### CORPORATE SERVICES DEPARTMENT

Caroline Holland – Director

**London Borough of Merton**

**Merton Civic Centre**

**London Road**

**Morden SM4 5DX**

***Ref:*** **DN494750**

***Date: 21th Aug 2020***

Dear Provider,

**Re: Soft Market Testing Questionnaire for a Passenger Transport Management Solution Contract**

The London Borough of Merton (“the Authority”) is seeking to undertake soft market testing to understand suppliers that can provide a ‘platform supply, implementation, maintenance and support’ for a Passenger Transport Management solution.

The Authority would like to receive level of interest and capacity information from potential suppliers, in the market that will be able to provide such a technical solution and support services contract.

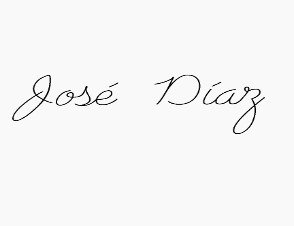
**Please note that this is NOT a call for competition.**

I would be grateful if you would complete this Soft Market Testing Questionnaire. Further information on the broad requirements of the sought contract is available in **Section 2**.

Your duly completed questionnaire must be **received by 12:00 noon on 30/09/2020** via the **London Tenders Portal (**[**https://procontract.due-north.com/register/**](https://procontract.due-north.com/register/)**).**

Any questionnaires received after this deadline will not be accepted. Should you have any queries regarding the process or questionnaire contents, please direct your queries to the nominated contact via the **London Tenders Portal**.

Yours sincerely



E&R Business Systems Team

# Background to the Council

Formed in 1965, the London Borough of Merton (‘the Authority’) is an outer London borough to the south-west of the capital and has geographic area of approximately 14.7 square miles.

It has a population of 199,700 (Census estimate at May 2011) living in 78,757 chargeable dwellings. The population according to Greater London Authority population projections is set to increase as follows: 206,612 by 2016 rising to 209,666 by 2021 then to 211,783 by 2026 and to 213,931 by 2031. Merton is home to the world-famous All England Lawn Tennis Club, where the Wimbledon Championships take place every year bringing an extra 500,000 people into the borough for this two-week tennis tournament.

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The borough is served by 7,500 businesses and has five main town centres, which are Wimbledon (taking in the Village, the Broadway and South Wimbledon), Mitcham, Morden, Raynes Park and Colliers Wood. Predominantly suburban in character, it has high levels of commuter flows in and out of Central London.

The Council is a ‘unitary Authority’, which means that it is a single tier Authority responsible for all local governance functions within the area. This includes functions such as social services, libraries, waste disposal and collection, highways, education, planning, licensing and much more. The Council is not responsible for the emergency services, maintenance of principal roads and public transport, all of which are provided by the Mayor of London’s departments.

The Council had a revenue budget of £144m in 2018/19 which funds a range of public services, employing a wide range of staff delivering the services, from street cleaners and town planners to teachers and social workers, who work in the four departments, including Merton’s schools: -

* Children, Schools and Families (CSF)
* Environment and Regeneration (E&R)
* Community and Housing (C&H)
* Corporate Services (CS)

Overseeing the running of these services and taking the lead in creating a vision for the future of Merton is the Leader of the Council. The Leader is elected by the full Council and appoints a Cabinet of up to nine Members who will each take on special responsibility for an area designated to them by the Leader. The Leader and Cabinet are collectively known as the ‘Executive’.

**The Council’s Corporate Priorities**

The financial reality facing local government dominates the choices the council will make for the future of the borough. The development of the Business Plan 2018/22 is therefore based on the set of guiding strategic priorities and principles, as adopted by the council on 13 July 2011;

* Merton should continue to provide a certain level of essential services for residents. The order of priority of ‘must’ services should be:-
* Continue to provide everything that is statutory.
* Maintain services – within limits – to the vulnerable and elderly.
* After meeting these obligations Merton should do all that it can to help residents who aspire. This means we should address the following as priorities in this order:-
* Maintain clean streets and keep council tax low.
* Keep Merton as a good place for young people to go to school and grow up.
* Be the best it can for the local environment.
* All the rest should be open for discussion.

The financial pressures facing Merton mean we should no longer aim to be a ‘place-maker’ but be a ‘place-shaper’. The council should be an enabler, working with partners to provide services and continues to strive to be London’s Best Council.

