G-Cloud 15 – Lot 2b Cloud Software (All other SaaS)

Service Definition Document

Homelessness, Housing Register, Housing Management, Private Sector and Renters' Rights

Locata (Housing Services) Limited

Contents

1. Introduction

1.1. Company Overview

Locata (Housing Services) Limited (referred to as Locata) are a not-for-profit company established in 2002 by four Local Authorities and three Registered Providers to provide high quality, value for money IT services and management consultancy to the public sector. Delivering systems which exceed that offered by the Private Sector in terms of price and quality remains Locata's core business objective, and we believe our Client base of more than 135 Local Authorities and Registered Providers is testament to our success in this objective.

Locata prides itself in being grounded in Social Housing. Many members of the team come from a housing background, having worked for Lettings, Allocations and/or Homelessness teams within Local Authorities, Registered Social Landlords and other third sector organisations. Collectively, we have more than 50 years of experience within the sector in our current workforce.

Our Clients are active partners in the onwards roadmap and continued development of our product. When combined with our team's own knowledge of the sector, our products are always built with the ever-changing requirements of housing professionals in mind. This collaborative ethos has been especially valuable in the development of our **LocataPro** platform — a leading Software-as-a-Service (SaaS) solution. Whenever we enhance the system or deliver new features, these are rolled out to all our Clients free-of-charge, meaning all Clients benefit from our strong community of engaged and knowledgeable users.

1.2. Value Proposition & Our Service Offering for the Social Housing Sector

Our LocataPro platform of modules was built with the ultimate aim of delivering on the value-for-money objective that is at the heart of everything our Clients do. The features and benefits of our products work towards this aim in a holistic manner.

1) Integrated modules covering the various functions of Social Housing – we think this is essential towards ensuring that work between services is joined-up and all in one place. Amongst the biggest frustrations of housing professionals is the administrative burdens and duplication their IT infrastructure can cause them. Our LocataPro platform works to prevent this.

2) Configuration of the system can be done by local users and doesn't require expensive development costs – this has long been a frustration of Local Authorities, whose busy and changing services need to have a system which can change with them. Our LocataPro products can be configured by you without requiring developer input – saving costs.

3) LocataPro products can be combined with our Public Portal - for self-service referrals and keeping information current, saving your users time and reducing admin burdens!

4) Intuitive, user-friendly and responsive interface built with ease-of-use in mind ensuring that onboarding and training new staff is easy.

5) Our LocataPro is an Off-The-Shelf SaaS (Software as a Service) solution, with free upgrades, meaning you can utilise the latest features and system Improvements without additional costs.

6) Our powerful and easy-to-use Report Builder and suite of standard reports enables you to easily monitor KPIs, identify and respond to the changing demands of your service.

7) Our LocataPro products include unlimited data storage. Your users can leave notes, record communications, store and manage unlimited documents without worrying about additional hidden fees.

8) Legislatively Compliant modules, with integrated and automated statutory reporting

9) System features and enhancements are derived directly from Client feedback, so the product is always adapting to changing requirements of the sector.

10) Access to detailed Helpsite, Community Forums and Support Site, which supplement your user's training and onboarding, making this an easier process for the ongoing utilisation of your systems.

1.3 Social Value

Locata's LocataPRO platform provides clear value for money for Local Authorities and Social Housing providers. The design and delivery of the system support the four CCS Social Value priority areas and enable measurable improvements for services, staff and residents.

Kickstart Economic Growth

LocataPro is an off-the-shelf SaaS platform with free upgrades, helping Authorities avoid unnecessary technology spend. Because configuration can be carried out by local users, services do not require costly external development. Integrated modules reduce duplication and administrative workload, enabling staff to focus on more impactful casework.

LocataPro aims to reduce administrative processing time by 25 percent within the first year of implementation. This is monitored through workflow data, case-handling time and annual reporting on upgrades and efficiency savings.

Make Britain a Clean Energy Superpower

LocataPro supports carbon reduction through digital-first working. The Public Portal cuts travel and paper usage by enabling residents and partners to complete referrals online. Unlimited digital storage encourages paperless working, and automated reporting reduces the need for printed documents.

The aim is to reduce paper-based processes by 80 percent within six months for new clients. Progress is measured through portal activity, digital document submissions and reductions in printed materials.

Break Down Barriers to Opportunity

The system’s intuitive design shortens training and onboarding for new and entry-level staff, helping organisations develop their workforce efficiently. The HelpSite, Community Forums and Support Site promote self-learning and reduce reliance on specialist IT staff.

LocataPro aims to cut onboarding time by 30 percent within nine months. This is tracked through client feedback, support analytics, time-to-competency measures and engagement with quarterly training webinars and online resources.

Build an NHS Fit for the Future

LocataPro supports wider health and wellbeing outcomes by enabling faster, joined-up working between housing and health-linked services. Integrated workflows allow teams to incorporate safeguarding and vulnerability processes, while real-time reporting highlights pressures that affect public health.

The target is for 50 percent of partner-agency referrals to be made online within 12 months. Monitoring includes referral analytics, use of shared workflows and KPIs linked to health-related housing indicators.

Governance and Oversight

Locata maintains structured oversight to ensure Social Value outcomes are achieved. Quarterly Social Value reviews assess progress, and an annual roadmap summarises improvements delivered. Social Value reporting is built into implementation plans, quarterly client reviews and annual impact summaries. Ongoing client feedback is used to guide system enhancements and ensure continual improvement.

2. Overview of the G-Cloud Service

2.1. Overview - LocataPro Platform, Modules & Bolt-Ons

LocataPro is a cutting-edge cloud-based solution comprising a comprehensive suite of integrated modules and bolt-ons designed to provide organisations with a centralised and flexible solution for managing various aspects of service and business operations.

These modules cover the full spectrum of Social Housing, enabling our Clients to scale the solution to local requirements. All LocataPro modules are individually priced and details of all pricing can be found in the Pricing Document provided separately.

LocataPro modules can be purchased in any order with additional modules and/or bolt-ons added at a later date according to your specific requirements.

Software as a Service (SAAS)

Locata has been providing web-based allocation applications to organisations since 2002 and is continually innovating and investing in our service provision.

The LocataPro modules and bolt-ons set out in this document are Locata's entry-level SAAS. However, they do provide a complete and very flexible system from which organisations can grow and develop services.

The LocataPro modules and bolt-ons can be additionally configured to meet the exact needs and policies of any organisation; this will be priced as per the Pricing Document where extra costs are to be defined.

The LocataPro modules are as follows:

Lettings (Allocations & Lettings System)

Lettings is our Housing Register and Allocations module, incorporating Choice Based and Nominations Based allocations, designed to assist users in assessing applications, advertising properties (if applicable), shortlisting and offering to applicants.

HPA2 (Homelessness Prevention and Advice System)

HPA2 is our Homelessness Case Management system, designed to match the process of the Homelessness Reduction Act 2017.

HRS (Housing Related Support System)

HRS is our Referral Pathway management module, enabling you to record available support – whether it is floating, accommodation based or otherwise, to manage your Applicants into the various support pathways, whilst receiving live updates from providers on availability and outcomes for your Applicants.

PSH (Private Sector Housing System)

PSH is utilised by Private Sector Housing teams in delivering their statutory and non-statutory functions. For example, PSH incorporates a comprehensive HHSRS assessment and statement of rates and works.

Estates (Housing Management System)

Estates is Locata's Housing Management solution. Delivered alongside integrations with other critical systems and infrastructure, such as payment processing and financial management systems, to enable our Clients to manage tenancies effectively after allocation.

There are additionally priced bolt-ons that are available for use cross-platform and also per module.

Client specific customisations and configurations are possible. In terms of the customisation permitted, our solutions are extremely configurable and as such the effect of "customisation" can often be achieved simply by end user configuration changes.

Various elements are available for local users with the applicable permissions to customise. Permissions can be controlled at a granular level, allowing for specific parts of the system to be adjusted by those users most appropriate without granting full "admin" controls.

Functionality available to customise on all modules includes:

- Workflows, Tasks and Questions
- Communications Templates
- Standard User Roles / Templates
- Journal Categories
- Applicant "Flags" (e.g. 2-person visit)

Additional functionality can be customised, which is module specific, some examples of which are given below:

- Providers and Services (HRS)
- Plans including Personal Housing Plans and Support Plans (HPA2)
- Patches (Lettings and Estates)
- Schedule of Rates (PSH)
- Case types (Estates and HPA2 Access Gate)
- Rent Arrears Rules (Estates and TARA)

Also, Users with appropriate permissions can initiate these customisations, ensuring that adjustments align with their operational needs. This approach promotes flexibility and efficiency, allowing Users to tailor the system to their specific requirements without compromising system integrity or security. By empowering Users to customise elements within their scope, the system facilitates seamless adaptation to evolving organisational processes and preferences.

Where more fundamental customisation is required, we are always happy to discuss these types of requirements and can often accommodate them subject to changes being defined in the On-Boarding phase as described in section 6.4.1 or via change control during the life of the contract.

Most Client requirements are likely to be met by the implementation of the modules and bolt-ons listed in section 3. However, if there are additional customisation or configuration requirements above and beyond the service defined within this document, the rates for further configuration work are charged as per the Pricing Document.

2.2. Overview - Locata Academy (System Agnostic Learning Site)

Locata Academy is a CPD-accredited e-learning platform designed to meet the training needs of Homelessness and Housing Options professionals.

Developed by sector experts, it offers structured pathways for new, experienced, and senior officers, combining interactive, scenario-based learning with up-to-date legislative guidance and policy updates.

With unlimited delegate enrolment under a fair subscription model, the Academy provides a cost-effective way for councils and providers to upskill entire teams. This ensures consistent, compliant service delivery while improving staff confidence, wellbeing, and long-term workforce resilience.

Note: Locata Academy is a part of the LocataPro system, however it is a standalone product. It does not share in the bolt-ons and extras that the LocataPro products have access too as they are not related to the Locata Academy Product.

Further information regarding training pathways, features and available modules are described in section 4. Pricing for Locata Academy is also available within the pricing document.

3. LocataPro Platform – Core Features

All of our modules sit within the same modern LocataPro platform. This means lower training burdens, easier onboarding and shared improvements and enhancements – as when a feature is implemented for one of our modules, we roll it out to all if it is appropriate. AI functionality is available to aid users in their work, and more AI functionality will be rolled out progressively. Core features of the platform are explained below:

3.1. Communications Suite

Multi-channel communications are essential towards the effective delivery of housing services, and our Communications Suite facilitates this - all LocataPro modules allow Users to setup Letter, Email and SMS templates to send to their Applicants.

Local Users can configure templates to pre-populate with any information held on the system, saving Users administration time on repetitive tasks. Users can also setup automations which send a defined template when certain conditions are met – this could be a decision letter, an offer letter or something simple like an alert to another user when someone requires a Temporary Accommodation (TA) placement.

All Communications sent from within the system are stored in the Applicant's Journal, which displays all notes, attachments and communications from all linked records across all modules. Users can also see correspondence sent within the Communications Log.

3.2. Task and Question Based Workflow & Dashboards

LocataPro is a workflow-based system, whereby the workflow is entirely configurable by local users – enabling you to adjust our product to your own requirements. Workflows within LocataPro can be broken down as follows:

1. Tasks – used to collate information, usually relating to a specific topic, for example "Housing Needs Assessment"
2. Questions – The elements used to capture and contain information for example "Do you have any pets?"
3. Rules – The scenarios which determine when a Task should be added, thereby continuing the "Workflow".

