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## **Bid Pack**

### **Attachment 3 – Statement of Requirements**

**Contract Reference: CCFI20A09 - Provision of Independent  
Scheme Administrator for the General  
Election 2019 Disability  
Reimbursement Scheme**

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Bid pack for: Provision of Independent Scheme Administrator for the General Election 2019 Disability  
Reimbursement Scheme

Contract Reference: CCFI20A09

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# **1. PURPOSE**

- 1.1 The Government Equalities Office are looking to appoint an Independent Scheme Administrator to deliver the General Election 2019 Disability Reimbursement Scheme.
- 1.2 This scheme will ensure that disabled candidates had not been unfairly financially disadvantaged by the additional disability-related support needs in seeking elected office. It will do this by reimbursing the disability-related expenses of eligible disabled candidates who stood in the 2019 General Election.

# **2. BACKGROUND TO THE CONTRACTING AUTHORITY**

- 2.1 The Government Equalities Office leads work on policy relating to women, sexual orientation and transgender equality, and are responsible for a range of equalities legislation.
- 2.2 The Government Equalities delivered the Disabled Candidate Support Scheme for the 2019 English Local Elections and Police and Crime Commissioner Elections between December 2018 and March 2020, and the Further Disabled Candidate Support Scheme for the 2019 EU Elections between November 2019 and January 2020.

# **3. BACKGROUND TO REQUIREMENT/OVERVIEW OF REQUIREMENT**

- 3.1 It is important that public offices, from the UK Parliament to local government, reflect the diversity of the UK population but currently the number of disabled people in elected offices is not proportionate.
- 3.2 The Disabled Candidate Support Scheme (DCSS) known as the EnAble Fund for Elected Office opened in December 2018 and ran until the end of March 2020. It was setup to cover elections planned and scheduled in this period, specifically the 2019 English Local elections and 2020 Police and Crime Commissioner (PCC) elections.
- 3.3 The DCSS did not cover the May 2019 EU elections, or the December 2019 General Election, as neither election was planned and scheduled. The Further Disabled Candidate Support Scheme (FDCSS) was set up to provide retrospective support for the May 2019 EU elections.
- 3.4 The General Election 2019 Disability Reimbursement Scheme will provide retrospective support for the December 2019 General Election. The intended outcome of this fund is to make sure disabled candidates are not unfairly financially disadvantaged by the additional disability-related support needs.

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- 3.5 The fund must be run at arm's length from Government to comply with electoral law and therefore GEO require an Independent Scheme Administrator to develop an application and recommendation process with set criteria.

## 4. DEFINITIONS

Expression or Acronym	Definition
DCSS	means Disabled Candidate Support Scheme.
FDCSS	means Further Disabled Candidate Support Scheme.
GE19DRS	means General Election 2019 Disability Reimbursement Scheme.
ESA	means Employment Support Allowance
JSA	means Job Seeker's Allowance
GEO	means Government Equalities Office
PCC	means Police and Crime Commissioner

## 5. SCOPE OF REQUIREMENT

- 5.1 The General Election 2019 Disability Reimbursement Scheme will provide retrospective support for disabled candidates who stood in the December 2019 General Election.
- 5.2 The scheme will:
- 5.2.1 Design, issue, and process applications from eligible disabled candidates who stood in the 2019 General Election to reimburse disability-related expenses.
  - 5.2.2 Promote the fund to eligible disabled candidates;
  - 5.2.3 Make decisions on applications;
  - 5.2.4 Release funding to successful applicants;
  - 5.2.5 Report on and keep records of all grants awarded and funding provided.
- 5.3 The General Election Disability Reimbursement Scheme will be open to eligible disabled candidates who stood in the 2019 General Election only, and will exclude candidates in all other elections.

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## 6. THE REQUIREMENT

### Application Design and Process Development.

- 6.1 The scheme administrator will design, set up and develop a new, accessible and inclusive scheme to support, make recommendations on, and administer applications that provide reimbursement of the disability-related expenses of December 2019 General Election candidates.
- 6.2 The scheme administrator will design a process for disabled candidates to apply for funding under the scheme.
- 6.3 The scheme administrator will design a process to make decisions on successful applications and funding granted under the scheme.
- 6.4 The scheme administrator will ensure that the scheme operates within the [Equality Act 2010](#) and any other relevant legislation.

