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**Durham County Council**

**Soft Market Testing Questionnaire**

**Procurement, Sales and Business Services - Commercial Customer Engagement and Contract Management System**

**DN560366**

**Introduction**

Durham County Council (DCC) are looking to explore the market to understand what opportunities exist for the provision of an customer engagement and contracts managements system to support their traded services provision.

**Overview**

Durham County Council’s provides over 50 traded services to schools, academies and other public and third sector organsiations. Services are provided via Service Level Agreements (SLAs). These SLAs range from Grass Cutting to ICT Support, from Payroll Services to School Improvement.

Service delivery is managed within specific teams who have their own systems to coordinate and manage day to day service delivery requests and issues i.e. a broken computer or boiler. However, a central sales team has recently been established that aims to standardise the councils approach to some common activities, these include customer engagement, contract management recording and new contract opportunities tracking.

**Overview of Requirements**

The Council are seeking a system which supports the work and processes within central sales team through the provision of the following general areas of functional requirements. This system will be a council system and will not be accessed by the customer.

**General**

* Parent/child records at site and staff level
* The ability to attach documents against the parent/child site record e.g. schools which are part of an Multi Academy Trust
* The ability to assign system permissions at a granular level in order to control access i.e. SLA manager only see their contract information
* Reporting and data queries should be available

**Contract Management and Opportunity Tracking**

* Record an SLA manager against each contract and use this information to send notofications
* Record details of the contracts taken against each parent/child site record
* Record cost details against contracts and produce an API that integrates two way with the Councils Oracle finance system in order to generate a charge/credit
* The ability to auto generate a contract cost based on a standard pricing methodology entered into the system
* Record notes against the specific contract
* The ability to attach documents against each contract record
* Send a notification, where required, to the customer which includes any contracts uploaded to the system as an attachment
* Send a notification email when a contract is initiated/terminated to DCC staff
* Send a survey to the customer when a contract is terminated
* Send a notification email to DCC staff when a contract is due to expire
* Record details of an up and coming opportunity against each parent/child site record
* Data collected when recording the opportunity should include:
  + Lead officer
  + Where opportuity came from
  + Opportunity area (pick list)
  + Opportunity date/contractcrenewal date
  + Field to record outcome of opportunitie i.e. sucessful
  + Ability to attach documents to the opportunity
  + General notes field
* Send a notification of an up and coming opportunity to DCC staff
* Record notes against a contract opportunity i.e.lessons learnt
* Identify where an opportunity has become a contract

**Customer Engagement**

* The ability to record the following data, gathered via customer engagement visits,against the parent/child site record:
* Date of visit/contact
* Meeting participants
* Location of meeting
* Notes
* Actions

**Installation**

Bulk upload of data into system from a spreadsheet

**Market Testing Exercise**

The requirements subject to this Marketing Testing Exercise are outlined below.

This Soft Market Test is targeted at providers who have experience of delivering systems and technologies as detailed within this document and the services outlined.

**Expected outcomes from this exercise**

The key outcomes intended from this Market Consultation are to:

* Understand market knowledge, capability, capacity and maturity.
* Understand the level of interest in potentially providing such services to the Council.
* Understand the scale and scope of experience currently in the market.
* Gather views from the market on pricing indicators and possible income to the Council.
* Gather innovative ideas and initiatives to influence the design and delivery of service provision in the future.
* Understand the range of products and options available in the market

This notice is not an invitation for formal expressions of interest. The Council is issuing this request **for information only**, in order to assess the reaction of the market and thus make any future procurement process more focused and efficient.

The benefits to your organisation in participating in this process will be to inform the Council of your product, place in the market place and what service you can offer.

Your responses will assist us in creating an opportunity that is well framed, focused, feasible and likely to be of interest to the market.

There is no commercial advantage or disadvantage to your organisation from being involved in this market testing exercise. It involves no element of supplier selection or bid evaluation.

Finally, please be assured that any commercially-sensitive information provided to us as part of this process will be treated in confidence, used only for the purposes of this market testing exercise, and will not be disclosed to any other organisation, subject to the provisions of the Freedom of Information Act.

Should you have any queries about the questions in this document, please **use the question and answer facility on the NEPO Portal to request clarification.**

Subject to the Council’s requirement to comply with the provisions of the Freedom of Information Act / Environmental Information Regulations, any commercially-sensitive information provided to us as part of this process will be treated in confidence, used only for the purposes of this market testing exercise, and will not be disclosed to any other organisation.

Should you have any queries about the questions in this document, please use the question and answer facility on the NEPO Portal to request clarification.

**How to Respond**

All responses should be provided by completing this questionnaire and uploading your response via the NEPO Portal system.

**THE DEADLINE FOR RESPONSES IS 4.30PM – FRIDAY 27th AUGUST 2021**

**PLEASE ENSURE THAT YOUR RESPONSE IS UPLOADED TO THE NEPO PORTAL BY THIS DATE AND TIME**

**Contact Details**

The Procurement Officer for this Market Testing exercise is Gavin Burrell.

Telephone: 03000 267401

Email: gavin.burrell@durham.gov.uk

Please note that any queries regarding the questionnaire should be raised via the NEPO Portal.

**Soft Market Testing – Questionnaire**

**Section 1 – Contact Details**

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| --- | --- | --- |
| **Question number** | **Question** | **Response** |
| 1 | Company Name: |  |
| 2 | Contact Name: |  |
| 3 | Position: |  |
| 4 | Contact Tel No: |  |
| 5 | Email: |  |
| 6 | Address: |  |

**Section 2 - About Your Company/System**

2.1 Please tell us about your company e.g. what products you offer, how long you have been in business for.

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| Response: |

2.2 Please provide details of your customer base and identify how this fits with the Public Sector, particularly Local Government Market. Please include details of the current contracts you have in place with Local Authorities.