Local Users can finetune your solution's workflows to exact requirements, such as:

- Creating new fields
- Adding new tasks and rules
- Adding logic to amend the behaviour of questions – such as making them mandatory or expanding the size of a textbox
- Rearranging the structure of the workflow, such as when Tasks appear in relation to each other

Any field you create within LocataPro then becomes immediately accessible via our reporting functionality.

3.3. Reporting

All LocataPro modules include our Report Builder functionality, allowing Users to easily and quickly adjust our pre-built report templates – or build a new one from scratch to see only the information you are interested in.

After creating a report, Users can view it, click through to any relevant records within the report or save it for future reference. Reports can also be easily downloaded into a CSV export – the function of which is controlled by permissions.

LocataPro also comprises Bulk Mailer functionality – allowing you to send communications to all records included within a report at the same time. You can also add important reports to your organisation's Dashboards.

Locata also offer a Data Warehouse facility, enabling you to perform more advanced reporting with your chosen Business Intelligence tool. More information on the Data Warehouse bolt-on is available at section 3.8 within this document. All bolt-ons are charged separately as defined in the Pricing Document.

3.4. Journals

The Journal is where Users can easily view what has happened against the various records held within LocataPro. Across the various LocataPro modules, there are multiple Journals for specific use cases – for example a journal for Homelessness cases and a journal for Housing Standards cases.

From within the Journal, Users can:

- Add notes, including flagging as "Important" if appropriate.
- Upload documents – such as Applicant ID
- Categorise any of their entries – and categories can be defined by Local Users

- Search and Filter – to see what they need such as entries with attachments.
- Print entries
- See which tasks have been completed on the case and other notes on progress

If records from different modules are linked together, such as a Lettings Applicant and their Homelessness Application, the journal will be shared between modules – enabling seamless sharing of information and documents between teams.

3.5. Public Portal

All LocataPro modules can be combined with a public-facing portal to provide your Applicants with a central location to manage all aspects of their interactions with the many parts of housing services, from homelessness to housing standards. The Public Portal facilitates a range of functions for Applicants such as:

- Accessing correspondence you have sent to them
- Uploading supporting documentation
- Viewing the status of their various cases and applications
- Self-Service referral forms into the various modules
- Viewing their Personal Housing Plan, including completing the actions set by their officer
- Viewing their Rent Statement (if applicable)
- Viewing and bidding on available properties
- Viewing their position and outcomes of any bids
- Action any tasks assigned to them by their officer

As noted above a key feature of the LocataPro Public Portal is that Users within the various modules can assign tasks to Applicants – which when completed update the relevant task in the system. For example, you could assign them a Housing Needs Assessment form to complete or a Financial Assessment.

The vast majority of Applicants access the Public Portal via a mobile device, so we have designed it in a Mobile First approach, ensuring the various parts of the portal adjust and respond to varying screen sizes.

3.6. Security & User Management

Our LocataPro products are designed with security best practice at the forefront of our design ethos. Various system features exist to facilitate secure and safe operations, such as:

- Granular Permissions – Define which Users have access to the system, specific modules or specific features within modules
- Audit Logging – All User actions undertaken are logged within the audit trail, which can be accessed against specific Applicant records or specific Users.
- User Validations – the system assists managers in ensuring the right people have access
- Database Separation – All of our Clients are setup on separate databases, segregating your data from other Clients.
- Azure AD Integration – If preferred and at no additional charge, User credentials can be managed outside of your system by integrating with your organisation's Microsoft Azure architecture.

The LocataPro platform incorporates the latest regulatory requirements with regards to data protection, including automating the redaction process for sensitive records in line with a defined policy you provide us.

3.7. LocataPro Support Portal

The LocataPro Support Portal is where Users can go to seek support in the day-to-day usage of their LocataPro systems. The Support Portal contains functions such as:

- Comprehensive Knowledge Base of Help Articles, including supplementary videos and images
- Community Forum – covering topics such as how to use certain features, how to respond to certain Freedom of Information requests and advice on how to approach particular legislative questions
- Ticketing – submit tickets when something goes wrong, you have a general query or if you have a great idea for a system improvement or new feature. You can see the status and progress of any tickets you submitted.

Support issues can be logged 24/7 via the Support Portal, where Users can also track the progress of their tickets. The Support Site is accessed via a hyperlink within the LocataPro Platform.

All Users of LocataPro have access to the Support Portal – which represents more than 15,000 Users – many of whom participate in assisting other Users with the queries on the forums, building a "Community of Users" – a unique and exceptionally valuable part of our solution proposition.

3.8. Cross-Platform Bolt-Ons

The below bolt-ons are non-standard functionality for the LocataPro platform of modules, available at an additional annual fee, further details are included within our Pricing Document. *Note: for all Cross-Platform bolt-ons, the cost is for the whole platform, not per module.*

SMS Texting Functionality

The ability to send SMS text messages from any LocataPro module you have. An annual subscription fee is charged for this bolt-on and SMS messages are charged per message as detailed in the Pricing Document.

Data Warehouse

The Data Warehouse is a SQL database of all data held across your LocataPro modules. We export this data to the database every night. You can then utilise your chosen business intelligence tool – such as Power BI – to link to and interrogate the data within the Data Warehouse. The functions of a 3rd party tool may give you additional functionality such as being able to run more complex SQL operations or scheduling reports.

File Size Limit Upgrades – 8 / 10 / 16mb

The default file size maximum is 4mb per file. If you need to upload larger files, we can apply a universal upgrade to your modules to 8mb, 10mb or 16mb per file.

3.9. LocataPro Lettings Module (Allocations & Lettings System)

The LocataPro Lettings module facilitates the end-to-end process of allocating Social Housing (and other tenure types) properties to Applicants. The Lettings product is flexible, allowing for configurations to meet local needs – meaning we can offer Lettings in both a Choice Based Lettings model and a Direct Matching / Nominations based model.

3.9.1. Housing Register Application Form

Lettings includes an online application form tailored to your local Allocations Policy and other requirements you have as part of implementation. As part of the implementation fee detailed in the Pricing Document, we configure your form to incorporate any rules to assist with banding calculations ensuring that banding is consistent across applications.

Our Lettings form also incorporates an Action Plan – comprising tailored actions and advice based on the answers given throughout the form and the Applicant's circumstances. This customised document can also be configured to provide realistic information on the Applicant's chances of being housed via the register.

Once the form is submitted, Applicants are able to upload any required supporting documents via the Public Portal. Users can turn this feature on and off for each Applicant, such as if further documentation is subsequently needed.

All of LocataPro's public facing forms are designed to be:

1. Responsive – they adjust to the viewer's device, including small screen sizes
2. Accessible – the comply with Web Content Accessibility Guidelines (WCAG 2.2 AA)
3. Government Digital Service - Service Standards Compliant – they comply with the Service Standard Government release to help teams create and run great public services.

Forms can be configured in a dynamic fashion, adjusting follow-up sections and questions based on previous questions answered by the applicant. The forms also sit behind our "Public Portal" functionality, meaning Applicants can save forms and come back to them at any time.

3.9.2. Change of Circumstances Form

Your Housing Register applicants can easily let you know any changes to their circumstances using the Change of Circumstances form for the Lettings module. This form utilises the same design principles as our other forms, whilst also having the benefit of pre-populating with any information we know about the applicant – making the process of updating their details less burdensome to Applicants, improving the customer journey.

When submitted, if there are changes which affect their assessment, the system alerts relevant Users or displays the task within the dashboard for actioning. An updated recommendation of assessment and banding will be displayed and a prompt for the User to confirm the changes.

3.9.3. Responsive Public Website

LocataPro uses responsive design in its approach to web design which means web pages look great on a variety of devices, windows or screen sizes. This allows Applicants to view the websites across all platforms, such as mobiles, tablets, laptop and desktop PC based browsers. With more than 96% of our interactions coming via the web, 85% plus of this traffic through mobiles and tablet platforms, has led us to adopt a Mobile First strategy going forward.

As part of the implementation fee detailed in the Pricing Document, the Public Website can be configured to your required style standards and there is a dedicated “Wiki” section which Local Users can edit to add supplementary content such as news or advice.

Applicants can also setup “Property Alerts” sending them an email notification whenever a property that matches their requirements is advertised on the website. The alerts an Applicant can set align with the properties they are eligible for.

3.9.4. Property Register / Adverts

If opting for a Choice Based Lettings model, the system can be setup to display adverts to Applicants based on a pre-defined advertising cycle, or properties can be advertised ad-hoc as required. How long a property is advertised for is at the discretion of the user advertising the property.

Properties are setup using our “Property Wizard” task group, capturing key information about the property such as:

- Number of bedrooms
- Type
- Accessibility features

The Wizard can also be used to capture photographs of the property to be displayed to the applicant on the public website. After bidding, Applicants can see their position and withdraw their bid, should they wish, via the Public Portal.

3.9.5. Auto Bidding (For Choice Based Lettings)

The Auto Bidding functionality of Lettings allows Users to easily set Applicants up to have bids applied automatically when the situation is appropriate – such as for Applicants unable to access the internet.

Auto Bidding assesses an Applicant’s set requirements under the Auto Bidding tasks against the features of available properties – for example lift access – and matches them at the end of the bidding period for the property. Where the number of bids an applicant can make is limited, the system will prioritise an Applicant’s bids, bidding on the properties with the highest chance of success.

3.9.6. Shortlisting

A property’s shortlist can be generated at any time at the push of a button or will automatically be created when the property’s bidding cycle ends. The Lettings module shortlisting page is designed to make shortlisting a quick and efficient process, providing Users with at-a-glance information they require to make informed decisions without navigating away to other pages.

Applicants within the shortlist can be expanded to see additional information, notes can be made on the shortlist against specific bidders and Users can easily skip or record the outcome of any offers made via the shortlisting page.

Landlords can be given the relevant permissions to enable them to process their own shortlists entirely, or Local Users can send specific bidders as nominations. This can be configured on a per-landlord basis, allowing you to hand responsibility to trusted landlords whilst maintaining control over other shortlists.

3.9.7. Bolt-Ons Available for Lettings Module

The below bolt-ons are non-standard functionality for the Lettings module, available at an additional annual fee, further details are included within our Pricing Document.

Assisted Assessment

This bolt-on interprets the Client's allocation policy to either suggest a banding/band reason or set an application to live awarding the correct band/band reason, saving User time and ensuring every application is assessed consistently in accordance with the policy.

Reviews Manager

This bolt-on helps Housing teams to ensure housing register applicant details remain up-to-date and accurate, inactive Applicants are removed automatically and applicants who no longer wish to be on the register are removed automatically.

Cross-Platform bolt-ons which enhance the functionality of this module are available and as detailed in section 3.8.

3.10. LocataPro HPA2 Module (Homelessness Prevention and Advice System)

LocataPro's HPA2 (Homelessness Prevention and Advice) module was created in response to the Homelessness Reduction Act (HRA) 2017, designed specifically to assist Local Authorities with the changing and new burdens placed upon them as a result of the Act. The workflow of HPA2 is matched to the HRA process, whilst still allowing for local configurability. The easy of configurability allows the HPA2 module to respond quickly to legislative changes which was evident with the easy that HPA2 could accommodate the Renters' Rights Act 2025.

