

04 September 2018

Dear Sir or Madam

**Invitation to Tender:** Getting Our Voices Heard

**Reference Number:** DRILL2018/GOVH

You are invited by the Disability Research on Independent Living and Learning Programme (DRILL) to tender for the above referenced contract. Our requirements are contained in this Invitation to Tender (ITT) document.

The Preferred Bidder will not be permitted to enter into negotiations on the terms of the Contract. Any attempts to negotiate amendments will breach the terms of this ITT and will result in the Preferred Bidder being excluded from the tender process.

You must follow all the instructions set out in this ITT when responding to it. Please email your response to this ITT to [sylviagordon@disabilityaction.org](mailto:sylviagordon@disabilityaction.org)

The deadline for submission is 27 November 2018 at 12 noon. Failure to provide all the information required will result in the rejection of the tender.

DRILL is simultaneously inviting tenders for another contract. The contract is “**Including Missing Voices**”. The reference number is DRILL2018/IMV. You may be interested in this opportunity as well. You will not be advantaged by responding to both tenders as they will be assessed independently.

Yours faithfully

Sylvia Gordon

DRILL Programme Manager

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**Contract Summary**

**Title:**

Getting Our Voices Heard

**Location of Contract:**

United Kingdom

**Value of Contract:**

Maximum of £100,000 (inclusive of VAT)

**Duration of Contract:**

12 months

**Section 1**

**Instruction to Bidders**

**1. General Information**

1.1 Disability Action reserves the right to vary any or all parts of the information contained in the Invitation to Tender.

1.2 Disability Action intends to accept the tender which scores the most marks against the criteria set out below. Disability Action at its sole discretion, reserves the right to accept or reject any tender. Disability Action does not bind itself to accept the lowest priced tender and will not be liable for any costs incurred in the production of your submission.

1.3 Disability Action reserves the right to change the timing or any other aspect of the procurement process or to cancel the procurement process at any stage or not to proceed with the procurement for any reason whatsoever without prior notice. Under no circumstances will Disability Action or any of its partners be liable for any costs or expenses incurred by Bidders and their partners in this procurement.

1.4 Disability Action reserves the right not to disclose information that it feels would put them at a commercial or unacceptable contractual disadvantage.

1.5 Tenders, all documents and all correspondence relating to the tender must be written in English, Arial 14.

**2. Tender documents**

2.1 Tenders should be submitted in accordance with the following instructions.

2.2 The Bidder is expected to examine all of the instructions, forms and specifications that comprise the tender documents. Unless the Bidder provides all of the information required the tender will be rejected.

2.3 All information issued in connection with the ITT remain the property of Disability Action and are to be used soley for the purpose of tendering.

2.4 The Preferred Bidder will not be permitted to enter into negotiations on the terms of the Contract. Any attempts to negotiate amendments will breach the terms of this ITT and will result in the Preferred Bidder being excluded from the tender process. In such circumstances Disability Action reserves the right to invite the next hightest scoring Bidder to enter the Contract.

**3. Clarification**

3.1 If you require clarification about the contents of this ITT or this ITT process, please email the DRILL Programme Manager: [sylviagordon@disabilityaction.org](mailto:sylviagordon@disabilityaction.org)

Questions or requests for clarification must be submitted prior to the closing date for the submission of questions.

3.2 Disabilty Action will publish all questions raised (without disclosing the source of the enquiry) and all responses on the DRILL website [www.drilluk.org.uk](http://www.drilluk.org.uk) It is your responsibility to check this regularly.

**4. Schedule of Charges**

4.1 Bidders will complete **Section 3**, **Appendix 3**, **page 28.** Table A Schedule of Charges, against each capitalised description, detailing a total and full cost of the Contract.

4.2 The rates entered will be deemed to include complete provision for full compliance with the requirements of the Contract.

4.3 The rates entered are firm and fixed and will not be subject to any variation.

4.4 The charges must be quoted in pounds sterling and inclusive of VAT.

4.5 Disability Action reserves the right to discuss and agree with the Contractor a maximum sum for all expenses.

4.6 Any attempt to qualify pricing or include assumptions in the Schedule of Charges will result in the rejection of your tender.

**5. Timetable**

*This is intended as a guide only. DRILL may vary these dates\**

|  |  |
| --- | --- |
| **Date** | **Timetable** |
| 04 September 2018 | Invitation to tender issued |
| 18 September 2018 (12 noon) | Closing date for questions |
| 27 November 2018 (12 noon) | Tender return deadline |
| By 11 January 2019 | Review / evaluation of tenders |
| Week commencing 14 January 2019 | Identification of Preferred Bidder\* |
| Week commencing 14 January 2019 | Go back to other Bidders with scores and offer of feedback\* |
| By 30 January 2019 | Contract Award\* |
| By 1 March 2019 | Contract Work Commencement Date\* |
| By 28 Februrary 2020 | Contract End Date\* |

**6. Documents**

6.1 Bidders must respond to and / or complete and return all documents in Section 3, plus additional information detailed as necessary.

