This is a published notice on the Find a Tender service: <a href="https://www.find-tender.service.gov.uk/Notice/014200-2021">https://www.find-tender.service.gov.uk/Notice/014200-2021</a>

#### **Planning**

# **Appointee Service Client Case Management System**

Southampton City Council

F01: Prior information notice

Prior information only

Notice identifier: 2021/S 000-014200

Procurement identifier (OCID): ocds-h6vhtk-02beeb

Published 22 June 2021, 2:44pm

## **Section I: Contracting authority**

## I.1) Name and addresses

Southampton City Council

Civic Centre

Southampton

SO14 7LY

#### **Email**

claire.mccormack@southampton.gov.uk

#### **Telephone**

+44 2380833000

#### Country

**United Kingdom** 

#### **NUTS** code

UKJ32 - Southampton

### Internet address(es)

Main address

www.southampton.gov.uk/business-licensing/supply-council/supply-portal.aspx

Buyer's address

https://www.mytenders.co.uk/search/Search\_AuthProfile.aspx?ID=AA0747

## I.2) Information about joint procurement

The contract is awarded by a central purchasing body

## I.3) Communication

Additional information can be obtained from the above-mentioned address

## I.4) Type of the contracting authority

Regional or local authority

## I.5) Main activity

General public services

## **Section II: Object**

### II.1) Scope of the procurement

#### II.1.1) Title

Appointee Service Client Case Management System

Reference number

SCC-SMS-0078

#### II.1.2) Main CPV code

• 72000000 - IT services: consulting, software development, Internet and support

#### II.1.3) Type of contract

Services

#### II.1.4) Short description

Southampton City Council requires procurement of a Client Money and Case Management solution for local authority Appointee services.

For a period of 3 years with a potential maximum 24 month extension subject to operational need and value for money considerations

The implementation of a complete integrated client recording system for client money and case management Appointee teams.

Combine all aspects of work in one database.

Key supplier requirements are recent experience (within the last three years) of supplying a product that can provide a complete software solution for the financial administration and case management of client affairs

Enable creation and maintenance of financial records for individual clients

Monitor income and expenditure

Functionality to integrate/upload bank account records to enable income and expenditure reconciliation

Client record system to enable all client information to be held within the system and to

record client history, notes and ideally to store of link to documents.

Diary/reminder facility

Reporting functionality

#### II.1.6) Information about lots

This contract is divided into lots: No

## II.2) Description

#### II.2.2) Additional CPV code(s)

- 75000000 Administration, defence and social security services
- 85321000 Administrative social services

#### II.2.3) Place of performance

**NUTS** codes

• UKJ32 - Southampton

Main site or place of performance

Civic Centre, Southampton, SO14 7LY

#### II.2.4) Description of the procurement

Southampton City Council requires procurement of a Client Money and Case Management solution for local authority Appointee services.

For a period of 3 years with a potential maximum 24 month extension subject to operational need and value for money considerations

The implementation of a complete integrated client recording system for client money and case management Appointee teams.

Combine all aspects of work in one database.

Key supplier requirements are recent experience (within the last three years) of supplying a product that can provide a complete software solution for the financial administration and case management of client affairs

Enable creation and maintenance of financial records for individual clients

Monitor income and expenditure

Functionality to integrate/upload bank account records to enable income and expenditure reconciliation

Client record system to enable all client information to be held within the system and to record client history, notes and ideally to store of link to documents.

Diary/reminder facility

Reporting functionality

## II.2.14) Additional information

Please provide information about your product and indicative pricing based on draft specification.

## II.3) Estimated date of publication of contract notice

30 September 2021

## Section IV. Procedure

### **IV.1) Description**

#### IV.1.8) Information about the Government Procurement Agreement (GPA)

The procurement is covered by the Government Procurement Agreement: Yes

# **Section VI. Complementary information**

## VI.3) Additional information

(MT Ref:223187)