WAVERLEY BOROUGH COUNCIL

HOUSING OVERVIEW & SCRUTINY COMMITTEE

19 SEPTEMBER 2017

Title:

IT SYSTEMS IN THE HOUSING SERVICE

[Portfolio Holder: Cllr Carole King]
[Wards Affected: All]

Summary and purpose:

To provide the Committee with an awareness and understanding of the IT systems used by the Housing Service, and to provide information regarding past challenges, future plans and aspirations for the Service regarding IT.

How this report relates to the Council's Corporate Priorities:

An efficient and effective IT system supports the service to deliver the Corporate Priorities regarding Customer Service, Community Wellbeing and Value for Money.

Financial Implications:

The service has dedicated budgets for capital (new systems and IT development) of £45,000 in 2017/18. Each year, as part of the budget setting process, current and future IT requirements are considered.

Legal Implications:

All data held on IT systems is subject to Data Protection legislation and is governed by the Council's IT strategies and policies. From May 2018, new requirements will come into force under the General Data Protection Regulations (GDPR) to ensure further security, accuracy and relevance of data held by the Council.

Introduction

1.   The Housing Service provides a range of services with similar and different IT user requirements. With nearly 5,000 homes, 9,000 tenants, 500 leaseholders, 1,500 applicants and 100s of enquiries and complaints, there is a lot of data to manage.

2.   In addition to the corporate IT systems used across all Council services, there are a number of specialist IT systems used to support the delivery of Housing Services.

Core Housing IT Systems

3.   Orchard Housing Management System

Orchard holds all the housing management and maintenance data regarding our homes and tenants to run the housing service. The system has a series of modules to manage services

Dashboard	Central record of tenant contacts and information
Person details	Current and former tenant details including name address and personal data
Property details	Address, size, age of home
Rent	Current and former rent accounts, weekly rental charges, payments, rent collection and arrears actions taken
Repairs	Responsive repair requests, authorisations and payments
Applications	Housing Need applications personal details, current and required housing details
Relet process	Process to manage notice, visits, works and letting of homes
Tenancy management	Processes to respond to ASB, tenant requests and managing tenancies
Leaseholder service charge	Records of leaseholders and annual service charges including repairs

4.   Keystone Asset Management Database

Keystone holds detailed information about the elements of the home including installation and renewal dates. The database also holds health and safety information including the asbestos register and servicing scheduling for gas, fire, legionella.

5.   Civica

Civica is a corporate document management system. In Housing it holds all tenant and property records i.e. holds the "paperwork" (eg applications, certificates, letters, file notes, review paperwork and complaints).

6.   Deeplake

Deeplake is a specialised SMS texting service for Social Landlords and Local Authorities, used by the Rents team to communicate with tenants about missed direct debits, rent account balances, and arrears notifications.

Bespoke Housing IT systems

7.   A number of Housing teams use bespoke case management systems to hold case details, action and outcomes for their service area:

- The Private Sector Housing team operate M3 Northgate, part of the Environmental Health system.

- Housing Options team has a bespoke Access case management database developed and supported internally. In addition, Housing Options advertise homes and manages applicant bids through Abritas. The system is hosted externally with data uploads from Orchard.

- The Family Support team has a bespoke SharePoint Case management database developed and supported internally.

Key IT system interfaces

8.   Orchard is the main housing management database, and is used as the lead system. Where possible and appropriate other systems are linked to or interface with Orchard to provide one view of the customer and/or service.

- Orchard users are able to access Keystone, Civica and the Council's mapping system directly from Orchard via a "hot key".

- Information flows back and forth between Orchard and MCM (contractor's database) detailing repair requests, payments, property and personal data.

- Orchard letters are automatically filed in Civica.

- Property details, servicing information and planned works flow back and forth between Orchard and Keystone.

- Applicant details uploaded automatically from Orchard to Abritas daily.

Civica | MCM

ORCHARD

Keystone | Abritas
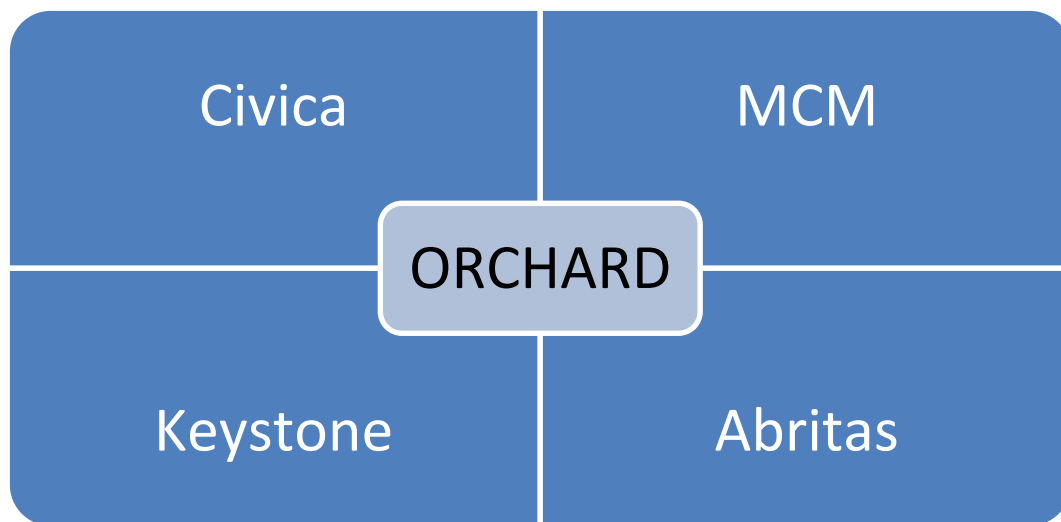
Corporate IT Systems

9. There is a wide range of corporate IT packages used in Housing to support general day-to-day work, or for specific tasks:

