



# Homes England

Date: 18 August 2023

Our Ref: RFI4429

Tel: 0300 1234 500

Email: [infogov@homesengland.gov.uk](mailto:infogov@homesengland.gov.uk)

[REDACTED]  
By Email Only

Dear [REDACTED]

## **RE: Request for Information – RFI4429**

Thank you for your request for information which was processed in accordance with the Freedom of Information Act 2000 (FOIA).

You requested the following information:

**1. Does your organisation use Customer Relationship Management (CRM) software? (Example: HubSpot, Salesforce, Dynamics, Other, etc.)**

- Yes
- No

**2. If yes, please specify which CRM(s) are used by your organisation:**

- HubSpot
- Salesforce
- Dynamics
- Other (Please specify)

**3. What license level/subscription does your organisation have?**

**4. What is the annual cost of your CRM system(s)?**

**5. List any job roles by (job title) within your organisation that communicate with contacts via the CRM(s) system?**

**6. Does your organisation work with any external agencies to manage the CRM?**

**7. Does your CRM integrate with other systems within your organisation? (Example: finance systems, Other CRM Systems, etc.)**

- Yes
- No

**8. If yes, please specify which other systems your CRM(s) are integrated with.**





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## Response

We can confirm that we do hold the requested information. We will answer your questions in turn below:

**1. Does your organisation use Customer Relationship Management (CRM) software? (Example: HubSpot, Salesforce, Dynamics, Other, etc.)**

We can confirm we do use CRM software.

**2. If yes, please specify which CRM(s) are used by your organisation:**

We can confirm we use Dynamics software.

**3. What license level/subscription does your organisation have?**

Dynamics Customer Service Enterprise licences, purchased via a public sector Microsoft Enterprise Agreement.

**4. What is the annual cost of your CRM system(s)?**

We can confirm we have 1,055 Dynamics 365 Customer Service Enterprise licenses for Homes England at a cost of £529.56 per license per year (total per year is £558,685.80)

**5. List any job roles by (job title) within your organisation that communicate with contacts via the CRM(s) system?**

We can confirm that we do hold the requested information. However, we rely on Section 40(2) of the FOIA to withhold some of the information from disclosure.

## Section 40 – Personal information

We are withholding some information from disclosure on the grounds that it constitutes third party personal data and therefore engages section 40(2) of the FOIA. Some of the requested information contains information about less than 10 individuals. Although it is not possible to identify the individuals directly from this information, we consider that the individuals are indirectly identifiable, as this information could be paired with other available information that would enable their identification. This would breach one or more of the data protection principles.





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Section 40 is an absolute exemption which means that we do not need to consider the public interest in disclosure. Once it is established that the information is personal data of a third party and release would breach one or more of the data protection principles, then the exemption is engaged.

The full text in the legislation can be found on the following link:

<https://www.legislation.gov.uk/ukpga/2000/36/section/40>

## Advice and Assistance

We have a duty to provide advice and assistance in accordance with Section 16 of the FOIA. To comply with this duty we are able to confirm that where there are less than 10 individuals in the data set, we have recorded the figure as <10.

Please see Annex A attached to this letter for the relevant job roles.

### **6. Does your organisation work with any external agencies to manage the CRM?**

We can confirm that we do not currently work with external agencies because the service is not operational until Quarter 3 2023/2024.

### **7. Does your CRM integrate with other systems within your organisation? (Example: finance systems, Other CRM Systems, etc.)**

We can confirm that our CRM does integrate with other systems.

### **8. If yes, please specify which other systems your CRM(s) are integrated with**

We can confirm that our CRM system is part of the 365 Microsoft suite of products so is fully integrated with that platform (for example: Microsoft Outlook).





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## **Right to Appeal**

If you are not happy with the information that has been provided or the way in which your request has been handled, you may request an internal review. You can request an internal review by writing to Homes England via the details below, quoting the reference number at the top of this letter.

Email: [infogov@homesengland.gov.uk](mailto:infogov@homesengland.gov.uk)

Information Governance Team  
Homes England  
Windsor House  
6<sup>th</sup> Floor  
42-50 Victoria Street  
London  
SW1H 0TL  
United Kingdom

Your request for review must be made in writing, explain why you wish to appeal, and be received within 40 working days of the date of this response. Failure to meet this criteria may lead to your request being refused.

