



**EXECUTIVE MEMBER DECISION NOTICE**

**LOCAL GOVERNMENT ACT 2000 SECTION 9E**

**1 EXECUTIVE MEMBER**

**COUNCILLOR FIONA THOMSON**

**2 TITLE OF REPORT**

**PURCHASE AND INSTALLATION OF A REPLACEMENT PROPERTY ASSET MANAGEMENT SYSTEM.**

**3 DECISION TAKEN**

**TO APPROVE A DIRECT AWARD TO MRI SOFTWARE LIMITED THROUGH THE CROWN COMMERCIAL G-CLOUD FRAMEWORK TO SUPPLY AND INSTALL A REPLACEMENT PROPERTY ASSET MANAGEMENT SYSTEM. THE AWARD WOULD BE A COMMITMENT FOR ONE YEAR WITH THE OPTION TO EXTEND FOR AN ADDITIONAL TWO YEARS.**

**4 IF URGENT, REASONS FOR URGENCY**

**N/A**

**5 DETAILS OF EXECUTIVE MEMBER**

Name            Councillor Fiona Thomson

Signature        \_\_\_\_\_

Date this decision was taken                    \_\_\_\_\_ 13 September 2021 \_\_\_\_\_

Date of circulation/publication of this decision    \_\_\_\_\_ 15 September 2021 \_\_\_\_\_

Supported by Chairman of the General Procurement Board

Name            Councillor Duncan Bell

Signature        \_\_\_\_\_

## **6 EXPLANATION/BACKGROUND**

An Executive Member Notice to procure a replacement system was approved by the appropriate member on 28<sup>th</sup> June 2021. No call-in was actioned in the call-off period.

The next step is to progress a direct award to MRI Software Ltd for a replacement system. The Property Services Team have had several demonstrations and deep-dive sessions with the supplier over the last six months investigating the details of the replacement system. As part of the investigation the team have also undertaken an exercise to understand how another independent organisation has been using this system for some time, understanding the benefits and lessons learnt.

The replacement system MRI Orchard Asset comes with pre-designed integration solutions to connect with our existing housing management and responsive repairs system Orchard Classic. These integrations are processing data back and forth between the two systems, updating master data in both systems. The interfaces share fixed data as well as overwriting existing data. There is a direct data connection in real time between the two systems.

The benefits of replacing a system using the same supplier with pre-designed integrations means the implementation of the system can be done within several months. The alternative would be to design these interfaces from scratch, possibly having to use additional middleware solution to help share the data across two different systems. This would require additional licensing, consultancy and implementation costs and comes with higher risks of failure and implementation between one to two years to fully complete.

Some examples of the pre-designed integrations and direct data connected in real time are listed below:

- Updating data in Orchard Asset as responsive repair work orders are completed and closed in Orchard Classic, including financial and variation of orders. Overwriting data in Orchard Asset. This allows for one version of the truth about all types of works completed at each property. This data is also used for insightful asset analysis and future planned option appraisals and modelling.
- Sharing all compliance information and planned maintenance programme from Orchard Asset into the Orchard Classic customer relationship management dashboard, and in time to share in customer online accounts. Improving transparency for staff and customers.
- Sharing of tenancy and property data stored in Orchard Classic and overwriting data in Orchard Asset to ensure we are working to one set of property and tenant data.
- Sharing of resident contact details and preferences between the systems.
- Sharing of any property or resident based attribute or warning between the systems.

- Sharing of key tasks outstanding in Orchard Asset with Orchard Classic, especially in relation to access for gas servicing.
- Sharing of compliance certification from Orchard Asset into Orchard Classic, as well as storing a copy in the electronic tenancy and property file. This is effective for when signing up new tenancies to have all compliance certificates in one place.
- Task management and alerts of outstanding tasks in Orchard Asset will be updated with any data changes in the Orchard Classic system.

There is an implementation project plan attached as appendix A. The plan for full implementation is across three phases and seven months. Project support for this period has been identified to support the Property Services Team with the implementation management and ensure pace of delivery from the supplier. This support will oversee the delivery of the project and keep it on track, mitigating any associated risk of failure. The Property Services Team are in full support of a replacement system.

## **7 BACKGROUND/**

The current property management asset system and data management no longer meets the full requirements of the service in managing property asset data effectively and efficiently. The investment is required to ensure the council is meeting all management requirements and that it is using insight to invest intelligently in its assets. The data is currently segmented across different sources including systems and contractors.

A replacement asset solution will ensure full transparency of data, information and compliance assurance in real time. This will significantly reduce the administration of manual processes and provide real-time reporting.

A replacement system will also meet the requirements of the Digital Strategy in providing mobile accessible services for officers, data being managed in the cloud allowing for easier access for multiple contractors needing to action work programmes and upload financial information for completed works.

Using the governments Crown Commercial Services Digital Services (G-Cloud Framework) the council can seek to quickly and efficiently procure software. This framework is specifically targeted at the public sector where suppliers have already had to meet minimum standards, there is transparent pricing and the terms are agreed in advance.

As the value of the contract is less than £1 million and considered a routine matter, it does not need to be considered by the General Procurement Board

### **7.1 Legal Implications:**

The purchase will be undertaken in accordance with the council's Contract Procedure Rules and the Public Contracts Regulations 2015 .

