episode type information (Work Package 6)
- Ensuring the introduction of the Portal does not lessen a Partner's Accessibility Compliance.

Phase 1 of the Portal will be implemented across the web sites of the 8 Councils in Norfolk (this is more than 8 sites as some Councils have information on more than one site). It is planned that more organisations in Norfolk should be sought so that the Portal will provide a window on a more comprehensive set of information for Norfolk. An 'Engagement Pack' is to be developed which can be used to market the portal to organisations and inform them about effort involved. Work Package 2 includes development of the Engagement Pack, marketing, signing up at least five new organisations and inclusion of their web sites within the Portal. [Note that signing up an organisation will involve them having access to the Portal from their web site as well as their site information being available through the Portal.]

5. Deliverables

The following deliverables will be produced from Work Packages 2, 5 and 6:

- Phase 1 of the Portal
- Training (done)
- Associated documentation including working instructions, SLA and information for inclusion in Engagement Pack (see below)
- Processes and services as part of maintenance and the managed service
- Acceptance tests which provide a baseline and checks to be used in change control
- Phased enhancements to the Portal which include
 - Adding new functionality as above
 - New organisation information/web sites
- Engagement Pack
- A communications/marketing plan

- An agreement [based on the agreement which the eight Councils will/have signed] document to be used as the basis of the relationship with other organisations
 - A minimum of five new organisations added to the Portal.
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6. Techniques, Processes and Procedures to be used

PRINCE2 is to be used to manage and control the project as a whole and links with suppliers.

The testing to be carried out on Phase 1 of the Portal is specified in a separate document

Best practice for Services Management will be used to manage the services provided in support of the live Portal Phase 1.

Change management and quality reviews are specified in the Quality Plan.

Services may be procured to develop the Engagement Pack, using existing Council procurement processes and procedures.

A range of marketing and communications techniques will be used to engage five new organisations, such as, researching likely candidates, working through 3rd parties including PROs within the Councils, presentations, meetings, negotiation, development of marketing materials, etc.

The Norfolk County Council legal team will be used to develop the legal agreement for non-Partners if this is thought to be necessary. A letter of commitment may be sufficient, especially for small organisations such as Parish Councils and small voluntary organisations.

7. Interfaces to be satisfied by the completed product

These Work Packages are linked with other Work Packages to deliver functionality within the Portal as follows:

- WP7 (E-democracy) for geo referenced searching including and/or separately a “Who’s my Councillor” search. Note that this work is to be done under the same contract as work in Work Packages 2, 5 and 6. [Work Package 7 has not been included in this document as the requirement is more than geo referenced searching.]
- WP3 may deliver e-Forms to the public through the Portal
- WP4 may deliver secure email/area via the Portal.

Work Package 1 includes ‘identifying the scope with Partners for a “possible joint database for information on non-partner organisations’ FAQs”’. The FAQ functionality developed in the enhanced Portal will need to take into account this requirement.

The Process Maps may provide input to Work Packages 2, 5 and 6, in particular areas for joint FAQs.

8. Configuration management requirements

As defined in the Quality Plan for the project.

9. Stage plan extract

<copy in from Project Plan>

10. Joint agreement on effort / cost / time

The resources to be used in these Work Packages are as follows:

- Andrew Mewes to manage and provide technical input to completion of Phase 1 of the Portal, including testing
 - Day-to-day contact with supplier
 - Andrew Mewes – technical issues
 - Teresa Coldicott – business issues
 - Ruth Kerry – budgets and contract
 - Teresa to ensure that information for Engagement Pack is produced
 - Andrew to ensure that appropriate processes and services for maintenance are put in place
 - Teresa to lead the enhancement work to the portal (as specified in the proposal) which builds on Phase 1 and working with Team Managers to ensure that quality products are delivered
 - Andrew to provide support on technical aspects
 - Ruth to manage the Portal contract , invoices and payments
 - Teresa to procure a suitable supplier and manage them to develop the Engagement Pack
 - Teresa to identify and recruit a minimum of five new organisations
 - Teresa to develop an agreement for the relationship with new organisations, working with Norfolk County Council legal team
 - Andrew to ensure that new organisations' web information is correctly embedded into the Portal ie simple tests
 - Ruth to support Teresa in development of documents and marketing as required
 - Ruth to develop acceptance criteria and QA documents, etc as required for any of the above
 - Ruth to conduct quality checks as required, for example checking the quality of the Engagement Pack (content) and ensure that Team Managers are happy with the content, look and feel.
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11. Any constraints to be observed

The Work Packages will concentrate on functionality that will benefit a number of Councils in order to meet ODPM requirements.

