

Commissioning Specification for Research and Consultation Database and Management System

14 May 2010



Oldham
Partnership

1 Summary

The Oldham Partnership wish to commission a consultation database and management system in order to:

- enable research and consultation to be targeted effectively with relevant groups of residents
- promote and support coordinated consultation
- help reduce consultation fatigue by enabling better communication with residents.

The consultation database and management system will enable local management and administration of the content contained within the system and will provide a secure environment for data storage.

It is intended that the consultation database and management system will include several different elements, which are discussed in further detail later in the brief:

- provision of secure storage of information about residents who have agreed to take part in further consultation and research
- provision of secure storage of residents' responses to consultations which links back seamlessly to information stored about residents
- a facility, e.g. via email, for communicating individually with participants in research and consultation
- a facility to allow residents to communicate and register their preferences online
- a facility for storage of consultation and research documents including questionnaires, individual questions etc
- a facility to allow the interrogation and administration of system users
- a facility for online publication of consultations that are open to all residents
- a facility for conducting online opinion polls and to allow other forms of online consultation
- a facility for publishing online targeted consultation and research
- a facility for publishing consultation findings, through permalinks to oldhaminfo.org, for joined up document management.

It is preferable for the system to be available for independent use by organisations across the whole of the Oldham Partnership. Proposals which require one organisation within the Partnership to act as a lead organisation will be considered, however, as long as clear provision exists for the system to be used with partners. Oldham Council will act as the lead organisation, should one be required.

There is a maximum budget of £37,500 in 2010-2011, which is intended to cover the costs of initial installation, set-up, developments, data migration and training. The maximum budget in 2011-2012 is £10,000, reflecting maintenance and licensing costs.

The Commissioned Activity will commence in the 2010-2011 financial year, and end on March 31 2011. As discussed above, the budget available for 2010-2011 is greater than that available for 2011-2012, reflecting expectations about additional costs for set-up, installation and training costs that will be required in the first year. It is intended that the use of a consultation database and management system will continue past this date (subject to continuation of funding and review), but this is not included in the current commission.

2 Capabilities

The consultation database and management system will have the following capabilities:

- A database that enables:
 - secure storage of database information about residents who have agreed to take part in consultation and research, together with the ability to:
 - add/update/remove records
 - store individual residents' responses to consultations e.g. to questionnaires and consultation documents
- A web presence that enables/includes:
 - a user registration /login system for residents participating in online and other research and consultation
 - publication of public-facing consultations (e.g. online consultation documents, online questionnaires, online opinion polls) and information about consultation events, with linkage to Oldham Partnership websites
 - residents to complete surveys, opinion polls and consultations online, and automatically uploads their responses to the database
- an administration system that enables/includes:
 - a user registration / login system for officers using the system to manage consultations
 - full administration of users, including allocation of an appropriate range of permissions and roles, together with flexibility about how these are allocated
 - management of database information about residents who have agreed to participate in further consultation and research
 - ability to import and export data to a range of standard formats
 - uploading of responses to non-online consultation (e.g. paper based-general residents' surveys) to the database of information about residents who have agreed to take part in consultation and research
 - storage of consultations and metadata associated with these (e.g. surveys, questions included, date of consultation, organisation managing consultation, responses)
 - ability to create and roll out consultation tools (e.g. consultations, surveys, etc.)
- a consultation document system, with live link to other research and information sites as required, in particular through permalinks to oldhaminfo.org and links to NHS Oldham's consultation and engagement management system
- ability to communicate with users and members of the database (e.g. ability to update users about new features, invite residents to participate in targeted consultation and research, ability to feed back results from consultations and research)
- notification of forthcoming consultations to residents and to consultation and research officers
- consistency with Oldham Partnership branding.

3 Minimum Standards

The provider will be required to accept, implement and where needed, evidence the following standards:

- Web accessibility: to WCAG (web content accessibility guidelines) Double-A standard (Exceptions by agreement only)
- Data Protection: signing and implementation of a Data Security Agreement (this applies if the consultation management system is hosted by a supplier, or where personal data is accessible to a supplier)
- Intellectual property rights: these will persist with the supplier, except where new software/improvements are specifically developed and paid for by the Oldham Partnership or one of the organisations within the Partnership. The supplier will not have ownership over personal data maintained within the database. Intellectual property rights to consultation tools developed for use on the system (for example, consultation documents, questionnaires, communications to residents and all other content written by officers working within the Oldham Partnership or member organisations of the Oldham Partnership) will remain the intellectual property of the Oldham Partnership or the partner organisation responsible for their development.
- Service Level Agreement: a service level agreement will be built in to any contract, to specifications laid down by the Oldham Partnership. The nature of the Service Level Agreement will be dependent upon the exact specification of the successful proposal.
- Appropriate training on all aspects of the system will be provided to an agreed level. This will include 'training the trainers' so that knowledge about how to use the system effectively can be shared efficiently within the Oldham Partnership and its member organisations.
- The system will be operational for use by mid August 2010.