A core ethos of HPA2, as with our other modules, is to make the process of managing a Homelessness Application easy and admin-light, freeing up time for Users to deliver meaningful actions such as prevention work or bidding for vulnerable Applicants. The system utilises the LocataPro core functions to great effect in reducing the administrative burdens on Users.

3.10.1. Homelessness Referral Form

Homeless Applicants can utilise a Referral Form to self-serve, requesting assistance with their housing situation. The HPA2 referral form collates essential information about the applicant and then upon submission loads those details into the back office for a User to action.

All of LocataPro's public facing forms are designed to be:

1. Responsive – they adjust to the viewer's device, including small screen sizes
2. Accessible – the comply with Web Content Accessibility Guidelines (WCAG 2.2 AA)
3. Government Digital Service - Service Standards Compliant – they comply with the Service Standard Government release to help teams create and run great public services.

Forms can be configured in a dynamic fashion, adjusting follow-up sections and questions based on previous questions answered by the applicant. The forms also sit behind our "Public Portal" functionality, meaning Applicants can save forms and come back to them at any time.

3.10.2. Plans including Personal Housing Plans (PHPs) and support Plans

The HPA2 module allows Users to create tailored PHPs for their Applicants. Users can add information, case details and guidance to the PHP as required. Users can also add tasks to the PHP that they and the Applicant will complete as part of the homelessness application process.

Applicants can manage their plan via the Public Portal, marking actions as complete, uploading supporting documentation and sending messages to their officer. Changes made by Users or the Applicant are displayed clearly and where appropriate officers are flagged to respond.

PHP templates are fully configurable by Local Users. A core feature of the plan is the ability to pre-populate it with information you have captured about the Applicant as part of the workflow. You can also configure the Plan to populate with specific section when certain circumstances apply – such as a section for Care Leavers or ex-Offenders.

3.10.3. Statutory Review Manager

The HPA2 module facilitates the logging and completion of Statutory Reviews requested by your Homeless applicants. Users can log a review against a case or against specific questions. The system captures the relevant Homelessness Case Level Collection (H-CLIC) information as part of the review process and allows the User to capture the outcome of the review and any new decision.

The other functionality of LocataPro greatly supplements and benefits the Reviews process, as Users can easily request additional information or documentation using the workflows of the existing case record and compile complex decision letters at the click of a button by utilising pre-populating placeholders within communications templates.

3.10.4. H-CLIC Management

HPA2 has been designed to make keeping cases compliant with the H-CLIC specification an easy process without significant additional burdens or training requirements for the User. HPA2's workflows revolve around the management of HRA Cases, but features the ability to capture information relating to the below:

- Applicants
- Cases
- Temporary Accommodation (Properties and Tenancies)
- Reviews

We have integrated the HPA2 product directly with the Department for Levelling Up, Housing and Communities' (DLUHC) DELTA system using the H-CLIC API. DELTA is the online system provided by DLUHC to facilitate the collection of statistical data and the administration of grant applications. The main benefits of this integration include:

1. We are always validating cases against the most up to date specification on DELTA – meaning there is consistency between errors on HPA2 and in DELTA
2. Validations can be done via the API in bulk
3. Submission to DELTA can be done within HPA2 – there is no requirement to download a file and manually upload to DELTA.

HPA2 utilises a traffic light system to alert Users to actions required in terms of H-CLIC validations:

- Green – Case successfully validated and no errors
- Amber – Case requires validation
- Red – Case has been validated and there are errors

The above traffic light system is utilised for individual cases and for the overall return, indicating compliance both on a case-by-case basis and for all cases combined.

The workflows of HPA2 include guidance at the relevant trigger points of an application, prompting the User to validate the case and to resolve any errors that are detected. The process of resolving errors is easy – the error is explained with guidance on how to resolve it, and Users are given a link to the relevant task and part of the application that requires amendment.

When Users are satisfied with the quality of their return, submitting to DELTA is completed with the click of a button.

3.10.5. Rough Sleeper Management

HPA2 includes features to facilitate the monitoring and management of your local Rough Sleeper cohort. These features allow you to:

- Capture information relating to the whereabouts of potential rough sleepers, helping officers to quickly make contact and verify their status as rough sleepers
- Capture information relating to outcomes achieved for those rough sleepers, such as facilitating access to support or health services
- Manage Rough Sleepers both within and outside the regular Homelessness Reduction Act workflow – such as where no Homelessness Duty is owed but support can be provided via outreach.
- Generate a report containing the information required for DELTA returns relating to Rough Sleepers

3.10.6. Temporary Accommodation – Essentials

TA – Essentials is included within the basic functionality of LocataPro's HPA2 Module and enables Local Authorities to collate and manage essential information relating to Temporary Accommodation as required for H-CLIC purposes.

Specifically, the TA – Essentials solution provides Local Authorities with:

- The ability to start and end Tenancies attached to homelessness cases
- A basic rent account for adding credits and debits manually
- A TA Dashboard for an easy-to-read view of current TA placements
- The ability to capture H-CLIC data and export it alongside the Case H-CLIC data for upload to DELTA

Additional bolt-ons to extend the functionality of Temporary Accommodation – Essentials are available at an additional charge, explained in the next section.

3.10.7. Bolt-Ons Available for HPA2 Module

The below bolt-ons are non-standard functionality for the HPA2 module, available at an additional annual fee, further details are included within our Pricing Document

Access Gate (Formerly Partner Lock)

Access Gate is Locata's secure multi-agency access and collaboration layer, designed to enable carefully governed third-party involvement in homelessness prevention and relief casework. It provides a controlled gateway for voluntary agencies, internal departments, and outreach teams to view selected client information and contribute to defined case actions, without exposing the full back-office system.

Developed in response to strong demand from councils, Access Gate offers a safe, auditable mechanism for involving wider partners in HRA work. It enhances prevention activity, reduces duplication, and ensures external users only see information they are expressly authorised to access.

Access Gate allows users to create associated other cases linked to an HRA case, with no limit on the number of additional cases. These cases can include HRA data or other case-specific information, making this a highly versatile bolt-on.

Example Use Cases

1. Council & Young Person's Charity Collaboration
   A council partners with a young person's charity to manage homelessness cases for individuals under 25. Using Access Gate, the council creates an associated case linked to the main HRA case, containing all required H-CLIC data and additional information for reporting. The charity logs into Locata's back-office system but only sees cases assigned to them. They can update case details, capture H-CLIC data, and progress actions without duplicating work or accessing unrelated records. This ensures compliance, efficiency, and secure data sharing.

2. HUB Inbound Contact for Quick Updates

A client calls the council to update their mobile number. The contact centre agent does not have access to the full HRA case but uses the HUB inbound associated case to update the client's contact details securely. This prevents unnecessary exposure of sensitive case data while maintaining accurate records and improving customer service.

3. Multi-Agency Outreach Teams

Outreach teams working with rough sleepers can be granted controlled access to specific cases and only the Rough Sleeper Management so that they can Capture information relating to the whereabouts of potential rough sleepers, helping officers verify rough sleepers' statuses.

TAP (Temporary Accommodation - Plus)

TAP provides Local Authorities with the ability to fully customise their Tenancy and Property workflows, schedule credits and debits against a TA Account and to create custom communication templates relating to the Property and Tenancy.

The TAP bolt-on builds upon the features included within the basic features of HPA2 to give Local Authorities far greater options for automation and customisation. Specifically, TAP as a solution provides Users with:

- The ability to schedule credits and debits against an account at the required frequency e.g. Daily
- An expanded HPA2 workflow platform, enabling custom workflows relating to tenancies and properties – allowing Local Authorities to configure their own Tenancy and Property Management functions such as compliance certificate or tenancy sign up procedures, within HPA2
- A Property Journal for storage of compliance information such as EPCs, Gas Safety and so on
- A Tenancy Journal for capturing notes and documentation specifically related to the Applicant's TA placement, separating it from the main case journal.
- The ability to create communications templates specifically for Properties and Tenancies, automatically populating with relevant Property and Tenancy fields.

TARA (Temporary Accommodation - Rent Accounting)

TARA provides all the functionality of TAP as well as many additional features. Local Authorities can customise the workflows for Rent Accounting and Arrears Management, create Loan and Storage accounts and setup repayment agreements. Unique to this bolt-on is the ability to interface with existing Local Authority Housing Benefit (HB), Payments and finance systems to minimise manual input by staff and automate transactions in the system.

The TARA bolt-on is designed to further build upon the customisation enabled by TAP, as well as enabling for powerful integrations with Local Authority services to automate transactions into Rent Accounts. Two integrations are included as standard and as follows:

- HB payments import into Locata
- Other payments import into Locata

System integration is the process of connecting multiple different systems. This allows businesses to share information between different sub-systems autonomously by translating data from different sources. The goal of system integration is to break down communication barriers among disparate systems by ensuring that data flows seamlessly between different platforms. This allows organizations to collect, analyse, and utilise data effectively, enabling informed decision-making and strategic planning.

We class an integration as some form of link or communication between a LocataPro module (or modules) and a 3rd party system. Integrations can take various formats, such as utilising the 3rd party's APIs or using a "flat file" approach whereby we export/import data utilising a certain format such as CSV to update records in our or the 3rd party's system. The most appropriate type of integration will depend on your requirement and the limitations of the 3rd party system - our LocataPro supports both API and Flat File approaches.

Additional integrations (beyond the first two included within the Annual Subscription Fee -see Pricing Document) can be configured as part of integration. Pricing for any additional integrations is based on the daily rate outlined within our Pricing Document. We can provide a full quotation based on your specification.

The step-by-step management of the full Rent Accounting process from sign-up to exit is possible with this bolt-on.

- Custom Rent Account and Arrears Workflow – Setup a consistent approach to Rent Account management, including the stages of Arrears management
- Loan Accounts – the ability to set up a loan account against a homelessness applicant
- Storage Accounts – track the costs of storing an applicant's furniture
- Multiple Accounts – You can create multiple accounts against a homelessness application so you can have a loan account and a TA rent account or multiple TA rent accounts against the same applicant
- Account Consolidation – ability to specify which account payments should be allocated to first, write off old debt
- Repayment Agreements – set up repayment agreements against an account and monitor if the required payments are being made, produce clear statements for the applicant showing what's owed as per the repayment agreement
- Rent Statements – easily print or email a rent statement to an applicant or bulk email or print rent statement to a number of applicants
- Rent Account Journal – keep notes and upload attachments relating to the rent or loan account including tenancy agreements
- Rent Account Communication – create standard letter, email and SMS templates for correspondence with TA applicants
- Payment Barcodes – generate barcodes and barcode letters to integrate with your payment system, allowing tenants to make payments at convenient locations
- Rent Dashboard – highlights rent arears and aged debt across the council, highlights the status of the suspense account and list rent accounts in arears where some action should be taken

- Update rents across all properties – ability to set up rent elements against a property so that when rents or charges change the change can be applied in bulk to all the correct TA properties
- Separate out charges covered by HB from charges covered by Applicant contributions – enables you to differentiate between charges that can be covered by HB and those that require an applicant contribution
- Suspense Account Management – review all transactions that have not been automatically assigned to the correct account and manually move the transaction to the correct account
- Arrears Management – Alerts and flags appear on accounts to warn Users of risks to rent accounts – such as if the Applicant's arrears are over a certain threshold or increasing consistently.

