REPORT TO: **POLICY AND RESOURCES COMMITTEE 12 DECEMBER 2016**

REPORT ON: **CASE MANAGEMENT AND MANAGEMENT INFORMATION SYSTEM**

REPORT BY: **EXECUTIVE DIRECTOR OF CORPORATE SERVICES**

REPORT NO: **408-2016**

1.0   PURPOSE OF REPORT

1.1   To recommend the purchase and supply of a Case Management and Management Information System to replace the existing in-house Information Technology (IT) Systems for Communities Learning and Development (CLD).

2.0   RECOMMENDATIONS

2.1   The Committee is asked to approve the following:-

 a) Purchase the supply and services of Cognisoft as the best value choice for the Case Management and Management Information System, hosted and managed by the Supplier.

3.0   FINANCIAL IMPLICATIONS

3.1   The total purchase and implementation cost of £39,800 will be funded from the 2016/17 IT capital budget.

3.2   Annual external costs for licensing, maintenance and support of £12,653 from year 1 onwards will be met from future Neighbourhood Services Revenue Budgets for a five year period.

3.3   Internal staffing costs for administering the system will be contained within the Neighbourhood Services Department and IT Revenue Budget.

4.0   MAIN TEXT

4.1   The following critical factors have influenced the procurement of the new Case Management and Management Information System:-

a) The existing application needs to be substantially upgraded to enable it to be deployed on smart hand held devices. The Council's approach was that external IT software solutions should be considered;

b) The need to make use of technology to mobilise the workforce, improve communication channels with customers and enable services to be delivered in a more flexible way;

c) The inflexibility of the current application to be adapted for deployment on mobile devices;

d) The impact of Corporate Services (IT) workforce planning and the reality of the reducing capability to maintain and enhance existing in-house systems in a rapidly changing environment;

e) It is a statutory requirement for Local Authorities to report on CLD under the CLD regulations (Scotland) 2013 and they are subject to inspection on performance and data showing trends and targeting of the service.

f) The need for Communities staff to be able to self-help in the creation and amendment of Management Information reports.

4.2   A programme of work to approach the market place for Case Management and Management Information Systems was initiated and managed by Customer Services and IT with each of the stakeholder services represented.

4.3   It was known that a number of market place solutions were already used by other Local Authorities. An Invitation to Quote would allow Dundee City Council to set out its requirements to the marketplace. A Quick Quote was advertised on Public Contracts Scotland advertising portal with 3 companies invited to quote.

4.4   An Invitation to Quote (ITQ) Team was established to prepare the necessary invitations to quote which included the specification of requirements. This group represented the key business areas within the Communities function of the Neighbourhood Services that would benefit from using such a new solution.

4.5   The tender assigned weightings to requirements within specific criteria which were applied as 70% for "Quality, aesthetics and functional characteristics and 30% "Price". Supplier tender responses were evaluated as well as scenario based product demonstrations held.

4.6   Two bids were received and the outcome from the qualitative evaluation phase and the 3 year total life cost, incorporating both product and maintenance cost figures were used to complete the Scottish Government Tender Evaluation Matrix to identify the preferred supplier/solution. For the provision of a Case Management and Management Information System the final scores were as follows:-

Ranking	Bidder	Quality Score (70%)	Price Score (30%)	Combined Score
1	Cognisoft	43.08	30	73.08
2	Agilecase	30.51	9.94	40.45

4.7   Cognisoft was identified and agreed to be the preferred supplier/solution for a Case Management and Management Information System for Communities Learning & Development.

4.8   The Cognisoft product is based on modern architecture, fully web based and flexible to meet future needs of the service. As such, it will meet the objectives of the Corporate Services (IT) workforce planning strategy.

4.9   As the system has inherent mobile functionality, information can be gathered and updated by staff "out in the field". This will create a culture where staff can easily access and record information without having to return to the office.

4.10   The system is accessible by business intelligence tools which will enable Communities staff to be self sufficient in the creation and maintenance of management information reports.

5.0   **POLICY IMPLICATIONS**

5.1   This report has been screened for any implications in respect of Sustainability, Strategic Environmental Assessment, Anti-Poverty, Equality impact Assessment and Risk Management. There are no major issues.

6.0   **CONSULTATIONS**

       The Chief Executive, Executive Director of Neighbourhood Services and the Head of Democratic and Legal Services were consulted in the preparation of this report.

7.0   BACKGROUND PAPERS

None.

Marjory Stewart
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