PROTOTYPE OUTLINE

CREATE ACCOUNT

- As a service manager at a voluntary sector provider I want to create an account on the prototype so that I become a registered provider
- As a social prescriber at a local authority I want to create an account on the prototype so that I become a registered searcher

LOG-IN

- As a service manager at a voluntary sector provider I want to confirm my identity against my account information so that I can use the prototype securely
- As a social prescriber at a local authority I want to confirm my identity against my account information so that I can use the prototype securely

PUBLISH

- As a service manager at a voluntary sector provider I want to be able to publish basic information about our organisation so that prospective refers are able to find out more about us
- As a service manager at a voluntary sector provider I want to publish information about our services so that the right people can be referred to our services

SEARCH

- As a social prescriber at a local authority I want to be able to search for volutary sector organisations in my locality
- As a social prescriber at a local authority I want to be able to search for volutary sector services in my locality to refer people to
- As a social prescriber at a local authority I want to have assurance that the search results that are returned provide a comprehensive view of the voluntary sector organisations and services that are available in my locality

PLAYLIST

 As a social prescriber at a local authority I want to create a playlist of voluntary sector organisations and services, that myself and my team frequently refer people to, so that I can accelerate searches and make fast referrals

UPDATE

- As a service manager at a voluntary sector provider I want to frequently update information about our organisation published services so that we receive the best possible quality of referrals
- As a social prescriber at a local authority I want to have assurance that the search results that are returned are current so that I have assurance that it is possible to make a referral to the organisations and services that are returned

PRE-APPROVE

- → As a social prescriber at a local authority I want to 'pre-approve' organisations and services so that I have assurance that they meet statutory requirements and that I cur down red tape and I can refer people to services as easily as possible
- As a service manager at a voluntary sector provider I want to 'pre-approve' our services so that I cut down red tape and people can be referred to our services as easily as possible

REFERRAL TECH RESEARCH

REFERNET

- → Paid UK based referrals software product for making referrals to advice services
- → Used by Citizens Advice Bureau but also Local Authorities, Health and Social Care
- → Publish, Search, Referral, Outcome
- → Software as a service
- → refernet.co.uk

OSCR

- → Scottish charities regulator and registrar
- → Maintains public register of charities on Scotland
- → Public search on OSCR website based on income, name, locality, purpose etc.
- → oscr.org.uk

MILO

- → Private system maintained by the Scottish Council for Voluntary Organisations (SCVO)
- Used by TSIs (Third Sector Interfaces) to manage local information about the voluntary sector orgs that they work with/refer to
- → Quality and coverage of data and information is only as good as the TSIs commitment to it, in some areas it is excellent in other is poor
- → scvo.scot/support/milo

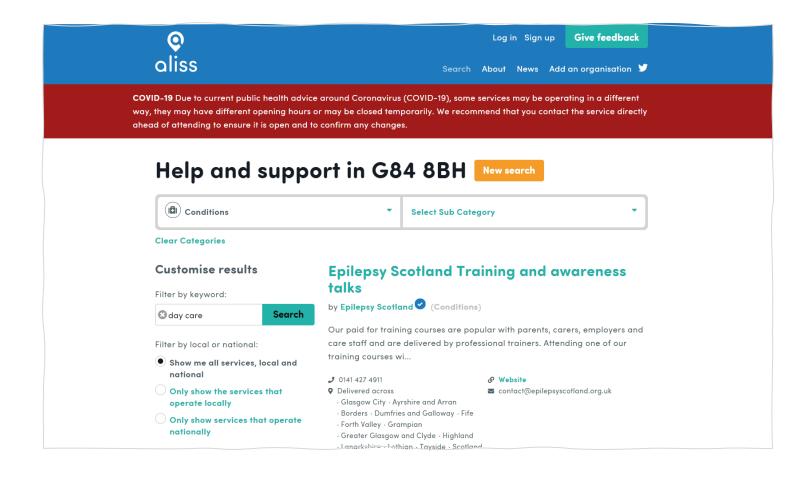
ALISS

- → Public system maintained by the Health and Social Care Alliance Scotland (the Alliance)
- → Used by people in Scotland living with long term conditions and their carers to access the information they need to live well
- → Search for voluntary sector organisations and services based on locality
- → Patchy coverage across Scotland and a mix of very local service and very national/UK wide help lines
- → Open API that gets used by NHS Inform (NHS24's web presence) to signpost people to voluntary sector service
- → aliss.org