Comparison – TA Management Levels for HPA2 Module	TA - Essentials	TAP	TA RA
Create and end TA tenancies	✓	✓	✓
Rent account to record payments and debits	✓	✓	✓
Capture and export HCLIC data	✓	✓	✓
Schedule payments and debits		✓	✓
Custom property workflow		✓	✓
Property journal		✓	✓
Custom tenancy workflow		✓	✓
Property and tenancy communication templates including emails, letters and text.		✓	✓
Custom account workflow			✓

Comparison – TA Management Levels for HPA2 Module	TA - Essentials	TAP	TA RA
Custom arrears workflow			✓
Loan accounts			✓
Storage accounts			✓
Multiple accounts			✓
Account consolidation			✓
Repayment agreements			✓
Rent statements			✓
Rent account journal			✓
Rent account communication			✓
Invoicing			✓
Payment barcodes			✓
Rent dashboard			✓
Update rents and charges across all properties			✓
Separate out charges covered by HB from charges covered by customer contributions			✓
Arrears Management			✓
Integration with finance, HB and payment systems			✓
Suspense account management			✓

Cross-Platform bolt-ons which enhance the functionality of this module are available and as detailed in section 3.8.

3.11. LocataPro HRS Module (Housing Related Support System)

HRS is our Referral Pathway management module, supporting you in referring Applicants into relevant pathways of support. HRS workflows revolve around the management of Applicants, but features the ability to capture information relating to the below:

- Applicants
- Providers
- Services
- Units of Support/Capacity
- Waiting Lists

HRS is exceptionally flexible, allowing you to utilise it for diverse types of support, with the ability to setup services with varying interpretations of capacity such as:

- Supported Housing
- Extra Care
- Social Care Bedspaces
- Floating Support
- Therapy
- Employment/Training

HRS takes much of the guesswork and administration away from you and your service providers by automatically calculating voids and capacity across services based on the maximum capacity versus current utilisation. Providers have a dedicated login, making it easy for them to access referrals into their service and log outcomes against their cohort of Applicants.

For Supported Housing, many of our HRS Clients pair this module with the HPA2 (Homelessness Prevention and Advice) module, synchronising the data held in each module and aligning workflows to reduce duplication between teams. In many cases, Applicants begin their journey within Homelessness and then are exported to HRS to be referred into services. When an Applicant is placed via HRS, it then becomes very easy for their Homelessness officer to be informed and subsequently discharge their duty. In this circumstance, a public referral form for HRS would be unnecessary. There is an annual subscription fee reduction available on the HRS module for existing Clients/users of other LocataPro modules, please refer to Pricing Document.

3.11.1. Providers Access Portal Services and Pathways

Within HRS, Providers have a dedicated login portal. After logging in, they can:

- View referrals assigned to them
- Accept / Reject Referrals and provide feedback
  - The referral outcome task is fully configurable by Local Users
- View all their services
- View all Applicants currently supported by their services

The workflows of HRS can be configured for variable access levels for providers such as:

- None – Providers cannot view information within this task
- Read-Only – Providers can view but not edit information within this task
- Full – Providers can view and edit information within this task

Provider Users can also be granted permissions to further restrict or expand the functionality they have access to such as:

- The Applicant’s journal (notes, attachments, etc.)
- Reports
- Adding their own Applicants
- Referring to other providers

3.11.2. Services and Pathways

Local Users can then configure the services that you would like to manage Applicants into. Services can be setup for single providers or you can use them in a “Pathway” structure whereby multiple providers deliver the service. For example a “Mental Health” pathway could have a cumulative capacity of 50 units across 5 providers – the benefit of this is that Users do not need to manage 5 waiting lists, instead all Applicants can be against a single waiting list and referred into the next available space with any provider within that Pathway.

Detailed workflows can be built around the providers and services including capturing information about units of capacity – such as type, accessibility features etc. Workflows can also be built to enable you to assess the quality of Services and Providers – which will become relevant with the Supported Housing (Regulatory Oversight) Act 2023.

3.11.3. Bolt-Ons Available for HRS Module

The below bolt-on is non-standard functionality for the HRS module, available at an additional annual fee, further details are included within our Pricing Document.

Public or Private Referral Forms

HRS can be paired with a Referral Form to enable easy self-serve access into your services. Referrals into HRS display on the HRS dashboard whereby Users can begin the process of assessment and referring into relevant services. We can deliver an open-access Public Referral Form that 3rd parties and Applicants can access, or we can deliver a Private Referral Form that is accessible only by trusted referrers that you setup.

A maximum of 10 working days development, consultancy and configuration time to create a custom referral form is included in the implementation fee detailed within the Pricing Document. Additional days beyond this initial budget are chargeable as per the Pricing Document.

Note: For Supported Housing, many of our HRS Clients pair this module with the HPA2 (Homelessness Prevention and Advice) module, synchronising the data held in each module and aligning workflows to reduce duplication between teams. In many cases, Applicants begin their journey within Homelessness and then are exported to HRS to be referred into services. When an Applicant is placed via HRS, it then becomes very easy for their Homelessness officer to be informed and subsequently discharge their duty. In this circumstance, a public referral form for HRS would be unnecessary. There is an annual subscription fee reduction available on the HRS module for existing Clients/users of other LocataPro modules, please refer to Pricing Document.

Cross-Platform bolt-ons which enhance the functionality of this module are available and as detailed in section 3.8.

3.12. LocataPro PSH Module (Private Sector Housing with Renters' Rights Act System)

The LocataPro PSH module supports Local Authorities in delivering both statutory and non-statutory Private Sector Housing functions, including meeting new obligations to enforce and report enforcement activities under the Renters' Rights Act (RRA). PSH workflows revolve around the management of properties and adherence to the Renters' Rights Act property evictions.

The system features flexible workflows with the ability to add new case types relevant to your local requirements but includes the following as standard:

- Disabilities Facilities Grant, including Schedule of Works functionality
- Empty Homes
- Home Repair Loan / DFG Top-up
- House of Multiple Occupation (HMO) Licence Application
- Housing Occupational Therapist Referral
- Housing Standards, applies Housing Health and Safety Rating System (HHSRS) assessments to case
- Harassment
- RRA Enforcement
- RRA Illegal Eviction
- Unlicensed House of Multiple Occupation (HMO)

Within the workflow of all cases the PRS system allows users to capture data about

- Properties
- Tenants
- Landlords / Owners
- Case specific data

Core tools included in the PRS module are:

- Owner and Landlord database, RRA Phase 2 ready
- Housing Health and Safety Rating System (HHSRS) Evaluation Tool
- Schedule of Rates and Schedule of Works Tools
- Contractors database

PSH enables Private Sector Housing teams to effectively and efficiently manage the statutory and non-statutory obligations, including meeting new obligations under the RRA, required of them to create thriving local communities and improve the overall health of local housing stock, benefiting their citizens.

There is an annual subscription fee reduction available on the PSH module for existing Clients/users of other LocataPro modules, please refer to Pricing Document.

Tool included in the PSH module are:

3.12.1. Schedule of Rates and Schedule of Works Tools RRA Phase 2 ready

For each Property captured within PSH, an owner or for RRA case types a landlord can be associated with it. The landlords' contact details, address and other important details such as any managing agent can be captured. There is a landlord Journal for users to record notes and add any attachments relating to each landlord. There is a communication centre that allows user to send all correspondence to the landlord via the PSH system, and the communication log shows all correspondence sent.

The landlord's database also displays to the User all the properties that a landlord is associated with, making it easy to see overall landlord ownership and to compile a holistic record of cases relating to a specific landlord's portfolio. This is particularly useful in pursuing court action, as Local Authorities can demonstrate where landlords may not be meeting their responsibilities overall – under the RRA or if multiple properties have Housing Standards complaints and notices or orders issues against them.

The information captured against the landlords and properties are configurable through the user front end for users with the correct permissions. This means that the councils can configure the Locata PSH module to match the National PRS Database when it's rolled out with phase 2 of the RRA.

3.12.2. Housing Health and Safety Rating System (HHSRS) Evaluation Tool

The Locata Pro PSH module includes a web application implementation of the HHSRS assessment framework. Allowing the council's environmental health officers to select which of the potential 29 hazards were identified when they inspected the property. The full help from the assessment framework about each of the potential hazards can be displayed on the screen at the click of a button. Once the officer has selected the hazards, they're able capture the Age of the Property, the Dwelling type and the likelihood of the Hazard. They then capture the spread of health outcomes between Class I, Class II, and Class III with the system calculating Class IIII. The system then calculates the HHSRS Score. No more need for spreadsheets and forms.

For each hazard, users can record their deficiencies, likelihood justification, health justification, schedule of works and timescales.

Upon completion of the full evaluation and adding the relevant hazards, Users can generate a full HHSRS Evaluation Report to provide to the landlord. The report can be sent from within the system using LocataPro's Communications Suite via email or can be printed and posted if required. Then, the workflows for the Housing Standards case type allow Users to follow the remainder of the enforcement process. The Communications Suite further saves Users time by pre-populating any notices or orders to be served with information captured within the workflows.

PSH's HHSRS Evaluation Tool is fully aligned with the enforcement guidance issued by the Department for Levelling Up, Housing and Communities. Locata has committed to ensuring ongoing compliance with future guidance updates.

3.12.3. Schedule of Rates and Schedule of Works Tools

PSH allows Local Users to configure schedule of rates into the system, setting out the costs associated with the performance of certain works conducted as part of the Housing Standards function. Users can use the template items configured within the Schedule of Rates to create Schedules of Works for the relevant case types. For example, there may be a Schedule of Rates relating to the performance of Disabled Facilities Grant work.

The PSH Schedule of Rates Tool saves Users significant amounts of time by eliminating the need to consult with contractors and tender documentation to establish the costs to perform a Schedule of Works. It also greatly improves consistency between Users as the items that can be populated into a Schedule of Works already have a description of the actions to be completed – so similar works will have the same description. This approach also greatly improves the clarity of what is required of relevant stakeholders such as contractors assigned to the works.

PSH allows for unlimited Schedules of Rates to be configured – allowing for different contractual agreements between varying contractors. Each Schedule of Rates also allows for unlimited items. Items can have a pre-defined name, description and cost – but Users compiling a Schedule of Works can manually adjust to specific requirements. The Schedule of Rates can be broken down into sections to make it easier for Users to find the relevant item or they can search for the name of any item to make compiling a Schedule of Works quick and easy.

3.12.4. Contractor Database

PSH allows Users to record the details of any contractors performing works for the Local Authority. Key details can be logged such as the contractor's contact details, name and address. Key Contacts for the contractor can be recorded, and a Contractor Journal allows Users to record notes and add attachments relating to each contractor.

The Contractor Database also displays to the user any Schedule of Works assigned to each contractor. Users can easily access and view cases related to any Schedule of Works and send correspondence to the contractor utilising the LocataPro Communications Suite.

3.12.5. Bolt-Ons Available for PSH Module

The below bolt-on is non-standard functionality for the PSH module, available at an additional annual fee, further details are included within our Pricing Document.