* **Appendix 1** Response to Tender and Pass / Fail Criteria plus additional information
* **Appendix 2** Response to Tender and Evaluation Criteria plus additional information
* **Appendix 3** Schedule of Charges
* **Appendix 4** Bidder’s Details
* **Appendix 5** Partner Details
* **Appendix 6** Declaration (signed)

6.2 DRILL is seeking tenders that includes a partnership approach. Therefore you will need a robust partnership agreement in place outlining the individual roles and responsibilities of each partner in relation to the delivery of the Contract. DRILL will need to see this partnership agreement as part of the tender process. A Lead Bidder needs to be clearly identified (Appendix 4 Bidder’s Details) as it will be with them that the Contract will be held and they will be the contractor and ultimately be accountable for its overall delivery.

6.3 Bidders (including partners) must declare any known or potential conflicts of interest.

**7. Submission of Tenders**

7.1 We will only accept responses submitted by email to the DRILL Programme Manager [sylviagordon@disabilityaction.org](mailto:sylviagordon@disabilityaction.org) unless there is a reasonable adjustment to consider. If this applies please contact the DRILL Programme Manager 4 weeks in advance of the closing date.

Any tender delivered after the closing date and time for any reason will be discounted.

7.2 In your tender response, clearly indicate the names and addresses of your partners and the scope of work you will employ them for.

7.3 Disability Action is not responsible if all or part of your tender is not received.

7.4 By submitting a tender, the Bidder agrees to keep the tender open for acceptance by Disability Action for **60** days following the closing date for submission of tenders.

7.5 Disability Action does not bind itself to award a contract and shall not be liable for any costs incurred in the production or submission of ITT. Under no circumstances will Disability Action or any of its partners be liable for any costs or expenses incurred by Bidders and/or their partners in this procurement.

**8. Notification of Award Contract**

8.1 The issue of a signed Contract will constitute Disability Action’s acceptance of the tender

**Section 2**

**Scope of Work**

1. **Background to DRILL**

Disability Research on Independent Living and Learning (DRILL) is a 5 year programme funded by the Big Lottery Fund’s (BLF) Research for Impact: Disabled People (RFI: Disabled People).

The RFI: Disabled People programme was developed by BLF in recognition of the distinct lack of evidence available from the perspective of how disabled people are enabled to achieve independent living.

The overall programme aim is:

*To build better evidence about approaches to enable disabled people to achieve independent living, which is used to inform future policy and service provision, as well as give a greater voice to disabled people in decisions which affect them.*

The DRILL concept was coproduced by a 4 Nation Partnership of Disabled People’s Organisations (DPOs). This included Disability Action, Disability Rights UK, Disability Wales and Inclusion Scotland. The process supporting the development from the overarching concept to full proposal included engagement with over 100 DPOs and approximately 40 academics, the majority of whom were disabled.

An application was submitted to the RFI: Disabled People programme which was successful. DRILL was awarded £5million of BLF funding.

1. **Introduction to DRILL**

Launched in 2015, DRILL is funded until August 2020. DRILL is led by disabled people and funds 32 coproduced research and pilot projects across the UK. The purpose of these projects is to find solutions about how disabled people can live as full citizens and take part socially, economically and politically.

DRILL promotes coproduction and collaboration between disabled people and their organisations, academia, research bodies and policy makers. Disabled people are empowered to have direct influence on decisions that impact on their independent living, particularly in relation to policies, legislation and services.

31 projects were selected by 2 competitive funding calls. A Four Nations Research Project involving the 4 DRILL Programme partners, led by Inclusion Scotland, is the final project.

Almost £2.8 million has been committed to these projects. Further information can be found at [www.drilluk.org.uk](http://www.drilluk.org.uk)

**Governance and decision making**

The Programme is led by disabled people in all parts of its structure. Aspects of the DRILL decision making and delivery framework include:

* DRILL Programme Board (DPB)
* 4 National Advisory Groups (NAGs)
* Central Research Committee (CRC)
* DRILL Ethics Committee
* DRILL Programme Team

Disability Action is the Contract holder with BLF. The Programme is governed by the DPB that is made up of the Chief Executive (or a person designated by the CEO) of each partner organisation.

There is a NAG in each nation – England, Northern Ireland, Scotland and Wales. The role of the National Advisory Groups has involved assessing grant applications from the nation and making recommendations about the projects to the fund.

Each NAG includes representation from disabled people and their organisations, academics and policy makers. Their role is now evolving with 3 of the 4 NAGs involved in the 4 Nations Research Project, alongside, providing advice and support to funded projects in their nation.

The CRC is a UK wide Committee that has made the final decisions on which projects to award DRILL funding to. The Committee also provided the due diligence check on the 4 Nations Research Project. The make – up of the CRC is similar to that of the NAGs.

The DRILL Ethics Committee provides a process for providing ethical approval to successful DRILL applications which do not have access to a university or another ethics committee. The Committee also provides guidance that the DRILL Programme Team can use to assist projects.

The DRILL Programme Team is based in the 4 partner organisations across the UK. More information can be found at [www.drilluk.org.uk](http://www.drilluk.org.uk)

**Where we have got to**

We are now commissioning to fill specific gaps that have been identified by DRILL. After the completion of each funding round an analysis of what DRILL has funded was carried out. This has helped shape the priorities for the 2nd Call and has assisted in identifying the gaps for commissioning.

DRILL engaged with the NAGs and the CRC in shaping the titles for commissioning. We also reflected on the priorities identified by disabled people via a UK wide roadshow engagement process held in the early stages of the Programme.

Please refer to **Appendix 7, page 35**. for further information on DRILL Outcomes and DRILL Principles.

1. **Title of the commission**

**“Getting Our Voices Heard”**

The DRILL Programme has identified that some topics of importance to disabled people that impact on their ability to achieve independent living are not easy to progress at a National or UK level. We are interested in maximising the influence on policy and practice of disabled people and their organisations.

The aim of the commission is to explore different approaches to exerting influence taken by disabled people and their organisations around a specific policy area, identify what works in different contexts and to make recommendations on approaches to take.

Tenders looking closely at successful examples of where Disabled People’s Organisations have influenced policy or practice will be welcomed.

The DRILL Programme covers all four Nations in the UK. We would like to see an element of the proposal looking at the similarities or differences across the Nations.

The solution you identify may require a different approach or a unified one, which should be considered as part of your proposal.

**Focus of tender**

Your proposal should be based on **one** issue thought to be crucial in allowing disabled people to achieve independent living.

We are particularly interested in proposals that focus on social care, transport or hate crime. However, we will consider funding another specific topic, **as long as you can make a very strong case** for it.

DRILL will require evidence within the project of a track record of authentic engagement with disabled people about the issue identified in the tender. Alongside their inclusion in a way that values the ethos of coproduction.

Please refer to **Appendix 8, page 39** for a DRILL definition of coproduction.

**A staged approach**

DRILL foresees the following stages as part of **Getting Our Voices Heard**. The stages are outlined alongside key outputs that will be required as a minimum. You must include all costs for accessible requirements and reasonable adjustments in the budget and consider how your project will be accessible to a diverse group of disabled people.

DRILL recognises that some of the stages may run con-currently. These stages should be referred to in your Delivery Plan.

**Stage 1**

Approaches are identified, analysed and documented of how DPOs have exerted influence on policy making and service provision at a national / UK level that has supported disabled people to achieve independent living.

This part of the project should research different approaches to exert influence and take into consideration:

* Devolution and the nuances of the policy landscape and approaches to influencing policy and service provision in each nation. For example, structure and accessibility to senior policy makers / senior civil servants and politicians, lessons from where influencing has been effective at a local government level – what is the context of this and is there anything transferable to nations and the UK level?
* The shared elements of effective approaches to exert influence and how to develop and lead an effective influencing strategy and action plan. For example, what are the key components of an impact strategy and action plan? What is the best way to evidence need if you are carrying out research and how should this be presented to maximise impact? Is partnership an effective approach or not and in what contexts? In what contexts is working at a national level effective – would the approach be more effective if it is a unified UK approach or not and if so why? Should various approaches run con-currently for impact?
* Is it easier to exert influence around certain impairments and / or certain experiences of disability? How do we create the same motivation and policy interest to influence policy and service provision to support all disabled people achieve independent living.

**Please note**. DRILL is not only interested in learning from what approaches have worked. We are also interested in what hasn’t worked and the learning from that.

**Outputs**

* A coproduced report detailing the research findings and recommendations about an approach or approaches to be taken forward with a cohort of DPOs (and other stakeholders) to maximise influence around the specific issue and policy area at a national and UK Level.

**Stage 2**

Coproduce and implement an Impact Strategy (based on the above learning) and initiate an Action Plan(s) with a cohort of DPOs (and other stakeholders) to maximise influence around the specific issue and policy area identified at a national and UK Level.

This part of the project should take into consideration:

* There will be one Impact Strategy. However nations are likely to require specific action plans to include various approaches to influencing policy and legislation within devolved and local administrations.
* Opportunities for knowledge exchange and learning for the cohort of DPOs (and other stakeholders).
* How to measure impact (what success looks like for you) to include indicators of change; and how to measure change as the Impact Strategy and Action Plans are implemented.

**We do not expect the Action Plans to be completed within the project lifetime. However DRILL does expect progress to be made against the indicators of change and for the project to measure the change by the end of the Contract.**

**Outputs**

* An Impact Strategy and Action Plans initiated, outputs and outcomes achieved and measured within the project lifetime.
* A plan for sustaining the work of the project on completion of the Contract, as far as practically possible in light of the funding being spent.

**Stage 3**

Contribute towards the evaluation of the Contract and produce a UK wide dissemination plan for the learning acquired.

This part of the project should take into consideration:

* DRILL requires all of the project learning to be noted and submitted.
* Connecting with the **Including Missing Voices** project commissioned by DRILL to establish and take on board mutual learning that may be of benefit to DRILL and disabled people and their organisations.

**Outputs**

* A Final Report documenting methodology, research findings, processes, actions initiated, progress against outcomes and learning.

**Outcomes**

**Getting Our Voices Heard** will contribute to all 4 DRILL Outcomes, particularly Outcomes 3 and 4. Please describe what the indicators will be and how you will evidence them. **Appendix 7, Page 35**.

1. **Partnership**

As part of this ITT, DRILL is seeking partnership bids to ensure that we obtain and provide for the following:

* The necessary skills and expertise to cover the requirements of the Contract.
* Opportunity to take forward a 4 nations approach to the work.
* Opportunity to embed the ethos and principles of DRILL, particularly that of coproduction.

