**Plan X accessibility audit brief**

Project Brief | London Borough of Lambeth | December 2023

**1. Introduction**

The London Borough of Lambeth (The Council) is working with the Department for Levelling Up, Housing and Communities (DLUHC) and 22 partner councils to develop **PlanX** - an online planning application and pre-application service for residents, developers and others involved in the planning system. We have two live services called ‘Apply for a lawful development certificate’, and ‘Find out if you need planning permission’ (FOIYNPP), with additional ‘Apply for’ services under development.

The Council wishes to undertake an accessibility audit and diverse accessibility user testing (DAUT) of the PlanX service. The primary aim of the audit is to ensure PlanX is acting in compliance with the [Public Sector Bodies Accessibility Regulations 2018](https://www.legislation.gov.uk/uksi/2018/852/contents/made), which aims to make public sector websites accessible to all users, especially those with disabilities. A similar audit was undertaken in early 2022, however PlanX has developed significantly since then and another audit is necessary.

The Council requires the audit to provide information as to where its new online service meets the required accessibility standards – as laid out in the regulations – and identify where it falls short. The resulting report should be clear and actionable (ideally with prioritised tasks) so that it can inform the service’s ongoing development [roadmap](https://miro.com/app/board/uXjVPrebzwQ=/) and website accessibility statement.

**2. Background**

Plan X is an open, collaborative R&D project funded by DLUHC’s Local Digital Fund to explore and develop 21st Century digital services across Local Government. The outputs of this project will be openly shared in such a way that they can be easily adapted and adopted by any local authority or private sector company wishing to provide a digital planning submission service.

**3. Scope of work**

**3.1 Accessibility audit and disable accessibility user testing (DAUT) scope**

The Council would like a representative sample of pages/user journeys on all PlanX services tested. Examples of what we require testing can be found here:

* For the ‘Apply for a Certificate of Lawfulness’ service, see the Lambeth example here - [Enter your email address - PlanX (lambeth.gov.uk)](https://planningservices.lambeth.gov.uk/apply-for-a-lawful-development-certificate)
* For the ‘FOIYNPP’ service, see the Southwark example here - [Find out if you need planning permission - PlanX (southwark.gov.uk)](https://planningservices.southwark.gov.uk/find-out-if-you-need-planning-permission)

These services are built on the PlanX platform, which allows councils to build complex public-facing services powered by dynamic forms.

**3.2 Accessibility standard**

The pages should be tested to ensure conformity with[WCAG 2.2](https://www.w3.org/TR/WCAG22/) level AA, whilst also taking into account the types of content that are exempt from the [Public Sector Bodies Accessibility Regulations 2018](https://www.legislation.gov.uk/uksi/2018/852/contents/made)*.*

**3.3 Technologies & users with access needs**

The most common combinations of assistive technologies and browsers should be included in the audit -<https://www.gov.uk/service-manual/technology/testing-with-assistive-technologies>

The successful supplier will work with the Council to identify the number and types of users we should conduct DAUT with, to cover a variety of disabilities to test our service on both desktop, tablet and mobile devices.

**3.4 Mobile versions**

PlanX is responsively designed and should be tested for compliance at its three main breakpoints (desktop, tablet, mobile) and across different browser versions.

**3.5 Report**

The resulting report should provide clear information as to where the tested pages have met standards, as well as recommendations as to what should be done to address areas where they have failed.

Ideally, these actions should be prioritised in a way that considers both the benefit for the user and the time/effort required to address the issue.

*\* The appointed supplier is not required to implement the recommendations included in the report. This work is outside the scope of this request.*

**3.6 Re-audit & re-testing**

The appointed supplier should provide a plan for re-audit and re-testing of iterations of the tool once the audit and user testing reports have been implemented. They should also demonstrate a willingness to engage in discussions with the developers on resolving any issues found. This will ensure the service is both compliant with WCAG guidance, as well as being friendly to use in a real life setting for users with access needs.

**4. Requirements**

The Council would like potential suppliers to provide responses to the questions listed below. **All questions & responses will be equally weighted and should be no greater than 250 words per question.**

1. An outline timetable identifying key milestones.
2. In terms of the requirements outlined in **Table 1** below, please provide:

i) What methodology will be used for delivering each of those areas - please detail in your proposal how you would approach each of these requirements;

ii) how you would approach remote accessibility testing (please provide any examples of previous experience);

iii) Please provide examples of any experience you have in carrying out accessibility audits (if possible for government services and/or public sector websites);

iv) Please provide any experience/evidence of involvement in the wider accessibility community; and

v) Please provide an example of where you have applied this approach before and how you would apply that delivery for this contract.

1. Recommendation of number of users and types of user, with access needs for DAUT testing.
2. Possibility and outline plan to conduct accessibility testing remotely in case of covid lock down/
3. Please demonstrate that you have a thorough understanding of [Public Sector Bodies Accessibility Regulations 2018](https://www.legislation.gov.uk/uksi/2018/852/contents/made).
4. Total lump sum fee (£) with breakdown. Please complete **Table 1** below as part of your submission.

