

## LONDON BOROUGH OF HAMMERSMITH & FULHAM

**Report to:** Jacqui McShannon, Executive Director of People's Services and Cllr Kwon, Cabinet Member for Adult Social Care and Health

**Date:** 01/07/2024

**Subject:** Purchase of the home care electronic monitoring and finance system (Access CM)

**Report author:** Jessie Ellis, Programme Lead

**Responsible Director:** Katharine Wilmette, Director of Adult Social Care

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### SUMMARY

This paper seeks agreement to award a contract to The Access Group for the use of their system Access CM, an electronic monitoring and finance system for commissioned home care and independent living services. Home care supports more than 1,500 residents in the community to live independently, including older, people with physical disabilities, learning disabilities, and mental health support needs. Approximately 70% of residents planned to move to the new contracts (patch and bridging) and current and new commissioned providers that will be required to use the system to monitor visit data. In addition, Access CM has a unique finance manager programme which interfaces with Mosaic for easy and accurate invoice management allowing the council to pay for services used rather than commissioned.

Digital Services completed a scoping exercise in March 2023 to study and explore options that met the requirements raised in the service request for a care management platform. This report evaluated and recommended a specific product that met the requirements sent out to the market. This paper recommends the purchasing of an electronic monitoring system with The Access Group for three years from 1 August 2024 – 30 June 2027 with the option to extend for a further one year as is the maximum term allowed on the Gov G-Cloud framework.

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### RECOMMENDATIONS

1. For the Cabinet Member to approve the purchase of the electronic monitoring system Access CM from The Access Group for a three-year contract a cost of £367,745 with the option to extend for a further one year at a potential total cost of £483,360.
  2. The system is purchased through the Crown Commercial Service G-Cloud 13 framework. G-Cloud 13 is an online catalogue where public sector customers can buy cloud-based computing services such as hosting, software and cloud support.
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## Wards Affected All

| Our Values  | Summary of how this report aligns to the H&F Values   |
|---|---|
| Building shared prosperity                                      | The homecare contracts that this service will help monitor are required to have a strong local presence in the form of a locally situated office which will help bring jobs for local people and support the local economy.   |
| Creating a compassionate council                                | This system will give the council valuable oversight on the time and length of homecare visits that the services are providing to residents. The data will support us to monitor the performance of the homecare providers and quality assure the services to get the best outcomes for our residents.  |
| Doing things with local residents, not to them                  |   |
| Being ruthlessly financially efficient                          | LBHF abolished charges for homecare to ensure all those who need it have access to the appropriate level of care and support to maintain or improve their independent living. The finance manager system enables the council to monitor visits to ensure we are only charged for services delivered.    |
| Taking pride in H&F   |   |
| Rising to the challenge of the climate and ecological emergency | As a technology company, The Access Group are placing focus on reducing their carbon emissions. Through their dedicated Carbon Reduction Plan they commit to purchasing renewable energy, vendor engagement programmes with a sustainable procurement policy and implement a sustainable travel policy. |

## Financial Impact

The cost for the three years contract is £367,745 with the option to extend for a further one year bringing the total potential cost of the contract to £483,360.

These costs include the cost of council licences, CM mobile per estimated number of residents on the home care contracts, and onboarding costs for the providers of the new home care and independent living contracts when they are implemented.

The first year has added set up costs in the form of consultancy days to develop and customise the system to meet our needs. This is due to the impending changes of homecare contracts, moving from three providers to seven new service providers and repurchasing of packages of care on Mosaic. The onboarding costs have been split across the term of the contract rather than upfront costs all in year 1. The costings are non-negotiable as they are the published costs on the Crown Commercial Service G-Cloud 13 framework that will be used to purchase the system.

The onboarding of the new contracts will not be needed at contract commencement (1 August 2024) as the contracts will not be implemented at the same time. These costs can be held back by The Access Group until they are needed. The contract will have part year effect at the start of the contract in August 2024, and at the end of the contract in Jun 2027 or 2028 if the extension is used. The cost of the contract will be funded from the Social Care capital grant in each respective year. Before the end of the contract (which may or may not be inclusive of the extension), a scoping exercise will need to be conducted to ensure the appropriate system is being used and value for money demonstrated.

Our current providers will need to continue to use the same system under the new contract. As the system itself doesn't change, no further modifications or mobilisations will be required.

Table 1 below sets out the associated costs by contract year.

