## **HMRC Mental Health Support**

**Background**

HMRC is the UK’s tax, payments and customs department. It collects the money that pays for the UK’s public services and gives financial support to people. Our [strategic objectives](https://www.gov.uk/government/organisations/hm-revenue-customs/about#priorities) set out how.

HMRC is committed to improving its customer experience and providing tailored support at the earliest opportunity for customers who need extra help. The [HMRC Charter](https://www.gov.uk/government/publications/hmrc-charter/the-hmrc-charter) defines the service and standard of behaviour that customers should expect when dealing with HMRC.

We have also published [principles of support for customers who need extra help.](https://www.gov.uk/government/publications/hmrc-charter/hmrcs-principles-of-support-for-customers-who-need-extra-help)

HMRC safeguards the wellbeing of customers and understands that for some, dealing with their tax affairs can cause anxiety. In order to fully support these customers, HMRC is looking for a voluntary and community sector organisation that can assist customers who are referred to them from HMRC. The referrals will be for customers who may be overwhelmed or anxious and need specialist mental health advice.

HMRC fund twelve VCS organisations to support customers who need extra help. These organisations receive approximately 114,00 combined calls a year from HMRC customers. Figures currently reflect approximately 4% of these customers are dealing with mental health issues. We are however only expecting to refer those customers that are in crisis with high referral criteria to the successful organisation.

**Overview of Requirements**

HM Revenue and Customs (HMRC) invites tenders from Voluntary and Community Sector organisations, registered charities or not for profit organisations that specialise in supporting people dealing with mental health problems. You will need to:

a) provide specialist mental health support to customers referred from HMRC who are feeling overwhelmed and anxious about their tax affairs, financial hardship or HMRC debt.

b) carry out a gap analysis on our current learning offer and capability to identify appropriate customers to sign post to the service. Our advisers need to identify, support and signpost customers to the service who are feeling overwhelmed and anxious about their tax affairs, financial hardship and HMRC debt.

HMRC will work with the successful organisation to have the referral service live by the end of September 2022 and work with the organisation for the remainder of the contract to understand how we can improve our capability and understanding around support needed for these customers.

The bids will be assessed on cost and the demonstration of ability to deliver a quality service as per the criteria outlined in sections 1 to 4.

**1.Outputs**

1.1 A referral route from HMRC to a mental health organisation who can give specialist support to HMRC customers who may be feeling overwhelmed and anxious about their tax affairs, financial hardship and debt.

1.2 A referral route from specialised mental health organisations to HMRC where specific tax or debt support is needed for customers who are feeling overwhelmed and anxious about their tax affairs or financial hardship.

1.3 A gap analysis on our current learning offer and capability that identifies how we can improve learning and capability for our advisers so they can identify, support and signpost customers to the service who are feeling overwhelmed and anxious about their tax affairs, financial hardship and HMRC debt.

1.4 Data, reporting and case studies of HMRC referrals and insight to help us shape our customer support offer for the future.

**2.Timetable (dates are estimated and subject to change)**

* Procurement opens 1st August
* Bid Closes 12th August
* Evaluation 15th August
* Contract Awarded 22nd August
* Voluntary standstill 22nd August – 2nd September
* 5th – 16th September mobilisation period
* 19th Sept - end Dec 2022 work between HMRC and Mental Health organisation to understand how we can improve learning and capability.
* Commencing end September to contact expiry work between HMRC and Mental Health organisation to understand volumes, demand, themes and case studies.
* Referral service must be live by 30th September 2022

**3. Skills, experience and infrastructure**

3.1 Your organisation must have proven skills and experience in supporting those facing mental health barriers to their lives, impacting their ability to function independently day to day. This should include appropriate vetting, professional accreditation, details of staff and volunteer training at all levels of the organisation.

3.2 Your organisation must have proven experience of working with other government agencies or similar to deliver comparable services-

* referral routes to provide support and advice to people struggling with a wide range of mental health problems.
* comms campaigns to raise awareness of the service
* gap analysis of learning products and capability to enable advisors to identify, support and signpost customers to the service who are feeling overwhelmed and anxious about their tax affairs, financial hardship and HMRC debt.

3.3 Your organisation must have the infrastructure, resource, and capability to handle in the region of 1000 referrals per year from any area in England/Northern Ireland/Scotland/Wales, 24 hours a day 365 days a year.

3.4 Your organisation must be able to effectively market and communicate the campaign to maximise the awareness of the service.

**4. Demonstrating Impacts**

4.1 HMRC would like you to monitor and evaluate the service and provide data, insight and reports to help HMRC shape and improve their future support offer for customers.

We would like to understand the effectiveness of the services through:

* written case studies of positive impact, demonstrating the different types of customers and mental health issues and how you were able to support them to resolve the problem
* reports on the number of referrals that you received from and to HMRC and the outcomes
* produce an annual evaluation report that highlights both the positive impacts, lessons learned and any potential opportunities arising from the evaluation.
* report on the gap analysis which highlights any areas that need development.

4.2 Your organisation must have robust quality standards and assurance processes in place to ensure that the appropriate level of service/support is being given to customers/clients.

**5. Your costs**

5.1 You must provide a breakdown of the costs of your proposal for the 18-month contract. You must show the full costs broken down as per the cost model provided.

**Further information**

# **How we will support you**

If your bid is successful, we will:

* allocate you an account manager from HMRC’s Customer Stakeholder Engagement Team who will be your first point of contact to discuss the progress of your activities
* discuss and agree your proposed outcomes and how you will measure
* review the data you collect by commissioning from you quarterly statistics as well as mid and end of year reports to evidence your outputs and expected outcomes 