Bidders should identify areas where partners will provide services and identify all such third parties in their response along with details of their scope of involvement. This information should be provided in **Appendix 5, page 31**.

The Lead Bidder will remain the point of contact for DRILL and will enter into a Contract with the funder and will thereafter be referred to as the Contractor. The Contractor will ensure that all terms and conditions of the agreement with DRILL are communicated to partners. The Contractor will ensure continuity of service in the event that a partner withdraws or fails to perform.

1. **Monitoring Performance**

**Inception Meeting**

Within 10 working days of the Contract being signed, the Contractor and partners (if applicable) will meet with DRILL to undertake an inception meeting.

**Contract Monitoring and Reporting**

The Contractor will take responsibility for managing issues, addressing poor performance and meeting all performance, equality, financial and legislative requirements. The Contractor will be required to:

* Maintain a risk register and review this with DRILL on a regular basis
* Maintain an effective filing system, both electronic and hard copy, and provide DRILL with access to this on request
* Maintain appropriate management information that enables the Contractor to report its own activity to DRILL and account for its time, staff and use of resources
* Allow access to all records associated with the delivery of the Contract to DRILL as required
* Attend DRILL Programme Board meetings (frequency to be agreed at the Inception Meeting). At the discretion of DRILL, these meetings may need not be attended in person by all partners, and teleconferencing and/or Skype may suffice on occasion
* Provide regular progress reports, the format, content and frequency will be agreed with DRILL at the Inception Meeting
* Submit a final report within one month of the end of the Contract with a final review meeting to be held within one month of submission

**Governance**

The Contractor will contribute to the DRILL Programme Board meetings (and attend when necessary) to enable the Board to understand the effectiveness and impact of **Getting Our Voices Heard**.

**Communications and Accountability**

The Contractor will maintain excellent communications with DRILL at all times ensuring that we are well informed, aware of issues and central to decision making in relation to progress. The Contractor will identify a named contact acting as Contract Manager. The designated person will carry all responsibility for the Contract.

The Contract Manager will liaise with and take instruction from the DRILL Programme Manager.

1. **Contract Terms**

The Contract is for a term of 12 months. DRILL may extend the contract for a minimum period of time at no extra costs. The value of the Contract for its duration will be up to a maximum of £100,000.00 (including VAT and any associated expenses). Bids in excess of this limit will be excluded.

1. **Indicative Timetable**

|  |  |
| --- | --- |
| **Actions** | **Due dates\*** |
| Inception Meeting with DRILL to agree plans and discuss requirements | Within 10 working days of Contract start date |
| Inception meeting write up  Draft communications protocol submitted to DRILL for approval  Invoicing schedule  Reporting schedule  Updated Risk Register and Delivery Plan (if applicable) | Within 10 working days of the Inception Meeting |
| Provide regular progress reports  Contribute to DRILL Programme Board meeting to discuss progress against the agreed delivery plan | Dates and frequency to be determined |
| Submit a final report and attend a final review meeting | Within one month of the end of the Contract with a final review meeting to be held within one month of submission |
| **Stage 1**  Approaches identified, analysed and documented of how DPOs have exerted influence on policy making and service provision at a national / UK level that has supported disabled people to achieve independent living. | Within 20 weeks of the Contract start date |
| **Stage 2**  Coproduce and implement an Impact Strategy (based on the above learning) and initiate an Action Plan(s) with a cohort of DPOs (and other stakeholders) to maximise influence around the specific issue and policy area identified at a national and UK Level. | Within 45 weeks of the Contract start date |
| **Stage 3**  Contribute towards the evaluation of the Contract and produce a UK wide dissemination plan for the learning acquired. | By Contract end date |

**\*This is an indicative timetable that DRILL reserves the right to amend.**

**Section 3**

**Appendix 1**

**Response to Tender & Pass/Fail Criteria**

You are required to respond to **ALL** of the criteria below. Please respond to Appendix 1 using no more than **4** A4 sheets in font / size Arial 14. To assist our evaluation of your tender submission, please ensure you clearly cross refer your responses to the Pass/Fail Criteria.

Additional documents you will need to submit as well as up to **4** A4 sheets are:

* Previous 2 year’s annual accounts prepared by a qualified accountant to include:
* Balance Sheet (or Statement of Balance)
* Profit & Loss Account and (or Statement of Receipts and Payments
* Full Notes to the accounts
* Certificates of Professional Indemnity Insurance and Public Liability Insurance, at a minimum cover of £5million for each
* A Data Protection Policy (GDPR compliant)

Initially we will evaluate your tender to see if you meet our **minimum PASS/FAIL CRITERIA** set out below.

Bidders who do not pass all the Pass/Fail criteria (A-E) below will be excluded from further consideration in the competition (i.e. their tenders will not be evaluated further and will be excluded from the competition).

