Open Contracting Data Standard Helpdesk Hubs

The **Open Contracting Data Standard (OCDS)** provides a common global standard describing **what to publish** and **how to publish it** when it comes to open data about public contracting processes. The standard is fully documented at http://standard.open-contracting.org

Over 2015/16 the **Open Contracting Partnership (OCP)** has developed a helpdesk service that supports partners to implement the OCDS by providing proactive and reactive support.

We are exploring how to scale and localise this model. Over 2017, we aim to establish regional helpdesk hubs in addition to our global helpdesk.

In brief

We are looking for a new or existing partner organisation to run a technical support team able to work with data publishers (mostly governments) and data users across the Latin America region to support implementation of the Open Contracting Data Standard (OCDS).

This **'helpdesk hub'** will also be responsible to maintaining the localised version of OCDS, and contributing to wider technical development activities.

Background

Field building

The Open Contracting Partnership strategy sets out the goal of *'building the field, not being the field'*. OCDS Helpdesk hubs are part of this model.

We want to see a vibrant eco-system which includes:

- **Community support** - with open source developers, NGOs and others building tools, sharing learning and providing assistance to implement and use the OCDS;

- **Commercial support** - with companies who can offer their clients technical assistance to implement the OCDS;

- **Core support** - with a dedicated team working to protect and promote the integrity of OCDS as a robust standard for contracting disclosure, and making sure that

everyone who requests it has access to assistance in publishing or using OCDS data.

The helpdesk hubs are part of a **core support offer**, which will work to stimulate the ecosystem of commercial and community support.

The case for core support

Although standards might look technical, they are, more than anything, social processes. With the OCDS we have two main objectives:

- **In-depth disclosure and use of data with real impact** - increasing the quantity and quality of information that is accessible on contracting processes, and making sure this is fit-for-purpose to meet a wide range of use cases.

- **Interoperable data** - supporting comparability across publishers, and making it easier for users to understand the data they are accessing, and to re-use common tools.

Commercial support is often focussed on technical accuracy and interoperability, whereas community support often has a limited set of use-cases in mind.

The helpdesk hubs focus on developing the public good components of OCDS to support interoperability, data quality and impact. They bridge the gap between commercial and community support offerings, and stimulate the development of both.

Helpdesk hubs are also central to the learning goals of Open Contracting: making sure that learning from OCDS implementation feeds back into a stronger standard, better documentation and improved tools.

The case for hubs

To date, the OCDS Help Desk has been staffed by Open Data Services Co-operative, based in the UK. A hubs approach can support the OCP's goals to deliver:

- **Multi-lingual support** - with translation of the schema, documentation and resources, and proactive and reactive support, in different languages;

- **Local implementation support** - on the ground on different continents;

- **Increased engagement in standard development** - with partners who can present a clear understanding of how the standard needs to be shaped to work within local legal, political and social contexts[1];

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[1] This will help address the risk of encoding too many anglo-centric assumptions in the standard itself.

- **More learning and sharing** - from different settings where OCDS is being used around the world.

Our approach to helpdesk hubs is grounded in a number of observations:

- **Reactive technical support should be unrestricted and provided to all who ask.** This ensures that any efforts to implement OCDS have the best chance of providing interoperable data, and prevents fragmentation of the standard, whether or not the effort's policy framing could be improved. Demand for support can be managed by developing self-service resources and tools that deal with the most common enquiries. The right guidance, at the right time, can make a big difference.

- **Proactive support should be provided strategically**. Having a range of leading implementation of OCDS that demonstrate the potential, and generate learning, is valuable. Through working with OCP Showcase and Learning projects, and selected other implementations and uses of OCDS, we can generate strategic examples and learning.

- **Ideas should be diffused broadly, some aspects of standards need centralisation.** The OCP wants to catalyse, rather than monopolise, the idea of open contracting - and in any country there may be many policy champions. However, by their nature, standards requires some central governance. By moving from one global centre, to a hubs model, we move the standard closer to the grassroots, whilst still maintaining coherence.

- **Supporting the OCDS requires a mix of skills.** It calls for an understanding of open data, of procurement and of standards. The current core support offering from the helpdesk combines developers, researchers and data analysts, embedded within a broader open data focussed organisation. Induction for new team members is a rolling process that takes 3 - 6 months to be fully up-to-speed on all aspects of the OCDS. A hubs model can create the critical mass of activity in other countries to allow existing or new organisations to bring together the right skill mix, and to allow us to invest in building capacity effectively.

- **We want to scale up sustainably**. Working with a limited number of hubs gives us the opportunity to learn how to do this.

Operational model

Helpdesk hubs will be formed pursuant to agreements between qualified organizations with the Open Contracting Partnership. Contracts will be for one year renewable terms.

