Report to Cabinet

Report reference: C-012-2022-23

Epping Forest
District Council

Date of meeting: 30th September 2022

Portfolio: Housing and Community (Cllr H Whitbread)

Subject: Housing and Asset Management System Project – Progress Update

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Recommendations/Decisions Required:

That the Cabinet note:

- **the progress on the implementation of the Civica Cx Housing and Asset Management System**
- **the cost benefit analysis**
- **a further progress update will be provided in April 2023.**

Executive Summary:

Following a procurement exercise, Cabinet agreed in June 2021 to award Civica the Contract for the implementation of their Housing and Asset Management Solution – Civica Cx. The Contract with Civica was finalised in August 2021.

The Civica Cx system will replace the existing NEC OHMS system and a number of other data sources e.g. spreadsheets, used within the Housing and Property Service.

Through the implementation of the Civica Cx system a number of opportunities / desired outcomes have been identified, including:

➢ Alleviate manual processes and use of spreadsheets
➢ Increased efficiency, including mobilisation of workforce
➢ Digital service delivery to customers
➢ Optimise revenue generation / collection
➢ Build / rebuild system knowledge and Super User expertise

This Report provides an update on progress on the implementation of the Civica Cx Solution.

Report:

1. Introduction – Project Kick-off Meeting and Project Phases

The Kick-off Meeting between EFDC and Civica for the Housing and Asset Management (HAM) System Project took place in September 2021 where the following high level Project Phases were agreed:

Phase 1:	Phase 2:
➢ Rents and Arrears ➢ Tenancy ➢ Service Charges and RTB ➢ Voids, Lettings, Temporary Accommodation ➢ Repairs ➢ Interfaces: Benefits, Payments, Repairs, Document Management	➢ Servicing and Inspections ➢ Planned Maintenance ➢ Estate Management ➢ Mobile Working ➢ Customer Self-Service ➢ Interfaces: Finance, Choice Based Lettings (CBL)

2. Project Governance: HAM Project Board and HAM Project Team

HAM Project Board: A HAM Project Board has been established with the EFDC Director of Housing and Property as the Project Sponsor. The HAM Project Board meets monthly and includes representatives from EFDC and Civica.

HAM Project Team: The HAM Project Team comprises internal staff from different service areas who have been seconded on to the Project as Super Users. The Team includes an internal resource seconded into the role of Solution Architect and is supplemented by specialist external resources for data migration and project management. The HAM Project Team works closely with Civica Implementation Consultants as well as other teams within the Council (e.g. Finance, Revs and Bens, Payments, Corporate ICT) and also EFDC Partners e.g. Qualis.

3. Milestone Dates - Phase 1

The following Milestone Dates have been agreed with Civica for Phase 1, progress against these Milestones is reported to the HAM Project Board:

Milestone	Due Date	Status	Comment
Project Kick-off	September 2021	Complete	Meeting between EFDC and Civica took place 10/9/22
Data Pass 1	April 2022	Complete	Scope includes Property, People, Accounts, Transactions data
Data Pass 2	August 2022	In Progress	Scope includes all data from Data Pass 1 and Repairs data
Data Pass 3	October 2022	Not Started	Scope includes all data from Data Pass 2 and Stock Condition, Asbestos data
Complete Testing	February 2023	Not Started	Scope includes integration, system performance and user acceptance testing (UAT)
Complete Training	March 2023	Not Started	Training to be delivered to EFDC staff and relevant Partner staff
PHASE 1 Go-live	**April 2023**		

Note: System configuration / set-up tasks are undertaken in parallel with the Data Passes

4. Phase 1 Progress

Summary Progress for Phase 1 is as follows:

- Civica Cx Workshops with EFDC: A series of Civica-led Workshops have been completed across the functional areas within the scope of Phase 1 e.g. Rents and Arrears; Tenancy; Service Charges and RTB; Voids, Lettings, Temporary Accommodation; Repairs; Interfaces (Benefits, Payments, etc.). These Workshops provide EFDC resources with the necessary knowledge on how to configure the Civica Cx system
- Data Migration: Data Pass 1 was completed in accordance with agreed dates, and Data Pass 2 is on target to complete in August 2022. Data Pass 2 is currently in progress is on target to be completed in August 2022. The HAM Project Team is directly each Data Pass through the "cleansing of source" data to improve consistency, accuracy and also ensure the data is in a format that can be loaded into the new system. The HAM Project Team has worked in conjunction with internal teams and 3rd Parties on the following to ensure that data collected can be loaded into the Civica Cx system
  - Stock Condition data
  - Census data
- Business Process Reviews: The HAM Project Team has worked with each service area to review of business processes and identify improvements – some of which can be achieved in advance of the implementation of Cx, some will be achieved as a result of the implementation of Cx. These reviews have been supported through Corporate Continuous Improvement and Change Management resources.
- Communications: an internal Briefing for staff within the Housing and Property Service has been provided, regular fortnightly updates are provided for Managers with the Housing and Property Service. A communications plan is being developed with the Comms team

The HAM Project currently remains on target to achieve a Phase 1 Go-live in April 2023.