**Pass/Fail Criteria**

|  |  |
| --- | --- |
| **Pass/Fail Criteria A** | PASS/FAIL |
| DRILL requires the provider to have a minimum of 3 years relevant experience successfully delivering similar projects.  Please provide evidence of 3 years of experience undertaking similar projects (similar in scale, value and complexity) successfully and 2 supporting references demonstrating this. |  |
| **Pass/Fail Criteria B** |  |
| Financial PASS/FAIL TEST (Where the bidder is a consortium, this test will be carried out on the Lead Bidder who Disability Action will enter into a contract with and the Lead Bidder should submit the information requested below).  In order for us to carry out this assessment, please provide copies of the last two year’s annual accounts to include:   * Balance Sheet (or Statement of Balance) * Profit & Loss Account (or Statement of Receipts and Payments) * Full Notes to the accounts   We will review these to ensure you have adequate financial standing to perform the services without putting Disability Action at risk. Where we have concerns we may request further information from you. Where our concerns are not addressed you will be excluded from further participation in the competition. |  |
| **Pass/Fail Criteria C** |  |
| Bidders must have Certificates of Professional Indemnity Insurance and Public Liability Insurance, at a minimum cover of £5million for each.  Bidders must have a Data Protection Policy (GDPR compliant). |  |
| **Pass/Fail Criteria D** |  |
| Bidder has submitted a complete tender that accords with every instruction and requirement set out in this ITT including |  |
| **Pass/Fail Criteria E** |  |
| The Bidder’s Total Costs in Table A do not exceed £100,000 (including VAT and expenses). Bidders whose costs exceed this amount will be excluded from further consideration in the tender process. |  |

**If you pass all of the pass/fail criteria set out above, we will evaluate your tender response using quality and price criteria which are set out below.**

**Appendix 2**

**Response to Tender and Evaluation Criteria**

You are required to respond to **ALL** of the criteria below. Please respond to Appendix 2 using no more than **16** A4 sheets in font / size **Arial 14**. To assist our evaluation of your tender submission, please ensure you clearly cross refer your responses to the Evaluation Criteria.

Additional documents you will need to submit as well as up to **16** A4 sheets are:

* Partnership Agreement
* Delivery Plan
* Detail of Proposed Delivery Team and Structure
* Risk Assessment Policy and Risk Register

Your bid will be scored out of 500 marks. 400 marks for the Evaluation Criteria (80%) and 100 marks for Price (20%). The Evaluation Criteria marks will be calculated by multiplying the quality score (1-5) for each criterion by its weighting. For example, under Criterion 1 a quality score of 3 would result in a mark of 30 (3 x 10).

Your responses should be supported by evidence or learning from previous implementation of proposed process(s), including methodology, for achieving the outcomes expected by DRILL for this Contract.

**Evaluation Criteria (400 marks overall)**

|  |  |  |
| --- | --- | --- |
| **No.** | **Evaluation Criteria** | **Weighting** |
| Criterion 1 | **Understanding of the brief**  Please demonstrate your understanding of the purpose and scope of work of the Contract.  Please demonstrate your understanding of Independent Living and the policy landscape impacting on disabled people and their organisations at a national and UK Level.  Please provide evidence that the issue your proposal sets out to address is crucial in allowing disabled people to achieve independent living. | 10 |
| Criterion 2 | **Proposed approach and methodology**  Please set out in your proposal how you will meet all the requirements as set out in Section 2 ‘Scope of Work’. Please describe your approach and methodology and set out how this is an effective way of fulfilling the purpose of Getting Our Voices Heard.  Please illustrate how you will fulfil the core principles of DRILL. These are:   * Something new about promoting Independent Living * Solutions that will make an impact * Led by disabled people and coproduced in equal partnership with others * Robust and based on sound research methods * Addresses intersectionality * Increases the learning and capacity of everyone involved * Contributes to the DRILL Outcomes, particularly 3 & 4 | 15 |
| Criterion 3 | **Understanding of coproduction**  Please describe in detail how disabled people have been involved in designing this proposal, and how the Contract will be led by disabled people. Please also describe how the Contract will be coproduced in equal partnership.  (Please refer to **Appendix 8, page 38** for further information) | 15 |
| Criterion 4 | **Delivery Plan**  Please provide a clear and realistic delivery plan and proposed timescale for the delivery of the Contract as detailed in the Staged Approach in **Section 2**.  Overall your response should include all of the necessary elements required to deliver the Contract, such as, key tasks, activities, milestones, and clearly explain the reasoning behind your approach. | 20 |
| Criterion 5 | **Team Details**  Please detail your proposed delivery team, including structure, key roles and each person’s skills and experience which are relevant to delivering the Contract.  Please detail organisation(s) you will partner with to deliver the Contract and complete **Appendix 5, page 31**. | 10 |
| Criterion 6 | **Risk**  Please identify the main risks to delivering this Contract on time and budget, and your proposals for mitigating / managing them.  Please submit a Risk Assessment Policy and Risk Register. | 5 |
| Criterion 7 | **Quality Assurance**  Please detail your approach to quality assurance for this Contract and how you will monitor quality on an ongoing basis. | 5 |

Responses to each criterion above will be allocated a score based on the methodology contained in the table below. This score will then be multiplied by the weighting in the column on the right.