Global hub

The current OCDS helpdesk team will transition to become the **global hub** with responsibilities for:

- Maintaining the core schema and documentation for the standard;
- Maintaining core tools and documents, including the validator, conversion tools, extension management tooling, mapping templates and guidance notes;
- Supporting standard governance and upgrades;
- Co-ordinating technical learning exchange amongst the hubs;
- Global community building with all support providers and OCDS users;
- Providing reactive help-desk support, or routing requests to regional or thematic hubs;
- Providing second-tier support and quality control for help-desk activities carried out by the hubs;
- Providing proactive support, engagement and advice to OCP and the hubs on request;

Regional hubs

Regional hubs will have a defined geographic or language area of operation, within which they will work on:

Helpdesk services:
- Providing reactive help-desk support to data publishers and users;
- Providing proactive support, engagement and advice to publishers and users at the request of OCP;
- Maintaining the CRM (ticketing system) and open contracting global map for their defined area of operation;

Standard development:
- Soliciting input into the governance of the standard, and ensure wide consultation;
- Supporting localization & implementation of OCDS, including translations;

Resource development
- Adapting and maintaining localised/contextualised training resources;

Learning
- Participating in peer-learning sessions.

Reporting
- Reporting on progress on key metrics as agreed with OCP

Hubs may also propose to work on **software and tool development** contributing to the core code and additional tools that help publishers and users of OCDS.

Organizations selected as helpdesk hub teams will receive **initial training** and will participate in weekly and monthly co-ordination calls. Up to 2 people per hub team will be

invited to **bi-annual hub retreats** to develop skills and shared learning. Hub teams will be expected to coordinate weekly with OCP & the Global hub team.

They will be provided with core tools, including the helpdesk CRM, which should be used to promote shared learning, and to provide key management information to the OCP.

Helpdesk support functions

The core helpdesk support role includes:

- **Needs assessment** - scoping how the OCDS can be used in particular contexts, and providing customised resources to data publishers and users.
- **Technical assessment** - supporting completion of technical assessment templates, and providing customised feedback to data publisher and users.
- **Data mapping -** supporting publishers and users to assess field-by-field the OCDS data that they could publish or use.
- **Training** - running online and face-to-face training sessions.
- **Data validation -** ensuring that published data complies with the standard, and providing bespoke feedback to data publishers on how to improve.
- **Data quality evaluations -** conducting comprehensive assessments of published data to assess conformance, completeness and quality.
- **Extension development** - creating and documenting extensions to the core OCDS schema to meet particular sectoral, publisher-specific or regional needs (writing JSON Schema).
- **Data use** - advising users and potential users on issues related to the use of OCDS data.
- **Writing up shared learning** - through blog posts and technical documentation.

In addition, hubs may undertake additional outreach and developer engagement activities, or may get involved in building new tools and maintaining core aspects of the OCDS technical infrastructure.

Resourcing requirement

Each Hub should propose its own model of resourcing and delivery, but should be prepared to offer a minimum of 1.5 FTE capacity over the course of the year. Budgets may allow more than this based on team rates.

For comparison, the Global Hub, which has been handling an average of 65 support requests a month, and developing core tools and standard, has a team of 3 part-time helpdesk analysts, and 3 developers who work on one 10-day sprint per month, supported by a wider team of technical and standards experts who input on an ad-hoc basis.

Helpdesk Hub skills profile

Running a hub involves a number of different skill sets, including data analysis, business analysis, project management, development (JSON, JSON Schema, Python), communications and community building.

Domain expertise in contracting and procurement is a big plus. These skills may be found in various combinations, but a hub is likely to need 2 - 4 team members (with a mix of full and part-time working) to ensure the right mix of skills is available.

Funding

OCP is committed to providing the core funding for the set-up of new hubs, working with each hub to ensure its long-term sustainability.

Over the medium to long-term, hubs will be encouraged to develop a mixed business model that is not solely reliant on international grant funding from the OCP.

Hubs may be hosted within an existing organisation, or could be newly established.

Open Data Services Co-operative offers to explore providing start-up finance to support other co-operatives bidding to operate as hubs.

Expressions of interest

At this stage we are looking for potential suppliers to submit an initial expression of interest to run the helpdesk hub **in Latin America**, with an emphasis on Spanish speaking countries.

Enter your expressions of interest on Screendoor[2]

Timeline

- **15th November 2016** - Deadline for Expressions of Interest

  OCP will then invite selected participants to submit full proposals. The invitation to submit full proposals will be shared by end of November.

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[2]

https://open-contracting-partnership.forms.fm/ocds-helpdesk-hubs-latin-america-call-for-expressions-of-interest

- **10th January 2017 -** Deadline for full proposals

  Proposal evaluation will take place throughout January, with negotiation over the appropriate model.

- **February 2017 -** Hub partner selected

  A process of set-up, training and onboarding will follow.

- **1st April 2017** - Estimated hub start date