5. Cost / Benefit Analysis

Members will remember that the driver for the replacement of the NEC OHMS housing management system was twofold:

- Replacing a 20 year 'end of life system' i.e. the NEC OHMS system
- Enable proactive 'sight' of our assets and income.

The benefits are as follows:

Business:	
Regulatory compliance	The system will provide the tools to move away from spreadsheets therefore having an holistic view of compliance in "one place"; resources can then be allocated accordingly.
Building safety compliance	The data can be attributed to both a block and property, can also produce a "golden thread"
Asset management	Having the correct data in one place will enable us to produce an asset register which will feed into the asset management strategy, also allow us to make informed strategic decisions.

Financial controls	New systems have analytics capability which will serve as an early warning system in terms of financial viability.
Protection of data	The system has a robust audit system which will allow us to track and audit any changes to accounts. Mitigating risk
Resource savings	Several processes will be automated reducing reliance on Business Support.
Customer:	
Rent Accounts	Self service via a customer portal.
Communication	Ability to use text messaging.
Support	Increased support for those people who require it as staff will be able to prioritise.

6. Project Risks / Issues

The following two key risks / issues have been identified and the HAM Project currently has an overall RAG rating of Amber – because the risks / issues have a RAG rating of Amber but there are mitigations in place:

Resources: a key outcome of the Project is to ensure that an effective level of knowledge and expertise is embedded within the organisation to manage and maintain the Civica Cx system and to continue developing the Cx system to support improvements to service delivery. A review of resourcing arrangements for supporting, maintaining, developing the Civica Cx solution is due to commence in September 2022, while a recruitment process is due to commence in August 2022 to engage a temporary ICT System Support Resource to allow permanent ICT resources to become more involved on the HAM Project.

Document Management: it is recognised that the existing solutions used by the Housing and Property Service for document management – including the NEC I@W Solution and internal shared drives – will not support service improvements and are a barrier to EFDC meeting its obligations around compliance with key legislation, including the Building Safety Act. As a result, an alternative solution based on Microsoft SharePoint is being evaluated in conjunction with the Corporate ICT Team; Civica have also been consulted on this approach and have indicated that other Civica Cx customers are already adopting SharePoint as their preferred document management solution and have implemented integration between Civica Cx and SharePoint.

7. Budget

A budget for the HAM Project was previously agreed as part of the 2020 budget setting, and included provision for 3rd Party software and implementation services as well as internal staffing resources to implement the new system i.e. Civica Cx. A paper setting out the breakdown of the budget was submitted to Cabinet in June 2021 as an appendix to the report seeking approval to award the Contract to Civica, this breakdown is provided below.

Regular budget monitoring meetings take place between the EFDC Project Manager and the EFDC Finance Team, with updates provided to the Project Sponsor and to the HAM Project Board.

Actual and forecast spend for the HAM Project remains within the budget previously agreed by Cabinet.

Revenue Implications

Cost / Income Item	2021/22 £	2022/23 £	Recurrent	Notes
Software AS&M	35,000	35,000	Yes	
Software hosting and managed service	71,000	71,000	Yes	Note: we may opt to host ourselves
Network WAN	15,000	15,000	Yes	
Project Manager (24 months)	75,000	100,000	No	
Project Assurance	19,000	25,000	No	
Data conversion / cleansing	50,000	66,000	No	
Housing / Asset staff backfill (6 x FTE over 2 year project)	175,000	233,000		Based on £30k + Oncost
ICT Housing Business Partner	53,279	53,279		Includes oncost. Will support and develop system beyond implementation
ICT Asst. Housing Business Partners	71,340	71,340		Includes oncost. Will support and develop system beyond implementation
Total	**564,619**	**669,619**		

Capital

Capital / Asset Sale Item	2020/21 £	2021/22 £		Notes
Software Licences and Implementation Costs	512,000			Note: no project profiling applied
Tablet devices x 100	10,000	30,000		Note: some staff would possible use their laptops
Integration contingency sum	50,000			
Total	**572,000**	**30,000**		