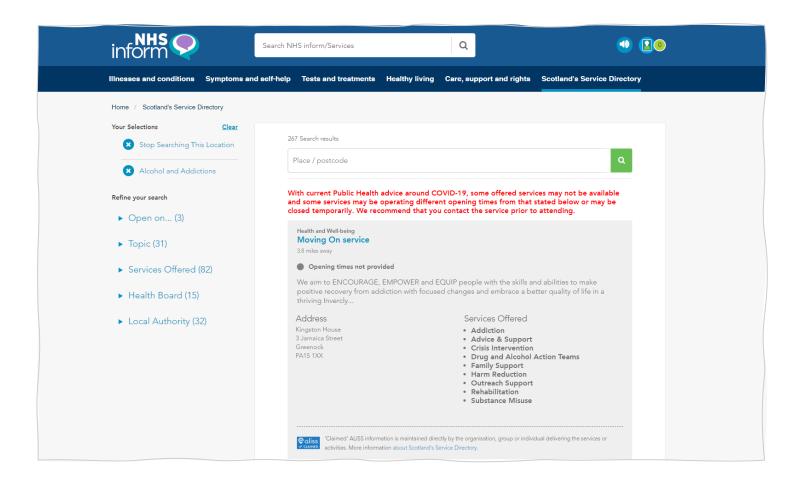
EVOC RED BOOK

- → EVOC is the Council for Voluntary Service (CVS) for the City of Edinburgh and a partner in the Edinburgh Third Sector Interface (TSI), which is part of a national network of Third Sector Interfaces
- → The EVOC Red Book is an online directory of third sector organisations and services in Edinburgh
- → Search for voluntary sector organisations by postcode, distance, category, service, age, day and keyword
- \rightarrow evocredbook.org.uk

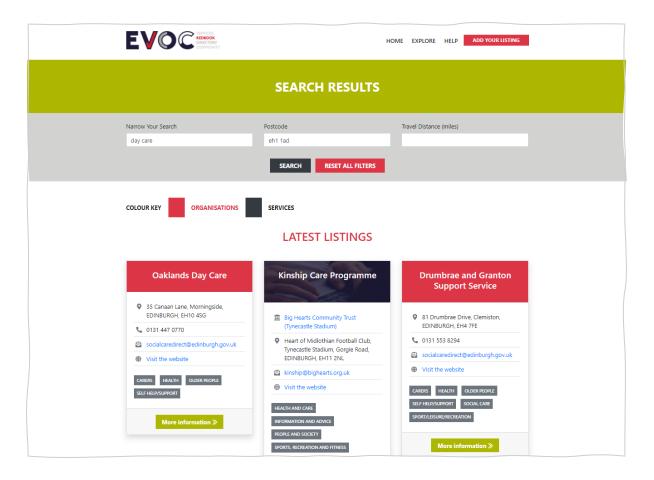
REFERRAL TECH RESEARCH – ALISS UI



REFERRAL TECH RESEARCH - NHS INFORM UI/ALISS API



REFERRAL TECH RESEARCH - EVOC REDBOOK UI





USER RESEARCH - SPACE DAY CARE - SERVICE MANAGER

SPACE DAY CARE - SERVICE MANAGER



ROLE

- → A service manager at a charity providing day care services for elderly people in South West Edinburgh
- → Manages capacity and demand for the day care services
- → Receives and processes referrals from people, their carers, social prescribers and health professionals (GP) and social care (Social Workers and OTs) professionals
- → Works across a network to share referrals and make/receive cross with other charities and volutary sector organisations

MOTIVATIONS

- → Building knowledge and awareness of the organisation and the services that it provides
- → Managing demand and making the best possible use of the charity's capacity to deliver day care services
- Receiving high quality referrals that are a good fit for the charity's services and signpost referrals that aren't a good fit to other providers
- → Providing the best possible day care for people needing care and support for their carers
- → Being part of a network that collectively provides the best possible support for people and their carers
- → Monitoring, evaluating and refining the based on the specific needs of people and their carers

TOOLS AND ASSETS

- → www.spacescot.org
- → <u>www.evocredbook.org.uk</u>
- → Referrals form
- → Slack to interact with other organisation and voluntary sector provides
- → Direct referrals from SharePoint via City of Edinburgh Council
- → Elderly peoples service meeting
- → Unregistered day care services meeting



USER RESEARCH - SPACE DAY CARE - 'PUBLISH' - AS-IS

MEANS

→ Website

www.spacescot.org

→ Local register

www.evocredbook.org.uk

→ Leaflets and open days

KEY INFORMATION

- → Organisation
- → Services
- → Location
- → Criteria dementia diagnosis and age (+60 except for early onset)
- → Access contact information so that they can phone and email

TARGET AUDIENCE

- → Third Sector Interface
- → Healthcare professionals
- → Social care professionals
- → Social Prescribers
- → People
- → Carers
- → Friends and family
- → Other voluntary sector organisations