**Table 1**

|  |  |  |  |
| --- | --- | --- | --- |
| **Req No** | **Requirement Desc** | **Requirement Detail** | **Amount (£)** |
| 4.1 | **Accessibility audit and diverse accessibility user testing (DAUT) scope** | The Council would like a representative sample of pages/user journeys on the Certificate of Lawful Development Submission Service. Examples of what we require testing can be found here:   * For the ‘Apply for a Certificate of Lawfulness’ service, see the Lambeth example here - [Enter your email address - PlanX (lambeth.gov.uk)](https://planningservices.lambeth.gov.uk/apply-for-a-lawful-development-certificate) * For the ‘FOIYNPP’ service, see the Southwark example here - [Find out if you need planning permission - PlanX (southwark.gov.uk)](https://planningservices.southwark.gov.uk/find-out-if-you-need-planning-permission)   This is built on the PlanX platform, which allows councils to build complex public-facing services powered by dynamic forms. The public interface is a React JS app using visually customised Material UI ([https://material-ui.com](https://material-ui.com/)) components.  The service contains hundreds of form inputs however, each is an instance of approximately twenty component types that make up the building blocks of the service (an example [here](http://storybook.planx.uk/?path=/story/planx-components-question--basic)) and can be tested in isolation.  This is a similar service to that which will be tested. The Council will work with the appointed supplier to define this list.  Initial thoughts on user journeys we would like to be tested include:   * The full Certificate of Lawful Development submission journey (Prospective application)   Permission permitted route  Permission needed route   * Householder application submission journey * Retrospective application journey * Find out if you need planning permission journey. |  |
| 4.2 | **Accessibility standard** | The pages should be tested to ensure conformity with[WCAG 2.2](https://www.w3.org/TR/WCAG22/) level AA, whilst also taking into account the types of content that are exempt from the [Public Sector Bodies Accessibility Regulations 2018](https://www.legislation.gov.uk/uksi/2018/852/contents/made)*.* |  |
| 4.3 | **Technologies & users with access needs** | The most common combinations of assistive technologies and browsers should be included in the audit -<https://www.gov.uk/service-manual/technology/testing-with-assistive-technologies>  Work with the Council to identify the number and types of users we should conduct DAUT with to cover a variety of disabilities to test our service on both desktop, tablet devices and mobile. |  |
| **4.4** | **Mobile Versions** | PlanX is responsively designed and should be tested for compliance at its three main breakpoints (mobile, tablet, desktop) and across different browser versions. |  |
| **4.5** | **Report** | The resulting report should provide clear information as to where the tested pages have met standards, as well as recommendations as to what should be done to address areas where it has failed.  Ideally, these actions should be prioritised in a way that takes into account both the benefit for the user and the time/effort required to address the issue.  *\* The appointed supplier is not required to implement the recommendations included in the report. This work is outside the scope of the request.* |  |
| **4.6** | **Re Audit & Re-Testing** | The appointed supplier should provide a plan for re-audit and re-testing of iterations of the tool once the audit and user testing reports have been implemented. This will ensure the service is both compliant with WCAG guidance as well as being friendly to use in real life with users with access needs. |  |

**5. Schedule**

The Council would like to discuss the delivery schedule with the appointed company and would like to commence work in February/March of 2024.

**6. Budget**

Tender values should be reasonable and considered.

**7. Proposals**

Proposals must be submitted no later than midnight on 12 January 2024 via email to: [digitalplanning@lambeth.gov.uk](mailto:digitalplanning@lambeth.gov.uk). The subject of the email should be “Tender - Website Accessibility Audit”. Proposals are to remain open for acceptance for a period of 60 days.

The Council will not be responsible for, or pay for, any costs or expenses that are incurred by any potential supplier in preparing and submitting their proposal.

**8. Contract award criteria**

Proposals will be assessed based on the following criteria.

* Quality Evaluation **50%**
* Fee **50%**

Each proposal will be given a score. A proposal considered to be unsuitable shall be rejected if it does not respond to important aspects of the brief. The Council is not required to accept the lowest priced proposal.

A copy of The Council’s Terms and Conditions is provided with this brief.

**9. Assessment schedule**

* Brief issued December 2023
* Deadline for proposals: 12 January 2024
* Appointment of chosen supplier: January/February 2024
* Project kick-off: February/March 2024

**10. Enquiries**

Any enquiries must be submitted in writing via email to:

Fin Pritchard and Greg Woodford

Email: [digitalplanning@lambeth.gov.uk](mailto:digitalplanning@lambeth.gov.uk)

c.c. [gwoodford@lambeth.gov.uk](mailto:gwoodford@lambeth.gov.uk) and [fpritchard@lambeth.gov.uk](mailto:fpritchard@lambeth.gov.uk)

Enquiries will be answered within three working days, except for emails sent 22/12/2023 to 01/01/2024, which will be answered the three working days after 01/01/2024.