**Table 1 – costs per year of the contract**

| <b>Product</b>   | <b>Year 1 (£)</b> | <b>Year 2 (£)</b> | <b>Year 3 (£)</b> | <b>Year 4 (£)</b> | <b>Total (£)</b> |
|--|-------------------|-------------------|-------------------|-------------------|------------------|
| <b>Concurrent CallConfirmLive! Licences</b>                            | 23,940            | 23,940            | 23,940            | 23,940            | 95,760           |
| <b>Landline AURA or CM Mobile ECM per SU</b>                           | 66,150            | 66,150            | 66,150            | 66,150            | 264,600          |
| <b>CMBI licences (2 named Writer licences 5 named Reader licences)</b> | 4,800             | 4,800             | 4,800             | 4,800             | 19,200           |
| <b>CMBI Provider Reader licences</b>                                   | 2,100             | 2,100             | 2,100             | 2,100             | 8,400            |
| <b>Fully Hosted Database Server Rental Support &amp; Maintenance</b>   | 9,000             | 9,000             | 9,000             | 9,000             | 36,000           |
| <b>Flightpaths (7 provider onboarding)</b>                             | 9,625             | 9,625             | 9,625             | 9,625             | 38,500           |
| <b>CM Project/ Consultancy Days</b>                                    | 15,200            |                   |                   |                   | 15,200           |

|   |                 |                 |                 |                 |                 |
|---|-----------------|-----------------|-----------------|-----------------|-----------------|
| <b>Mosaic Project/<br/>Consultancy Days</b> | 5,700           |                 |                 |                 | 5,700           |
| <b>Total:</b>                               | <b>£136,515</b> | <b>£115,615</b> | <b>£115,615</b> | <b>£115,615</b> | <b>£483,360</b> |

### ***Director of Finance Comments***

The recommendation above to purchase an electronic monitoring system “Access CM” will cost £367,745 over the proposed 3-year contract period. The option to extend for a further 1 year will mean potential overall total costs of £483,360.

The contract commencement date is the 1<sup>st</sup> August 24 which means there will be part year effects as follows:-

£102,386 for 2024/25  
£120,840 for 2025/26  
£115,615 for 2026/27  
£28,904 for 2027/28

In comparison, the current contract with Access is £75,470 per annum and the increase in costs are mainly due to the impending changes of homecare contracts, moving from three providers to seven new service providers.

The costs can be funded from available Social Care resource.

Finance Comments completed by Cheryl Anglin-Thompson, Principal Accountant, Commissioning, Health Partnerships & Public Health, Tel. 020 8753 4022. 22/06/22  
Date 15<sup>th</sup> April 2024

Finance Comments verified by James Newman, AD Finance, 19 June 2024

### **Legal Implications**

This report recommends that the Council awards a contract to Access UK Limited for the provision of electronic monitoring and finance software. The value of the contract is £483,360 (including the extension period).

The award is from a call off from the Crown Commercial Services G-Cloud 13 Framework (Lot 2). Awarding via a call off meets the requirements of the Council’s Contract Standing Orders and the Procurement Contract Regulations 2015.

The appropriate decision maker is the SLT Member.

The decision is a Key Decision (see Article 12 of the Constitution) and the report must be submitted to Committee Services for publication on the Council’s website.

Angela Hogan, Chief Solicitor (Contracts and Procurement) 24th April 2024

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**Background Papers Used in Preparing This Report**  
**None**

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## DETAILED ANALYSIS

### Proposals and Analysis of Options

1. A scoping exercise was undertaken by the Digital Services team to study and analyse the systems available in the market to meet the set of requirements to meet the service needs. An options paper was completed in March 2023 which recommended that The Access Group system Access CM (previously known as CM2000) was the most suitable system to match the requirements at the best value.
2. As part of the options analysis, a list of criteria provided the basis for assessing what services were required and for this procurement exercise, five providers were approached. In selecting shortlisted providers, one provider was identified to have functionality which clearly matched most of the requirements for home care monitoring solutions, however they decided not to participate after the demonstration and their internal discussions. To ensure a fair selection process, suppliers had an opportunity to demonstrate and to present their products. Obligation free mock data systems were set up with dummy data so we could evaluate the systems.
3. Of the systems evaluated, Access CM offered the best value system that met the requirements set out in the scoping exercise. The table below provides a summary of the options.

| System     | Summary   |
|------------|---|
| Provider A | Only offered a brokerage solution. There was no electronic monitoring or finance manager elements available                           |
| Provider B | Extensive configuration would have been required, and it was significantly higher cost than Access CM                                 |
| Provider C | No finance manager or interface with Mosaic would have meant increase in brokerage / finance teams time manually arbitrating invoices |
| Provider D | Chose not to take forward   |
| Access CM  | Minimal implementation costs with the most economically advantageous annual costs.  |

4. Access CM, is in use in both the Home Care and Reablement teams. Both teams also use Mosaic, the social care case management platform. Finance Manager is an integral part of Access CM, designed to automate payments to care providers by comparing actual, planned and commissioned care. In Mosaic, H&F create a care package that details the type of care needed, the frequency of visits, and the budget for this care package. Through the Access Group interface, Mosaic transmits this information to the Access CM tool and can be monitored by the H&F brokerage team. Care providers are informed of the care package and sent the associated purchase order (PO) via email, there is no separate system in place for the brokerage team; the entire process is

conducted via telephone and email communication with the care providers. As part of the scoping exercise we evaluated if it was worth purchasing the add on Adam brokerage solution but concluded that the costs outweighed the benefits.