4 Other Information

It is recognised that in some cases one single product will not deliver all functionality. It would be acceptable to state which other software or web products would be required additionally in order to provide the desired functionality. Whilst other software or web-products may be used, the 'look and feel' of the Residents' Research and Consultation Database should be consistent throughout, both for officers using the system to manage research and consultations, and for residents accessing the system to participate in consultations or read findings from research and consultation. Costings for such systems should be shown in any quotations.

Site hosting is neither desirable nor undesirable (though it is a requirement that content shall be managed locally). Quotations shall clearly state the hosting options that are applicable and separate costings for each option if applicable. For hosted services, the Service Level Agreement will specify a percentage uptime, and number of users and residents able to use the system concurrently without performance loss.

The total cost, including costs associated with other software or web-products (but excluding any e-petitions module), should not exceed £37,500. Costings for any proposed e-petitions model (desirable) should be detailed separately.

Any questions prior to or during the commissioning process should be directed to Shirley Allen at shirley.allen@oldham.gov.uk or tel 0161 770 5146.

5 Submission Procedure

Expressions of interest should be submitted and addressed as below to arrive no later than 12 noon on Friday 4 June 2010.

Private and Confidential
Shirley Allen
Oldham Partnership
Oldham Business Centre
Cromwell Street
Oldham
OL1 1BB

All submissions must be on the template provided and include:

- Details of how the system meets the detailed specification, laid out point by point in the same tabular format as the specification.
- Screenshots can be included to help demonstrate and clarify explanations.
- Supporting background documents can be provided but all proposed functionality must also be clearly explained within the response template.
- Yes or No answers will not usually be sufficient.

Brief details (2 A4 pages) of the organisation's background, size (staffing) and relevant experience Implementation details. It is expected that implementation would begin in July 2010.

Full costings of:

- Implementation / initial purchase
- Ongoing maintenance / hosting
- Training costs
- Any additional costs (for example, technical support)

Details of capacity to undertake bespoke developments if required

Details of how further developments are planned and prioritised i.e. details of your roadmap.

6 Selection Procedure

Stage 1

Once proposals are received, the Assessment Panel will meet during the week commencing 7 June 2010. The panel will exclude any proposals:

- That do not meet financial requirements as laid out in the commissioning specification
- That arrive after the deadline
- That are not laid out as specified (at our discretion)
- That do not meet 10 or more of the 83 essential requirements.

The panel will then reduce to a shortlist, based on the scoring criteria below.

Criteria will be:

Criteria	Weighting
Value for money	10
Residents' and consultation responses database/s	30
Residents' consultation website	30
Administration tools: consultation development and management	35
Administration tools: reports on consultation findings	10
Administration tools: organisation and administration of users	20
Logistics and other features	15
Training	10

Requirement Categories will fall under these criteria headings as follows:

Criteria	Requirement Categories
Value for Money	Panel judgement
Residents' and consultation responses database/s	Storage, adding and modifying cases
Residents' consultation website	Resident members features, communication with consultees, publication of consultation tools, online opinion polls facility, e-petitions facility, and publishing tools
Administration tools: consultation development and management	Tailored communications to residents, consultation tool development, document management, display and interrogation
Administration tools: reports on consultation findings	Storage of reports, Administration of reports, Display and interrogation of reports, upload to OldhamInfo
Administration tools: organisation and administration of users	Storage of organisational admin user information, administration of admin users
Logistics and other features	Site usage monitoring, Site hosting, Minimum system compatibilities, System setup, System upgrades, Navigation, web pages and look and feel, Miscellaneous features
Training	Tailored training to organisational/ Directorate leads and consultation managers, training manuals/ documents, training for trainers

Scoring for the criteria will be:

No functionality at all	0 - 1 (if panel is in agreement then a score of 0 may disqualify)
Functionality exists, but does not meet the majority of essential requirements	2 - 3
Functionality exists, meets the vast majority of essentials, but not all, to an acceptable standard and some desirable requirements	4 - 5
Meets the vast majority of essential and some desirable requirements to an acceptable standard, including usability	6 - 7
Meets the vast majority of essential and desirable requirements to an excellent standard and/ or also delivers other useful features	8 - 9
Meets all essential and desirable requirements to an excellent standard and also delivers other useful features	10

Value for Money will be scored on a 0 to 10 scale according to the expert opinions of the panel.

