PROCUREMENT OF HOUSING MANAGEMENT SYSTEM - UPDATE

Housing Committee and Full Council approvals for the procurement of a new housing management system (HMS):-

Date & Committee	Agenda Item	Link to Meeting Documentation
9 April 2019 Housing	Repairs & Maintenance Service 2020	Item 11
8 December 2020 Housing	Council Housing – Housing Management System Transformation	Item 8 Business Case
17 December 2020 Full Council	Council Housing – Housing Management System Transformation	Item 6a

Introduction

Stroud District Council's (SDC) landlord services use a number of technical administration systems to manage its property repair, capital investment, and tenant management/support activity. This includes work in relation to major works, contractor administration, budget reconciliation, and income (rents) management.

The integration of information from these independent systems requires additional manual work and also significantly inhibits effective single users or tenant case management. To this extend it was no longer fit for purpose and some of the systems are reaching the end of their software support contracts or are being decommissioned by their suppliers.

On this basis procuring a new, fit for purpose integrated system was identified as a priority.

Process to procuring a new, integrated system

Following collaboration with, and advice received, from Sarah Turner, Senior Policy and Governance Officer, and Jo Spain, Policy and Procurement Officer, a Procurement Plan, authorised by the Head of Housing Services, Kevin Topping, was submitted to the Senior Policy & Governance Officer. This is a requirement prior to the commencement of any tender or quotation exercise with a total estimated value of £25,000 or more.

Pre-market investigation showed that 14 suppliers were signed up to the Crown Commercial Services Data and Application Solutions (DAS) RM3821 Framework, Lot 2b; this framework is the one most commonly used to procure housing and repairs management software. Therefore, the decision was made to undertake a compliant procurement via the DAS framework for a new, fully cloud and browser-based HMS, to replace the existing on-premise solution.

In December 2021, an Invitation to Tender (ITT) was placed onto the Proactis (procurement) Portal and two complete ITT responses were received from suitably qualified and capable tenderers at the end of January 2022.

Sara J Weaver, Interim Tenancy Operations Manager
Ext: 4183
Email: sara.weaver@stroud.gov.uk

In February/March 2022, the tenderers were invited to hold demonstrations, based on structured, detailed scenarios, closely aligned to the requested functionality. Members of the Project Board, as well as staff from Tenant Services, Customer Services, and ICT, attended sessions which were all presented remotely due to Covid-19 restrictions.

Subsequently, a number of formal clarifications were raised based on functionality, integrations, implementation plans, and undefined costs. Additional clarification sessions were then undertaken with tenderers around contactor, planned maintenance, and assets functionality.

Due to the transformational features required of the new HMS, and in order to guard against being forced to accept an inferior solution, which might have been tendered at a low cost, a ratio of 75% quality and 25% cost was decided.

The quality score was split between prescriptive technical requirements, scoring a maximum of 51%, with accompanying Method Statements, requiring detailed written responses, making up the remaining 24%. Both cost and quality scoring were allowable within the Crown Commercial Services Data and Application Solutions (DAS) RM3821 Framework, Lot 2b, requirements.

Costings and Budget
The five-year contract sum was calculated as £904,199. This included the application software, implementation and data migration, integrations, training and project management, cloud/virtualised hosting, network services, and some transitional licence costs from the existing housing management solution modules.

On 15 July 2022, Jon Coldridge, Principal Accountant, signed-off on the budget costings, advising that both the capital and revenue budgets were sufficient to cover the predicted spend. This was further confirmed on 1 August 2022, following a clarification meeting between Lucy Clothier, Accountancy Manager; Adrian Blick, Interim Director of Transformation and Change & Head of IT; Jon Coldridge, Principal Accountant; Helen Stables, Senior Business Improvement & Systems Officer; and Sara Weaver.

Recommendation
It was recommended to the Strategic Director of Communities, Keith Gerrard, and the Project Board, that we communicate to NEC Housing our intention to award, subject to contract. Approval was given on 17 August 2022.

Contract Negotiation
After a 10-day standstill period, we have entered contract negotiation and finalisation. This is being managed by Chris Reynolds, Fit for the Future Programme Manager; Adrian Blick; Yvonne Abbott, Senior Legal Assistant at One Legal; Helen Stables, and Sara Weaver

Mobilisation
Phase 1 – project initiation to include Project Board and Team meetings and acceptance of the Project Initiation Document (PID)

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