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| Response: |

2.3 Please provide details of customers comparable to Durham County Council where your system is either currently in use or being implemented for use within a similar environment/setup. Please provide key contact details for each organisation in case the Council wishes to contact such organisations.

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| Response: |

2.4 Has your company developed any case studies to illustrate the savings, benefits, and transformation in service delivery (in cost and staff time) by implementing your product? If so, then please provide copies as attachments to be returned with this document.

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| Response: |

2.5 Is the system a complete solution, or would the Council need to buy further options to meet our requirements? (If additional software products are required please describe any additional licensing implications).

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| Response: |

2.6 Is your system, and any associated third-party software required to operate the system, all web based?

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| Response: |

**Section 3 – Questions for Response**

**The Council would like you to complete the following in order to gain an understanding to the functionality available within your system and future system developments.**

**1. System Requirements**

In light of the ‘Overview or Requirements’ detailed earlier in this document please explain what functionality is within your system which would help meet the following key system requirements;

**Contract Management and Opportunity Tracking**

Please outline the functionality within your system which can assist with this process with particular regard to:

* Record details against each contract (SLA) for an individual school within the system
* Uploading documents against contracts (SLA)
* Generate contract (SLA) cost based on a standard pricing methodology contained within the system

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| Response: |

**Customer Engagement**

Please outline the functionality within your system which can assist the Council with the recording of Customer Engagement which can be undertaken by various distinct parties but which will form part of a single customer record.

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| Response: |

**2. Performance Reporting/MI Reporting Tool**

Please outline the functionality within your system which can assist the Council with the reporting and monitoring of performance data relating to contract (SLA) performance (including the ability to write queries to interrogate the data)

Also is there support for the Council generating reports using 3rd-party tools such as Power BI;

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| Response: |

**3. System Interfaces**

Please explain if your system is able to interact with and exchange data with other Council or external systems, for example the Council’s Oracle Financial System using an Application Programming Interface (API) or exchange of flat file datasets (e.g. CSV).

In addition, does you system integrate with Outlook/Office 365 in order to help staff work as efficiently as possible.

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| Response: |

**4. Mobile Working**

Does your system facilitate the use of mobile working and in particular the ability for the user to use the system in an ‘offline’ mode and then resynch any work with the application when network connectivity is available, if so, please describe how?

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| Response: |

**5. Technical Specification**

Please describe the system architecture of your solution covering whether or not you offer a Cloud based solution with data residing in the UK.

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| Response: |

Are you aware of and are you able to comply with the NCSC Cloud Security Principles?

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| Response: |

Please outline the requirements for your solution if it were to be hosted on premise by the Council

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| Response: |

In the event of any system failure, are there any procedures in place to ensure the service can still be operational e.g., your disaster recovery and back up procedures and the approach you would apply to this situation?

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| Response: |

Does the system render on multiple device types such laptops, tablets, desktops, smartphones? If so which O/S are supported?

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| Response: |

Does the system work with multiple Web Browsers such as Microsoft Edge and Google Chrome? If so, please detail which.

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| Response: |

Please describe how you provide continual development of the system and how upgrades and patches are managed and implemented.

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| Response: |

**6. System Implementation**

What would be the usual implementation period for the proposed solution based on a project of this size and scope?

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| Response: |

Migration of historic data, from locally held spreadsheets will be required, please can you describe how you will do this?

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| Response: |

What resource(s) would likely be required from the Council during implementation? For example, what types of staff would you expect to be involved?

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| Response: |

**7. Pricing and Payment Mechanisms**

Please describe how you would approach pricing for an IT system based on the size and scope of this requirement (as detailed in this document). Please include indicative implementation and maintenance costs based upon a potential initial 4 year agreement (with the option for the Council to extend beyond any initial term)

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| Response: |

**8. Service Level Agreements and Service Credits**

Please provide an overview of your Service Level standards and any service credit arrangements you operate.

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| Response: |

**9. Training**

Based on your experience and the Councils requirements, can you provide details of what training would be required in order to implement this system? This may include a variety of training methods including online/classroom based training and e-learning software.

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| Response: |

**10. Data Protection and Information Security Management**

Does your system ensure compliance with the latest data protection legislation (For example, does your system support the new/enhanced information rights requirements e.g. erasure, anonymization, portability, fair processing, GDPR). If so, please describe how

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| Response: |

**11. Procurement Process**

If you have recently participated in a procurement of a similar system, please outline the procurement process used any recommendations you would make to improve the process.

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| Response: |

There are a number of procurement procedures available to the Council these are as follows:

Open ITT, Restricted Process, Competitive Dialogue with Negotiation and Competitive Dialogue

Please describe your experiences of each/any of the above procedures and identify the procedure you feel would be most appropriate for this procurement and why.

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| Response: |

**12. Individual Meetings**

Following receipt of responses to this market testing questionnaire the Council reserves the right to hold individual meetings and/or system demonstrations with interested parties where they have indicated a willingness to partake.

Please outline below whether you would wish to attend such a meeting. The sessions will take place online via Teams and will be arranged through the NEPO Portal.

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| Answer: |

In relation to the meetings/demonstrations, do you have any advice as to how these would best be structured and delivered based on any previous experience you may have in order that they provide maximum benefit for you and ourselves?

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| Response: |

**13. Anything you would like to tell us.**

Are there any other features of your system you would like to tell us about which will help deliver a cost effective and efficient service?

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| Response: |

**END OF QUESTIONNAIRE**