Stage 2

Shortlisted proposals will be invited to give a live presentation of their systems and to answer both predetermined questions and those resulting from presentations and from the panel's analysis of responses to the commissioning specification. These will take place on 23 June 2010. Organisations should make sure that staff who deliver presentations are able to answer highly technical questions, and demonstrate all parts of systems, including administration sections.

The Assessment Panel will then make a decision as to which tender to accept. (In exceptional circumstances the panel may request further information.)

Criteria and scoring for stage 2 (final decision) will be the same as at stage 1.

The successful applicant organisation will subsequently be notified of the outcome and invited to participate in the next stage of the process, (the drawing up of an agreed Delivery Schedule). Unsuccessful organisations will be notified as soon as possible.

7 Appendix 1: Detailed Specification

See Note for definitions of terms

Requirement	Essential or Desirable	Comments
<p>USABILITY</p> <p>All features to be efficient and simple to use, and embody principles of good web design.</p>	E	Usability will be assessed throughout
<p>RESIDENTS' AND CONSULTATION RESPONSES DATABASE/S</p>		It is likely that there will be a need to divide into residents' database (such as demographic characteristics and contact details) and consultation responses database. There may be some overlap. It will be essential that residents' data is easily linked to their survey and consultation responses.
<p>Storage:</p> <ul style="list-style-type: none"> Ability to add, and populate, an unlimited number of bespoke fields of information about residents, and consultation responses from residents, in formats to include but not be limited to <ul style="list-style-type: none"> dates nominal, ordinal, scale unlimited string data (enabling qualitative and other information to be stored) 	E	
<p>Unlimited number of cases (i.e. no limit to the number of residents who can be on the database)</p>	E	

<ul style="list-style-type: none"> • Unlimited number of variables/fields per case 	E	
<ul style="list-style-type: none"> • Core resident fields (to our specifications) to include <ul style="list-style-type: none"> ○ name ○ address ○ gender ○ ethnic group ○ date of birth ○ contact details ○ tags for areas of consultation interest ○ responses to survey questions 	E	
<ul style="list-style-type: none"> • Ability to store information about specific consultation needs (e.g. arising from disabilities or language issues). 	E	
<ul style="list-style-type: none"> • Storage of current, updated and historical data 	E	
<ul style="list-style-type: none"> • Secure storage and environment for residents' personal information and responses to research and consultations 	E	
<ul style="list-style-type: none"> • Ability to interrogate the database in order to target prospective research and consultation database participants effectively (e.g. by area of residence, demographic factors, attitudinal/ perception/behavioural factors i.e. by any combination of basic resident's details and consultation responses for those residents) 	E	
<ul style="list-style-type: none"> • Ability to carry out complex SQL style database queries 	E	
Administration (Local):		
<i>Adding and modifying cases</i>		

<ul style="list-style-type: none"> • Ability to add new residents/cases to the database 	E	
<ul style="list-style-type: none"> • Ability to import large numbers of new cases from other formats (e.g. .csv, .xls, .sas, .spss, etc), without extensive manual data entry being required 	E	
<ul style="list-style-type: none"> • Ability to add and populate new fields within the database (each new consultation will generate new fields) and to define their properties 	E	
<ul style="list-style-type: none"> • Ability for administrator to remove residents who have died, moved out of the borough or no longer wish to remain on the database 	E	
<ul style="list-style-type: none"> • Ability to group fields by consultation / research activity / topic area 	E	
<ul style="list-style-type: none"> • Ability for online consultation tools used within the system to automatically add and populate new cases and fields within the database (i.e. when a new resident fills out an online consultation, this should automatically generate a new case and populate the appropriate fields) 	E	
<ul style="list-style-type: none"> • Ability to upload individual research and consultation results (e.g. where a consultation takes place using interview methods or using paper-based surveys). 	E	
RESIDENTS' CONSULTATION WEBSITE		
Resident member features:		
<ul style="list-style-type: none"> • Resident self-registration facility 	E	