1. **solution Overview**

# About the Contract:

# The purpose of the technical solution and support services contract that the council will be seeking to procure is to provide a technology platform and related services that deliver on the following broad requirements:

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| Scheduling and Planning visits for Supervisors  Scheduling and planning visits of supervisors to client schools and day centres. The minutes and subsequent required actions of the meetings with the staff need to be recorded and easy to share.     The Solution should have the capability to capture all the relevant details required for planning the visits. e.g. Frequency of visits, date planning, Time window for visits, Monitor visit targets etc. |
| GPS and telematics data    To know the real time location of the bus and the stage of a route it is at - e.g. just collected client number 7 out of 10, current speed of the bus and during the journey, recording arrival and departure times and maximum speeds to be flagged up if exceeded the legal limit.    Geofencing of vehicles - To be aware if a bus has strayed out of a predetermined, acceptable area.     Efficiency monitoring of routes capability – e.g. (Co2 emission, fuel)  The system to inform us of the Co2 emissions for each bus and run, as well as how much fuel is used. Parameters of acceptable amounts can be set.     Promote safe driving - To monitor driving styles and to ensure that they are smooth, sensible and considerate of clients and other road users.    ETA (Estimate Time of Arrival) Notifications - instant alerts - To provide arrival time notifications of arrival times at schools / day centres, as well as ETA's at the next client's home / at the school. Notify the Supervisors if running late. Departure time from the depot would also be beneficial.    Map routes with visible area display on screen - To calculate a route with manually entered clients and then display a map of the total route on the screen with an icon displaying the real time location of the bus.    Monitor routes at a glance on screen- Clear (uncluttered) display of maps and a numbered list of the clients, also showing their current progress.    System responds rapidly to changing route conditions - e.g. RTAs, utilities' works, emergencies. Live, real time traffic alerts / re-routing on the mobile devices. System to send spoken and visual alerts. |
| Client, staff and vehicle database  For clients :  Facility in The Solution to store client details E.g. names, addresses, contact details, sensitive information - behavioural and physical needs, to be seated separately, child at risk flag, equipment needed for safe and enjoyable transport.    For staff - E.g. licences held, training done and reminders for refreshing the certificates.  For buses - registration information, maximum number of seated and wheelchair passengers, LEZ / ULEZ compliance info, permit info, service history, planned replacement date.    Solution must be fully GDPR compliant. If the solution is hosted, it needs to be ISO 27001 and 27008 and PSN/CoCo compliant, BS7666 compliant.  GDPR, PSN/CoCo, ISO27001 and ISO27008 compliance are mandatory requirements. |
| Route Planning and optimisation  Consider restrictions in route planning e.g. vehicle features, driving rest times, opening hours of businesses / establishments, drop off & pick up times, client specific information, load & weight information - these factors need to be input so that the correct bus and staff member is utilised at the right time and in the right place.  The Solution should suggest optimal routes, taking into consideration different parameters such as location, generic road conditions and width barriers, ambulant / wheelchair client, bus size and type, Time On Board, start time of school / day centre etc. Results to be displayed graphically with a breakdown of the timings for each client.  Facility to create new routes with details of sites, starting point, PA collection point, clients etc.   The Solution should allow manually / automatically change the details on the route easily and suggest the route order. |
| Report    The solution should have facility to create ad hoc/custom reports. E.g. Report on time on board for a client, the time on board for the first client to be collected (from home to school / day centre), the total number of clients at a particular centre, the total number of ambulant and wheelchair clients that attend 1 site and all sites, transport cost per head, route details on mobiles for the drivers / personal assistants, list of buses, cost of buses per annum.    Measure KPI'S (Key Performance Indicators) - quickly, easily and automatically - Ability to generate KPI reports easily from the system on a desired KPI e.g. time on board, arrival times at establishments (schools / day centres), number of clients transported. To display graphs and text, as desired. |
| Dashboards    E.g., Day tasks and checking there are no routing clashes in scheduling. Some of the details to be displayed includes - start times at the depot, arrival times at schools / day centres, afternoon times for the same routes, middle work, assigned vehicles, vehicles off the road, servicing requirements, staff working and staff off work, work to be covered. |
| Mobile working (mobile driver app)    To enable better customer service and to achieve paperless operation, share tracking information with customers to enable 2-way communication so that the crews can be notified of transport cancellations, real-time traffic issues, emergencies, general notices, meetings, etc.  The Solution needs to show that a member of staff has read a message once they have done so. Staff can send info / updates to Supervisors and create incident reports in the field, rather than waiting to return to the depot. Staff can view routes and clients' details on the mobile device securely.  Lone worker emergency button needed to contact police and Supervisors quickly. |
| Fleet maintenance requirements:  The Solution will be required to store fleet maintenance requirements  e.g. Keep vehicles roadworthy safe and operational, capture walk around checks, report and manage defects, reminder for service and inspections - This is for the drivers to complete their defect checks on mobile devices. To report defects to Supervisors, Fleet team and workshop staff. To be designed so that it is legally compliant with the vehicle being roadworthy, easy to use and can look at historical information. |
| Gather customer reviews via the software    The solution should have capability to receive invaluable customer surveys and get them automatically uploaded to the system. The purpose is to use them to improve our service to customers. |
| Easy to use supervisor search tools    Ability to retrieve data easily within the system. E.g. Search details by a client's name / street name / sites / vehicle / reports / staff etc. |
| Notifications  Notifications on e.g. arrival times / departure times, messages to staff. |
| Training    The Solution supplier, will be required to provide initial physical training sessions in the Transport office (post COVID-19) and a comprehensive, easy to use pdf manual. If COVID-19 persists, we would like to discuss remote training options. |
| Development, Capacity Building and Support Services covering among others  The Supplier of the Solution will be fully responsible for its implementation, including responsibility for full extract, transform, load data migration from the Council’s incumbent System to its own  The supplier of The Solution will also be responsible for:   * Deployment and embedding into the organisation; * Full technical support for implemented solution, upgrades and any business integrations; * Training and continual workforce skills development and support; * On-going business development review and consultancy. |