**Quality Scoring Methodology**

|  |  |  |
| --- | --- | --- |
| 0 | Poor | Limited information that does not address the quality criteria. Does not give DRILL confidence in the ability of the Bidder to deliver the Contract. |
| 1 | Weak | Response is supported by weak standard of information and / or evidence in several areas giving rise to concern about the ability of the Bidder to deliver the Contract. |
| 2 | Satisfactory | Response is supported by a satisfactory standard of information and / or evidence in most areas but a few areas lacking in detail given rise to some concerns about the ability of the Bidder to deliver the Contract. |
| 3 | Good | Response is comprehensive and supported by a good standard of information and / or evidence. Gives DRILL confidence in the ability of the Bidder to deliver the Contract. Meets DRILL’s requirements. |
| 4 | Very Good | Response is comprehensive and supported by a high standard of information and / or evidence. Gives DRILL a high level of confidence in the ability of the Bidder to deliver the Contract. Exceeds DRILL’s requirements in some respects. |
| 5 | Excellent | Response is very comprehensive and supported by a very high standard of information and / or evidence. Gives DRILL a very high level of confidence in the ability of the Bidder to deliver the Contract. Exceeds DRILL’s requirements in most respects. |

**Price Scoring Methodology (100 marks overall)**

The evaluation of price will be carried out on the Schedule of Charges you provide response to **Appendix 3 Table A, page 28**.

|  |  |  |
| --- | --- | --- |
| Price Criterion | 100 marks will be awarded to the lowest priced bid and the remaining bidders will be allocated scores based on their deviation from this figure.  For example, if the lowest price bid is £100 and the second lowest is £108 then the lowest price bidder gets 100 marks (full marks) and the second placed Bidder will be awarded 92 marks ((100/108) x 100). | **20%** |

## **The scores awarded for evaluation criteria and price will be added together to obtain the overall score for each Bidder. The Bidder with the highest overall score will be the preferred Bidder.**

**Appendix 3**

**Schedule of Charges**

Bidders must complete Table A, Schedule of Charges below estimating the number of days and travel and subsistence costs associated with their bid. The total fixed price will be inclusive of VAT and inclusive of expenses and all costs to be incurred.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **TABLE A:**  **(firm and fixed costs)** | | **eg project director / principal investigator** | **eg senior consultant/manager/ researcher** | **eg junior**  **consultant/junior researcher** | **Total days** | **Total Fees** |
|  | | ***e.g. £500*** | **e.g. £300** | **e.g. £200** |  |  |
|  | ***Quantity*** |  | | |  |  |
| Inception meeting to agree plans and finalise requirements with DRILL | *1* | *e.g. 0.5* | *1* | *1.5* | *3* | *850* |
| Other (insert additional rows to include other deliverables) |  |  |  |  |  |  |
| *[Add as necessary]* |  |  |  |  |  |  |
| Expenses |  |  |  |  |  |  |
| Travel and subsistence |  |  |  |  |  |  |
| Other (non-staff) costs –  *Please specify* |  |  |  |  |  |  |
| **Sub-total** | | | | | |  |
| **VAT** | | | | | |  |
| **Total Costs including VAT and expenses (this figure will be used for the purposes of allocating your score for the price criterion and must cover the cost of meeting all our requirements )** | | | | | |  |

Please note any contract awarded will be based on DRILL’s standard terms and conditions of contract and you will be required to sign up to these if successful.

**Appendix 4**

**Lead Bidder’s Details**

**Main Contact**

Please tell us who will be the main contact. This should be the company and person who will be responsible for the Contract.

|  |  |
| --- | --- |
| Contact name |  |
| Address |  |
| Postcode |  |
| Full legal name of the main contact organisation |  |
| Contact email |  |
| Contact phone number |  |
| Best way to contact |  |

**Organisation Type (please mark)**

|  |  |
| --- | --- |
| Disabled People’s Organisation |  |
| Voluntary organisation |  |
| Education sector |  |
| Public sector |  |
| Private sector |  |
| Other |  |

**VAT Registration Number (if applicable)**

|  |
| --- |
|  |

**Payment Details**

|  |  |
| --- | --- |
| Account name |  |
| Bank name |  |
| Address |  |
| Account Number |  |
| Sort Code |  |

**Conflicts of Interest**

Please note any conflicts of interest. For example, a board member of one of the DRILL partner organisations (Disability Action, Disability Rights UK, Disability Wales and Inclusion Scotland)

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|  |

**Appendix 5**

**Partner Details**

Please tell us about other partners involved. Please replicate and complete this table if you have more than one partner.

|  |  |
| --- | --- |
| Contact name |  |
| Address |  |
| Postcode |  |
| Full legal name of the main contact organisation |  |
| Contact email |  |
| Contact phone number |  |
| Best way to contact |  |

**Organisation Type (please mark)**

|  |  |
| --- | --- |
| Disabled People’s Organisation |  |
| Voluntary organisation |  |
| Education sector |  |
| Public sector |  |
| Private sector |  |
| Other |  |

**Role / Responsibility with the project (100 words maximum)**

|  |
| --- |
|  |

**Conflicts of Interest**

Please note any conflicts of interest. For example, a board member of one of the DRILL partner organisations (Disability Action, Disability Rights UK, Disability Wales and Inclusion Scotland)

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|  |

**Appendix 6**

**Declaration**

**The Bidder is to type the following on its own headed paper.**

Dear Disability Action (on behalf of DRILL)

**Contract for Tender Title: Getting Our Voices Heard (‘the Contract’)**

We undertake to keep the Tender open for acceptance by DRILL for a period of 60 days from the return date.

