### Corporate Services Department

Caroline Holland - Director

**London Borough of Merton**

**Merton Civic Centre**

**London Road**

**Morden SM4 5DX**

***Date: 10/01/2020***

Dear Provider,

**RE: Soft Market Testing Questionnaire for the provision of Print and Post automation software**

The London Borough of Merton (“the Authority”) is seeking to explore different options in the market, as well as potential innovative solutions to deliver print and post automation that meet the Authorities current requirements and supports the ongoing aspirations of the Authority.

Currently the Authority uses software to manage the production of mail pieces that support integration with enveloping machines to ensure accurate insertion of mail pieces into appropriate envelopes. The software uses workflows to manage a complex set of integrations with the councils systems. Inputs to the workflows come in a variety of formats ranging from raw data to fully formatted documents either in bulk or as individual items. Within the workflows input items are merged with templates that are designed and maintained within the software. This ensures corporate identity is maintained and critically controls application of OMR mark-up to print files, which is key to ensuring the integrity of the process.

The software currently in use is reaching end of life so the Authority would like to discuss the provision of Print and Post automation software with suppliers who provide this to similar organisations. Interested parties are invited to complete and submit a Soft Market Testing Questionnaire for the provision of Print and Post automation software. Please provide answers to the questions found at the end of this document.

**Please note that this is not a call for competition.**

I would be grateful if you would complete the Soft Market Testing Questionnaire. Further information is available in Section 2. Your duly completed questionnaire must be received by **5pm on Friday 24th January** **2020** **via London Tenders Portal. (**[**https://procontract.due-north.com/register/**](https://procontract.due-north.com/register/)**).**

Any questionnaires received after this deadline may not be accepted.

Should you have any questions regarding the process or the documents please direct your queries to the nominated contact, via the London Tenders Portal (<https://procontract.due-north.com/register/>).

Yours sincerely,

Nutan Kale

Business systems manger

Merton Council

#  Instructions and Conditions

**Completing the form**

Please ensure that all questions are completed in full, and in the format requested. If the question does not apply to you, please state clearly ‘N/A’.

**Verification of Information Provided**

Supporting evidence is not required to be submitted, however the Council reserves the right to request these documents.

**Confidentiality**

The Authority confirms that it will keep confidential and will not disclose to any third parties any information obtained from a named customer contact, other than to the Crown Commercial Service and/or contracting authorities defined by the Public Contract Regulations.

**Freedom of Information**

In accordance with the obligations and duties placed upon public authorities by the Freedom of Information Act 2000 (the ‘FoIA’) or Environmental Information Regulations (2004) (the EIR), all information submitted to the Council may in theory be disclosed in response to a request made pursuant to the FoIA or EIR.

In respect of any information submitted by an organisation that it considers being commercially sensitive, the organisation should:

* clearly identify such information as commercially sensitive;
* explain the potential implications of disclosure of such information; and
* provide an estimate of the period of time during which the organisation believes that such information will remain commercially sensitive.

Where an organisation identifies information as commercially sensitive, and even where it does not, the Council will endeavour to maintain confidentiality by assessing whether it is appropriate to apply the various exemptions available in the FoIA or EIR. Organisations should note, however, that, even where information is identified as commercially sensitive, the Council might be required to disclose such information in accordance with the FoIA or EIR. Accordingly, the Council cannot guarantee that any information marked ‘commercially sensitive’ will not be disclosed.

**Supplier clarifications and questions**

Any queries regarding this questionnaire should be submitted electronically, via the London Tenders Portal – no later than

Clarifications and questions can be raised through the Messaging function, within the London Tenders Portal (<https://procontract.due-north.com/register/>)

The Council will respond to all reasonable clarifications as soon as possible through the Messaging function, which may be sent to all Suppliers expressing an interest in the process.

**Submitting the Questionnaire**

Your completed questionnaire must be submitted no later than **5pm on Friday 24th January 2020** through the London Tenders Portal.

The Suppliers attention is specifically drawn to the date, time and method of submission – you should allow adequate time to submit your response via the Portal.