1. **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’. Should you need to provide additional information in response to any of the questions, please submit it in a clearly identified annex.Please note that this is **NOT a call for competition.**

**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 has been 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 must be submitted electronically via the London Tenders Portal, **no later than 14:00hrs on 23/09/2020.**

Clarifications and questions can be raised through the Messaging function, within the London Tenders Portal.

The Council will respond to all reasonable clarifications requests 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 should be submitted **no later than** **12:00 noon on 30/09/2020** via the **London Tenders Portal** (<https://procontract.due-north.com/register/>)

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.

**The Soft Market Testing Questionnaire Process**

The Soft Market Testing Questionnaire has been designed to assess level of interest and capacity information from suppliers of Passenger Management Systems. The Council will then be in a position to undertake a full review of the service and may choose to procure these services once this review has been completed.

**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.

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.

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| **Section 1.1** | **Potential supplier information** | |
| Question number | Question | Response |
| 1.11 | Full name of the potential supplier submitting the information |  |
| 1.12 | Registered office address (if applicable) |  |
| 1.13 | Registered website address (if applicable) |  |
| 1.14 | Trading status (please tick what applies)  If **Other**, please state status below: | Public Limited Company  Limited Company  Limited Liability Partnership  Other Partnership  Sole Trader  Third Sector  **Other** (please provide narrative) |

**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.

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| **Section 1.2** | **Contact details and declaration** | |
| Question number | Question | Response |
| 1.21 | Contact name |  |
| 1.22 | Name of organisation |  |
| 1.23 | Role in organisation |  |
| 1.23 | Phone number |  |
| 1.24 | E-mail address |  |
| 1.25 | Postal address |  |
| 1.26 | Signature  (electronic is acceptable) |  |
| 1.27 | Date |  |

**Part 2: Pre-Tender Questions**

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| **Section 2** | **Capacity and Experience (Please tick boxes / Provide brief narratives as applicable)** | |
| 2.1 | Does your organisation have experience of 3 years or more in delivering and implementing Passenger Management Solution platforms and related training and technical support services to local government authorities or public sector bodies within the UK?  If **NO**, please indicate very briefly any other sectors and for how long below: | Yes  No |
| 2.2 | Does your organisation have experience and current capacity in providing the full scope of the indicative broad requirements for the solution contract being proposed as provided in this brief?  If **NO**, please indicate very briefly what aspects you can’t provide below: | Yes  No |
| 2.3 | Does your organisation have experience of providing hosted (cloud) solutions and services for local government authorities or public sector bodies in the UK?  If **YES**, please indicate below how many (number) of these do:   1. Have a fully hosted (cloud) deployment of your solutions **[ ]** 2. Have a mix of hosted and on-premises deployment of your solutions **[ ]** | Yes  No |
| 2.4 | On average, what has been the time scales (in months) for implementation of your solutions and services in a local government authority? | **[ ]** |
| 2.5 | Does your organisation offer all **Or** part of your solutions and services through any public sector relevant framework such as published Crown Commercial Services (CCS) Procurement Frameworks?  If **YES**, please provide reference links below: | Yes  No |
| 2.6 | What is the current number of UK local government authorities presently using a full range of your solution and services?  Are any of these London based Local Authorities? | **[ ]**  Yes  No |
| 2.7 | Would you be open to provide details for 1 **or** 2 of the local authorities that are a good example of the deployment of your solutions and services?  If **YES**, please provide authority name **AND** a named contact below: | Yes  No |