Upon receipt, your request for review will be passed to an independent party not involved in your original request. We aim to issue a response within 20 working days.

You may also complain to the Information Commissioner's Office (ICO) however, the Information Commissioner does usually expect the internal review procedure to be exhausted in the first instance.

The Information Commissioner's details can be found via the following link:

<https://ico.org.uk/>

6<sup>th</sup> Floor  
Windsor House  
42 - 50 Victoria Street, Westminster  
London, SW1H 0TL

0300 1234 500  
@HomesEngland  
[www.gov.uk/homes-england](http://www.gov.uk/homes-england)





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Please note that the contents of your request and this response are also subject to the Freedom of Information Act 2000. Homes England may be required to disclose your request and our response accordingly.

Yours sincerely,

**The Information Governance Team**

For Homes England





Assistant - Safety, Health, and Environmental	<10 staff members
Assistant Accountant	<10 staff members
Assistant Accountant - Financial Planning Analysis (Resource)	<10 staff members
Assistant Director - Acquisitions and Partnering	<10 staff members
Assistant Director - AEC and Money Laundering Reporting Officer	<10 staff members
Assistant Director - Affordable Housing Grant Provider Management	<10 staff members
Assistant Director - Affordable Housing Growth	<10 staff members
Assistant Director - Building Safety Fund	<10 staff members
Assistant Director - Consumer Risk	<10 staff members
Assistant Director - Corporate Projects	<10 staff members
Assistant Director - Customer Excellence	<10 staff members
Assistant Director - Delivery Planning and Insight	<10 staff members
Assistant Director - Developer Services	<10 staff members
Assistant Director - Development and Infrastructure Risk	<10 staff members
Assistant Director - Development Finance	<10 staff members
Assistant Director - Development Finance and Emerging Risk	<10 staff members
Assistant Director - Development Services	<10 staff members
Assistant Director - Equity and Partnerships Origination	<10 staff members
Assistant Director - Equity and Partnerships Transaction Management	<10 staff members
Assistant Director - Finance Transformation	<10 staff members
Assistant Director - Financial Accounting and Reporting	<10 staff members
Assistant Director - Government Relations	<10 staff members
Assistant Director - Guarantees and Product Development	<10 staff members
Assistant Director - HSE Estates & Facilities	<10 staff members
Assistant Director - Infrastructure Finance	<10 staff members
Assistant Director - Infrastructure Grants Project Management	<10 staff members
Assistant Director - Internal Audit	<10 staff members
Assistant Director - Loans Transformation	<10 staff members
Assistant Director - Operational Management	<10 staff members
Assistant Director - Policy, Processes and Major Projects	<10 staff members
Assistant Director - Portfolio Analytics	<10 staff members
Assistant Director - Product and Client Function	<10 staff members
Assistant Director - Provider Services	<10 staff members
Assistant Director - Regional	<10 staff members
Assistant Director - Strategy	<10 staff members
Assistant Director - Sustainability and Design	<10 staff members
Assistant Director - Technical Hub	<10 staff members
Assistant Director - Transactional Services	<10 staff members
Assistant Manager - Infrastructure Grants Project Management	<10 staff members
Assistant Manager - Portfolio	<10 staff members
Auditor - Internal	<10 staff members
Business Partner - Finance Transformation	<10 staff members
Business Partner - Investment Finance	<10 staff members
Business Partner - Land and Development Finance	<10 staff members
Chairman	<10 staff members
Chief Customer Officer	<10 staff members