The time limit for spending the ODPM funding is 31st March 2004 so invoices for all work carried out must be submitted in time for processing in this financial year [date to be advised by Norfolk County Council].

12. Independent quality checking arrangements

See Quality Plan for general quality checks, roles and responsibilities.

Quality criteria and types of quality checks will be applied to all the deliverables specified above, see Annex A for Product Descriptions.

13. Reporting arrangements & Sign-off requirements

All deliverables will be QA'ed by the Project Office and Team Managers as required.

Approval by the Project Board will be sought for major deliverables such as going live with Phase 1 and the enhanced Portal.

14. Problem handling and escalation

As documented in the Quality Plan. As far as possible problems will be managed by the Project Office and only escalated to the Project Board if they cannot be resolved.

15. Work return arrangements

Not relevant to Work Packages 2, 5 and 6 as the work to be done by suppliers will be managed by the Project Office.

16. How completion is to be advised

Completion will be judged by Team Managers and the Project Office as follows:

- Phase 1 of the Portal and enhancements to the Portal will be tested in accordance with the contract and a test plan, and there must be no 'showstoppers' (see separate test criteria document)
- Leaflets about joining the Portal have been delivered
- Engagement Packs available on the web
- Demonstration that each new organisation site is searched by the enhanced Portal.

The Project Board will be advised when work is completed by suppliers and payments can be made.

1. Product Description for Phase 1 of the Portal including training, associated documentation and processes and services

Purpose of product

See contract and associated Statement of Requirement.

Dependencies

Soft 'go live' of Phase 1 of Portal to be completed before enhanced Portal work to be started.

Format and presentation

As specified in the contract.

Quality criteria for Portal

- As extracted from the Contract and Statement of Requirements and documented in a separate paper (Acceptance Criteria)

Quality criteria for training

- Was the training fit for purpose?
- Was at least one representative from each Partner trained?
- Does any partner feel they need further training?

Quality criteria for documentation

- Is it complete and comprehensive, ie have all parts of documentation been provided
 - Instructions for Team Managers for embedding search in their web sites
 - Instructions for new organisations to be included in Engagement Pack
 - SLA
 - Procedures such as reporting problems, help desk support, etc
 - Everything which was specified in the contract
- Is it comprehensible, easy to read, clear?
- Is it usable, fit for purpose?
- Is it under version control by supplier?
- Has it been supplied in an appropriate medium (electronically, paper based, etc)

Quality criteria for processes and services as part of managed service

- Has documentation (instructions) been provided for all processes and services and does it meet the above criteria?
- Has everything specified in the contract been provided?
- Have the processes and services been tested/tried, eg phone numbers work?
- Have all Team Managers got access to the processes and services?

- Are all processes and services covered in the SLA?
- Are the processes and services sustainable without the Project Office post March 2004?

Quality Checks for Portal

- Testing against acceptance criteria by Project Office and Team Managers
- Additional checks as specified by Test Managers during development of the Portal
- User testing through use of Citizen Panel representatives, feedback sought through evaluation form.

Quality checks for training

- Project Office to check that Team Managers are satisfied with the training provided (verbal feedback).

Quality checks for documentation

- Desk review by Project Office and Team Managers.

Quality checks for processes and services as part of managed service

- Desk review of documentation by Project Office and Team Managers
- Test of instructions by Project Office and Team Managers to make sure they work
- Project Office to periodically check that SLA is being met.

2. Product Description for phased enhancements to the Portal

Purpose of product

To add enhanced functionality outlined in the Statement of Requirement and to introduce new organisations to the Portal.

Dependencies

Soft 'go live' of Phase 1 of Portal to be completed before enhanced Portal work to be started by supplier.

Hard 'go live' [80% of Partners to have implemented the search on their web sites] before starting to add new organisations.

Work Package 1 includes 'identifying the scope with Partners for a "possible joint database for information on non-partner organisations' FAQs"'. The FAQ functionality developed in the enhanced Portal will need to take into account this requirement.

Internal dependencies and conflict may arise between the need to add the new functionality to existing Partners and to add new organisations. A higher priority should always be given to existing contributors (Partners and organisations), where over time existing contributors to the Portal will include non-Council organisations.

Format and presentation

As specified in the contract (new Proposal from supplier and acceptance by the Partnership).

Quality criteria for additional functionality (meta-data policy)

Detailed criteria to be developed alongside agreeing meta-data policy (separate document, as for Portal Phase 1) including such things as:

- Appropriate standards to be used
- Comprehensibility of policy document
- Meeting the needs of all existing Partners and organisations
- Evidence that tagged content used by Portal in accordance with policy (consistent classification across all contributor sites)
- Taking into account non-Partner requirements (ie non-Council organisations such as police and voluntary sector)
- Is the policy sustainable without the Project Office post March 2004?

Quality criteria for 'generic template content'

Agreement on use of the 'generic template content' to meet the following criteria

- Meets the needs of a minimum of 6 Council Partners
- Can be used by non-Council organisations
- Specifies mandatory and optional functions

- Full reasoning given for options chosen in the agreement
- Identifies work to be done by Partners to meet the agreement
- Is it sustainable without the Project Office post March 2004?
- Other criteria may be added as the Agreement is further specified.

Quality criteria for FAQ

Detailed criteria to be developed alongside FAQ implementation, including such things as

- Joint FAQs available for all agreed themes, topics, life events/episodes, etc
- Search on FAQs and life events/episodes
- Meeting performance and workload requirements in contract for Phase 1 of Portal
- Meeting agreed strategy on indexing FAQs (see contract for Phase 1)
- Ensuring the user is presented with information they really want or expect
- Layout of screens to be agreed as part of development
- Appropriate balance of FAQs across Partner sites retrieved
- Seamless search for FAQs across all sites
- Indexing new FAQs as per contract for Phase 1
- Look and feel fits with Partner standards, government standards
- Ability to scale up to include up to 100,000 pages across Partners' and other organisations' sites and ability to remove sites (could become a problem with new organisations who do not maintain their sites)
- Statistics to be provided on usage of FAQs
- Security as per contract for Phase 1
- Documentation for Partners and other organisations (latter to be included in Engagement Pack if possible)
- Thesaurus and spell checking to be implemented
- Is it sustainable without the Project Office post March 2004?

Quality criteria for FAQs for non-Partner organisations

In addition to meeting the above criteria for FAQs

- Ability to host FAQs centrally for non-Partner organisations
- Non-Partner FAQs meet quality criteria for FAQs generally applied by Council partners (is there any best practice?)
- FAQs for non-Partners are up-to-date (part of long term need for maintenance)
- Equal or agreed relevant weighting given to non-Partner FAQs during searching
- Is it sustainable without the Project Office post March 2004? .

Quality criteria for A-Z

Detailed criteria to be developed alongside A-Z implementation, including such things as

- Comprehensive and agreed (by Team Managers) list of labels/values to be used as meta-data for A-Z (categories)

- All Partners used above meta-data to categorise content on their site
- A-Zs generated to include all of above categories from all Partner web sites when A-Z searching conducted by user
- Meet performance and workload requirements in contract for Phase 1 of Portal
- Meet agreed strategy [which needs to be developed] on A-Zs
- Ensure the user is presented with relevant information in A-Z
- Layout of screens to be agreed as part of development
- Appropriate balance in A-Z categories depending upon information available in various categories and what Partners have specified as relevant
- Joint A-Z looks seamless
- New A-Z information indexed as per contract for Phase 1
- Look and feel fits with Partner standards (generally and specifically for A-Z)
- Ability to scale up for 100,000 pages across Partners' and other organisations' sites
- Ability to remove sites (if Partners and other contributing organisations do not maintain them)
- Statistics to be provided on usage, common categories, etc
- Security as per contract for Phase 1 of Portal
- Documentation for Partners and non-Partner organisations (latter to be included in Engagement Pack if possible)
- Thesaurus and spell checking to be implemented
- Is it sustainable without the Project Office post March 2004?

Quality criteria for A-Z of new organisations

In addition to the above requirements for Partners

- Agreed (by Team Managers) list of labels/values to be used as meta-data for A-Z extended as necessary to meet the needs of introducing new organisations
- Is it sustainable without the Project Office post March 2004?

Quality Checks for additional functionality (meta-data policy)

- Desk review by Project Office and Team Managers.

Quality checks for 'generic template content'

- Desk review by Project Office and Team Managers (plus others brought in by Team Managers such as Web Editors)
- Review by any organisations which may become contributors (depending upon progress of discussions with organisations to join Portal)
- Team Managers to assess work required by their organisation and ability to meet any timescales for making changes.

Quality checks for FAQ

- Desk review of themes, topics, etc by Project Office and Team Managers (plus others brought in by Team Managers such as Web Editors)
- Evidence of testing by supplier

- Testing of new functionality by Project Office and Team Managers, including re-running tests for Phase 1
- Desk review of documentation by Project Office and Team Managers.

Quality checks for FAQs for non-Partners organisations

- Testing by Project Office and new organisation to check that their FAQ information is retrieved
- Testing by existing Partners to ensure correct integration of new organisation's FAQs with their own FAQs.

