

Market Engagement

For the provision of

Print and direct mail services

(This is not a call for competition)

**Market Engagement Information Pack**

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# 1. Introduction

Thank you for agreeing to take part in our market research and expression of interest request. We greatly value your interest in this project and appreciate the efforts that you are undertaking to be part of the process.

Onward is currently seeking market input and information regarding door entry systems.

The purpose of this engagement is to enable key business stakeholders to engage with suppliers operating in the print and direct mail market in order to be better informed as to our future requirements and to help us shape our proposal for a potential formal tendering process.

# 2. Onward

**2.1 Background**

Onward Group Ltd is one of the largest registered providers of social housing based solely in the North West of England with 35,000 homes across Greater Manchester, Cheshire, Merseyside and Lancashire. Formerly known as Symphony Housing Group, we rebranded to Onward in April 2017 and now operate as a single organisation under one common board.

Onward is as a not-for-profit organisation, committed to the regeneration and sustainability of the North West region, with a primary focus on making a positive difference in the communities we serve.

**2.2 Information about Onward Group Limited**

Details about Onward and its subsidiaries, including their legal status, are shown below:

| **Name** | **Legal Status** | **No of homes owned/ managed** | **Purpose/ area of activity** |
| --- | --- | --- | --- |
| Onward Group Limited(OGL) | Registered Provider No. L4649. Non-Charitable Community Benefit SocietyFCA No. 31216R | Non-stock-holding | Group parent. |
| Onward Homes Limited(OHL) | Registered Provider No. LH0250Non-Charitable Community Benefit SocietyFCA No. 17186R | Owns and manages 31,208 homes across the North West. | The society provides general needs, sheltered and supported housing accommodation at affordable rents to those in housing need and providing low cost home ownership and associated facilities, amenities and services. |
| Contour Property Services(CPS) | Non-Charitable Community Benefit SocietyFCA No. 23975R | Leasehold management of 3,979 properties. | Providing housing and leasehold management services to other members of Onward GroupLimited. |
| Onward Repairs Limited(ORL) | Private Limited CompanyCO No. 03538264 | Non-asset-owning | Employs 70+ FTE staff to undertake a range of repairs and maintenance service in Lancashire. |

*Additional information is available at* [*www.onward.co.uk*](http://www.onward.co.uk)

# 3. Background

Onward Group have a large portfolio of properties to let to on general let, sheltered, and supported tenancies. Spread across three main regions, Lancashire, Greater Manchester, and Merseyside. As a result, there is a regulatory requirement for print and direct mail services to our residents. Currently this is not harmonised across the group however Onward is looking to standardise this to make the process more efficient and cost effective. Additionally, Onward would look to consider other options for sending letters and information to be printed and sent to residents (i.e. online portal).

# 4. Project

This is a soft market testing at this stage.

# 5. Market Test

**5.1 General**

Onward Group (Onward) are undertaking market research to consult with potential suppliers. At this stage we are undertaking preliminary market engagement. This will not be defined as negotiation and any future tender process will remain an open competitive process.

Involvement in this pre-market engagement exercise will not preclude a participant from participating in any future tender process.

**5.2 Objectives**

The primary objectives are:

* To share information in relation to this potential opportunity;
* To identify solutions which provide value for money;
* To determine that the requirements can be provided by participants that are familiar with similar requirements;
* To ensure that the requirements are correctly aligned with current and best practice, which are proven and affordable;
* To obtain timelines for procurement and service delivery;
* To gain an insight into potential commercial arrangements;
* To validate budgets;
* To look at standardisation across the Group where possible; and
* To look at standard products and services across the Group.

**5.3 Subsequent Actions**

As a result of this Preliminary Market Consultation, Onward will review and may revise budgets, the contents of the technical requirements and the in-scope services prior to the possible issue of any Tender or Requests for Quotations.

Participants in this Market Consultation will be notified when any subsequent Contract Notice or Request for Quotation is issued.

**5.4** **Requirements**

Onward is looking to procure a single provider to provide print and bulk mailing/direct mailing services across the Group.

As Onward is reviewing its requirements, we are looking at what is available in the market. Please provide any solutions or services information that you think Onward may find relevant in Appendix 1.

**5.5 Budgetary Costings**

As part of your response, Onward wishes to confirm that its budget estimates for the project are correct. Participants are welcome to provide any initial pricing for any solutions they propose as well as standard pricing for items such as letters and delivery costs.

Onward accepts that these costs are indicative only at this stage and in no way constitute a formal proposal.

**5.6 Soft Market Test Process**

Following this initial process, Onward may proceed with a further soft market test including a workshop. Respondents to this initial exercise will be contacted if there is further engagement.

**5.7 Disclaimers**

This Market Consultation places no onus on Onward to subsequently issue a Tender for any or all of the scoped items described in this document, nor does it place any onus on Onward to invite those participating in the Preliminary Market Consultation to subsequently bid for such services, notwithstanding any requirements of the Public Contracts Regulations 2015.