### Process of Applications and Recommendation

- 6.5 The scheme administrator will support potential applicants to make applications to the scheme, ensuring it is accessible.
- 6.6 The scheme administrator will issue and process applications received from eligible disabled candidates and make decisions on applications for funding within the specified time period and agreed with the GEO during Contract Inception.
- 6.7 The scheme administrator will be expected to make a common sense judgement, independent of GEO, on whether there is evidence that shows the applicant required some level of adjustment to allow them to compete on a level playing field against other candidates, and take all the evidence in the round to make decisions on a case by case basis.
- 6.8 The scheme administrator will need to take into account the need for support that will need to be tailored to the individual and the requirement for specialist assessment and approval. There is currently no set criteria for disability-related expenses. Support may include, for example, the cost of providing transport support, specialist equipment such as screen reader software, or British Sign Language (BSL) interpretation for hearing impaired candidates. It would not include costs that all candidates might expect to incur, e.g. normal campaigning costs, such as leaflet printing and distribution.
- 6.9 The scheme administrator are therefore wholly responsible for their decisions, and any actions or events that directly arise from their decisions, to award funds to individuals or suppliers.

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## Grant Funding and Management

- 6.10 The scheme administrator will administer and release funding to cover disability-related expenses. The scheme administrator will provide additional scrutiny for high value awards above £40,000, including referring high value claims to GEO before they are awarded, and funding approved shall not exceed the £69,000 cap on the Grant Fund budget.
- 6.11 The scheme administrator will be expected to make payments to successful applications at the point the application is approved, and then be reimbursed by GEO upon receipt of evidence on a monthly basis.
- 6.12 The scheme administrator will be expected to put in place measures that identify and mitigate the risk of potential fraud from applicants. These measures will be agreed by GEO during Contract Inception and must prevent potential reputational damage to the GEO.

## Promotional Lines and Materials

- 6.13 The scheme administrator will work with GEO to agree appropriate promotional lines and materials that are proportionate to anticipated volumes for the scheme. The promotional lines will seek to attract eligible applicants, ensuring all information about the scheme is inclusive and accessible, and promote the fund to eligible disabled candidates using political, local, disability and other networks.

## 7. KEY MILESTONES AND DELIVERABLES

- 7.1 The following Contract milestones/deliverables shall apply:

Milestone/Deliverable	Description	Timeframe or Delivery Date
Inception Meeting	Discuss context. Discuss roles and expectations	Within week 1 following Contract Award
Develop and agree reporting mechanism to the GEO, giving GEO direct oversight of the management of the fund.	Design and agree governance structures and monitoring information and mechanisms. Design and agree application, assessment and recommendation processes and timelines, including additional scrutiny for high value awards.	Within week 3 following Contract Award

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	Design and agree a quality assurance process for decision making process.	
Promote the scheme fairly	<p>Work with GEO to agree promotional lines and materials for the scheme that will attract eligible applicants ensuring there is high sufficient demand for the interim fund, including targeting under-represented groups and ensuring all information about the scheme is inclusive and accessible.</p> <p>Engage with key stakeholders, including those identified by GEO, to enable wider promotion of the scheme fairly to an intersectional audience.</p>	Within week 4 following Contract Award
Process and administer funding grants for eligible applications	Process applications for disabled candidates and make decision on applications for funding/support for decision within a specified time period agreed with the GEO, dependent on need.	Within week 16 following Contract Award
Release funding	Administer and release funding to cover disability-related expenses for support of disabled candidates	Within week 20 following Contract Award
Light touch evaluation	Work with the GEO on a light touch evaluation, lessons learnt of the scheme.	Within week 20 following Contract Award

## 8. MANAGEMENT INFORMATION/REPORTING

- 8.1 The Independent Scheme Administrator will provide monthly reports to GEO on general progress and against KPIs, agreed monitoring information, risk management and lessons learnt.
- 8.2 The scheme administrator will report on and keep records of all grants awarded and funding provided, including monitoring information required by GEO and real-time publication of key information, such as number of applications received, number of applications approved, total amount of grant funding approved and received by eligible candidates, in response to requests from

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GEO. The scheme administrator will be expected to provide this in a suitable format such as Excel or Word.

8.3 GEO would also:

- 8.3.1 Retain the right to conduct spot checks of applications, evaluation and awarding process and to intervene where they felt necessary;
- 8.3.2 Retain the right (but not duty) to attend and participate in panels/boards if necessary;
- 8.3.3 Expect regular Management Information to discuss process, delivery and concerns;
- 8.3.4 Agree key performance indicators and monitoring information requirements with the successful bidder.