## RFI4429 - Annex A

Chief Development Officer	<10 staff members
Chief Digital and Data Officer	<10 staff members
Chief Economist	<10 staff members
Chief Executive Officer	<10 staff members
Chief Investment Officer	<10 staff members
Chief Officer - Information Security	<10 staff members
Chief Operating Officer	<10 staff members
Chief Risk Officer (Exec)	<10 staff members
Consultant - Brand	<10 staff members
Creative Artworker	<10 staff members
Developer - Software	<10 staff members
Director - Acquisitions and Partnering	<10 staff members
Director - Affordable Housing Grants	<10 staff members
Director - Building Remediation	<10 staff members
Director - Capability Building CoE	<10 staff members
Director - Construction	<10 staff members
Director - Development	<10 staff members
Director - Finance	<10 staff members
Director - Help to Buy	<10 staff members
Director - Infrastructure Funding	<10 staff members
Director - Internal Audit	<10 staff members
Director - Land	<10 staff members
Director - Loans	<10 staff members
Director - National Development	<10 staff members
Director - Portfolio Management	<10 staff members
Director - Products, Equity and Partnerships	<10 staff members
Director - Projects	<10 staff members
Director - Projects (Large Sites)	<10 staff members
Director - Regeneration Partnership (York)	<10 staff members
Director - Regeneration Programme	<10 staff members
Director - Regeneration, Partnerships and Major Projects	<10 staff members
Director - Regional	<10 staff members
Director - Strategy, Research, Analysis and Sponsorship	<10 staff members
Director - Technical Services CoE	<10 staff members
Engineer - Infrastructure Solutions	<10 staff members
Engineer - Test	<10 staff members
Executive Assistant	18 staff members
Executive Assistant - CEO	<10 staff members
Executive Director - Markets, Partners and Places	<10 staff members
Executive Director and CFO	<10 staff members
Graduate	<10 staff members
Head - Acquisitions	<10 staff members
Head - Admin Finance	<10 staff members
Head - AEC Governance and Investigations & Deputy Nominated Officer	<10 staff members
Head - AEC Operations and Deputy Money Laundering Reporting Officer	<10 staff members
Head - Affordable Housing Strategy	<10 staff members



## RFI4429 - Annex A

Head - Assurance	<10 staff members
Head - Building Safety	<10 staff members
Head - Building Safety Fund	<10 staff members
Head - Business Control	<10 staff members
Head - CAL (National) and Commercial Disposals	<10 staff members
Head - Capital Projects	<10 staff members
Head - Chair and CEO Office	<10 staff members
Head - Change	<10 staff members
Head - Chief Development Office	<10 staff members
Head - Chief Investments Office	<10 staff members
Head - Coastal Communities	<10 staff members
Head - Consumer Risk	<10 staff members
Head - Contract Management	<10 staff members
Head - Credit Portfolio	<10 staff members
Head - Customer Engagement and Relations	<10 staff members
Head - Customer Journey (Apply)	<10 staff members
Head - Development & Infrastructure Risk	<10 staff members
Head - Development Finance	<10 staff members
Head - Development Finance Portfolio Management (South)	<10 staff members
Head - Development Services	<10 staff members
Head - Development Transformation	<10 staff members
Head - Disposals	<10 staff members
Head - Distressed Investments	<10 staff members
Head - Economics	<10 staff members
Head - Equity, Partnerships and Guarantees	<10 staff members
Head - Estates Management	<10 staff members
Head - Facilites and H&S	<10 staff members
Head - Financial Due Diligence	<10 staff members
Head - Financial Planning and Analysis	<10 staff members
Head - Garden Towns and Villages	<10 staff members
Head - Governance and Reporting	<10 staff members
Head - Government Relations	<10 staff members
Head - Growth	<10 staff members
Head - Guarantees	<10 staff members
Head - Guarantees Risk	<10 staff members
Head - Housing Guarantees Transactions	<10 staff members
Head - Infrastructure	<10 staff members
Head - Infrastructure Finance	<10 staff members
Head - Infrastructure Grants (North)	<10 staff members
Head - Infrastructure Grants Project Management	<10 staff members
Head - Infrastructure Grants Transactions	<10 staff members
Head - Internal Communications	<10 staff members
Head - Investment Risk	<10 staff members
Head - Large and Strategic Partnerships	<10 staff members
Head - Lending Alliances	<10 staff members
Head - Loans Transformation	<10 staff members

