**WINCHESTER CITY COUNCIL COMMISSION**

**SPECIFICATION**

**MONEY AND BENEFITS ADVICE AND DEBT COUNSELLING SERVICE FOR WINCHESTER CITY COUNCIL HOUSING TENANTS**

***Summary:*** Winchester City Council Housing Services wishes to commission the provision of a money and benefits advice and debt counselling service. The clients of the service will be Winchester City Council tenants or members of the tenant’s household and will be referred to the provider by officers from Winchester City Council Housing Services. The service should provide practical and moral support to clients to enable them to maximise their income and manage their debts. The objective is to reduce rent arrears, court appearances and evictions as a result of housing debt and to assist tenants with improved money management skills.

***Deadline for bids*:** Bids from appropriate organisations and individuals should be submitted by **12:00** **noon on Friday 11th March 2016**, in accordance with the requirements set out in section 3 of this specification.

1. **Background Information**

1.1 Introduction

In line with its established commissioning approach, Winchester City Council continuously reviews the services it provides and looks for opportunities to identify different ways of working which are likely to deliver innovative, effective and cost-effective responses to local needs.

* 1. The Policy Context

The Winchester City Council Strategy (2010 to 2020) sets out four overarching outcome areas, in which the Council is committed to delivering real change for local people. These are: Active Communities, a Prosperous Economy and a High Quality Environment, alongside its own ambition to be an Efficient and Effective Council.

As part of its Active Communities outcome, the Housing Service is committed to supporting its tenants to ensure they can pay their rent, have the security of a home of their own and enjoy many of the benefits of living in Winchester.

1.3 Rent Arrears Levels for Winchester City Council Tenants

In comparison to other Housing Providers, rent arrears levels for Winchester City Council tenants are low. In 2014/15 1.2% of all rent due was collected compared to a National Average of 2.68% of rent arrears as a percentage of total rent due. Despite this very good performance, rent arrears levels are slowly increasing and in 2014/15 8 tenants were evicted for rent arrears.

Officers working in Housing Services are encountering more tenants who are experiencing financial difficulties and falling into rent arrears. In 2014/15 56 new referrals were made to the current Money and Benefits Advice Service provider and 67 cases were supported with in the region of 843 client contacts and 793 new issues being identified.

The service is integral to the Housing Service rent arrears process and helps to maintain the overall good performance in rent collection levels.

1. **The Commission**

2.1 The Brief

This commission seeks to achieve the following outcome:

*Provide money and benefits advice and debt counselling services to Winchester City Council tenants &/or members of their household to help them maximise their incomes and manage debt.*

This brief sets out the nature of the commission, and provides further details about submitting a bid, the evaluation process and contractual arrangements.

Bids are invited from any individual or organisation in the private, public or voluntary sector with the appropriate expertise and capacity to deliver the commissioned work, as outlined below.

2.2 Expectations and Assumptions

Whilst the City Council is interested in hearing from a range of potential providers, all of whom may approach this commission in different ways, there are some key expectations:

1. To provide debt counselling and money and benefits advice to clients from the Winchester district referred by employees from WCC Housing Services, to help them maximise their incomes and manage their debts.
2. To provide a home visiting service for clients.
3. To provide support on welfare benefit or money advice issues to WCC Housing Service employees.
4. The service should be available a minimum of 23 hours a week to be worked over at least 3 days per week.
5. Clients must be able to access the service in a variety of ways, including face to face, by telephone, email and text messaging.
6. To provide added value activities, for example events that promote the service.
7. To collaborate with other teams within the council who are also offering commentary services, for example those offering Universal Credit advice.
8. Reporting on outcomes and performance to WCC Income Services Manager on a regular basis, including providing a list of clients who have accessed the service.

2.3 Anticipated Characteristics of the Successful Bidder

The City Council has no preconceived view about the type of provider suitable for this commission, but expects the work to be completed to a high standard. To this end, it is anticipated that the successful bidder will have knowledge, skills and capacity in some or all of the following areas:

* A high level of experience in welfare benefits, money management and debt advice
* Practical experience of working with social housing tenants
* A high level of familiarity with legal and operational requirements around safeguarding and equalities issues
* Excellent communication, interpersonal and organisational skills
* Appropriate levels of safeguarding and diversity awareness/training
* A proven ability to deliver outcomes
* Excellent recording and performance monitoring techniques

2.4 Fee

The maximum fee for this commission is £30,000 per annum payable over three calendar years (i.e. £90, 000 exclusive of VAT) payable in quarters. The first payment will be issued on inception, following receipt of a Purchase Order from the City Council.

There are no additional travel or other expenses, unless the Council specifically chooses to fund – on a one-off basis - goods or works (eg printing, venue hire) that are deemed to be required to fulfil the brief effectively and which are agreed in writing in advance.

The fee is intended to cover all costs of the service including paying all staffing costs and for complying with all relevant legislation.

2.5 Monitoring Arrangements

The successful provider will attend a contract initiation meeting to formally agree milestones and performance indicators. This will be followed by quarterly contract monitoring meetings led by WCC Income Services Manager.

