

**Specification**

**Asset Software System**

**CHS (Ref: T25/003/CHS)**

1. General Requirements

CHS require the use of an asset management system. We use Aareon QL (QL) as our housing management system and current asset database, and this receives work completion data from our contractors in real time. The new asset management system will need to be configured in line with the current asset management data set up on QL. Both systems will need to speak to each other to ensure the data remains consistent and live updates are provided throughout the period both systems are in use.

CHS’ compliance data is managed within QL therefore a traditional compliance module is not required from the asset management software and instead CHS’ focus is on the Decent Homes Standard and the Housing Health and Safety Rating System (HHSRS), alongside compliance with Awaab’s Law. The asset management system will need to demonstrate CHS undertake stock condition surveys and that this data meets the requirements of the Social Housing Regulators Safety and Quality Standards.

As a Registered Social Landlord, CHS has also committed to improving the energy efficiency of its customers’ homes and contributing to reducing carbon emissions. CHS is required to bring all homes to EPC Band C by 2030. CHS is also committed to achieving the aim of not installing replacement gas boilers from 2035 and reaching the target of Net Zero Carbon from its on-going activities by 2050.

To plan for delivering against these targets, CHS has started to model the potential level of investment required and the benefits this investment will bring. This level of investment is in addition to the investment already planned to maintain CHS’s properties to the standards set out in CHS’s Asset Management Strategy. More in-depth energy modelling tool is now required to validate the exercise already undertaken that will lead to developing a more targeted approach.

We require the asset management software to provide a business intelligence platform that allows CHS to really understand the performance of its assets, measured against the organisation’s objectives, to inform long term strategic asset management decisions in relation to enhanced data visualisation, interrogation and mapping which can drill down to an individual property level as well as show the financial performance of stock over 5, 10 ad 30-year period.

We would also like a system that enables mobile data collection to enable us to efficiently carry out condition surveys and re-inspections using consultants and/ or internal CHS staff. The mobile data collection system should provide full connectivity to speed up the survey process, whilst at the same time maintaining consistency and accuracy. The mobile data collection systems automatically synchronise with the main software to ensure the latest survey data is always available to the people who need to access it.

1. Testing

To enable a robust and efficient quality assurance of delivered system, bidders shall include the configuration, testing and handling of issues during the mobilisation period. To conduct any test, a dedicated IT-environment should be provided on which the services can be tested prior to the release on the production software. The specific testing procedures will be agreed with the successful provider. The tenderer should provide detailed information on handling and executing such testing procedures during implementation, project delivery and maintenance phase.

1. Training

Within the testing phase, specified training for staff members of CHS Property Services team who will eventually operate the system shall be provided during the mobilisation phase. The training shall enable the operational team to understand and get acquainted with the system behavior and workflows of the business processes. The time, place, material, involved persons, documentation, expected results and other different parameters are to be defined with the supplier. To ensure a successful training, suitable documentation and training material should be provided to all participants, in the best case in advance of the dedicated training sessions.

1. Resources

It is important for bidders to provide resources and expertise of staff members to support the long-term success of the product. This is likely online or phone support services which must provide after sales support to the Property Services team who will take the leading role and will be the one with whom manage the system after the service is mobilised. During the mobilisation period, project management is required on both sides and is essential for the success of a project. Communication within the project is essential. The bidder shall inform on exchanges, particularly on used communication tools, such as email for standard communication and meeting tools for virtual communication like MS teams.

1. Project Schedule

The bidder must provide a project schedule listing the detailed project steps with deadlines, respective milestones and the critical path. It must respect the deadlines given by CHS and reflect the durations to implement the required aspects. Therefore, the project schedule is to be agreed between CHS and the supplier on award of the tender.

1. Software

It should provide the technical capability to execute the required business processes in a highly digital way using secure, reliable, and automated processes. The business-related software is primarily a customized software solution, which has been developed and configured to serve the requirements Registered Social Landlords and the duties set out by the Social Housing Regulator. The bidders shall be requested to provide detailed product information for the tendered software, to evidence that it meets standard asset database specifications and is in accordance with good practice. The architecture of the IT-service is subject to the bidder’s set-up and update their software needs to evaluate the advantages and disadvantages of each architecture and include CHS’ system in future changes in a way which benefits both parties.

Updates of the software should be a standard process to enable proper and future-proof operations of the software apart from new requirements which are needed because of market design changes or new legislative decisions. CHS shall be made aware of the continuous development of IT-solutions. It is difficult to predict the extent of future developments after the implementation phase. But still a respective budget shall be considered throughout the operation phase to guarantee the smooth and robust functioning of the IT-solution based on future design improvements.

1. Security

IT-solutions need to be secure in various aspects to properly protect the processed data. The bidder shall deal with the most critical security risks for the IT-service during the maintenance and future change requests. The following security criteria shall be addressed within the requirement specification and correspondingly the solution concept specified by the bidders:

* Login: A dedicated login shall secure the access limitation to the software to a specified group of users. To access the software, the login needs to be successfully set-up.
* Role based security concept: the users may operate different business processes following a role-based security concept. By setting different rights and roles within the software, the access to different data can be restricted and flexibly updated in the future based on the request of the software operator.
* Encryption and signatures: any transactions or actions by users or via system to system should be highly secure. This is necessary to clearly identify the user or system, which sends, receives, or processes data and, in addition, provides higher security against manipulation or data loss.
* Documentation of all user actions and tracking (Audit Log): each action shall be well documented within the software enabling tracking and verifying user actions. Some of the information may be accessible for specific users in the software.
* Protection against common threats: the bidder shall provide information on how the offered service is protected against common threats such as hacking, electricity outages or fire.
* Backup restore concept: Data loss must be prevented in any case. Therefore, the bidder must provide a respective backup and restore concept.
* Integrity: the bidder shall provide a meaningful and comprehensive data integrity model. Completeness and correctness of data and information stored in the software are of importance. Any modification is restricted to authorised users only.
1. Data protection and security: Data protection regulation (GDPR General Data Protection Regulation and any national requirements related to data protection and data security must be provided by the bidder.
* Risk prevention such as secure coding and testing practices must be considered based on IT standards during the project implementation, maintenance, and future change requests.
1. Workability

The tendered IT-service may serve different requirements particularly related to the number of business processes. These processes are conducted by specific users with different user rights. Such circumstances must be reflected in the workability of the provided software. CHS should be able to add and modify content that is subject to numerous changes particularly in the areas of users, companies, their roles, and rights, as well as to enable smooth and future-oriented use of the service with the least involvement of the supplier (bidder). CHS should be able to do this on their own. CHS will provide a detailed list of users and their access requirements.

1. Performance

The software service provider shall ensure that the data volume of actual and future processes will not affect the usability of the system and exceed the performance. The standard interface of IT-services should support the user friendly and intuitive handling of the IT-solution. Aspects such as the appearance, the navigation structure and authorizations shall be easily adaptable and expandable. They shall be suitable for access to people with disabilities in order to guarantee equal rights.

1. Interface

The software needs to interact with QL. The specification will be developed within the implementation of the respective project phase. Interfaces of an IT-trading platform are particularly for the purpose of:

* Receiving completion data for components such as kitchens and bathrooms.
* Ensuring property element data matches QL e.g. components are added and updated.
* Ensuring data discrepancies are flagged.
* Reducing the reliance on the software as one source of data.

Any data exchange is performed using defined data formats which need to be respected by all system participants represented by a service or system user. In case of proprietary data structures, the data formats need to be defined explicitly within implementation period. In general, wide-spread data formats for machine-to-machine communication are .XML and Microsoft .CSV in the housing sector. The latter may also be used by system users due to a more suitable human readable structure.

1. Reporting

Any kind of data, user actions or automated processes must be logged in the IT-solution. The reports must be displayed in a user-friendly way to be accessed by a specific user group. Other information might just be stored and made available for reporting purposes. The needed extent of monitoring and reporting activities shall be flexible to allow reporting on all data within the system. The bidder may provide a standard tool for reporting, which can facilitate a way to withdraw statistics that can be used for publication. Reporting shall be provided in a way that they can created by CHS’ operations team without involvement by the IT-provider (bidder) during the maintenance period

1. Availability

The availability should be very high, for example 99.9%. In case of working day operation, the availability might be limited to 99.9% during support times (e.g. working days 09:00 to 17:00). This releases pressure from the bidder to immediately resolve runtime failures outside operational hours. Still, there should also be an availability defined for the period outside support times, but this can be less, for example 99%. The definition of the availability influences the maintenance costs significantly on both sides. Typically, the downtimes for planned updates should be handled on weekends outside of critical business times.

1. Support

In case of 24/7 support, support during office hours, usually between Monday to Friday excluding public holidays. This might be favourable in case the IT-solution is mainly used during business days and no business-critical processes are executed outside of this timeframe, particularly on weekends. Typically, three types of priority classes (high, medium and low) should be provided to prioritise calls which correspond to the criticality of the problem and the influence on the use of the IT-service.