<ul style="list-style-type: none"> • “forgotten password/username” email facility 	E	
<ul style="list-style-type: none"> • option for system to remember residents’ user id and login automatically 	D	
<ul style="list-style-type: none"> • Ability for residents using the consultation database to update their contact information, preferred method of contact and selected demographic information 	E	
<ul style="list-style-type: none"> • Ability for residents to read submissions and responses they have made to consultations 	D	
Communication with consultees:		
<ul style="list-style-type: none"> • Ability to publish descriptions of currently open consultations 	E	
<ul style="list-style-type: none"> • Ability to notify research and consultation participants about online publication of findings for work in which they participated 	D	
<ul style="list-style-type: none"> • Ability to publicise consultations taking place on external websites (e.g. budget simulator) or using other media (e.g. roadshows, focus groups etc.) 	D	

Ability to support Oldham Partnership branding. If external hosting is used, this should be seamless and compliant with Oldham Partnership branding.	E	
Publishing tools:		
<ul style="list-style-type: none"> Ability to publish a range of online consultation documents intended for online response (e.g. online surveys, documents for comment etc.) 	E	
<ul style="list-style-type: none"> Ability to publish consultations to/embed consultations in more than one website (e.g. Oldham Partnership, Oldham Council, NHS Oldham etc.) 	D	
<ul style="list-style-type: none"> Ability to print consultation tools cleanly and easily, including printing to pdf 	D	
Online opinion polls <ul style="list-style-type: none"> Ability to publish single question opinion polls and display real-time results. 	E	

<p>Ability to support E-Petitions</p> <ul style="list-style-type: none"> • Ability for residents to create E-Petitions, and for residents to see which are available, and sign up to them • Ability to create permalinks to individual E-Petitions, to facilitate circulation of details by residents • Facility to email site administrators when E-Petitions are set up, and when the number of petitioners passes a set threshold value • Compliance with the new statutory duty on petitions 	D	Should you be submitting a proposal for e-petitions please cost this separately.
<p>ADMINISTRATION TOOL: CONSULTATION DEVELOPMENT AND MANAGEMENT</p>		
<p>Tailored communications:</p>		

<ul style="list-style-type: none"> • Ability to send tailored communications to selected groups of residents by: <ul style="list-style-type: none"> –Exporting addresses and phone numbers –Email –Text such as notification about forthcoming consultations and research that may be of interest • Ability to send automated reminders about consultation deadlines • Ability to share draft reports with participants for comment (e.g. to support action research projects etc.) prior to publication • Ability to thank research and consultation participants for their participation • Ability to notify research and consultation participants about online publication of findings for work in which they participated 	E D D	
<ul style="list-style-type: none"> • Ability to prompt residents for updated contact information on a regular schedule (e.g. annually) 	D	
<ul style="list-style-type: none"> • Ability to view summary information about correspondence and communications relating to specific consultations (e.g. for consultation managers to be able to check if ‘thank you’ messages have been sent etc.) 	D	
<ul style="list-style-type: none"> • Research and consultation participants, and relevant user groups can be notified about the publication of reports to which they contributed 	D	
<ul style="list-style-type: none"> • Ability to display summary information about the consultations in which individual residents’ have taken part (in order to avoid over-consulting) 	E	

<ul style="list-style-type: none"> Ability to export data to other formats (e.g. .csv, .xls, .sas, .spss) for analysis. 	E	
<ul style="list-style-type: none"> Ability to select data fields to be downloaded. 	E	
Consultation tools development / document management:		
<ul style="list-style-type: none"> Ability to create and develop a range of consultation tools / documents (e.g. online surveys, documents for comment, snap polls, showcards etc) 	E	We are interested in innovative approaches
<ul style="list-style-type: none"> Ability to store consultation tools / documents 	E	
<ul style="list-style-type: none"> Ability to store metadata about consultation tools/ documents such as <ul style="list-style-type: none"> Date and fieldwork period Intended audience Frequency of updating etc. Subject key words/ theme Questions asked Summary description/abstract Officer and organisation responsible	E	
<ul style="list-style-type: none"> Ability to store metadata about individual questions asked as part of consultation (e.g. missing item response, problems with the question, how results from the question were used, theme). 	E	
<ul style="list-style-type: none"> Ability to copy/replicate consultation tools to prevent duplication of effort (e.g. replicate 2009 survey X to form basis of 2010 survey X) 	D	
<ul style="list-style-type: none"> Individual online survey questions searchable and able to be cut and pasted into consultation tools being developed. 	D	