The performance indicators required will include the number of clients seen, client information, time spent with each client, and outcomes. The provider will be required to produce quarterly reports and an annual report.

1. **Making a Bid**

3.1 Eligibility to Bid

This commission has been advertised on the South East Business Portal and via local and regional networks. Bids may be submitted by any organisation (private, public, voluntary sector) which considers itself able to fulfil the brief effectively or indeed by an individual on the same basis. Where individuals or organisations feel they would benefit from working together to deliver this project, the Council will accept bids from a combination of partners. However, the contract will only be with one lead individual or organisation and this lead partner must be made clear on the submission.

3.2 Timings

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| **Date** | **Event** |
| Monday 1st February 2016 | Specification published on South East Business Portal and Contracts Finder |
| Monday 22nd February 2016 | Deadline for questions from potential bidders  |
| Friday 26th February 2016 | Responses to questions will be published on the procurement sites by this date |
| 12 noon on Friday day11th March 2016 | Deadline for receipt of written bids |
| Wednesday 23rd March 2016 | Evaluation of written bids |
| Wednesday 13th April 2016 | Short-listed bids invited for interview |
| Monday 18th April 2016 | Notification of commission award decision |
| Wednesday 27th April 2016 | Inception meeting with provider |
| Monday 2nd May 2016 | Service commencement |

Please note these dates in your diary as they cannot be changed to accommodate individual bidders.

Please note that the interview panel will expect to meet the key personnel involved in delivering the project.

It is recognised that the exact timing of the service commencement may depend on the approach adopted to delivering it, but clearly there is a wish to establish the service as quickly as will allow for a good outcome.

3.3 Content of a Bid

There is no set format for a bid, but you must include the following information, and keep in mind the evaluation criteria:

* Full description of the organisation(s) including governance arrangements, or – for individuals – a current cv
* A clear description ***not exceeding 3 A4 pages*** of how you propose to deliver the commission, describing the expertise available for delivery and a set of possible performance indicators relevant to the commission outcomes (excessively long or jargon-ridden bids are less likely to score well during evaluation)
* A simple project plan
* For lead organisations, a copy of the most recent annual accounts, an up to date balance sheet or other appropriate evidence where not available
* A breakdown of costs (exc VAT); please also state whether you are VAT registered
* A basic risk assessment
* A general statement explaining how you meet the evaluation criteria for the commission as set out below
* Two referees for work of a comparable nature, and relevant to the proposed service.

3.4 Evaluation Process and Criteria

*Process*: All bids will be evaluated in the following sequence:

* Shortlisting by a panel, which will include the Head of Housing Management & Allocations; relevant Council officers; a Councillor, and if practical a WCC tenant.
* Checks on shortlisted organisations by the Council’s Finance Team: organisations deemed to present an unacceptable financial risk to the Council will be rejected;
* Take-up of references;
* Presentations by up to three individuals/organisations to the panel (we would expect the key individuals that would be involved in delivering the commission to attend the interviews);
* Second interviews may be arranged if required.

*Criteria:* The evaluation criteria which will be applied to all bids are as follows:

1. the ability and capacity of the bidder(s) to deliver the commission, based on:
* approach to delivery of the commission (methodology, proposed PIs, how the commission will be resourced to meet the requirements as set out in the expectations of the commission)
* relevant skills and experience (including skills mix)
* response to the brief, and to the commissioning approach more broadly (understanding of issues and opportunities)

*max 35 marks*

1. recognition of and provision for the support needs of individuals from minority backgrounds as identified by Equalities Law (including safeguarding and equalities qualifications/policies, proposed access arrangements)

*max 20 marks*

1. the capacity of the bidder(s) to deliver the commission and the credibility of plans to make the project sustainable

*max 15 marks*

1. the stability and reliability of the bidder (track record, financial status and resilience of lead bidder, overall credibility of bid)

*max 10 marks*

1. value for money of the bid, such as day rates, added value, enhancements and potential impact of the project on tenants.

*max 20 marks*

3.5 Contracting Arrangements

Following the selection of the preferred bidder, a follow-up meeting may be arranged for further information or clarification. Assuming this is satisfactory, there will be an inception meeting at which any contractual details can be finalised and performance indicators agreed.

A purchase order will then be issued, and – in combination with this specification and the successful bidding document – will form the contract. Please note that it can take up to two weeks to set up a new supplier on the Council’s payments system, and another week for an initial payment after that period. Bidders may wish to factor this in to the project plan, if it is reliant on start-up funding.

1. **Making a Bid**

Please submit your bid, consisting of one hard copy and one electronic copy on a memory stick or disc, by 12:00 noon on Friday11th March 2016, in a sealed envelope to:

Amber Russell

Head of Housing Management & Allocations

Winchester City Council

Colebrook Street

Winchester

Hampshire

SO23 9LJ

Please mark the bid ‘Money and Benefits Advice Commission - Confidential’ with your company/organisation name alongside it.

Proof of postage is not considered to be proof of receipt. You may wish to send your bid by a ‘signed for’ service.

The contact officer for this commission is Christopher Pope, Income Services Manager, Winchester City Council, email cpope@winchester.gov.uk All questions/points of clarification should be raised via the contact officer.

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