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Planning

## **Contract for the Provision of a Housing and Assets Management System**

THE EXTRACARE CHARITABLE TRUST

F01: Prior information notice

Prior information only

Notice identifier: 2024/S 000-017339

Procurement identifier (OCID): ocds-h6vhtk-046d68

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### **Section I: Contracting authority**

#### **I.1) Name and addresses**

THE EXTRACARE CHARITABLE TRUST

7 Binley Business Park Harry Weston Road

COVENTRY

CV32SN

#### **Contact**

Rosalie Schultz

#### **Email**

[procurement.tender@extracare.org.uk](mailto:procurement.tender@extracare.org.uk)

#### **Telephone**

+44 2475186580

**Country**

United Kingdom

**Region code**

UKG33 - Coventry

**Charity Commission (England and Wales)**

327816

**Internet address(es)**

Main address

<https://www.extracare.org.uk/>

**I.3) Communication**

Additional information can be obtained from the above-mentioned address

**I.4) Type of the contracting authority**

Body governed by public law

**I.5) Main activity**

Housing and community amenities

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## **Section II: Object**

### **II.1) Scope of the procurement**

#### **II.1.1) Title**

Contract for the Provision of a Housing and Assets Management System

#### **II.1.2) Main CPV code**

- 72260000 - Software-related services

#### **II.1.3) Type of contract**

Services

#### **II.1.4) Short description**

The ExtraCare Charitable Trust (ExtraCare) is seeking to procure a preconfigured cloud based Housing and Assets Management software as a service.

The requirement is for a modular, "off the shelf" solution which may require some configuration or customisation, consisting of interconnected modules built on Microsoft Dynamics platform and with a proven product suitable for use within the Authority's market which includes an element of leasehold properties, social housing and lifestyle services and care.

The requirement is not for a solution design service or bespoke software development.

The Authority estimates that the potential contract value may range between £1,500,000 to £2,700,000. Depending on the approach and timescales for implementing the requirements.

The Authority is considering a contract term of 5 years with the option to extend for up-to 2 more years.

#### **II.1.5) Estimated total value**

Value excluding VAT: £2,700,000

#### **II.1.6) Information about lots**

This contract is divided into lots: No

## **II.2) Description**

### **II.2.2) Additional CPV code(s)**

- 48000000 - Software package and information systems
- 72261000 - Software support services
- 72263000 - Software implementation services
- 72265000 - Software configuration services
- 72268000 - Software supply services

### **II.2.3) Place of performance**

NUTS codes

- UK - United Kingdom

Main site or place of performance

ExtraCare head office is located in Coventry, UK, and operates 18 retirement villages across the UK and has 36 charity shops across across the Midlands and the North of England.

It is not a known or immediate requirement that work is performed on site, although this may be required from time to time.

### **II.2.4) Description of the procurement**

ExtraCare is seeking to procure a preconfigured cloud-based Housing and Asset Management software as a service.

The requirement is for a modular, "off the shelf" solution which may require some configuration or customisation, consisting of interconnected modules built on Microsoft Dynamics platform.

We are seeking a product suitable and proven for use within the Authority's market which includes an element of leasehold properties, social housing and lifestyle services and care.

There are approximately 4199 properties across our villages, consisting of apartments, cottages, and bungalows, of which approximately 20% of our housing portfolio is social housing, whilst 80% are leasehold.

Our key objectives are:

- To meet our legal and regulatory needs.
- To deliver economy and efficiency benefits.
- To deliver a more effective service, allowing us to focus on our aim of delivering better lives for older people.

The selected platform will replace legacy systems and other largely manual or spreadsheet-based data and processes, improving effectiveness and efficiency across the organisation.

Key functional areas include the ability to manage:

- Resident leases and tenancy management.
- Income management including rent, service charges (all types). Setting and collecting rent and service charges, and management reporting.
- Asset Management- including building/safety compliance, stock condition and asset registers down to component level, preventative maintenance planning and investment management.
- Reactive repairs including - work order, workforce, and cost management.
- Housing management, including annual visits, complaints, Anti-Social behaviour, statutory resident communications.
- Management reporting including NROSH statutory reporting; and
- Sales & Marketing.
- Case management (including for Anti-social behaviour, complaints, etc).

The contract will need to support a phased approach to deployment of the modules, enabling an initial set of modules to be implemented, with the option of implementing further modules at the discretion of ExtraCare during the contract.

The requirements are for the provision of the software (including licenses), implementation services, training, and support.

Route to Market: It is anticipated that a Restricted (procurement) Procedure will be used, however depending on the level of interest expressed, other routes to market may be considered.

Interested suppliers are encouraged to express their interest by emailing:  
[procurement.team@extracare.org.uk](mailto:procurement.team@extracare.org.uk)

We may seek to undertake some pre-market engagement prior to the formal tender exercise. If you would like to be considered to participate in any pre-market engagement activity, please express your interest no later than 14th June 2024.

#### **II.2.14) Additional information**

The ExtraCare Charitable Trust is a registered charity and as such must carry out charitable purposes for the public benefit.

ExtraCare was established in 1988 to provide services to older people and this is explicit in our Vision to deliver 'Better Lives for Older People' and our Mission 'Creating sustainable communities that provide homes older people want, lifestyles they can enjoy and care if it's needed.'

To deliver our vision and mission we essentially do three things: we develop new villages, we operate villages and schemes, and we support our villages, schemes and our 'extra-care' model through fundraising, advocacy and research.

#### **II.3) Estimated date of publication of contract notice**

4 July 2024

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## **Section IV. Procedure**

### **IV.1) Description**

#### **IV.1.8) Information about the Government Procurement Agreement (GPA)**

The procurement is covered by the Government Procurement Agreement: Yes

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## **Section VI. Complementary information**

### **VI.3) Additional information**

The Contracting Authority reserves the right not to award any contract pursuant to this procurement exercise and/or to abandon this notice at any time and/or to proceed with a subsequent tender exercise for part of the services at its sole discretion.

The Contracting Authority shall have no liability whatsoever to any applicant or potential supplier as a result of its exercise of that discretion. For the avoidance of doubt, all costs incurred by any applicant and/ potential supplier in engaging with this notice shall be incurred entirely at that applicant`s/potential supplier`s risk.