UPDATE

- → Service do change relatively frequently and do need to be updated
- → Approximately yearly updates to the website and EVOC Red Book

KEY ISSUES

- → Publishing and promoting capacity when it is available
- → Managing demand when it exceeds capacity
- → Receiving unsuitable referrals i.e. late stage dementia
- → Lack of awareness of the organisation, the service, what it is and how to access it i.e. OT community in the Pentlands
- → Current tools and assets are not completely intuitive i.e. EVOC Red Book

KEY OPPORTUNITIES

- → Statutory sector engagement and uptake of the voluntary sector
- → Statutory sector technology limitations
- → Publicising information sources and targeting key audiences



USER RESEARCH - CITIZENS ADVICE NEW FOREST – ADVICE SERVICE MANAGER

CANF - SERVICE MANAGER



ROLE

- → An Advice Service Manager (ASM) at a charity providing advice services for citizens in the New Forest
- → Manages capacity and demand for the advice services
- → Receives and processes direct enquiries from people
- → Receives and processes referrals from organisations, aligned to a specific project
- Works across a network and makes cross referrals to other charities and volutary sector organisations
- → Supervises volunteer force that are providing advice

MOTIVATIONS

- → Building knowledge and awareness of specific projects, in a targeted way, so that people who need it most can access services (e.g. Hampshire Fuel Voucher Scheme)
- → Redirecting more generic enquiries to the most appropriate channels for example national CA services (e.g. Consumer Help Line)
- → Providing the best possible advice for New Forest residents no matter how diverse their needs
- → Being part of a network that collectively provides the best possible support for people in need of advice services (as an onward referral)

TOOLS AND ASSETS

- → <u>www.citizensadvice.org.uk/</u>
- → Advisernet/Cabnet/BMIS detailed national level resources for advisors and ASMs and for running local Citizens Advice services
- → newforestcab.org.uk/
- → Shared drive with resources to share with advisors
- → Directory of local services (word doc in development)
- → Library of national and local resources
- → Child Poverty Action Group online resources for advisors
- → GOV.UK



USER RESEARCH - NEW FOREST CITIZENS ADVICE - 'PUBLISH' AS-IS

MEANS

- → Visible presence in local community
- → Advisers at queues for food larders
- → Local offices in market towns
- → Engagements with partner organisations and influencers

KEY INFORMATION

- → Organisation
- → Key generic areas/service
- → Specific projects
- → Locations
- → Access (telephone, email, webchat)

TARGET AUDIENCE

- → Local Authorities (as funders)
- Other government funded bodies, health and social care and community service professionals (e.g. Social Prescribers)
- → People
- → Other voluntary sector organisations

UPDATE

- → Information changes frequently and is updated on the national Citizens Advice website
- → The local CANF focusses on contact, donations and volunteering

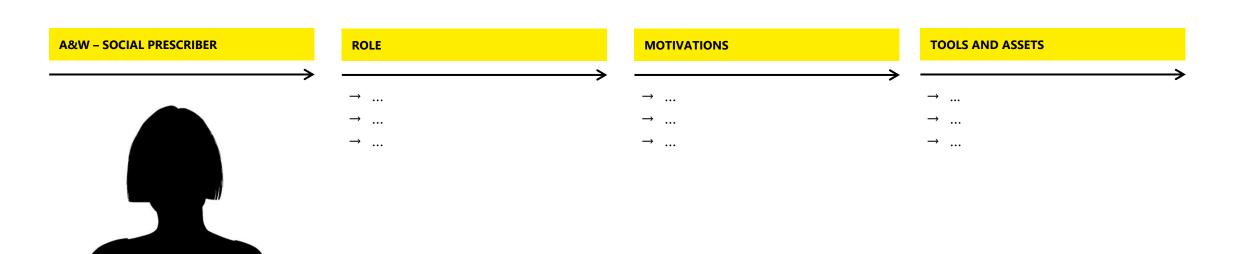
KEY ISSUES

- → Social prescribers need detail to understand CANF service (e.g. difference between national telephone based debt advice service and CANF who could provide more specific local face to face debt advice)
- → Commissioned/paid organisations queue jumping by referring people into CANF services which are free to everybody
- → CANF are already under significant demand (that exceeds capacity)

KEY OPPORTUNITIES

- $\,\rightarrow\,$ Reliable and detailed source of information about CANF services and projects
- → Reliable source of information for CANF advisors about other voluntary sector services
- → Managing capacity and demand for generic advice and specific projects

USER RESEARCH - ADUR AND WORTHING - SOCIAL PRESCRIBER



USER RESEARCH - ADUR AND WORTHING - 'SEARCH' AS-IS