- **Microsoft Office**
  - Provides templates, documents, spreadsheets, email, databases and presentations (Word, Excel, Outlook, Access and Project)

- **SharePoint**
  - Microsoft web-based platform for document management and storage. SharePoint is the platform for Waverley's intranet and filing system for general documents eg policy, procedures, team notes. SharePoint also provides a database for all corporate complaints.

- **Lync telephony**
  - Phone system provided by Microsoft.

- **I lap and Mapping System**
  - The Housing Enabling team access planning applications and preapplication consultations through the planning systems.

- **SDS Proval LS**
  - The Housing Development team use a financial assessment tool for the future development of sites.

- **Adelante**
  - Cash income system that interfaces with Orchard.

- **Agresso**
  - Manages accounts payable, accounts renewable and the general ledger. (invoices, authorisations and payments).

- **Website systems**
  - Jadu is used to create the Council's website and Firmstep for web based applications (online forms).

- **Red Oxygen**
  - A texting system used by the Housing Options team to contact applicants and landlords.

- **Business Objects**
  - A universe to enable reporting from Orchard raw data.

- **SafetyNet**
  - Case sharing system with Police and statutory agencies

Housing IT Development

10. Over the last few years the Housing Service has prioritised and resourced IT improvements. The Housing IT development work plan and all Housing IT development requests are reviewed by an officer governance group, with Housing and IT representatives chaired by the Strategic Director of Frontline Services. The Housing IT Governance Group assesses the business case, priority and capacity of new projects.

11. The Process Improvement Programme (PIP) in 2014/15 reviewed and improved key housing management and maintenance service delivery processes. The programme achieved its aims to reduce manual handling, maximise the use of Orchard and improve tenant satisfaction.

    Process Improvement Programme: Projects

Housing Maintenance - Interface with contractor(s) and processes for:
• Responsive repairs
• Planned maintenance
• Cyclical works
Housing Management – processes for:
• Tenancy conditions
• Managing tenancies
• Rent Services
• Change in tenancy circumstances
Leasehold management – processes for:
• Right to buy
• Service charges and invoicing
• Section 20 consultation

    The project also delivered on implementing electronic interfaces between Waverley and its maintenance contractors (Annexe 1).

12. Customer Dashboard – there is a common issue for all service providers that data is held by different teams in different locations. This can lead to poor customer service as there is no central record of actions, information or guidance provided. The

housing team launched the Orchard Customer Dashboard in 2016 to provide a comprehensive view of customer contacts (<u>Annexe 2</u>).

13. Orchard Upgrades – the housing service is now working on the latest release of database. Upgrades and patches have been reviewed, tested and installed to maximise functionality of the system. In 2017, IT completed a comprehensive upgrade of the Business Objects reporting tool.

14. Keystone development - in 2017 the team have implemented a new servicing module to manage health and safety reviews and works.

15. Website Review – in 2016/17 all web pages were reviewed, deleted or edited to provide clear transactional based information.

16. Future developments and workstreams include:

- Orchard-Agresso interface – the IT Governance group has championed this interface to stop double-handling of invoices in Orchard and in Agresso. The interface is currently in testing ahead of going live.

- Digital platform – the Housing team have started work to pilot the corporate digital solution to improve the range of service options to residents. The first phase is to develop a digital platform for tenants to view their rent balance and account details. The project will be rolled out to other transactions to allow tenants to self service. Thus reducing avoidable contacts and free capacity to support those in need.

- Maintenance Procurement Project and new contracts implementation.

- Compliance with GDPR.

- Email integration (Orchard and Outlook).

- Orchard development – ongoing review and update of key management and maintenance processes.

- Texting development.

- Office upgrade – corporate initiative to move all users to Office 365 in 2017/18.

Staffing

17. The provision of IT is supported by the Corporate IT team and one dedicated project officer in Housing. Challenges in recruitment, demand for IT services and corporate initiatives all have an impact on the capacity of the IT team to support the Housing service.

18. Within the Housing team, IT has historically been under-resourced and under-developed. The lack of capacity and resources has impacted/delayed project progression and the risk to service delivery has been recognised. The Orchard system had not been kept up to date before the Orchard Project Officer started in post 2014. The Orchard Project Officer is working to identify Orchard Champions

within each team to add support, training and involvement in Orchard processes and developments.