We declare that this is a genuine Tender, intended to be competitive, and that we have not fixed or adjusted the amount of the Tender by, or under, or in accordance with, any agreement or arrangement with any other person. We further declare that we have not done, and we undertake we will not do, any of the following acts prior to the award of this Contract:

* Collude with any third party to fix the price of any number of Tenders for this Contract;
* Offer, pay, or agree to pay any sum of money or consideration directly or indirectly to any person for doing, having done, or promising to be done, any act of the sort described herein and above.

We understand that you are not bound to accept the lowest priced, or any, Tender.

We undertake to agree to the following, if we are awarded the Contract:

* Sign DRILL Letter of Offer and Standard Terms and Conditions to confirm you will do everything you set out in your Tender;
* Confirm that Disclosure and Barring Service, Disclosure Scotland and / or Acess NI certificates to the required standard are in place;
* Apply for ethical approval. If you have not indicated that a university or another organisations will be responsible for this, it will be a required to complete an ethical approval process with the DRILL Ethics Committee;
* Submit Equality and Diversity information;
* Comply with the General Data Protection Regulation 2018;
* Share the intellectual property produced by the project by licencing under a Creative Commons Attribution Share-Alike 4.0 Licence;
* Apply to deposit the research / project data into the UK Data Service. Deposits should be made within 3 months of end of Contract;
* To comply with the DRILL acknowledgements and the use of the BLF logo and DRILL logo;
* To comply with the DRILL Terms and Conditions and if they are a charity, comply with the Charity Commission guidance on campaigning and politicial activity.

|  |  |
| --- | --- |
| Signature |  |
| Print Name |  |
| Date |  |
| Authorised to sign tenders for and on behalf of |  |

**Appendix 7**

**DRILL Outcomes and Principles**

**DRILL Outcomes**

DRILL has 4 overall outcomes that have been agreed with BLF. These are:

1. Increase our knowledge about key issues and new evidence of what works and enables us to achieve independent living and fulfil our (disabled people’s) potential
2. Disabled people experience improved wellbeing, independent living, choice and control through participating in or engaging in DRILL
3. Exert positive influence on policy making and service provision to support disabled people to achieve independent living, through coproduction of a robust set of research findings.
4. Disabled people are empowered and have direct influence on decisions about policies, legislation and services which affect them

**DRILL Principles**

**Something new about promoting independent living**

We are looking for original, creative proposals that will provide important new evidence in new ways. We are interested in proposals that explore new ways to solve problems, or new ways for disabled people to participate and contribute. We are interested in new ideas that will work in a changing world.

**Solutions that will make an impact**

It is important the proposals we fund make and impact and leave a legacy. Might your proposal and the benefits anticipated be transferable? If decision makers need to be influenced to change something, what will you do to try and persuade them? Would your proposal have a positive impact on lots of disabled people, or a particularly excluded group?

**Led by disabled people and coproduced in equal partnership with others**

It is important that disabled people’s voices are heard throughout. You will need to show how your proposal reflects disabled people’s priorities and how disabled people’s voices will be heard throughout the process of design and delivery. This may include disabled people being involved in:

* Leading and steering the overall proposal
* Deciding on approach and methodology
* Undertaking coproduced delivery of the proposal
* Communicating the findings to inform policy and service provision
* Evaluating the impact of the proposal funded by DRILL

We are not saying that being ‘led’ by disabled people means they know best about everything. Neither do non-disabled researchers - or even disabled researchers. The point of coproduction is that different people have different, important things to contribute and that all are equally valued. This is not the same as disabled people being researched. They must be partners in carrying out the project.

**Robust and based on sound research methods**

In your proposal provide an overview of the methodology be it qualitative, quantitative or mixed. Please specify and justify the techniques to be used. For example, semi - structured interviews, focus groups and questionnaires. Where appropriate, please provide details of the sampling frame and explain the data analysis techniques to be used and applied. For example, data analysis techniques might be thematic coding of interview transcripts or quantitative analysis of survey data applied by using, for example, manual coding, qualitative software, descriptive and inferential statistics. If using software, please tell us what.

It is really important to provide a strong evidence base to convince decision and policy makers about what works for disabled people.

For research projects this means the right research methods are used to produce sound research evidence that can be trusted.

**Addresses intersectionality**

Intersectionality is a term used to describe overlapping social identities and how these impact on an individual’s experience of oppression and discrimination. It is important that DRILL impacts on disabled people from all communities. Your proposal needs to address intersectionality. Please consider how identities such as gender, race, social class, sexual orientation and age work together to complicate the experience of disability and therefore people face any number of barriers to participation.

**Likely to increase the learning and capacity of everyone involved**

We are looking for proposals that encourage people from different life and work experiences to come together, work together and learn from each other. We believe that this will support coproduction partners to learn from and share knowledge with each other. Tell us what you will do to make sure the coproduction partners can learn as much as possible from each other and from being involved.