Quality checks for A-Z

- Meta-data categories reviewed by Project Office and Team Managers against standards and own organisational requirements
- Evidence of testing by supplier
- All Partners to review use of above meta-data on their own sites
- Testing of new functionality by Project Office and Team Managers
- Desk review of documents by Project Office and Team Managers.

Quality checks for new Partner organisations

- Testing by Project Office, Team Managers and new organisations to ensure retrieval of correct categories and information from all relevant sites.

3. Product Description for Engagement Pack, communications/marketing plan, legal agreement and signing up of new Organisations

Purpose of product

Phase 1 of the Portal is implemented across 8 Council web sites in Norfolk. The intention is to extend the Portal across other relevant web sites such as as other levels of Councils such as Parish Councils, services such as ambulance and police, voluntary organisations which work with the Councils such as Citizens Advice Bureaux, Age Concern, Barnardo's, etc.

In order to achieve the above one or more documents which explains what is required, and can also be used as a marketing document, need to be developed. A plan is needed to prioritise effort put into recruiting new organisations and to indicate what needs to be done. The plan needs to be executed in order to meet the target of at least 5 new organisations by end of March 2004.

Dependencies

Hard 'go live' of Portal Phase 1 [80% of Partners to have implemented the search on their web sites] before starting to recruit new organisations for credibility reasons.

Format and presentation

Format and presentation of Engagement Pack to be agreed as part of contract with supplier.

Quality criteria for Engagement Pack

- Meets the specified requirement in the contract
- Provides sufficient information for a new organisation to set up their site for joining the Portal and highlight facilities to be developed (FAQs and A-Z) [timing issue between development of enhanced Portal and production of Engagement Pack]
- Promotes the benefits of joining the Portal making it look an attractive proposition for intended audience and their customers/clients
- Overview of vision for the Portal (longer term plan explained)
- Emphasis on Norfolk
- Explains the work done to date by Partners (what), why, when, by whom [presents some facts]
- Looks attractive without over selling, encourages intended audience to read the document however it is received (through post, by hand, after a presentation or meeting, etc)
- Easy to read within 15 minutes
- Doesn't date easily (careful about dates, functionality and information which will become obsolete)
- Value for Money, balance of cost against quality (eg number of colours used, paying for special pictures, etc)
- Uses relevant logos for Partnership and Partners
- Conforms to Council standards where they exist in terms of look and feel

- Easy to create a web-based version (or could be part of deliverable)
- Electronic copy which can be read by all Partners
- All glossy copies of Pack to be the same (no errors, variation in colour, etc)
- Is the document and its use sustainable without the Project Office post March 2004?

Quality criteria for Plan

- Does it conform to [Norfolk County] Council standards?
- Does it contain all the essential information (who, what, why, when, where, how?) without having unnecessary detail?
- Will it achieve the desired results (all in Partnership understand what is to be done by whom and when)?
- Is it sustainable without the Project Office post March 2004?

Quality criteria for legal agreement

- Does it contain all essential aspects in terms of ownership, responsibilities, liability, etc of existing Partners, suppliers, new organisations, etc?
- Is it legal and binding?
- Is it clear and understandable by lay people (so lawyers don't need to be consulted by prospective organisations)?
- Are there any subtle or hidden messages (which should not be there)?
- Is there minimal 'small print'?
- Will this put off prospective organisations?
- Is it sustainable without the Project Office post March 2004?

Quality criteria for signing up of new organisations

- Has a comprehensive list of potential new organisations been prioritised so that effort is put into recruiting new organisations which existing Partners most want?
- Have existing Partners agreed on a balance of quality and quantity (preferred new organisations versus number of new organisations)
- Are the above priorities reflected in the plan?
- Is the process of signing up new organisations sustainable without the Project Office post March 2004?

Quality Checks for Engagement Pack

- Project Office, Team Managers and Marketing/communications staff within Councils to desk review the Pack at various stages in its development
 - Story Board of sections, how they link, etc
 - First full draft of text
 - Pictures, graphics, colours, etc
 - Final draft before print
- Review of final draft by Project Board?
- 'Trial run' of discussion using final draft with a well known, potential new organisation
- Web editors to review electronic version

- Sample checks of glossy version.

Quality checks for Communications/Marketing Plan

- Desk review by Project Office, Team Managers, communications/marketing staff within Councils (one or more representatives)
- Review by one or two e-Champions
- Review of final draft by Project Board.

Quality checks for legal agreement

- Desk review by Project Office and Team Managers
- Desk review by legal team involved in drafting of agreement
- Review by Project Board and e-Champions?.

Quality checks for signing up of new organisations

- Project Office and Team Managers to review consistency of plans and priorities
- Communications/marketing staff to review priorities.

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