Referral and Application Forms

PSH can be paired with Referral and Application Forms for the various functions of Housing Standards teams. For example, a Referral form could be used for local residents to submit to the Local Authority a request for an inspection of their Private Rented property if they are dissatisfied with the quality of their accommodation and their landlords' response to their complaint. Likewise, a Public Application Form can be used to enable landlords to submit applications for various licenses, such as HMO.

These form types drop directly into PSH as new cases, saving Users time in manually transferring data between paper application forms and the system. It also allows residents and landlords to self-serve, making applications and requests at times that suit them better which can then be actioned by the Local Authority in normal working hours.

A maximum of 10 working days development, consultancy and configuration time to create a custom referral form is included in the implementation fee detailed within the Pricing Document. Additional days beyond this initial budget are chargeable as per the Pricing Document.

Cross-Platform bolt-ons which enhance the functionality of this module are available and as detailed in section 3.8.

3.13. LocataPro Estates Module (Housing Management System (HMS))

LocataPro's Estates module is a comprehensive cloud solution designed to streamline and optimise all aspects of housing management for Local Authorities and other registered housing providers. Built on the LocataPro platform, its configurable workflow allows it to match a Client's own tenancy and rent accounting processes.

The Estates module comprises the following features:

3.13.1. Property Information Management

A centralised database of property details, including addresses, unit types, and any other property information. Clients can add at any time the fields they need to hold, and set up workflows to handle property management.

Properties can be grouped into Blocks and Estates, each with their own set of fields and workflow and can be grouped into Patches automatically, with patches assigned to officers.

Garages can be managed separately from properties, with their own set of rules for rent management.

3.13.2. Patches

The Patches feature of Estates allows you to allocate work based on any information held against cases or client records. For example, should you wish to distribute Rent Accounts or Tenancies based on their location, Patches would allow you to distribute based on addresses, postcodes, ward data and many other address related fields.

Patches is not limited to address fields – cases can be distributed based on case information such as case types – with ASB cased automatically going to one user or team of users whilst Repairs cases go to another team or user.

Patches can be adjusted by local users with the appropriate permissions, allowing you to fine-tune the process of allocating work and to update this later should you have organisational changes – such as changing staffing levels.

3.13.3. Tenancy Management

Estates records all tenancy details; configurable workflow to handle tenancy starts, leases, lease renewals and notices, tailored to different tenures.

3.13.4. Rent Collection and Financials

Fully featured rent account systems with rent debits, loans and other account types. Configurable workflow for arrears processes and an innovative system for identifying and managing arrears.

Rents are calculated based on a configurable set of Rent Elements, held against the tenant, property, tenancy or account.

Account types include:

- Rent accounts
- Garage rent accounts
- Loans
- Storage
- Insolvency and Legal accounts

Eash account type has its own set of rent elements and workflow. Rents, and expected benefit payments are automatically debited, and payments recorded. Statements can be produced automatically or on demand.

Rents for the next financial year can be set up at any time. These will then automatically come into force at the start of the financial year.

Direct Debits can be set up and, with the appropriate integration, automatically update tenants' accounts.

Arrears are monitored using a set of configurable rules, to signal, for example, erratic payments, payment plan breaches or missing benefit payments. Users can then manage each arrears case, with configurable workflows and correspondence.

The rent system also handles write-offs, and a separate process can be set up to handle former debt.

3.13.5. Case Management

Cases can be created against tenants which handle a particular set of circumstances. These might include:

- ASB
- Client Complaint
- Damp and Mould
- Pest Problem
- Right To Buy
- Succession

The Client/User can set up any type of case and then create a workflow to guide and record Users' actions on that case.

3.13.6. Integration

Estates can integrate with other systems such as finance systems, CRM, repairs, or 3rd party services.

As standard, Estates includes three import integrations to cover HB payments, Universal Credit and Cash, plus our standard tenancies export. Any additional integrations, or changes to our standard tenancy export, can be included and charged according to the day rate noted in the Pricing Document provided separately.

The Estates module fully integrates with the other LocataPro modules, such as Lettings and Housing Related Support.

3.13.7. Bolt-Ons Available for Estates Module

Cross-Platform bolt-Ons which enhance the functionality of this module are available and as detailed in section 3.8.

4. Locata Academy (System Agnostic Learning Site)

The Locata Academy offers a structured, CPD-accredited e-learning platform tailored specifically for professionals in Homelessness and Housing Options. Available separately from LocataPRO, it addresses the widespread challenges of staff burnout, high turnover, training gaps, and inconsistent service delivery within Local Authorities and Registered Providers. Locata Academy offers value for money training options, allowing users to move through the training at their own pace. Further pricing details can be found in the pricing document.

The Academy equips officers with confidence, knowledge, and resilience through interactive, scenario-based training programmes built by sector experts, providing a comprehensive and flexible learning experience designed to enhance your homelessness professional development.

Whether your staff are new to the field or experienced professionals, explore our courses, enrol, and start the Modules. Upon joining, individuals and managers can track course progress, engage with the learning units, and quickly develop and apply expertise as a homelessness officer or manager.

Locata Academy comprises the following features:

4.1. Training Pathways

The Academy delivers three progressive levels of training, tailored to staff experience:

Beginner *(**Core**)*

- 3 blocks totalling 65 hours of guided learning.
- Designed to provide new officers with strong foundations, reducing early-stage overwhelm.

Experienced *(**Extra** includes both Experienced and Expert pathways)*

- 3 blocks totalling 55 hours of guided learning.
- Supports officers moving beyond the basics into more complex casework and legislative application.

Expert *(**Extra** includes both Experienced and Expert pathways)*

- 4 blocks totalling 62 hours of guided learning.
- Provides senior officers with advanced, scenario-based learning, ensuring they can effectively interpret legislation and manage complex cases.

Each Block concludes with at least one assessment (70% pass mark). Locata Academy certificates are awarded on completion of the evaluation, enabling officers and employers to evidence competency and continuing professional development.

4.2. Training Features

Training features on Locata Academy have been carefully worked through to provide a winning platform for learners who will experience top-flight training.

Locata Academy features were designed:

- With Industry Experts and authored by former homelessness officers and policy specialists.
- To provide up-to-date content which is regularly updated with legislative and policy changes.
- To contain interactive scenario-based case studies, exercises, and quizzes.
- To be accessible and available online at any time, allowing officers to revisit training as needed.
- To deliver comprehensive resources and access to over 300 supporting guides, templates, and best practice documents.
- Through a CPD Certified process and recognised accreditation supporting professional standards and officer career progression.

4.3. Locata Academy Modules

There are eleven blocks of e-learning distributed between three modules, designed for homelessness officers in England.

4.3.1. Beginners Module

- Block 1 - Introduction to Homelessness & Homelessness Reduction Act

  This block provides seven units of learning and serves as a brief introduction to homelessness itself. We will then delve into the Homelessness Reduction Act 2017, a significant piece of legislation aimed at tackling the root causes of homelessness and preventing homelessness from occurring.

- Block 2 - Applications & Assessments

  This block of nine units outlines how you can support individuals who are homeless or at risk of homelessness. The process begins when an individual approaches their local council seeking help due to homelessness or the threat of losing their accommodation.

- Block 3 - Awarding a Duty

  This block has six units of learning and covers the processes and assessments you need to make to award a Prevention or Relief Duty under the Homelessness Reduction Act 2017.

4.3.2. Experienced Module

- Block 4 - Temporary Accommodation & Referrals

  The five units of learning for Temporary accommodation play a crucial role in providing short-term housing solutions for individuals and families who are homeless or at risk of homelessness.

- Block 5 - Main Duty

  There are four units of learning for The Main Duty, under which, according to homelessness legislation, local housing authorities are mandated to secure suitable temporary accommodation.

- Block 6 - Other Duties

  Provides four units of learning covering the Homelessness Reduction Acts, various Other Duties for local housing authorities beyond the Main Duty, such as the protection of personal property, the duty to cooperate, discretionary duties/powers, and the right to review decisions.

4.3.3. Expert Module

- Block 7 - Interview Skills

  The three learning units in this block offer guidance and techniques for conducting effective Housing Options interviews and negotiating resolutions, which are vital elements in the effective execution of duties under homelessness legislation.

- Block 8 - Casework Management and Decision Making

  This course comprises four units of learning on homelessness. This block covers case work decision-making and the management of cases. Participants will learn all aspects of gathering and recording information, and using this information to make decisions under public law decision-making.

- Block 9 - Practical Prevention Casework

  Four units of learning cover successful prevention casework, which hinges on early identification and the proper intervention relevant to the presenting problem, where there is a risk of homelessness.

- Block 10 - Housing Allocations

  These three units of learning demonstrate the importance of understanding the Allocation of Housing Act 1996, specifically Part 6 of the Housing Act 1996, and how to apply it when assessing applications to a local housing authority's housing register and making housing allocations.

- Block 11 - Understanding the Renters' Rights Act

  These four units of learning provide an understanding of the Renters' Rights Act and cover the following: an overview of the RRA, explaining the changes, the new obligations on landlords as a result of the RRA, how landlords can obtain possession post-RRA, and the Housing Options Service - how to implement the RRA.

4.4. Benefits for Councils and Providers

Local authorities and housing providers are facing increasing pressures: high staff turnover, heavy caseloads, stretched budgets, and growing complexity in homelessness and housing needs. Recent reports highlight that frontline staff often lack access to structured training, with 40% reporting that they do not have enough time to perform their job effectively, and many citing burnout, skills gaps, and recruitment churn as critical risks.

The Locata Academy directly addresses these challenges by offering a structured, accessible, and consistent training solution.

For both councils and providers, this approach offers significant benefits by reducing reliance on ad-hoc, inconsistent, and costly in-person training and enabling authorities to control their budgets. At the same time, ensuring teams receive regular, high-quality learning. Locata Academy also provides clear learning pathways to help new starters gain confidence quickly, reducing the disruption caused by staff turnover and burnout.

With Improvements in the consistency of service delivery across teams, such as Housing Options, Social Services, and Administrative support teams, compliance with legislation and best practices is embedded organisation-wide. Allowing senior officers to focus on leadership rather than firefighting, confident that their staff are well-trained, up-to-date, and flexible.

Building long-term workforce depth and resilience by ensuring teams across the organisation are skilled, compliant, and confident, strengthening the stability and effectiveness of frontline services is of prime importance and by using the Locata Academy, councils and providers can ensure their workforce is better supported, more consistent, and more resilient helping to deliver higher-quality services for residents while protecting staff wellbeing and retention.

4.5. Ongoing Access & Support

Locata Academy is committed to providing continuous value well beyond the completion of initial training. We recognise that housing and homelessness legislation, policy, and best practice evolve rapidly, and officers need reliable access to current, authoritative guidance. For this reason, the Academy ensures that learners and organisations have support throughout their training journey and beyond.

Users can revisit training modules at any time, enabling staff to refresh their knowledge and reinforce learning when dealing with complex cases or new responsibilities. The platform is continually updated with changes in legislation and policy, ensuring officers remain compliant and informed without the need for repeated, costly training cycles.

To support smooth implementation, we offer an optional onboarding call, helping teams to embed the Academy into their staff development processes. In addition, learners and managers have access to a wide range of self-service resources, including online help articles, FAQs, and peer community forums, which provide ongoing guidance and a network of shared best practices.

This approach ensures that Locata Academy is not a one-off training intervention, but a sustainable, evolving support system that underpins professional development, compliance, and service consistency across Housing Options teams and wider staff groups.

4.6. Accessibility & Standards

All Academy materials and online platforms are:

- Responsive – optimised for desktop, tablet, and mobile use.
- Accessible – compliant with WCAG 2.2 AA standards.
- UK Public Sector Service Standards Compliant – aligned with Government Digital Service standards for online delivery.

4.7. Subscription Models

Locata Academy is available under a subscription model that provides for ongoing access to the whole Academy, including all updates, resources, and new module releases.

Details of these models, including annual fees, are set out in the Pricing Document.

5. Data Protection

5.1. Information Assurance

Locata maintains Cyber Essentials Plus security accreditation which can be made available on request.

All Data is held in ISO27001 accredited Microsoft Azure data centres in the UK.

We use the Microsoft UK South Region as our primary location which is in London. For disaster recovery reasons the data is all backed up to Microsoft's UK West region which is located in Cardiff. Clients can typically specify where their data is stored and processed, depending on the capabilities and policies of the platform or service they are using. As a cloud service provider we can offer options for data residency, allowing Clients to choose the geographic location of data centres where their data will be stored. Additionally, some platforms provide features for data sovereignty, ensuring that data processing adheres to specific regulatory requirements or company policies regarding privacy and security. By providing control over data storage and processing locations, Clients can tailor their data management strategies to meet their unique needs and compliance obligations.

Each Client's data is physically segmented and separated by being stored within its own specific Client database, rather than being logically separated within a shared database. This eliminates the possibility of inter-Client data leakage, and allows us to apply Client specific access/security policies. Test and Production environments are hosted on physically separate database and web servers that are on separate Microsoft Azure subscriptions.

Access to all servers is strictly controlled, and only available to senior technical staff.

We have chosen to use Microsoft Azure as our hosting partner as they offer the most wide-ranging security accreditations amongst the cloud hosting companies. Among other defences, Microsoft run threat analytics on our servers to detect suspicious activity that may indicate a threat and sends real-time alerts so that we can respond. Further to Microsoft threat detection systems, we run Syspeace on the servers that monitors failed login attempts and blocks the IP address that they come from if there are more than 5 failed attempts. Also, along with antivirus we run Sophos anti-ransomware protection that detects and blocks file encryption and enables rollback of any encrypted files.

5.2. Data Back-up/Restoration & Disaster Recovery

Our solutions run under Microsoft SQL server database management system. The servers are configured in always on availability sets, and the data is physically held within Microsoft Azure storage. The data in the Microsoft Azure storage account is always replicated to ensure durability and high availability. Azure Storage automatically backs up the data so that it is protected from planned and unplanned events, including transient hardware failures, network or power outages, and massive natural disasters. Our data is replicated across the separate data centres within our always on availability sets.

As well as the automated continuous backup processing within Azure storage, full database backups are made weekly supplemented by transaction log backups which take place every 15 minutes. This provides a point in time restore capability.

The web servers are in availability sets of at least 2 servers each, so that should there be a server failure or if maintenance on a server is required, all of the load can be failed over to the other server in the availability set. This means that patches can be applied during office hours and zero-day exploit patches can be applied as soon as Microsoft has the patch available. The servers within the availability sets are geographically separated, so any potential disruption in one location should not affect the performance at the other data centre.

5.3. Business Continuity Statement/Plan

The scope of the Business Continuity Plan encompasses all aspects of our organisation's operations, including key business areas, critical functions, and dependencies between various departments.

Key Business Areas are as follows:

- Customer Service
- Product Development
- Sales and Marketing
- Finance and Accounting
- Information Technology
- Operations and Supply Chain

Critical Functions include:

- Customer Support: Ensuring uninterrupted assistance to Clients.
- Product Development: Maintaining innovation and product enhancement.
- Sales and Marketing: Sustaining revenue generation and market presence.

- Financial Management: Ensuring financial stability and compliance.
- IT Infrastructure: Guaranteeing system availability and data security.
- Supply Chain Management: Securing the flow of materials and goods.

Dependencies between Business Areas and Functions:

- Customer Support relies on IT infrastructure for communication tools.
- Product Development depends on a continuous supply chain and IT systems.
- Sales and Marketing require IT support for Client engagement.
- Financial Management relies on IT systems for financial transactions.
- Operations and Supply Chain depend on IT systems for inventory management and logistics.

Acceptable Downtime for Each Critical Function:

- Customer Support: Minimal downtime (less than 1 hour).
- Product Development: Moderate downtime (up to 4 hours).
- Sales and Marketing: Moderate downtime (up to 4 hours).
- Financial Management: Minimal downtime (less than 1 hour).
- IT Infrastructure: Minimal downtime (less than 1 hour).
- Supply Chain Management: Moderate downtime (up to 4 hours).

Outline Plan to Maintain Operations:

- Establish a dedicated Crisis Management Team responsible for implementing the BCP.
- Ensure redundant IT systems and data backups to minimise downtime.
- Implement cross-training programs to ensure staff availability across critical functions.
- Establish communication protocols for internal and external stakeholders during emergencies.
- Regularly review and update the BCP based on evolving risks and business needs.
- Conduct drills and simulations to test the effectiveness of the BCP and identify areas for improvement.
- Collaborate with key vendors and partners to ensure their BCP aligns with our organisation's requirements.

By implementing this comprehensive Business Continuity Plan, we aim to mitigate risks, minimise disruptions, and ensure the continuity of our operations during adverse events.

5.3.1. Access to our Microsoft Azure Network

This will be led by the Director using Key senior staff to implement. IT Continuity systems are based upon Microsoft Cloud availability sets, with built in load balancing and clustered database servers across multiple data centres. Details of Microsoft's SLAs can be found at https://azure.microsoft.com/en-gb/support/legal/sla/virtual-machines/v1_4/.

The web servers and the SQL server database servers are in availability sets of at least 2 servers each, configured as a SQL Server Always On availability group and load is balanced between the web servers. This means that should there be a hardware failure the system will automatically failover to the other server in the availability set. Microsoft will then copy an image of the virtual server to another node and the server will come back up. If there is a disaster at the primary data centre within the UK, real time backups of the server images are kept in secondary data centre within the UK. These would then automatically come online to provide the same level of service.

A further advantage of this technology is that if maintenance on a server is required, all of the load can be failed over to the other server in the availability set, and that patches can be applied without disruption the solution. This means that patches can be applied during office hours and zero day exploit patches can be applied as soon as Microsoft has the patch available.

5.3.2. Backup, Resilience & Disaster Recovery

In terms of data backup, transaction logs are taken every 2 hours and mirrored across the different geographic locations, which allows for point in time restoration. As stated, we have real time copies of the data at each of the geographic locations within the UK.

Additionally, should there be a disruption to power over all or part of the country all of Locata's infrastructure is in Microsoft's Azure UK data centres. The Azure data centres have been built to be resilient to interruptions of power from the UK's National Grid. The Azure data centres have uninterruptible power supplies and vast banks of batteries to ensure that electricity remains continuous should a short-term power disruption occur. Emergency generators provide backup power for extended outages and planned maintenance. The data centres have on-site fuel reserves for the generators.

Further to this the server disks and backup data is stored in two locations in the UK in both locations we maintain three healthy replicates of a Client’s data.

We have established procedures and practice routines to mitigate the unlikely event that disaster recovery will be needed. However, we are very aware that it is possible to lose, for example, a database server and its mirror, making disaster recovery necessary.

We practice Database recovery each month, and Web Server recovery annually.

In the event of disaster, our disaster recovery will be led by a Director with a team of key senior staff. Typically, recovery will be attempted in more than one way – with, say, one team working on fixing the original fault, whilst another works on producing a working system from the backups, and the final recovery dependant on who gets a working system up first. This keeps downtime to an absolute minimum.

You will be kept up to date with what progress we are making, and how long we expect your system to be down for. Restoring a system at the moment takes less than an hour.

Recovery Point Objective - RPO	15 Minutes
Recovery Time Objective - RTO	Less than an hour

A more detailed plan can be provided on request.

5.4. Privacy by Design

LocataPro is fully GDPR compliant. Our products and systems comply with the EU General Data Protection Regulations (GDPR). A full GDPR Statement can be provided which sets out LocataPro’s compliance with the GDPR and was created in conjunction with our own specialist Data Protection consultant.

6. Using the Service

6.1. Ordering

To order any LocataPro services, a detailed requirement/request to discuss requirements should be emailed to enquiries@locata.org.uk to establish if your organisation requires any enhancements to the entry-level systems outlined in this document.

Upon receipt of request/requirements a quotation will be provided where additional requirements or customisations are defined by the Client. If costs will be incurred due to the additional requirements or customisations identified by the Client, above those defined in this document and the Pricing Document, they will be charged accordingly and as per the Pricing Document.

Assistance will be provided to complete an Order Form and Call-Off Contract.

6.2. Invoicing and Payment Terms

Payment terms will be subject to the specific details of the actual Call-Off Contract.

We can be flexible to the requirements of the Client for invoicing, however in general, invoicing would be quarterly in arrears or annually in advance.

Should additional services be procured during the term of the Call-Off Contract, Implementation Fees would be invoiced upon receipt of Purchase Order, whilst Subscription Costs would be invoiced in line with other existing products, adjusting invoices pro-rata if applicable.

6.3. Availability of Trial Service

There are no trial services available. However, upon request Locata can provide a demonstration or arrange for the prospective Buyer to visit one of our existing Clients to review the system.

6.4. On-Boarding & Off-Boarding

6.4.1. On-Boarding

On-boarding can be broken down into the below stages:

- Scoping: Locata consult with you to define which modules and bolt-ons are required to fully satisfy service requirements.

- Deployment: we setup and provide a fully functional live site based on our out the box solution. We will also perform 0.5 days of Super User Training here (free of charge), so you can configure the system to meet your exact requirements.

- Configuration: Using the available functionality within the applicable modules, the system is configured to local requirements. This can be performed by Local Super Users with the relevant permissions using the powerful no code system functionality, or Locata can configure the system on your behalf as part of implementation consultancy. Implementation consultancy will be charged as per the Pricing Document.

- Training and Go-Live: We provide end-user training and can also provide train-the-trainer training. During any training we also signpost to our detailed Helpsite articles which include videos and supplementary content to assist with learning to use all system functionality. Training can be via Microsoft Teams or on-site, with on-site being our recommended approach. Please refer to section 6.5 for further details of what training is included.

- Business as Usual: We provide you with a dedicated Account Manager to assist you with day-to-day enquiries and to ensure you utilise our products to their fullest extent, maximising value for money.

6.4.2. Off-Boarding

Prior to the contract end date Locata would make contact with you to explain the options available to you in terms of extension or new contract. If following these discussions you would like to opt to cease using our services, we will begin the off-boarding process, following the Data Exit Plan (example provided below) agreed as part of your initial Call-Off Contract. On an agreed date and time, access to back-office and public sites will be disabled and amendments to data will no longer be possible. For the entirety of the contract you will be able to access and download any data held on the system by utilising the core reporting functionality of LocataPro. Data can be downloaded for each record individually too.

Following termination of service, all copies of your data will be securely destroyed upon your written instruction or 30 days after the contract end date, whichever is sooner. Written confirmation will be provided of the data's destruction.

Should you require us to provide data in bulk or to host your data after the expiry end date additional charges may apply dependent on your requirement. This will be priced as per the Pricing Document where extra costs are to be defined. We recommend that you put any requirements in writing at least 90 days prior to the end date of your contract.

Example - Data Exit Plan wording:

> *On expiry or termination of this Call-Off Contract, the Supplier shall continue to provide the Deliverables under this Call Off Contract until close of business on the agreed date and time in accordance with the terms and conditions of this Call-Off Contract.*
>
> *Where the Deliverables are no longer provided after agreed date:*
>
> *On an agreed date and time (to be agreed between the Buyer and the Supplier), the Supplier shall switch off access for the Buyer to the Supplier's back office and public site (if a public site forms part of our service provision) and no further amendments may be made.*
>
> *The Supplier's support desk will no longer respond to staff queries and any services provided by the Supplier shall also cease.*

Preparation of data

For the entirety of the contract until the Expiry Date or End Date the Buyer will be able to access and download any of their data held on the system via its core functionality. Data can be downloaded for each record individually.

Should the Buyer require the Supplier to provide data in bulk or to host their data after the Expiry or End Date, additional charges may apply, dependent on the requirement. The Buyer should put any requirements for the handling of their data in writing to the Supplier at least 30 days prior to the Expiry Date or End Date.

The Supplier will destroy all copies of the Buyer Data when they receive written instructions to do so or 30 days after the End or Expiry Date. Written confirmation will be provided to the Buyer that the data has been destroyed.

Cost

There will be no cost associated with the Supplier providing the system functionality to enable them to download their data from individual records.

Should there be additional requirements such as amending the format of the provided data, providing the data as a bulk data-load, or to host the Buyer Data, this may be chargeable.

Outstanding Payments

All outstanding invoices are to be paid in full prior to final transfer of data.

6.5. Training

The LocataPro modules are designed to be intuitive and easy to use for staff, whilst also benefitting from consistency of design between modules. These together reduce training requirements significantly. In general, we would recommend 0.5 days training for End Users and an additional 0.5 days training for Super Users / System Admin roles.

We will provide 0.5 days of End User training and 0.5 days of Systems Admin training per module procured. These training sessions are delivered on-line via Microsoft Teams. Additional training days would be priced as per the Pricing Document.

We can deliver and do recommend face-to-face training. This would be priced as per the Pricing Document.

All training is supplemented, free of charge, with the LocataPro Support portal, giving Users access to 100s of Knowledge Articles, videos and a community of users who can assist them with their queries. Their Locata Account Manager will also remain available to support and advise them following delivery of training.

6.6. Implementation Plan

A detailed implementation plan can be provided on request.

Typically, a back-office site can be set up and available 1 week from receipt of purchase order. Subsequent configuration of the rest of system would generally take between 12-24 weeks depending on the module procured, however we can and have delivered systems in shorter timescales.

If timescales are tight, we would recommend opting for implementation consultancy. This is where Locata take on much of the work which would normally be performed by local users, such as adjusting decision letters, setting up Users, configuring workflows for local processes and configuring PHP templates. This is entirely optional, as local Users can configure the systems too. Implementation consultancy, if required, will be charged as per the Pricing Document.

6.7. Data Restoration

Full backups and transitional logs are kept so that should the Client require it the database can be restored to a previous version and the database can be restored to a point in time. As mentioned in section 5.3.2, transaction logs are taken every 2 hours and mirrored across the different geographic locations, which allows for point in time restoration. As stated, we have real time copies of the data at each of the geographic locations within the UK.

A full audit trail is kept of all data changes.

6.8. Service Migration

There are several ways to import data into the Locata system. These are detailed in the Technical requirements section (7.2) of this document.

Primarily Clients will need to upload their data to our servers via SFTP. Data migration is not a prerequisite. Clients can start using the entry-level modules out the box without the requirement for any data migration.

6.9. Service Management

A dedicated Locata Account Manager will manage the implementation phase. During this phase, your Account Manager will remain with you throughout and be an escalation point in the unlikely case of any issues. A permanent secondary escalation point will be the Locata Accounts Director. After implementation, in the unlikely event of an issue, the first point of contact would be the LocataPro Support Portal. If the Support Agent cannot resolve the issue, the escalation chain is your Locata Account Manager, then the Locata Accounts Director and Managing Director.

6.10. Service Constraints

Our aim is to provide 100% system availability. However, there are points in time when we may need to take the services down for major hardware or software upgrades and as such we warrant to a 99.8% availability.

We consult with our Clients as far in advance as is possible to schedule this at a time when it will have the least impact upon their business operations. In consultation with the Client we always plan to carry out this type of work either at weekends or overnight. We plan to limit this amount of scheduled downtime to each Client to two days per calendar year.

6.11. Service Levels

In terms of performance, Locata aims to provide single screen, single record refresh of data within 1 second. There are sophisticated search and reporting tools which can return huge amounts of information, and these will be variable in terms of the time they take to place these back to the Client system.

However, as our systems are provided over the internet we can only warrant performance at our end. Obviously, local bandwidth connections can impact upon performance and as such our key monitoring statistics will be based upon the performance of queries on our servers.

In terms of availability, we aim to provide 100% availability, subject to our programmed maintenance. However, there are invariably times when we cannot meet this so in terms of contractual performance, we warrant to a 99.8% availability. In order to achieve these performance levels, the data centres are monitored 24/7 and the operators alert us to any issues immediately.

We will react to hardware or operational availability issues immediately upon being alerted. Issues with the software are logged on the support site, which is available to registered users 24/7 and monitored during normal working hours (Monday to Friday, 9 – 5 excluding national bank holidays). The online support system offers direct updates to the reporting officers email inbox so communication about the issue is allowed to flow freely with the ability to respond quickly and easily.

Telephone support is available to local system administrators within normal working hours (Monday to Friday, 9 – 5 excluding national bank holidays).

When a fault is logged with our Support team, it is categorised on the following basis:

- Critical - System is unavailable.
- High - Critical functionality is unavailable.
- Medium - Non-critical functionality is unavailable.
- Low - Minor errors and cosmetic issues.

We aim to respond to and resolve faults in timescales relating to their priority, explained below:

- Critical issues – Senior Technical Consultant assigned within 1 working hour, resolution within 1 working day
- For all other categories of support tickets - 99% of issues will be resolved within 5 working days but the average resolution time is less than 2 working days.

In some scenarios, fixes for Medium and Low priority faults may be deployed with the next scheduled release. This will be clearly communicated and explained via the Support Site / ticket communication.

6.11.1. Additional System IT Support Notes

Subscription costs cover the general maintenance of the system including the resolution of any issues raised within the defined response times above.

Also included are hosting and management of all data security, backup systems and processes, providing SSLs, registering domains, upgrading the infrastructure e.g. increasing the amount of data storage to cope with expansion and any increase in demand. Subscription costs also include maintaining the underlying operating environment by keeping this up to date with security fixes and patches.

All service issues are logged on the support site which is monitored by our dedicated UK based support team. At all times the support team includes a senior support consultant, and dedicated triage officer who accesses issues within 2 hours and determines the appropriate next steps for resolution. We have real-time dashboards reporting on issues logged, issue severity and issue age. Over the past 12 months we have had an uptime of 99.99% there were 3157 tickets logged from 153 different organisations. The average resolution time for all tickets was 1.58 days. Reporting on issue statistics is available to clients.

6.12. Outage and Maintenance Management

Our solutions run under Microsoft SQL server database management system. The servers are configured in always on availability groups, and the data is physically held within Microsoft Azure storage. The data in the Microsoft Azure storage account is always replicated to ensure durability and high availability. Azure Storage automatically backs up the data so that it is protected from planned and unplanned events, including transient hardware failures, network or power outages, and natural disasters.

As well as the automated continuous backup processing within Azure storage, full database backups are made weekly supplemented by daily differential backups and transaction log backups which take place every 15 minutes. This allows us point in time recovery.

The web servers are in availability sets of at least 2 servers each, so if a server fails or maintenance on a server is required, the load will be automatically switched to the other server in the set. So patches can be applied during office hours and zero day exploit patches can be applied as soon as Microsoft has the patch available.

In the event of outages, our approach ensures transparent communication and access to information across all fronts. Each public-facing website and back-office system is equipped with a public dashboard messaging service, facilitating real-time updates for Users. As an added layer of resilience, our business websites, hosted separately, serve as a fail-safe mechanism. Additionally, we employ email alerts as a primary channel for disseminating critical information independently of other systems.

Furthermore, all Users benefit from access to our Community Forums, where we proactively communicate known issues and system outages. These forums are hosted on a 3rd party site and remain unaffected during system disruptions, ensuring continuous access to essential updates and support resources. Through this multi-faceted approach, we prioritise transparency, accessibility, and reliability, enabling effective communication and support even during challenging circumstances.

6.13. Financial Recompense Model

In terms of systems availability, if we do not meet our warranted values above (99.8% availability), we offer to refund a multiplied pro rata rate of 1.5 times for the downtime listed above, up to a maximum of the annual subscription fee, per year.

Thus, for the avoidance of doubt and as an example, if a Client is paying £10,000 per annum and the system was down for one day over and above the tolerances defined, we would refund 1.5 x £10,000/365 up to a max of £10,000.

7. Provision of the Service

7.1. Client Responsibilities

Obligations of the Client include but are not limited to:

- Provision of continuous internet availability with suitable bandwidth.
- User account management.
- Other responsibilities are spelt out in the Terms and Conditions Document provided separately.

7.2. Technical Requirements and Client-Side Requirements

All of our IT solutions are web based and fully hosted by us and are based upon Microsoft Technology. You purchase the service not the system, which means you have no hardware, operating software or IT infrastructure costs.

Users access the system via a secure web site. They need a browser that's connected to the internet to access the system. For public-facing websites our sites are W3C compliant, and we support all the major browsers. Our back-office and public-facing sites are WCAG 2.2 AA compliant to ensure they meet the Public Sector Bodies (Websites and Mobile Applications) (No. 2) Accessibility Regulations 2018. The back offices are supported on the latest versions of Microsoft Edge, Chrome and Safari.

Locata systems are open to integration, and the architecture has been designed on the premise that it would stand between Clients' systems and so would need to be able to export and import data flexibly and reliably.

Data can be loaded into Locata's system via

- A one-off flat file import where the file structure is specified by Locata
- A one-off flat file import where the file structure is specified by the Client
- A nightly one-way data load
- A call to our web service

Clients can access data in the Locata System via

- batch exports
- calling our web services
- Locata calling your web services
- integrating with your document management system

In terms of Client-side requirements, LocataPro software is web-based so a modern, standards-compliant web browser (Chrome, Edge, iOS mobile safari) and an internet connection are required In addition, proxy servers must not cache the LocataPro domain.

7.3. Development life cycle of the solution

7.3.1. Agile Development

Our Agile development methodology, involves several iterative stages aimed at delivering a high-quality solution that meets the Client's needs:

- Identify Problems/Needs: The first step involves understanding the problems or needs of the stakeholders and end-users. This might involve conducting interviews, surveys, or workshops to gather requirements and prioritise them.

- Plan: Once the problems and needs are identified, the team plans the project by breaking down the requirements into smaller, manageable tasks. This often involves creating a product backlog, prioritising user stories, and estimating effort.