## RFI4429 - Annex A

Head - Local Government Capacity Centre Learning	<10 staff members
Head - Local Government Capacity Centre Programme	<10 staff members
Head - Market Diversification and Affordable Housing Services	<10 staff members
Head - Market Engagement	<10 staff members
Head - Master Development	<10 staff members
Head - MPP Services	<10 staff members
Head - Operational Management and Commercials	<10 staff members
Head - Operational Transition	<10 staff members
Head - Operations Policy	<10 staff members
Head - Planning and Enabling	<10 staff members
Head - Product	<10 staff members
Head - Project Management (Infrastructure Grants)	<10 staff members
Head - Project Valuation & Appraisal	<10 staff members
Head - Prov Mgnt Large and Strategic Providers	<10 staff members
Head - Prov Mgnt SME / Unreg'd / Specialist Providers	<10 staff members
Head - Provider Services	<10 staff members
Head - Public Sector Land	<10 staff members
Head - Regional	<10 staff members
Head - Research and Analysis	<10 staff members
Head – Self-Commissioned Homes Unit	<10 staff members
Head - Strategic Growth	<10 staff members
Head - Strategic Projects	<10 staff members
Head - Structured Finance	<10 staff members
Head - Structured Property Finance	<10 staff members
Head - Structured Real Estate Finance	<10 staff members
Head - Subject Matter Expert (Evolve)	<10 staff members
Head - TAG	<10 staff members
Head - Technical Excellence	<10 staff members
Head - Technical Hub	<10 staff members
Head - Town Planning	<10 staff members
Junior Manager - Infrastructure Finance	<10 staff members
Lead - Business and Service Transition (MAP)	<10 staff members
Lead - Business Intelligence	<10 staff members
Lead - L&OD Projects	<10 staff members
Lead - Loan Origination	<10 staff members
Manager	<10 staff members
Manager - Acquisitions	<10 staff members
Manager - Affordable Home Ownership	<10 staff members
Manager - Affordable Housing Products	<10 staff members
Manager - Affordable Housing Strategy	<10 staff members
Manager - Analytics, Knowledge and Information	<10 staff members
Manager - Assurance	<10 staff members
Manager - Business	<10 staff members
Manager - Business Intelligence	<10 staff members
Manager - CAL (National) and Commercial Disposals	<10 staff members
Manager - Change	<10 staff members

## RFI4429 - Annex A

Manager - Change Communications	<10 staff members
Manager - Change Risk	<10 staff members
Manager - Chief Development Office	<10 staff members
Manager - Chief Investments Office	<10 staff members
Manager - Community Engagement	<10 staff members
Manager - Compliance Audit	<10 staff members
Manager - Contracts	<10 staff members
Manager - Contracts & Performance	<10 staff members
Manager - Contracts Standards and CI	<10 staff members
Manager - Core Business Contracting	<10 staff members
Manager - Customer Relations	<10 staff members
Manager - Data and Reporting	<10 staff members
Manager - Delivery Control Performance	<10 staff members
Manager - Delivery Management	<10 staff members
Manager - Delivery Support	<10 staff members
Manager - Development	15 staff members
Manager - Development Finance Loans	13 staff members
Manager - DPP	<10 staff members
Manager - Engagement	<10 staff members
Manager - Environmental	<10 staff members
Manager - Estates	15 staff members
Manager - External Communications	<10 staff members
Manager - FDD	<10 staff members
Manager - Financial Accounting	<10 staff members
Manager - First Homes Contracts	<10 staff members
Manager - Government Relations	<10 staff members
Manager - Growth	11 staff members
Manager - Help to Build Apply	<10 staff members
Manager - Help to Buy Accounting	<10 staff members
Manager - Historical Grants	<10 staff members
Manager - HTB Stakeholder Communications	<10 staff members
Manager - Infrastructure Finance	<10 staff members
Manager - Infrastructure Grants Project Management	<10 staff members
Manager - Infrastructure Grants Transactions	<10 staff members
Manager - Internal Audit Data Analytics & Reporting	<10 staff members
Manager - Lending Products Risk	<10 staff members
Manager - Loans & Equity Accounting	<10 staff members
Manager - Master Landscape Development	<10 staff members
Manager - Onboarding	<10 staff members
Manager - Operational Management	<10 staff members
Manager - Partnership and Business Development	<10 staff members
Manager - Planning and Enabling	17 staff members
Manager - Planning and Enabling (Large Sites)	<10 staff members
Manager - Portfolio	<10 staff members
Manager - Processing Operations	<10 staff members
Manager - Product	<10 staff members