### **7.2 Financial Implications:**

The value of the direct award committed contract for one year is estimated at approximately £148,799; £76,679 license and subscription costs for one year and £72,120 one-off implementation costs. If the option to extend the contract for two years is taken, total contract costs for 3 years would be £302,157.

7.3 Risk Implications:

Some of the teams current processes are manual and there is a risks around data management risks if the service does not procure an alternative system.

This system will help mitigate the risks associated with all areas of compliance relating to properties and communal blocks; servicing programme, planning of remedial works, project and contract management, data transparency for customers and contractors, and management of risks and reporting.

7.4 Other Implications (including communications, security and terrorism, human resources, procurement, climate change, human rights, health and wellbeing, equality and diversity)

The replacement system will provide intelligent data regarding the council's position for owned dwellings in meeting the zero-carbon emissions target.

No other direct implications from this decision.

7.5 Alternative options considered and reasons for their rejection (if any):

The Council could undertake a procurement on the open market. The benefits of framework are set out in the report, and is a quick and efficient method for the council to procure cloud based software. An open procurement would take significantly longer.

The council could continue with the current software. This software does not meet the current needs of the service, and is not a mobile solution.

**BACKGROUND PAPERS USED TO INFORM THE DECISION**

7.6 Not applicable

**8 DETAILS OF ANY MEMBERS OR OFFICERS WHO HAVE DECLARED AN INTEREST IN THIS MATTER AND NATURE OF ANY SUCH INTEREST AND ANY DISPENSATIONS GRANTED**

8.1 None

**9 ADDITIONAL CONFIDENTIAL OR EXEMPT INFORMATION CONSIDERED**

9.1 No

Contact Officer: Andrew Harper, Procurement Manager  
[a.harper@welhat.gov.uk](mailto:a.harper@welhat.gov.uk) / 01707 357371

Appendix A – Top level implementation plan for Orchard Asset

Subject to commencement of the project being September 2021.

Customer - Project Plan - ORCHARD ASSET full delivery



Asset and Asset Mobile Implementation			September 2021				October 2021				November 2021				December 2021				January 2021				February 2021				March 2021					
			wc	wc	wc	wc	wc	wc	wc	wc	wc	wc	wc	wc	wc	wc	wc	wc	wc	wc	wc	wc	wc	wc	wc	wc	wc	wc	wc	wc		
Activity	Resource	Duration	2	9	16	23	30	6	13	20	27	4	11	18	25	1	8	15	22	29	6	13	20	27	4	11	18	25	1	8	15	22
<b>PHASE 1 - Core and Location, Survey and Mobile Survey, Asbestos and Energy</b>																																
Project Initiation																																
1.Orchard Asset Installation																																
2. Location Implementation																																
3. Survey and Mobile Survey Implementation																																
4. Asbestos Implementation																																
5. Servicing Phase 1 - To include Jobs API																																
5a. Servicing Phase 2- servicing jobs interface set up (development) to be included in above section																																
6. Energy Implementation																																
7. HHSRS Implementation																																
<b>PHASE 2 - Projects and planned</b>																																
8. Project and task Implementation																																
9. Options appraisal Implementation																																
10. Fixed assets/component accounting Implementation																																
11. Projects Phase 3- Information management and finance interace set up																																
12. Project Closure Activities																																

**From:** [Fiona Thomson](#)  
**To:** [Richard Baker](#)  
**Cc:** [Alison Marston](#); [Lucy Aston](#)  
**Subject:** RE: Upcoming Executive Member Decision Notice - Procurement of Asset Management System  
**Date:** 13 September 2021 17:00:04

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Good afternoon Richard.

*"I confirm approval of The Procurement of the Asset Management System, exercising powers delegated to me under paragraph 18 of the Cabinet Procedure Rules within the Constitution"*

Kind regards  
Fiona

Cllr Fiona Thomson  
Handside Ward  
01707 395932

Executive Member for Housing and Climate Change  
Welwyn Hatfield Borough Council  
Chair of Welwyn Hatfield Dementia Action Alliance

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**From:** Richard Baker <r.baker@welhat.gov.uk>  
**Sent:** 07 September 2021 16:49  
**To:** Fiona Thomson <fiona.thomson@welhat.gov.uk>  
**Cc:** Alison Marston <a.marston@welhat.gov.uk>; Lucy Aston <l.aston@welhat.gov.uk>  
**Subject:** FW: Upcoming Executive Member Decision Notice - Procurement of Asset Management System

**Classification:** Restricted

Hi Fiona,

Following on from the decision earlier this year to source software via the government digital marketplace (gcloud) to support with Housing Asset Management and Compliance, software and relevant modules have been selected.

This is provided by the same supplier as the main orchard system so will integrate well and provide significant improvements to all areas of asset management. The attached sheet sets out the benefits and costs which are within the allocated budget. If you are happy with the recommendation please can you sign and return to me, or if you would like to discuss in more detail please let me know and I will pop us a call in.

Kind regards

Richard Baker  
Head of Resources  
Welwyn Hatfield Borough Council