Neither this document nor any of the associated engagement activities comprise any part of any procurement exercise and participation does not imply intention or commitment by Onward to take up the services and thereby engage Regulation 41 of the Public Contracts Regulations or to include or exclude Participants from a future procurement. No information provided in the response to this exercise will be used in any evaluation of any subsequent competitive procurement exercise.

No information provided either by Onward or the Participant at this market engagement stage will constitute a response to any Tender, which may subsequently be issued, nor does it bind Onward or any Participant to contracting for supply at a price or specification discussed during the Market Consultation.

**5.8 Participants Costs**

Onward will not reimburse any costs incurred by Participants during Market Test whether or not Onward decides to proceed with the Tender or whether or not the Participant chooses to participate in any Tender issued.

**5.9 Project Confidentiality**

At this early stage of such a project, confidentiality is vital to ensure expectations and marketplaces are managed effectively. Therefore:

* All Participants must treat all information supplied by Onward in connection with this pre-market engagement process as confidential (and shall ensure that their employees, consultants, subcontractors, advisers, insurers and funders shall treat documentation supplied in relation to this Preliminary Market Consultation Document as confidential).
* No Participant should disclose that it has been invited to pre-market engagement in relation to this project or release details of this document (and all the documents forming part of or appended or scheduled to this document) other than on a strictly confidential basis and to the extent strictly necessary to such parties as the Participant needs to consult in order to respond.
* This Preliminary Market Consultation Document is issued in confidence and remains the property of Onward.

**5.10 Completeness of Information**

To avoid clarification questions at the Tender stage, Participants are asked to raise any areas where they feel additional information needs to be provided in the Scope of Services in Appendix 1.

**5.11 Information Provided to ONWARD**

At Onward’s discretion, the Participant may supply documentation to Onward following the Market Test workshop. Onward reserve the right to include any such information in any subsequent documentation produced in connection with this or any other project including any resultant Tender Information Pack that may be produced as a result of this Market Engagement.

If a Participant wishes particular information not to be reproduced, please ensure that this is clearly specified on the relevant parts of information provided.

# 6 Onward Main Contact

The main contact for any queries in relation to this pre-market engagement is:

Name: Lewis Sinkala

Title: Senior Procurement Category Manager

Email: lewis.sinkala@onward.co.uk

# Appendix 1 - Questionnaire

**Please return this Appendix to the following persons by the closing date 6th June 2023.**

**Lewis Sinkala – Senior Procurement Manager -** **lewis.sinkala@onward.co.uk**

**Lauren Dearden – Head of External Affairs and Communications –** **lauren.dearden@onward.co.uk**

**Rob Davies – Head of Income and Financial Inclusion -** **robert.davies@onward.co.uk**

**Adam Pendlebury – Senior Information Systems Analyst -** **adam.pendlebury@onward.co.uk**

**General Information**

|  |  |
| --- | --- |
| **Organisation Name** |  |
| **Contact Details Name** |  |
| **Job Title** |  |
| **Address** |  |
| **Telephone Number** |  |
| **Email Address** |  |
| **Web Address** |  |

**Questions**

**To be addressed as part of the Participant’s response. Please answer directly below. Where appropriate, please provide real examples and appropriate evidence to the questions above for shared benefit.**

|  |  |  |
| --- | --- | --- |
| **No** | **Question** | **Supplier Response** |
| 1 | Please briefly describe your organisation’s experience of providing print and direct mail services specifically. |   |
| 2 | Please detail how you have supported similar organisations to Onward in rationalising their print and mailing services and any lessons learned that you wish to share with Onward at this pre-procurement stage. |   |
| 3 | How do you ensure robust levels of data and information security? Is your organisation accredited to any standards? |   |
| 4 | What is your standard model for transferring data? |   |
| 5 | How do you ensure consistency across large organisations and different departments? |   |
| 6 | What is your standard invoicing process? How do you ensure a seamless and efficient billing and invoicing process? |   |
| 7 | Does your standard solution use a portal? Is there an ability to audit and check things before they are sent? |   |
| 8 | Please detail the types of print your organisation can offer (e.g. leaflets, boards, banners)? Please could you provide a copy of a brochure detailing standard offerings from your organisation. |   |
| 9 | The home ownership team often have to send multiple letter types with multiple inserts. Please detail your experience in dealing with more complex requirements |  |
| 10 | Do you have experience in interfacing with any internal document management systems? |   |
| 11 | What is your process for mail merges? |   |
| 12 | Does your organisation have a process for printing multiple documents to send to a single end user without having to merge them all into a single document? |   |
| 13 | Does your solution/system timestamp when documents are sent? |   |
| 14 | What information would you need from Onward to be able to bid for this contract? |   |