## 9. VOLUMES

- 9.1 GEO anticipate up to 20 applications for the General Election Disability Reimbursement Scheme. This estimate is based on the number of candidates who stood in the 2019 General Election (3,327), estimated number of disabled candidates based on the general population (22% of the general population are disabled), estimated number of disabled candidates with a relevant disability (ie one that creates a barrier to standing for elected office that can be addressed through the fund) and number of applications to previous funds.
- 9.2 The Disabled Candidate Scheme for the 2019 English Local and Police and Crime Commissioner Elections received 46 applications in total. 5 were rejected leaving 41 applications awarded subject to evidence submission, of which 33 disabled candidates received financial support having submitted evidence.
- 9.3 The Further Disabled Candidate Scheme for the May 2019 EU elections did not receive any applications.

## 10. CONTINUOUS IMPROVEMENT

- 10.1 The Independent Scheme Administrator will be expected to continually improve the way in which the required Services are to be delivered throughout the Contract duration.
- 10.2 The Independent Scheme Administrator should present new ways of working to the Authority during monthly Contract review meetings.
- 10.3 Changes to the way in which the Services are to be delivered must be brought to the Authority's attention and agreed prior to any changes being implemented.

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## 11. PRICE

- 11.1 The total available budget for the delivery of this requirement has been set at £99,000.00 excluding VAT.
- 11.2 This is to be split between Delivery costs for the Independent Scheme Administrator and Grant Fund as follows:
- 11.2.1 Independent Scheme Administrator budget will be capped at £30,000.00 inclusive of all expenses but exclusive of VAT.
- 11.2.2 The Grant Fund budget will be capped at £69,000.00 exclusive of VAT and used to provide reimbursements for disability-related expenses for successful applicants.
- 11.3 Prices are to be submitted via the e-Sourcing Suite Attachment 4 – Price Schedule excluding VAT and including all other expenses relating to Contract delivery.

## 12. STAFF AND CUSTOMER SERVICE

- 12.1 The successful provider shall ensure a sufficient level of resource throughout the duration of the Contract in order to consistently deliver a quality service.
- 12.2 The successful provider staff assigned to the Contract shall have the relevant qualifications and experience to deliver the Contract to the required standard.
- 12.3 The successful provider shall ensure that staff understand the Authority's vision and objectives and will provide excellent customer service to the Authority throughout the duration of the Contract.

## 13. SERVICE LEVELS AND PERFORMANCE

- 13.1 The GEO (Authority) will measure the quality of the Supplier's delivery by adherence to the Key Milestones within Section 7 above, in addition to the following:

KPI/SLA	Service Area	KPI/SLA description	Target
1	Management Information and Reporting	Provide monthly reports to GEO on number of applications received, and approved, total amount of grant funding approved and received by eligible candidates	100%
2	Management Information and Reporting	Respond to Adhoc MI requests within 48 hours and provide MI within 5 working days Mon-Fri	90%

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3	General Requests	Response to general queries within 48 hours Mon-Fri	90%
4	Processing of Applications	Process applications within the proposed time, agreed with GEO during inception.	90-100%

## 14. SECURITY AND CONFIDENTIALITY REQUIREMENTS

- 14.1 The supplier must put in place a fraud prevention plan that includes checks on payment types and tracking and recovery where necessary. Funds incorrectly allocated will be will at the providers own expense.
- 14.2 The Supplier must provide information on data security, specifically how data will be collected and retained under the grant application process and protected in line with GDPR.
- 14.3 Data collected must record full details of each claim made under the scheme and retain these details locally. When sharing that information for audit purposes, the supplier will be required to use an identifier for each individual and not names.

## 15. PAYMENT AND INVOICING

- 15.1 Payment can only be made following satisfactory delivery of pre-agreed certified deliverables.
- 15.2 Before payment can be considered, each invoice must include a detailed elemental breakdown of work completed and the associated costs.

Invoices should be submitted to:  
NEWPORT SSCL - CABINET OFFICE  
PO Box 405  
NEWPORT  
NP10 8FZ

- 15.3 Payments for delivery costs will be made on a monthly basis.
- 15.4 GEO will reimburse the scheme administrator for grant payments made to eligible disabled candidates whose applications for funding disability-related expenses are successful, in full, in arrears on a monthly basis.

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## **16. CONTRACT MANAGEMENT**

- 16.1 Attendance at Contract Review meetings in person, where appropriate is mandatory and shall be at the Supplier's own expense. Where this is not possible video and/or telephone conference will be acceptable.

## **17. LOCATION**

- 17.1 The location of the Services will be carried out at the offices of the Supplier.

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