## RFI4429 - Annex A

Manager - Project	<10 staff members
Manager - Provider Management	16 staff members
Manager - Provider Onboarding	<10 staff members
Manager - Reporting and Analysis	<10 staff members
Manager - Resource Planning	<10 staff members
Manager - Specialist Housing Delivery	<10 staff members
Manager - Strategic Development	<10 staff members
Manager - Strategy	<10 staff members
Manager - Strategy and Markets	<10 staff members
Manager - Structured Real Estate Finance	<10 staff members
Manager - Systems Contract	<10 staff members
Manager - Taxation	<10 staff members
Manager - Technical	<10 staff members
Manager - Technical Hub	<10 staff members
Manager - Transaction Delivery	<10 staff members
Manager - Transaction Services	<10 staff members
Manager - Transactions	<10 staff members
Manager - Valuation & Appraisal	<10 staff members
Officer - Brand and Content Communications	<10 staff members
Officer - Business Support	18 staff members
Officer - Communications (Social Media and Content)	<10 staff members
Officer - Conferences and Events	<10 staff members
Officer - Customer Relations	<10 staff members
Officer - Delivery Support	<10 staff members
Officer - Finance	<10 staff members
Officer - HTB Stakeholder Communications	<10 staff members
Officer - Operations Support	<10 staff members
Officer - Procurement	<10 staff members
Officer - Procurement MI & Compliance	<10 staff members
Officer - Programme	<10 staff members
Officer - Projects Support	<10 staff members
Officer - Transactions	<10 staff members
Principal Auditor	<10 staff members
Programme Manager - Local Government Capacity Centre	<10 staff members
Secretary - Development	<10 staff members
Senior Analyst	<10 staff members
Senior Analyst - BSF Data	<10 staff members
Senior Data Scientist	<10 staff members
Senior Economist	<10 staff members
Senior Manager - Acquisitions	13 staff members
Senior Manager - Acquisitions and Partnering	<10 staff members
Senior Manager - AEC Customer Due Diligence	<10 staff members
Senior Manager - AEC Governance	<10 staff members
Senior Manager - AEC Investigations	<10 staff members
Senior Manager - Affordable Housing Strategy	<10 staff members
Senior Manager - AH Products	<10 staff members

## RFI4429 - Annex A

Senior Manager - AHP Business Development	<10 staff members
Senior Manager - Arrears Strategy and Performance	<10 staff members
Senior Manager - Assurance	<10 staff members
Senior Manager - Building Remediation	23 staff members
Senior Manager - Business	<10 staff members
Senior Manager - CAL (National) and Commercial Disposals	<10 staff members
Senior Manager - Chief Development Office	<10 staff members
Senior Manager - Chief Investments Office	<10 staff members
Senior Manager - Commercial Management	<10 staff members
Senior Manager - Commercial Sustainability	<10 staff members
Senior Manager - Communications	<10 staff members
Senior Manager - Community Engagement	<10 staff members
Senior Manager - Compliance Audit	<10 staff members
Senior Manager - Consumer Risk	<10 staff members
Senior Manager - Contract Management	<10 staff members
Senior Manager - Contracting and Operations Manager	<10 staff members
Senior Manager - Contracts	<10 staff members
Senior Manager - Customer Communications	<10 staff members
Senior Manager - Customer Experience	<10 staff members
Senior Manager - Customer Insight	<10 staff members
Senior Manager - Customer Relations	<10 staff members
Senior Manager - Delivery Control Frameworks	<10 staff members
Senior Manager - Delivery Control Performance	<10 staff members
Senior Manager - Delivery Planning and Insight	<10 staff members
Senior Manager - Delivery Support	<10 staff members
Senior Manager - Delivery, Strategy & Implementation	<10 staff members
Senior Manager - Developer Contract Management (Top 50 Developers)	<10 staff members
Senior Manager - Development	34 staff members
Senior Manager - Development (Large Sites)	<10 staff members
Senior Manager - Development Finance	10 staff members
Senior Manager - Development Loans	<10 staff members
Senior Manager - Development Risk	<10 staff members
Senior Manager - Equity & Partnerships	<10 staff members
Senior Manager - ESG Investment	<10 staff members
Senior Manager - Estates	<10 staff members
Senior Manager - FDD	<10 staff members
Senior Manager - Finance Analyst (MAP)	<10 staff members
Senior Manager - Finance and Data	<10 staff members
Senior Manager - Financial Accounting	<10 staff members
Senior Manager - Financial Planning and Analysis (Delivery)	<10 staff members
Senior Manager - Financial Planning and Analysis (Resource)	<10 staff members
Senior Manager - First Homes Programme Management	<10 staff members
Senior Manager - Geo Spatial	<10 staff members
Senior Manager - Government Relations Liaison	<10 staff members
Senior Manager - Growth	12 staff members
Senior Manager - Help to Build Apply (L17)	<10 staff members

