

To: Finance, Resources and Customer Service Policy Board

On: 8th June 2023

Report by: Director of Finance and Resources

Heading: Contract Authorisation Report for the Customer Portal and Customer Relationship Management System (Reference RC-CPU-22-307)

1. **Summary**

- 1.1 The purpose of this report is to seek the approval of the Finance, Resources and Customer Services Policy Board to award a Contract for the Customer Portal and Customer Relationship Management System to Granicus-Firmstep Limited.
 - 1.2 The recommendation to award the Contract follows a procurement exercise conducted in accordance with Framework Schedule 5: Award Procedure and the Customer Guidance issued for Lots 1-3 of the Crown Commercial Services G-Cloud 13 Framework Agreement RM1557.13 and the Council's Standing Orders Relating to Contracts for an above Government Procurement Agreement (GPA) Threshold Services contract.
 - 1.3 A Contract Strategy was approved by the Head of Digital, Transformation and Customer Services and the Strategic Commercial and Procurement Manager on the 20th April 2023.
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2. Recommendations

It is recommended that the Finance, Resources and Customer Services Policy Board:

- 2.1 Authorise the Head of Corporate Governance to award the Contract for the Customer Portal and Customer Relationship Management System to Granicus-Firmstep Limited, being a Call-Off Contract made under the Crown Commercial Services G-Cloud 13 Framework Agreement RM1557.13, in accordance with the award procedure for this Framework.
- 2.2 The initial term of the Contract is 3 years with the Council's option to extend the Contract (extension period) for up to 12 months. The proposed Contract start date is the 2 October 2023, however, the actual date will be formally confirmed in the Crown Commercial Services G-Cloud 13 Framework Agreement RM1557.13 Call-Off Contract (Order Form).
- 2.3 The Contract value for the initial 3-year term will not exceed £399,090 excluding VAT. Where the optional extension period is utilised, the additional value will not exceed £133,030 excluding VAT, with a total value of £532,120 excluding VAT.

3. Background

- 3.1 The Council has a requirement for a Customer Portal and Customer Relationship Management System. The Council launched My Account, an online self-service customer access portal in March 2016 using the Firmstep Customer Platform and Forms solution (supplied by Granicus-Firmstep Limited) and this system has enabled the Council to meet these objectives. Customers can securely access a range of council services on the Firmstep platform (including Council Tax; Benefits; Housing Rent and online payments) utilising the Improvement Service's mygovscot myaccount as the means of authentication. The Customer Portal and Customer Relationship Management has become a critical system in the delivery of customer services to Renfrewshire citizens and most of the Council services that the public used either face to face or telephone can now be accessed online via the portal.
- 3.2 The Council's current contract for Customer Portal and Customer Relationship Management System expires on 1st October 2023. The current contract Service Provider is Granicus-Firmstep Limited.
- 3.3 The Council identified the Crown Commercial Services G-Cloud 13 Framework Agreement RM1557.13 (the Framework) as a suitable route to market. The

Framework consists of 4 Lots and Lot 2 of this Framework offers a suite of cloud provisioned software and associated services.

- 3.4 Following the Framework Schedule 5: Award Procedure and the Crown Commercial Services RM1557.13 G-Cloud 13 Lots 1-3 Customer Guidance Buying Process, the Council followed the steps 1-3 using search criteria and filters as detailed below:

Search Criteria Number	Search criteria and filter applied	Search Result (Suppliers)
1	Customer Self Service, Portal	19
2	CRM System	19
3	Data storage and processing locations - United Kingdom and European Economic Area (EEA)	19
4	Management access and authentication - 2 factor authentication	10
5	Management access and authentication -user name and password	10
6	Metrics Reporting -API access	3
7	Metrics Reporting -reports on request	2
8	Security certification - ISO / IEC 27001 (service security)	2
9 and 10	User authentication - 2 factor authentications and username and password	2
11 and 12	User support - email or online ticketing and phone and mail or online ticketing and phone	2

- 3.5 After applying all relevant filter and search criteria, two suppliers were identified and progressed onto stage 4 evaluation and selection. The two suppliers were Granicus-Firmstep Limited and Arrow Business Communications Limited.

In line with the step 4 evaluation and selection process, a desk top analysis of both Suppliers was conducted by Council officers against the Council's requirements and the individual Supplier Service Descriptions available on the Contract Award Service (the hosting platform for the Framework). The desk top analysis identified that Arrow Business Communications Limited solution could only partially meet the Councils requirements with regards to the scope, functional requirements and user interface however Granicus-Firmstep Limited could meet all of the requirements, therefore the Council was able to progress to stage 5 award and make a direct award under the Crown Commercial Services G-Cloud 13 Framework Agreement RM1557.13 to Granicus-Firmstep Limited. The Contract will be formed using the Framework Award, Call off Contract Order Form and Call-Off Terms.

- 3.6 Community benefits were requested as part of the Framework Award Procedure and Granicus-Firmstep Limited will confirm the community benefits in the Call-Off Contract Order Form.

Implications of the Report

1. **Financial** – The financial status of Granicus-Firmstep Limited was assessed which confirmed that the organisation satisfied the Council's requirements in relation to financial stability.
2. **HR & Organisational Development** – No HR & Organisational development implications have arisen or are anticipated.
3. **Community/Council Planning** –
 - Tackling inequality, ensuring opportunities for all – this contract will allow the residents of Renfrewshire to access a wide range of services online at their convenience.
 - Working together to improve outcomes – this contract will support the Council digital strategy and continue to provide the services required to the residents of Renfrewshire.

4. **Legal** - The procurement was carried out in accordance with Framework Schedule 5: Award Procedure and Customer Guidance issued for Lots 1-3 of the Crown Commercial Services G Cloud 13 Framework Agreement RM1577.13 and the Council's Standing Orders Relating to Contracts.
5. **Property/Assets** - No property/assets implications have arisen or are anticipated.
6. **Information Technology** – This contract will ensure continuation of the Customer Portal and Customer Relationship Management System that allows the citizens of Renfrewshire to access critical services via the portal rather than face to face or telephone appointments.
7. **Equality & Human Rights**
(a) The Recommendations contained within this report have been assessed in relation to their impact on equalities and human rights. No negative impacts on equality groups or potential for infringement of individuals' human rights have been identified arising from the recommendations contained in the report. If required following implementation, the actual impact of the recommendations and the mitigating actions will be reviewed and monitored, and the results of the assessment will be published on the Council's website.
8. **Health & Safety** – There are no health and safety implications associated with the award of this Contract.
9. **Procurement** - The procurement exercise was conducted in accordance with Framework Schedule 5: Award Procedure and the Customer Guidance issued for Lots 1-3 of the Crown Commercial Services G-Cloud 13 Framework Agreement RM1557.13 and Renfrewshire Council's Standing Orders Relating to Contracts.
10. **Risk** – The insurance cover held by Granicus-Firmstep Limited were assessed as part of their appointment on to the Framework and will be reviewed by the Council's Risk Management.
11. **Privacy Impact** – Granicus-Firmstep Limited are required to adhere to the Framework conditions and Call-Off terms which include provision for Data Protection and GDPR and will also be reviewed by the Council's Information Governance team as part of the award process and agree to the Data Protection requirements as noted within the Order Form and Call-Off Contract Schedule 7.
12. **Cosla Policy Position** – No Cosla Policy Position implications have arisen or are anticipated.

13. **Climate Risk** – The level of impact associated with provision of this service has been assessed using the Scottish Government Sustainability Test and is considered to be low risk.
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List of Background Papers

None

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