Display and interrogation:		
<ul style="list-style-type: none"> Ability to search consultation tools by theme, title, organisation and summary description/abstract 	E	
<ul style="list-style-type: none"> Consultation tools searchable by full document search 	D	
<ul style="list-style-type: none"> Ability to display all current and past consultation tools, with ability to order by theme, date, consultation type. 	E	
ADMINISTRATION TOOLS: REPORTS ON CONSULTATION FINDINGS		
Reports on Consultation Findings:		
<ul style="list-style-type: none"> Reports on consultation findings automatically uploadable to OldhamInfo (www.oldhaminfo.org) 	D	
<i>Storage of Consultation Findings</i>		
<ul style="list-style-type: none"> Unlimited storage of reports on consultation findings and associated metadata information with reports on consultation findings such as: <ul style="list-style-type: none"> Date of publication Organisation Name and authors Abstract Keywords/ themes 	E	
<ul style="list-style-type: none"> Ability to add or delete reports on consultation findings 	E	We do not expect provision of a text editor for report editing.

<ul style="list-style-type: none"> • Ability to manipulate (add, modify, delete) all aspects of; • Associated metadata/ bibliographical data • Themes 	E	
<ul style="list-style-type: none"> • Administration tools to enable local administration of reports on consultation findings 	E	
<ul style="list-style-type: none"> • Ability to upload reports on consultation findings in a range of formats (e.g. word, pdf) 	E	
Display and Interrogation of Reports on consultation findings:		
<ul style="list-style-type: none"> • Reports on consultation findings sortable and searchable by theme 	E	
<ul style="list-style-type: none"> • Reports on consultation findings sortable and searchable by title or organisation, and full abstract 	E	
<ul style="list-style-type: none"> • Reports on consultation findings sortable and searchable by full document search 	D	
<ul style="list-style-type: none"> • All reports on consultation findings downloadable 	E	
<ul style="list-style-type: none"> • All reports on consultation findings able to be displayed in format for web-viewing 	E	
ADMINISTRATION TOOLS: ORGANISATION AND ADMINISTRATION OF USERS		
<i>Storage of organisational admin user Information</i>		
<ul style="list-style-type: none"> • Unlimited user details storage 	E	

<ul style="list-style-type: none"> Secure environment for user details 	E	
<ul style="list-style-type: none"> Details to include for example: <ul style="list-style-type: none"> Username Password Name Job title Organisation Email User type (access rights) 	E	
<ul style="list-style-type: none"> Unlimited number of users from organisations within the Oldham Partnership. 	D	
<ul style="list-style-type: none"> Unlimited number of users from lead organisation and specified (or unlimited) number of users for officers from organisations working in partnership with lead organisation. 	E	
Administration of Admin Users		
<ul style="list-style-type: none"> Ability to manipulate (add, delete, modify) all user details 	E	
<ul style="list-style-type: none"> Ability to list users and search or sort by any user field (ability to use wildcards in search desirable) 	E	
<ul style="list-style-type: none"> Ability to export all user details except passwords 	E	
<ul style="list-style-type: none"> Administration tool enabling local user administration 	E	
<ul style="list-style-type: none"> Ability to identify user groups and roles and assign groups different levels of access to residents' data. In particular, we want to be able to: 	E	

<ul style="list-style-type: none"> ○ restrict or limit ability to download residents' personal data (i.e. we will want some groups of users to be able to download responses to a consultation, linked to demographic data and a case number – but not to be able to download this data linked to individual respondents and contact details) 	E	
<ul style="list-style-type: none"> ○ restrict or limit ability to view residents' personal data linked to attitudinal/perception/self-reported behaviour data (by role and organisation type) 	E	
<ul style="list-style-type: none"> ○ restrict or limit ability to add, modify or delete residents' data. 	E	
<ul style="list-style-type: none"> ○ restrict or limit ability to add, modify or delete consultation tools and communications with residents. 	E	
<ul style="list-style-type: none"> ○ restrict or limit ability to view/ download anonymised datasets. 	E	
<ul style="list-style-type: none"> ● We need to be able to set constellations of access rights appropriate to different kinds of users and organisations. These constellations of access rights need to be flexible, so that we can tweak and adapt them as needed. 	E	
<ul style="list-style-type: none"> ● Roles that we expect to need include but are not limited to: 		
<ul style="list-style-type: none"> ○ system administrators, with overall responsibility for the system 	E	
<ul style="list-style-type: none"> ○ organisational/directorate consultation lead (with ability to publish consultation tools and reports, send update reminders to consultation managers) 	E	

<ul style="list-style-type: none"> ○ managers of individual consultations (to develop consultation tools, publish, communicate with residents, interrogate database to target appropriate participants, import and export consultation tools and results, download anonymised results) 	E	
<ul style="list-style-type: none"> ● Ability to limit access to particular statistics/ facilities/ reports by user access rights, and to be able to customise user types to control access to particular information sets (e.g. create an “nhs user” tag to show users who would have access to NHS specific documents) 	E	
<ul style="list-style-type: none"> ● Ability to define users groups (based on roles and organisations) and define permissions about what consultation data linked with personal data specific users can view and download 	E	
<ul style="list-style-type: none"> ● Ability to define permission levels (by role and organisation) to limit access to personal information appropriately. 	E	
<ul style="list-style-type: none"> ● Ability to define permission levels (by role and organisation) to limit access to the person information which users and officers can change. 	E	
<ul style="list-style-type: none"> ● “forgotten password/username” email facility 	D	
LOGISTICS		
Site Usage Monitoring:		
<ul style="list-style-type: none"> ● Access to Google Analytics or equivalent analysis of traffic sources, browser capabilities, etc. 	D	

Site Hosting:		
<p>Site hosting is neither desirable nor undesirable, but quotations should clearly state the hosting options that are applicable. Please specify:</p> <ul style="list-style-type: none"> • a percentage uptime, • numbers of users (i.e. consultation officers) able to use the system at the same time without performance loss and • numbers of residents (i.e. those responding to consultations) that are able to use the system concurrently without performance loss. 	E	
Minimum System Compatibilities		
• Internet Explorer 6 and onwards	E	
• Firefox 3.0 and onwards	E	
• 32 bit screen colour	E	
• Screen resolution 1024x768 or higher	E	
• Commitment to continued compatibility updates for future popular technologies as part of ongoing maintenance	E	
• Plugin-free environment for the residents' consultation website	E	
• Plugin-free environment for admin users	D	
• Mobile access (eg for txt polls)	D	
System Setup		

<ul style="list-style-type: none"> Ability to initially populate the system with datasets, consultation tools etc., in a time and cost efficient manner. 	E	
System Upgrades		
<ul style="list-style-type: none"> Details of product upgrade schedule, and of the extent to which upgrades are chargeable. 	E	
<ul style="list-style-type: none"> Details of capacity to undertake bespoke developments. 	E	
Navigation, Web pages and look and feel		
<ul style="list-style-type: none"> Ability for authorised users to add/ delete public-facing web pages 	E	
<ul style="list-style-type: none"> Ability for authorised users to modify public-facing web pages 	D	
<ul style="list-style-type: none"> Ability to embed graphics on web pages as appropriate 	D	
<ul style="list-style-type: none"> Ability to detect that weblinks within e.g. metadata are weblinks, and display as such 	D	
<ul style="list-style-type: none"> Pages editable locally, possibly through a content management system 	D	
<ul style="list-style-type: none"> Live update of consultation responses without exporting 	D	
Miscellaneous features:		
<ul style="list-style-type: none"> Ability to print easily and cleanly from all parts of the system 	E	
<ul style="list-style-type: none"> Provision of permalinks to documents and consultation tools 	D	
<ul style="list-style-type: none"> Feedback/contact us web form 	D	
TRAINING		

<ul style="list-style-type: none"> • Training delivery tailored to the needs of: <ul style="list-style-type: none"> • organisational/directorate leads • consultation managers 	E	
<ul style="list-style-type: none"> • Manuals and other documentation for the system, so that people can train themselves 	E	
<ul style="list-style-type: none"> • Training for those who are to deliver training 	E	

Notes:

The following notes provide clarification of what we mean by some of the terms used in the commissioning specification.

Cases

A unique resident record, containing all information held on the resident within the database (e.g. classificatory information, responses to consultations, together with any metadata held about the resident).

Consultation tools

Any materials used to deliver research or consultation. Examples include questionnaires, focus group or interview schedules, show-cards, documents published for comment and online polls.

Reports

Written findings from consultations.