**Notes for completion**

1. The “authority” means the contracting authority, or anyone acting on behalf of the contracting authority, that is seeking to invite suitable candidates to participate in this soft market testing process.
2. “You” / “Your” refers to the potential supplier completing this soft market-testing questionnaire i.e. the legal entity responsible for the information provided. The term “potential supplier” is intended to cover any economic operator as defined by the Public Contracts Regulations 2015 (referred to as the “regulations”) and could be a registered company; the lead contact for a group of economic operators; charitable organisation; Voluntary Community and Social Enterprise (VCSE); Special Purpose Vehicle; or other form of entity.
3. Please ensure that all questions are completed in full, and in the format requested. If the question does not apply to you, please state ‘N/A’. Should you need to provide additional information in response to the questions, please submit a clearly identified annex.

The authority confirms that it will keep confidential and will not disclose to any third parties any information obtained from a named customer contact, other than to the Cabinet Office and/or contracting authorities defined by the regulations, or pursuant to an order of the court or demand made by any competent authority or body where the authority is under a legal or regulatory obligation to make such a disclosure.

**Part 1: Potential Supplier Information**

Please answer the following questions in full. Please note that this questionnaire does not represent a call for bids and is being issued as part of a market testing exercise for the purpose of identifying potential interest and capacity in relation to the service referred to.

Responding to the questionnaire does not in any way guarantee that an organisation would be invited to participate in any future procurement process.

Participation or non-participation in the exercise will not prevent any provider from participating in any future procurement exercise, nor is it intended that any information supplied as part of this exercise will place any provider at an advantage or disadvantage in respect of any future procurement process.

|  |  |
| --- | --- |
| **Section 1** | **Potential supplier information** |
| Question number | Question | Response |
| 1.1(a) | Full name of the potential supplier submitting the information |  |
| 1.1(b) – (i) | Registered office address (if applicable) |  |
| 1.1(b) – (ii) | Registered website address (if applicable) |  |
| 1.1(c) | Trading status 1. public limited company
2. limited company
3. limited liability partnership
4. other partnership
5. sole trader
6. third sector
7. other (please specify your trading status)
 |  |

**Contact details and declaration**

I declare that to the best of my knowledge the answers submitted and information contained in this document are correct and accurate.

|  |  |
| --- | --- |
| **Section 1** | **Contact details and declaration** |
| Question number | Question | Response |
| 1.2(a) | Contact name |  |
| 1.2(b) | Name of organisation |  |
| 1.2(c) | Role in organisation |  |
| 1.2(d) | Phone number |  |
| 1.2(e) | E-mail address  |  |
| 1.2(f) | Postal address |  |
| 1.2(g) | Signature (electronic is acceptable) |  |
| 1.2(h) | Date |  |

**Part 2: Questions**

|  |  |  |
| --- | --- | --- |
|  | **Questions** | **Responses** |
| a. | How does the system support application of OMR mark-up to facilitate automatic enveloping of variable multi-page letters? |  |
| b. | How is the system able to validate addresses on mail pieces? |  |
| c | How will the system integrate with other systems to facilitate automation of bulk production of documents produced by batch processes? |  |
| d | How will the system integrate with other systems to capture and process ad hoc individual mail pieces?  |  |
| e | How will the system merge variable data with templates to create mail pieces from a variety of data sources e.g. plain text, csv, SQL databases, pdf? |  |
| f | How will the system support design and maintenance of Templates. How does the Template design process ensure that corporate identity can be maintained?  |  |
| g. | How will the system support the council in its aspiration of channel shift to move away from physical printed media in its communications, including integration with corporate customer portal?  |  |
| h | Explain your charging model e.g. outright purchase; leasing or volume/transaction based pricing structure.  |  |
| i | Explain how you deliver training e.g. on customer site, Computer Based Learning or supplier site delivery. Outline how much training would be anticipated. We anticipate training for maximum of 10 staff.  |  |
| j | Does any framework cover the provision of software and services provided by your organisation such as Crown Commercial Services, ESPO or YPO.  If so, please provide details |  |
| k | Please provide reference sites using your software, preferably local authorities, |  |
| l | Prior to any contract award what lead time would you recommend prior to starting the new service? |  |
| m | Are there any technical standards that are relevant to this solution and should be included in the council’s specification? |  |
| n | If relevant what is the standard ‘availability’ of your hosted solution? Do you offer service credits in the event of the solution being unavailable? |  |
| o | Are there any other features or functions that, in your experience, the council should include (or exclude) from our specification in order to achieve the desired outcomes? |  |