- Design: In this stage, the team designs the architecture and user experience of the solution. This might include creating wireframes, mock-ups, or prototypes to visualise the solution and gather feedback from stakeholders.

- Build: The development team begins implementing the solution based on the designs and requirements. Agile encourages iterative development, so the solution is built incrementally in short development cycles called sprints.

- Test: Testing is performed throughout the development process to ensure that each increment meets the quality standards and fulfils the requirements. This includes unit testing, integration testing, and user acceptance testing.

- Deploy: Once a feature or increment is tested and approved, it is deployed to a production environment where end-users can access it. Deployment in agile is often automated to streamline the process and reduce manual errors.

- Review and Iterate: After deployment, the team conducts a review to gather feedback from stakeholders and end-users. This feedback is used to identify areas for improvement and inform the next iteration of development.

- Maintain: Agile development doesn't end with deployment. The team continues to maintain and support the solution, addressing any issues that arise and making updates based on changing requirements or feedback.

These stages are often repeated in iterative cycles, with each iteration building upon the previous one to incrementally improve the solution and deliver value to the stakeholders. Agile methodology emphasises collaboration, flexibility, and responsiveness to change throughout the development process.

7.3.2. Agile Sprints

From time to time we use, sprints which are time-boxed iterations during which a cross-functional team works collaboratively to deliver a potentially shippable increment of product functionality. Sprints typically have fixed durations, commonly ranging from one to four weeks, with two weeks being a common choice.

During a sprint, the team focuses on completing a set of user stories or tasks from the product backlog that have been selected for implementation based on their priority and estimated effort. The goal is to deliver tangible value to the Client by the end of the sprint.

- Planning: At the beginning of each sprint, the team conducts a sprint planning meeting to select the user stories or tasks to be worked on during the sprint. The team estimates the effort required for each selected item and commits to completing them by the end of the sprint.

- Execution: Throughout the sprint, the team collaborates closely to design, develop, and test the selected items. Daily stand-up meetings are held to provide updates on progress, discuss any obstacles or blockers, and ensure alignment within the team.

- Review: At the end of the sprint, the team holds a sprint review meeting to demonstrate the completed work to stakeholders, gather feedback, and discuss any adjustments or refinements needed. This provides an opportunity for stakeholders to see the progress made and provide input for future iterations.

- Retrospective: Following the sprint review, the team conducts a sprint retrospective meeting to reflect on their processes, identify what went well and what could be improved, and make adjustments for future sprints. This continuous improvement process helps the team optimise their performance and effectiveness over time.

- Incremental Delivery: Sprints emphasise delivering incremental value to the Client with each iteration. By breaking down work into manageable chunks and delivering them incrementally, Agile teams can respond quickly to changing requirements and priorities, and stakeholders can see tangible progress on a regular basis.

- Adaptability: Sprints allow for flexibility and adaptability throughout the development process. If new information or priorities emerge, the product backlog can be adjusted, and the team can pivot accordingly in subsequent sprints.

Overall, sprints in Agile development provide a structured framework for iterative and incremental delivery, fostering collaboration, transparency, and responsiveness within the team and with stakeholders.

7.3.3. Change Management

Our Change Management process plays a crucial role in ensuring the integrity and security of our systems and services. Every change, regardless of its nature, undergoes a rigorous evaluation process to guarantee that it is carefully considered, meticulously planned, and ultimately, deemed appropriate for implementation. Central to our approach is maintaining a comprehensive audit trail that meticulously documents every aspect of the change process, including the rationale behind each decision and the individuals involved.

Our processes adhere to the stringent standards set forth by ISO 27001 (as applicable), a globally recognised framework for information security management. Changes are meticulously assessed to ascertain that they do not introduce any potential security vulnerabilities or compromise the confidentiality, integrity, or availability of our systems and data. This proactive approach ensures that our Clients' sensitive information always remains safeguarded.

Before any change is deployed to Client sites, it must first pass through our Quality Assurance (QA) environment. Here, it undergoes thorough testing to ensure compliance with established security principles, as well as functional and performance requirements. By subjecting changes to rigorous testing in a controlled environment, we mitigate the risk of introducing vulnerabilities or disruptions into the production environment.

Furthermore, our Change Management process includes robust auditing mechanisms to validate the validity and appropriateness of each change. Through regular audits, we verify that changes adhere to established policies, procedures, and regulatory requirements. This proactive monitoring and auditing not only uphold the integrity of our systems but also instil confidence in our Clients and stakeholders.

To prevent unauthorised changes and maintain the integrity of our development environments, we implement stringent access controls and monitoring mechanisms. Access to development environments is tightly controlled, and only authorised personnel with the requisite training and experience are granted access. This ensures that changes are made by individuals who possess the necessary expertise and adhere to established protocols, minimising the risk of unauthorised modifications or inadvertent errors.

Our Change Management process is meticulously designed to ensure that changes are carefully evaluated, thoroughly tested, and meticulously documented to uphold the highest standards of security, integrity, and compliance.

7.4. After-Sales Account Management

A dedicated Locata Account Manager will be assigned and responsible for:

- Preparing and communicating clear Project Plans on project initiation
- Managing the delivery and implementation of any products purchased
- Developing and maintaining strong relationships with the Client
- Serving as the lead point of contact for all Client account management matters throughout the life of the Call-Off Contract

7.5. Termination Process

The Client can terminate the Call-Off Contract at any time by giving Locata 30 days’ notice.

If the Client fails to pay Locata undisputed sums of money when due, the Locata must notify the Client and allow the Client 5 Working Days to pay. If the Client doesn’t pay within 5 Working Days, Locata may End the Call-Off Contract by giving the length of notice in the Call-Off Contract Order Form.

If you would like to opt to cease using our services, we will begin the off-boarding process, following the Data Exit Plan agreed as part of your initial Call-Off Contract. On an agreed date and time, access to back-office and public sites will be disabled and amendments to data will no longer be possible. For the entirety of the contract you will be able to access and download any data held on the system by utilising the core reporting functionality of LocataPro. Data can be downloaded for each record individually too. Further information regarding the off-boarding process is detailed in section 6.4.2.

For the entirety of the Call-Off Contract until the Expiry Date or End Date users are able to access and download data held on the system via our Reporting tools and GDPR functionality. If Clients have the Data Warehouse bolt-on Users can extract data from the data warehouse via ODBC or ADO.

If you require an alternative solution to the above, we are happy to discuss your requirements and this will be priced according to the Pricing Document. We recommend that if you have alternative requirements, you communicate them to us at least 3 months prior to your intended termination date, so we can ensure data is available for testing prior to termination of your contract.

We will destroy all copies of your data when we receive written instructions to do so or 30 days after the End or Expiry Date. Written confirmation will be provided to you that the data has been destroyed.

8. Our Experience

8.1. Case Studies

8.1.1. Cumberland Council – Case Study with Home Options Team Leader

The Challenge

Cumberland Council was established as a new unitary council on the 1 April 2023, the new council replaced the three district councils of Allerdale, Carlisle and Copeland. Each of the three districts have been using Locata HPA2 since the Homelessness Reduction Act was enacted in April 2018 and had made various changes to their workflows to reflect local working practices within their district.

With the transition to a unitary council, the three former districts (now referred to as "Localities") needed to consolidate their separate HPA2 systems into a single, unified system. This was essential for enhancing service provision and standardising working practices across the entire authority area. There are medium-to-long term plans for case officers to eventually work across the whole authority, however for now, the locality teams also had a need to continue to manage cases within their respective localities – so the new unified system had to support both these short and longer term requirements.

Our approach

To ensure we fully captured the service requirements and delivered a tailored solution, we prioritised face-to-face meetings with service managers. These strategic discussions not only helped us understand their current processes and challenges but also provided valuable insights into their future goals and essential needs. By conducting thorough internal discussions with locality teams beforehand, we were able to structure these meetings for maximum efficiency, ensuring that we aligned on the most critical requirements and set a clear path forward for success

For each locality to retain their existing data without having to access two separate systems the decision was taken to take a data cut from each system and merge the data into the new Cumberland council system over the weekend in order to minimise service disruption for both customers and officers.

In developing the solution, we leveraged:

- Over 20 years of expertise in delivering homelessness service provision and case management.
- Insights gained from previous consultancy engagements.
- Established industry best practices.

This all allowed us to create a new case workflow structure to simplify and standardise processes to facilitate a shift in service provision across the entire authority area.

We streamlined the process by configuring a new PHP solution designed to significantly reduce the time officers spend manually entering or duplicating information already captured in the system. By automating a large portion of the process, we ensured that when the PHP was generated, it seamlessly pulled in relevant data from the existing workflows, enabling officers to work more efficiently and focus on higher-priority tasks.

Part of the requirement was that new cases would be allocated to case officers that worked in a particular locality based upon the postcode of the customers current or last settled address. When a new online referral was made by a customer, public body or other organisation the system would allocate to the relevant locality. For forms received from outside the Cumberland area the system would automatically allocate fairly across the localities utilising a “round-robin” approach.

Throughout the process we actively sought and encouraged testing and feedback from the teams to ensure that it fully met their specific needs and allowed them to move seamlessly to the new combined system.

8.1.2. Strategic Director of Housing & Communities at New Forest District Council

Please explain what the situation was before we implemented our product or service.

"The Council used a 25-year-old legacy housing management system which was server based and was used to record tenant data and manage rent accounting and arrears collection. Over the years functionality was increasingly used outside of the system due to its limitations in functionality and the lack of flexibility in building up a range of ne data collection fields, plus being server based remote access was slow and restrictive in a new hybrid working world."

Please give specific reasons why you like the product or service we have provided.

"The new Locata Estates Product was designed to meet our specific needs with its standard architecture allowing for flexible design of functionality and processes. The product architecture provides a no fuss look and feel aiding the ability to navigate and identify and record key information.

Locata Housing Services provide a very unique and positive approach to implementation, tailoring support and collaborative time with customer teams as required. It is this collaborative approach and dedication to each implementation that contributes to successful implementations and long-term relationships which continue to improve the software year on year."

Please give some examples of how the implementation of our product or service has improved working life for you and your team.

"Our Rent Income team had a dedicated officer processing UC and APA payments, taking several days per week, which resulted in less time dedicated to the collection of former tenant arrears. By developing automated processing taking DWP files directly into the Estates module we have full and up to date UC payment records and income uploaded to rent accounts. This officer now can fully focus on the recovery of former tenant rent arrears and collection rates have increased.

Our Central business team carried out a number of manual functions and maintained several spreadsheets and reports for managers. These processes were captured and automated in the with new Estates module resulting in a role moving to another team to meet unmet demand which impacted on the welfare of existing members of staff.

Before implementing the Estates module we manually transferred new tenant data from the Locata CBL system to our existing housing management system. By integrating the estates and CBL and HPA systems in to one management system the journey of a homeless person through the HPA , CBL then in to Estates as a tenant their full record builds and transfers seamlessly with them, ensuring there are no data protection issues, additional integrations or manual work involved, providing one version of the truth about that tenant and reducing the number of hours required for manual data entry."

8.2. Clients

8.3. Contact Details

Should you have any queries or wish to discuss your requirements in further detail please contact us using the following details:

Telephone: 01895 637595

Email: enquiries@locata.org.uk