

To: Finance, Resources and Customer Services Policy Board

On: 30 August 2017

Report by: Chief Executive and the Director of Finance and Resources

Heading: Contract Authorisation Report: Integrated Customer Portal and Customer Relationship Management (CRM) Solution

1. Summary

- 1.1. The purpose of this report is to request the Finance, Resources and Customer Services Policy Board to authorise the Head of Corporate Governance to enter into a contract for an Integrated Customer Portal and Customer Relationship Management (CRM) Solution, reference RC/FA/135/18.
 - 1.2. The procurement exercise was conducted in accordance with the Call Off Contract requirements under Lot 1 of the Scotland Excel Framework Agreement for Customer Service Platform (0415) and the Council's Standing Orders Relating to Contracts clause 29.5 use of existing Framework Agreement
 - 1.3. A contract strategy was approved by Head of Customer and Business Services and the Strategic Commercial Category Manager on the 4th July 2017.
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2. Recommendations

- 2.1. It is recommended that the Finance, Resources and Customer Services Policy Board authorise:

- a. The Head of Corporate Governance to award the contract for the Integrated Customer Portal and Customer Relationship Management (CRM) Solution to Firmstep Limited
 - b. The total contract value is £344,178 excluding VAT, this value includes the extension periods
 - c. The contract is for a initial period of 3 years with the option to extend for a further 2 occasions, each for a 12 month period. The Contract will commence on 2nd October 2017 or the date stated in the Letter of Acceptance.
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3. Background

- 3.1 The Council has identified the need to develop a programme of change to meet its strategic objectives and create a modern, prosperous and fair Renfrewshire. "A better future, A better Council" programme has been developed to enable the Council to deliver the actions and improvements for the Councils citizens, make better use of processes and technology, smarter use of assets and improve communication.
- 3.2 The Council have taken the decision to migrate the existing Customer Portal (CP) and the Customer Relationship Management (CRM) solution into a single secure integrated solution in order to manage all customer contact and deliver all online services. This will ensure better digital access for customers and will allow the Council to develop new ways of delivering better customer services and the demand for digital access for services will be met.
- 3.3 The procurement exercise was tendered as a mini competition under the Scotland Excel Framework Agreement for Customer Service Platform Lot 1 Hosted Solution (0415). The procurement exercise was conducted in accordance with the further competition requirement under the Scotland Excel Framework Agreement for Customer Service Platform and the Council's Standing Orders Relating to Contracts 29.5 use of existing Framework Agreement.
- 3.4 The two (2) Suppliers on Lot 1 were invited to participate in this mini competition. The deadline for tender submissions for this mini competition was 12 noon on the 13th July 2017. Both suppliers made a tender submission.
- 3.5 Both suppliers' tender submissions in relation to qualification were evaluated by Scotland Excel at the time of awarding places to onto the Framework Agreement and were deemed to meet the minimum requirements. Quality scores was not restricted to the Scotland Excel Framework therefore this enabled Renfrewshire to apply specific scoring for the methodology and approach to the migration of the Customer Portal (CP) and the Customer Relationship Management (CRM) systems.
- 3.6 Both tender submissions were evaluated against a set of award criteria which was based on a quality / price ratio of 60% / 40%. The scores relative to the award criteria of each tenderer are as follows:

Tenderer Name	Quality Score (60%)	Price Score (40%)	Total Score (100%)
Firmstep Ltd	44.45%	30.55%	75.00%
Netcall Telecom Ltd	31.55%	40.00%	71.55%

- 3.7 It is recommended that the Contract is awarded to Firmstep Ltd, who based on evaluation, have provided the most economically advantageous tender.
- 3.8 Firmstep Ltd have committed to deliver the following community benefits as a result of delivery of this contract:
- 7 x Work placements (16 + years of age)
 - 1 x Further Education visits
 - 3 x Work Experience Placements (14-16 years of age)
 - 1 x S/NVQ (or equivalent) for an existing employee
 - Will provide non financial support for a Community Project

Implications of the Report

1. **Financial**
All suppliers' tender submissions in relation to financial stability were evaluated by Scotland Excel at the time of awarding places to onto the Framework Agreement and were deemed to meet the minimum requirements

The implementation costs will be covered by the Better Council Change Programme resources and that future revenue costs will met from the release of efficiencies.
2. **HR & Organisational Development**
No TUPE implications have arisen or are anticipated
3. **Community Planning –**
Empowering our Communities – Improving customer experience and provide easy access to the solution which can be accessed through different channels i.e. smart phone, tablet or PC

The community benefits submitted under this contract are listed within section 3.7 of this report

4. **Legal –**

The procurement exercise was conducted in accordance with the requirements for further competition for Scotland Excel Framework Agreement for Customer Service Platform (0415), and the Council's Standing Orders Relating to Contracts 29.5 use of existing Framework Agreement.

5. **Property/Assets –**

No property/asset implications have arisen or are anticipated

6. **Information Technology –**

The implementation of an integrated CRM/CP provision is aligned with the strategic direction of ICT and the Council's Digital Strategy.

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 -**

All suppliers' tender submissions in relation to health and safety were evaluated by Scotland Excel at the time of awarding places to onto the Framework Agreement and were deemed to meet the minimum requirements

9. **Procurement –**

The procurement exercise was conducted in accordance with the requirements for further competition for Scotland Excel Framework Agreement for Customer Service Platform (0415) and the Council's Standing Orders Relating to Contracts 29.5 use of existing Framework Agreement.

10. **Risk -**

All suppliers' tender submissions in relation to insurance risk were evaluated by Scotland Excel at the time of awarding places onto the

Framework Agreement and were deemed to meet the minimum requirements

11. **Privacy Impact –**

Following initial discussion with the Council's Information Governance team, a Data Processor Agreement (DPA) was agreed and will be formalised with Firmstep Limited.

12. **Cosla Policy Position –**

No Cosla Policy Position implications have arisen or are anticipated

List of Background Papers

(a) None

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