**5. Option 1 (RECOMMENDED) – Award a 3 year contract with the option to extend for a further one year, without the Customer Success Plan add on.**

The cost of a 3-year contract is £367,745, the total cost rising to £483,360 if the one-year extension is implemented. This is the recommended option following the Digital Services team's options analysis. The other options considered did not fully meet the requirements or were considerably more expensive. Commissioning this system ensures we have an electronic monitoring system in place which works with the current commissioned providers and will be able to transfer packages and maintain oversight when the new contracts are awarded. It will provide continuity and assurances through the mobilisation period and the three- or four-years term reduces the time and expensive of further systems analysis and procurement. Without this system we will have no standardised way to monitor visits and managing payments will be more labour intensive.

Commissioners have access to live visit data to monitor performance, and bespoke reports can be created to evidence performance over time. These reports and data are helpful when responding to safeguardings, complaints or concerns raised, and to help monitor and improve quality.

**6. Option 2 – Award a 3 year contract with the option to extend for a further one year, with the Customer Success Plan add on.**

As Option 1 except with the add on cost and use of the Access Group's Customer Success Plan (Premier). The Customer Success Plan would give the council access to a manager to help ensure we are getting the best use of the system, are fully utilising the reporting functions and assistance to get the most of these to monitor and review performance, and 6 annual reviews.

The customer success plan would be a useful tool in contract managing the services, providing best use of the system and its full functionality. Implementing the plan could potentially save time and money council officers spend on capturing and interpreting data.

The total cost of implementing this add on would be £447,237.50 for three years, and £589,350 for four years. The Customer Success Plan (Premier) service is an additional annual cost of £26,497.50, over three years this would add additional expense of £79,492.50, and £105,990 if the one year extension option is used. Due to the expense of this service and no guarantee of realising savings on officer time, it is not recommended to include this option in the purchase.

**7. Option 3 - Have no electronic monitoring in place**

If we do not procure any electronic monitoring system, we will have no means to monitor visit data, such as time of attendance, length of visits, carer continuity, missed visits etc. and would need to solely rely on the data provided

directly by the home care agency. In addition, we would not have access to Finance Manager and would require agencies to submit monthly invoices with no way of checking if the visits had taken place. This is likely to lead to increased costs as providers could charge for all commissioned visits whereas we currently pay only for actual visits which typically is around 90% of commissioned time.

### **Reasons for Decision**

8. In addition to the reasons for the decision (recommendation) outlined in Option 1, the Adult Social Care commissioning team use Access CM for contract monitoring purposes, identifying what is working well and areas for improvement using their reporting function which enables staff to view details on visits made, carer continuity, ECM compliance, and visit times to hold providers to account and monitor improvements.
9. Commissioned visit times are put on the system and matched against actual visit data for accurate payment of services. Brokerage colleagues use the system for arbitration and financial management, ensuring only commissioned hours are paid for. Anything over the commissioned visit times are flagged, requiring providers to give more information as to why the time of the visit was greater than commissioned to see if the payment is justified
10. Access CM is regularly used for contract monitoring purposes, identifying what is working well and areas for improvement, such as monitoring that double up visits are happening at the same time. The data has been used to evidence under performance and providers have implemented changes as a result.
11. Staff can view live visit data, enabling analysis of resident visits. For example to observe times carers arrived and left visits or if a carer is currently on site. This can be useful for responding to complaints on punctuality or length of stay. This data can be used as part of safeguarding enquiries such as evidencing details of visits or when reviewing residents if there are regular cancellations or service refusals.

### **Equality Implications**

12. No implications. Homecare is available to all adults in the borough with eligible assessed needs in line with the Care Act 2014. Access CM will be used for all residents in receipt of care and support from the contracted home care providers.

### **Risk Management Implications**

13. The award of this contract will allow the council to continue to have access to electronic contract monitoring of the home care and independent living services in place and a smooth transfer to the new contracted provision when these are awarded. Keeping the same electronic system reduces the risk of mobilising such a large service. The report recommends awarding a contract through a competitively procured framework, in line with the objective of being ruthlessly financially efficient.

14. *David Hughes, Director of Audit, Fraud, Risk and Insurance, 7 May 2024*

### **Climate and Ecological Emergency Implications**

15. Access is committed to making a sustainable positive impact on the communities in which they operate. We aim to make a distinctive contribution to inequality and social development through the establishment of effective partnerships and programmes that make best use of the energies and skills of our employees

*Approved by Hinesh Mehta, Assistant Director Climate Change, 10/05/2024*

### **Procurement implications**

16. Using the key attributes of the software, identified as part of the options appraisal, a word search identified Access CM as the only match Using Crown Commercial Services G-Cloud 13 framework to call off the contract.
17. *The results of the evaluation process have been verified 09<sup>th</sup> May 2024 by Joe Sardone, Category Lead – People, Procurement and Commercial.*

### **ICT (required for any changes to IT systems)**

18. *No changes*

### **LIST OF APPENDICES**

- Appendix 1 – [Access: Hosting Security Overview](#)  
Appendix 2- Data Privacy Impact Assessment factsheet  
Appendix 3- G-Cloud Call Off Contract- GDPR information