Senior Manager - Housing Guarantees	<10 staff members
Senior Manager - Housing Guarantees Transactions	<10 staff members
Senior Manager - Infrastructure	<10 staff members
Senior Manager - Infrastructure Finance	<10 staff members
Senior Manager - Infrastructure Grants Project Management	<10 staff members
Senior Manager - Infrastructure Grants Transactions	10 staff members
Senior Manager - Internal Audit	<10 staff members
Senior Manager - Internal Communications	<10 staff members
Senior Manager - Investment Risk	<10 staff members
Senior Manager - Investments Accounting	<10 staff members
Senior Manager - Large and Strategic Partnerships	<10 staff members
Senior Manager - Loans (Evolve)	<10 staff members
Senior Manager - Market Engagement	<10 staff members
Senior Manager - Master Development	<10 staff members
Senior Manager - New Business	<10 staff members
Senior Manager - Onboarding	<10 staff members
Senior Manager - Operational Management	<10 staff members
Senior Manager - Operational Risk	<10 staff members
Senior Manager - Panels	<10 staff members
Senior Manager - Partnership and Business Development	29 staff members
Senior Manager - Partnerships	<10 staff members
Senior Manager - Performance	<10 staff members
Senior Manager - Pipeline and Engagement	<10 staff members
Senior Manager - Planning and Enabling	38 staff members
Senior Manager - Planning and Enabling (Large Sites)	<10 staff members
Senior Manager - Planning Procedures	<10 staff members
Senior Manager - Policy and Processes	<10 staff members
Senior Manager - Portfolio	16 staff members
Senior Manager - Portfolio Relationship and Performance	<10 staff members
Senior Manager - Product Development	<10 staff members
Senior Manager - Product Implementation	<10 staff members
Senior Manager - Projects	<10 staff members
Senior Manager - Provider Management	<10 staff members
Senior Manager - Provider Management (SME)	<10 staff members
Senior Manager - Relationship Help To Build	<10 staff members
Senior Manager - Risk and Control	<10 staff members
Senior Manager - Risk Reporting	<10 staff members
Senior Manager - Safety, Health and Environmental	<10 staff members
Senior Manager - Specialist Housing Delivery	<10 staff members
Senior Manager - Strategic Projects	<10 staff members
Senior Manager - Strategic Property	<10 staff members
Senior Manager - Strategy	<10 staff members
Senior Manager - Strategy and Markets	<10 staff members
Senior Manager - Structured Real Estate Finance	<10 staff members
Senior Manager - Technical	10 staff members
Senior Manager - Technical Accounting	<10 staff members

Senior Manager - Technical Capital Projects	<10 staff members
Senior Manager - Technical Environment	<10 staff members
Senior Manager - Technical Hub	<10 staff members
Senior Manager - Technical Project	<10 staff members
Senior Manager - Transaction and Portfolio Support	<10 staff members
Senior Manager - Transaction Services	<10 staff members
Senior Manager - Transactions	<10 staff members
Senior Manager - Valuation & Appraisal	<10 staff members
Senior Specialist - Economic Research	<10 staff members
Senior Specialist - TAG	<10 staff members
Senior Technical Manager - Building Fabric and MMC	<10 staff members
Senior Technical Manager - Sustainability	<10 staff members
Senior User Researcher	<10 staff members
Specialist - Customer Communications	<10 staff members
Specialist - Economic Research	<10 staff members
Specialist - Estates Management Contracts and Performance	<10 staff members
Specialist - Forecasting and Engagement	<10 staff members
Specialist - Geo Spatial	<10 staff members
Specialist - Monitoring & Reporting	<10 staff members
Specialist - Operations Processing	<10 staff members
Specialist - Operations Standards	<10 staff members
Specialist - Procurement MI & Compliance	<10 staff members
Specialist - Professional Services	<10 staff members
Strategic Finance - Business Modelling Manager	<10 staff members
Technical Manager - Sustainability	<10 staff members