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Tameside Metropolitan borough COUNCIL

**Soft Market testing**

**Welfare Rights and Debt Advice Case Management System**

Contract Period:

**2021 – 2024; 3 year contract period**

1. **Background**

Tameside Council (the Council) provides specialist welfare rights and debt advice to its residents. The service is looking to procure a replacement case management system to specifically record advice around welfare benefits and debt.

The service advises approximately 2500 residents each year through a combination of telephone, email, web-chat and face to face contact. Representation at welfare benefit appeals is also provided along with representation at County Court for matters involving rent and mortgage arrears.

The Council is interested to hear from suppliers of case management systems specifically suitable for welfare benefit and debt advice cases.

The Council’s standard terms and conditions will be utilised in any contract award and it will be mandatory that any shortlisted suppliers complete the Council’s cyber security assessment questionnaire which will be reviewed by the councils IT security operations prior to any system being chosen.

1. **Key Aims**

The advice case management system should be intuitive and user friendly. The system should have the capability to transfer cases/data from the current case management system (Casetrack) together with any associated documents uploaded to the case record.

The key requirements of the service specification are outlined at Appendix 2 which includes essential and desirable functions. Interested providers are asked to specify yes/no to each function and attach this to their response. Each function should have the capability to add choices to drop down menus and should have the flexibility to add/amend fields by the Council when required. The system must be able to run standard and bespoke management information reports.

**Project Timescales**

|  |  |
| --- | --- |
| **Stage of the project** | **Anticipated deadline** |
| Soft market testing | 27 May 2021 – 23 June 2021 |
| Evaluation of soft market test responses | 7 July 2021 |
| Decision regarding procurement route | 14 July 2021 |
| Procurement process (if any) to commence | 4 August 2021 |
| Contract Start Date | 1 November 2021 |

1. **Soft Market Testing**

**THIS IS NOT A CALL FOR COMPETITION**

The Soft Market Test is intended to allow interested organisations with relevant experience of providing case management systems for advice agencies, to provide information with no commitment to themselves or Tameside Council. This soft market test exercise is for information gathering and internal review only at this time, no decision has been made as to whether this will result in a procurement exercise. Should a procurement exercise result from this review, the Council may decide to use a framework for the procurement, there is no guarantee this will be an openly advertised tender opportunity.

Tameside Council is looking at two options for its case management system; to award a contract with an indicative start date of November 2021, depending on cost, or to explore whether it uses internal resources for its case management system. Suppliers are requested to provide detailed information on their system capabilities, pricing structure and licence arrangements.

During the Soft Market Test we would like to gauge the level of interest.

Interested suppliers are required to complete the following company information form and a short questionnaire (at appendix 1) as well as the specification response (at appendix 2). Suppliers who complete and return the questionnaire and specification response ***may*** be invited to meet with Tameside Metropolitan Borough Council representatives to discuss its requirements.

The questionnaire should be returned via The Chest - <https://www.the-chest.org.uk/> by midday on 23 June 2021 latest. If Suppliers have any questions about this soft market test, such questions should be submitted to the Council using the ‘Question and Answer’ facility within the opportunity advertised on The Chest. A copy of the question and a copy of the written reply may be circulated to all Suppliers, with anonymity of the Supplier preserved. Suppliers must not raise questions through any other channels, including emails direct to the Council or to STAR Procurement. No questions will be responded to, other than those raised through The Chest as described above

**We encourage your participation in this soft market testing exercise, but must emphasise that your involvement in this exercise will not carry any commercial advantage in any ensuing procurement process.**

**No information provided in response to this soft market testing exercise will be used in any evaluation of any subsequent response to a procurement exercise.**

1. **General Information**

|  |  |  |
| --- | --- | --- |
| **3.1** | Full name of your organisation: |  |
| Contact Details Name: |  |
| Job Title: |  |
| Address: |  |
| Telephone no: |  |
| Fax No: |  |
| Mobile No: |  |
| Email Address: |  |
| Web Address (if any): |  |

1. **Undertaking from the supplier**

|  |  |
| --- | --- |
| Name:\* |  |
| Signed: | Duly authorised on behalf of the Supplier  (Electronic signature required here) |
| Position: |  |
| Date: |  |

**Appendix 1 – Questionnaire**

**Please complete the following questionnaire fully, highlighting any information that you consider to be commercially sensitive\*. Responses to each question are limited to 500 words**

1. Would you be interested in bidding for this proposed Project?

If Yes, why?

If No, why not?

Response:

1. Please detail the experience your organisation has in delivering this type of system, particularly in relation to welfare rights and debt advice case management systems.

Response:

1. Please outline your pricing structure and licencing arrangements, including cost to migrate cases from the current system.

Response:

1. Please detail how you will meet the current and future requirements as detailed in the service specification? In addition, please specify yes/no to each function within the spreadsheet at appendix 2 and attach this to your submission.

Response:

1. If TMBC go to tender following the soft market test, is there anything in addition to the information in this brief that suppliers would need to be advised of in order to aid in their response.

Response:

1. Is your system Cloud Hosted or On-Premise?

Response:

1. If Cloud Hosted, does the system expect to send emails on behalf of the council using the @tameside.gov.uk email addresses?

Response:

1. If Cloud Hosted, does the system meet the Council’s password policy – 9 characters (1 lower, 1 upper, 1 number, 1 symbol) and support the use of Multifactor Authentication

Response:

1. Is the system one which your department will solely manage or will it need Tameside IT’s involvement to manage various aspects/rollout software – please specify

Response: