Report to Cabinet

Report reference: C-002-2021-22

Date of meeting: 21 June 2021

Epping Forest District Council

Portfolio: Housing Services - Councillor H Whitbread

Subject: Recommendation of the supplier for the proposed Housing Management System

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Appendix 1 – Budget (confidential)

Recommendations/Decisions Required:

1. **That Cabinet agrees the recommendation to proceed and appoint Civica to provide our new Housing Management system; and**

2. **That Cabinet note the methodology used to appoint the successful supplier.**

Executive summary

EFDC is currently using OHMS housing management system. It is usual practice to review system on a periodic basis to assess currently suitability. It was agreed in 2019 that a soft market test be undertaken to understand the products which are now available, and how they may meet the needs of a progressive service in a fast-moving environment. Our review revealed that we could purchase a product which was capable of:

- Negating the need for manual processes and spreadsheets
- Enabling agile and mobile working in the field (mobilising the housing officer)
- Enabling housing services to be delivered digitally
- Build / rebuild super user expertise within Housing
- Easier production of regulatory and statutory returns, reducing staff effort
- Greater customer insight through analytics enabling mitigation of tenant risks, focused service delivery and resource optimisation
- Increased staff satisfaction and productivity
- Operational and management information providing early warning indicators of issues and supporting business decisions
- Measurable process efficiency – ability to reflect more streamlined ways of working
- Reduction in arrears (rents and service charges)
- Significant reduction in time taken to process estimates and actuals for service charges

This would provide an excellent opportunity to use technology to reshape our service to be digital by default, and enable the team to concentrate resources on those most needing the support. In addition, providing a system which meets the aspirations of both our staff and customers.

A new housing management system would result in significant savings, particularly the administration of payments and tenancy changes which are carried out by business services. It will also remove the risk around processes being applied incorrectly or mistakes being made, as these processes will be automated.

Report:

1. Background

EFDC uses OHMS as its current Housing Management system. OHMS was implemented nearly 20 years ago and is supported and maintained by Northgate Public Sector (NPS). Although Northgate has no plans to retire OHMS or announce its end of life, it is not being developed beyond essential legislative changes and lacks some of the functionality that you would expect to find in a modern system. Equally there are a number of OHMS modules that were never implemented and there are a number of key processes that are conducted manually and/or supported by spreadsheets. A lack of integration with other core systems is a key issue. The lack of integrated processes adds a huge risk to the organisation, particularly around our new requirements to meet the Rent Regulations.

We are also in the planning stage for developing a programme for regenerating our assets, a new system will enable us to manage our assets appropriately, using intuitive information. In addition, it is vital we have a system which can support us in doing this, and therefore allow for clear transparency between this and the HRA business plan.

In addition, our approach to working with customers is 'progressive', as such officers need a system which is able to compliment such work. An example of this is the 'one view of a customer' approach which allows housing officers to take more of a holistic view of the needs and challenges a customer may have.

2. Procurement Process

In 2020 EFDC begun the process of an EU compliant procurement, this was undertaken to determine how EFDC business requirements for the next 5-10 years could best be met. The desired outcomes and objectives of this procurement were to identify a supplier and a solution.

 Following this a full procurement exercise was undertaken, the steps of which are highlighted below. The process has now been completed and based on our scoring methodology, Civica are being recommended as our preferred provider. The process followed the EFDC standard procurement methodology. This involves defining key parts of the process and apportioning weighting. The allocation of weighting used was developed by EFDC and is in line with industry averages.

Category	% Weighting
Functional	31.50%
ICT	13.50%
Project	9.00%
Strategy	4.50%
Commercial	9.00%
Price	22.50%
Demonstrations	10.00%
Totals	
Rank	

Scoring Methodology – Functional score

The officers, supported by our retained IT consultant developed the specification, this formed a key part of the tender document as it sets out the functionality required across all modules of the system. The tender document was published in line with legislation, 5 providers put forward expressions of interest. Due diligence was carried out and this reduced the eligible suppliers to 3. A comprehensive process was then undertaken.

Scoring Methodology – Functionality

The specification identified over 800 functional requirements which were assessed and scored by representatives from each module area. Clarifications were sought from the suppliers throughout.

Scoring Methodology – ICT Scores

Interviews and demonstration sessions where used to score the ICT section of the project. This part of the process includes how the service is managed and delivered, information security, disaster recovery, backups, data integration / interfacing capabilities and reporting. This is very important as it can form the future functionality of the product for example cloud-based vs based in house.

Scoring Methodology – Project

This is key to the implementation of the project and includes the structure of the project plan, the methodology project and recommendations around the actual implementation of the project (including resourcing).

Scoring Methodology – Strategy

The part of the scoring represents the future road map, this forms part of the demonstration session. This is important as housing management systems are used to facilitate the legislative returns, as such EFDC needed assurance that the road map is future proof. A further example of this would be the potential changes to the Decent Homes Programme, there would be a need to align the system to the new requirements.

Scoring Methodology – Commercial

This section included 31 contract conditions which suppliers were required to reflect in their proposed agreement or provide a satisfactory alternative form of words. These contract conditions included service level agreements and a provision for service credits.

Scoring methodology - Demonstrations

Each of the suppliers underwent 2.5 days of demonstrations to officers, based on the original specification. Each element of the specification was given a score by each officer. Following this a selection of reference calls were made to organisations using the system. As before, this was carried out in a structured manner to allow for transparency.

Decision making process

The final part of the procurement involved pulling the scores together from all 7 categories, this then provides the lead officer with a final score and thus a

recommendation can be made.

Outcome

Following the exercise which has been carried out to the above specification, the provider which ranked number 1 was Civica. Therefore, this forms the basis of our recommendation to Cabinet.

Reason for decision:

Members are asked to approve the appointment of Civica as the preferred provider for the Housing Management System.

Options considered and rejected:

Officers considered whether to carry on with our current system, however this would not suit the business needs of EFDC.

Consultation undertaken:

As part of the procurement process, officers were consulted.

Resource implications:

A budget was approved as part of the DDF, this included staffing resources to implement the system.   A budget paper is provided in Appendix 1

Legal and Governance Implications:

All procured requirement have been met. The project has and will continue to be monitored using EFDC Governance programme.

Safer, Cleaner, Greener Implications:

NA

Background Papers:

DDF application report

Impact Assessments:

Attached

Risk Management:

A risk matrix is in place and will form part of the implementation moving forward.