**Contributes to DRILL outcomes**

Here you need to sum up how your proposal will contribute towards meeting the DRILL outcomes, particularly outcomes 3 & 4. This includes telling us about your proposals activities, outputs, and outcomes. The activities are the anticipated actions and events that the proposal will need to undertake to make progress. The outputs are what happens as a result of an activity. The outcomes are the changes that result from outputs.

**Appendix 8**

**Definitions used by DRILL**

1. **Who do we mean by ‘disabled people’**

DRILL is inclusive of disabled people living with different impairments or long term health conditions. This includes people who think of themselves as ‘disabled people’ because they are disabled by barriers that society places in their way. It also includes people who think of themselves in other ways, for example, living with a particular health condition of some kind such as cancer or dementia.

People who use British or Irish Sign Language might describe themselves as members of the Deaf community. They might see themselves as being part of a cultural minority based on the language they use. People might think of themselves as having a learning impairment, or being a mental health service user or survivor, or choose other identities like these.

1. **Social model of disability**

The social model of disability believes people are ‘disabled’ through lack of access to buildings, information, communication, personal support, education, employment and by the attitudes of others. There is a distinction made between impairment and disability. Impairment is an injury, illness or congenital condition that causes or is likely to cause a long term effect on physical appearance and/or limitation of the function of an individual. Disability is the loss or limitation of opportunities to take part in society as equal due to institutional, environmental and attitudinal barriers. Society - not the person or the impairment - is the problem. A human rights approach to disability is part of the social model.

<http://www.disabilitywales.org/wordpress/wp-content/uploads/Social_Model_of_Disability.pdf>

1. **Social model language**

DRILL recognises that language is important. A key component of the social model of disability is that individuals or groups of people have a right to determine how they are referred to. We refer to this as self – ascribed identity. We appreciate that people’s lived experiences, understanding and use of language may be different. DRILL funded projects and commissions are required to reflect the social model of disability in their practice.

1. **Independent Living**

Independent Living is defined as: “All disabled people having the same choice, control, dignity and freedom as any other citizen to achieve their goals at home, in education, at work, and as members of the community. This does not necessarily mean disabled people doing things for themselves but it does mean having the right to practical assistance based on their choices and aspirations.” <http://www.dur.ac.uk/resources/beacon/CoinquiryTookitFINAL.pdf>

1. **Disabled People’s Organisations**

Disabled People’s Organisations (DPOs) and Disabled People’s User Led Organisations (DPULOs) are organisations whose governing documents state that at least 51% of their membership and management committee self – define as being disabled. These are organisations which work to, and advocate for the Social Model of Disability and Independent Living.

1. **Coproduction**

DRILL projects are led by disabled people and their priorities, usually in partnership with researchers (disabled and / or non-disabled) and others. DRILL projects are not undertaken ‘on’ or ‘for’ disabled people; they are undertaken ‘with’ and ‘by’ disabled people.

Coproduction in DRILL projects arises from relationships in which the skills, knowledge and experience of all participants are equally valued and combined in the process of planning and delivering projects together.

Whilst acknowledging the constraints of producing research and pilots projects both within and outside of academic institutions, coproduction in DRILL projects requires the following principles to be embedded into practice:

**Accessibility:** Projects are coproduced in ways that are accessible and understandable to all involved. Project findings are made available in a wide range of accessible formats and in places that disabled people can access.

**Experts by lived experience:** Projects respects the value of academic, professional and experiential knowledge and requires the active use of all these forms of knowledge.

**Collaboration and shared goals:** Each step of the project process is undertaken in equal partnership. A mutual understanding of what the project is, why it is being done, and what the aims, objectives and desired outcomes of the project are, provide a sound basis for partnership working.

**Equalising power relations:** Disabled people’s priorities steer the project process; power and responsibility are shared equally and constantly reviewed, and all partners can influence decisions throughout the process, with opportunities for reflection and learning from experience.

**Impact:** research outcomes have real impacts which improve independent living for disabled people beyond the life of the DRILL Programme.

**Coproduction Resources**

Durham University: Co-Inquiry Toolkit

PDF: <http://bit.ly/DURHAMcoinquiry>

Word (37Mb): <http://bit.ly/DURHAMcoinquiryW>

Inclusion North Self-reflection tool: Coproduction – How are you doing?

PDF: <http://bit.ly/INcoprotool>

Word (27Mb): <http://bit.ly/INcoprotoolW>

Independent Living in Scotland: Coproduction Toolkit

Online: <http://bit.ly/ILIScopro1>

Easy Read PDF: <http://bit.ly/ILIScopro2> Easy Read Word (39Mb): <http://bit.ly/ILIScopro2W>

DIY Guide PDF: <http://bit.ly/ILIScopro3> DIY Guide Word (1Mb): <http://bit.ly/ILIScopro3W>

1. **What do we mean by research projects and pilot projects**

A DRILL research project is about finding out about something and develop new solutions that will have an impact, based on the findings and evidence that the research produces. The maximum award for a DRILL research grant has been £100,000.00.

A DRILL pilot project is about putting into practice a potential solution to achieve independent living for disabled people. This is to see how well the solution works and whether anything could be changed to make it work better. The maximum award for a DRILL pilot project has been £150,000.00.