Conclusion

19. The Housing Service has a comprehensive range of IT systems to support service delivery. The IT Governance Group supports and champions changes and developments. There is a clear vision for increased IT capabilities with a digital platform. The team has a continuous improvement ethos to deliver ongoing system developments to increase efficiencies and improve customer service. As with all IT systems, user knowledge, process development, data input and housekeeping are essential to the integrity of the system.

20. The team is well placed for future developments but recognises the need for ongoing training, user engagement and strong performance management. To deliver future developments and be fit for purpose the Housing team is minded to request additional resources at the 2018/19 budget setting process.

Recommendation

It is recommended that the Housing Overview & Scrutiny Committee considers the information provided, and agrees any observations or matters to be followed up by the Committee.

Background Papers

There are no background papers (as defined by Section 100D(5) of the Local Government Act 1972) relating to this report.
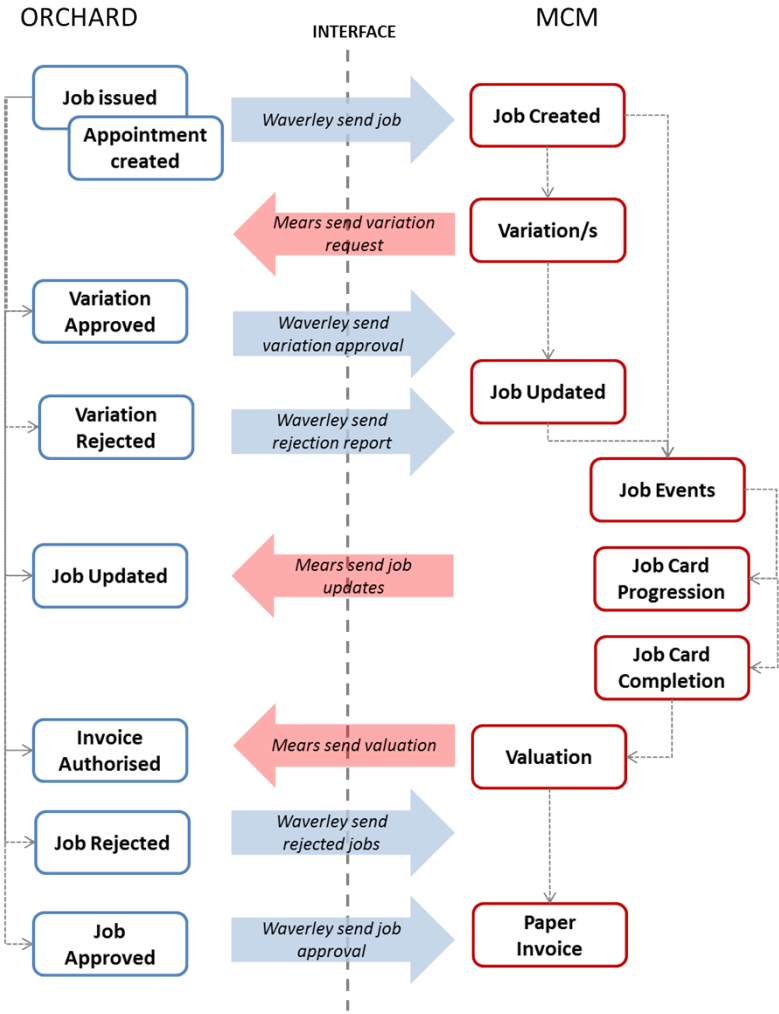
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Process Improvement Project: Project Purple

This diagram shows the process flow of a job once it is issued to the main contractor. The job information is passed through the interface and Orchard is updated automatically. The updates are sent between the two systems in standard orchard files. The process starts with the job being issued to the contactor and ends when the paper invoice is sent to Waverley for the job(s)

Information flows between the systems either instantly or within ten minutes depending on the event.

Orchard customer dashboard

Go live - Monday 4 April 2016

ONE SERVICE

ONE CUSTOMER

ONE VIEW
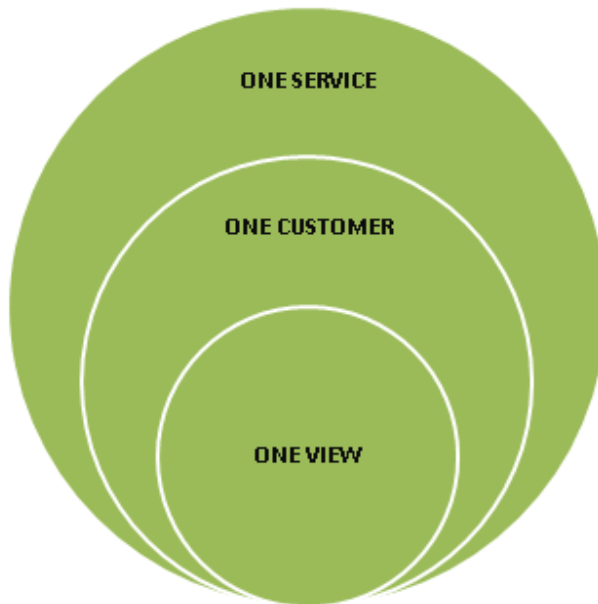
Remember to record all customer contacts on the new Dashboard to give one comprehensive view the next time the customer calls