**Request for Quotes**

**Provision of occupational therapy assessments and strategic and administrative support**

**Contract Period: 12 or 18th months**

# Summary

1. Lambeth Accessible Transport Unit is seeking to appoint a provider to deliver end to end occupational therapy assessments, both face to face and desk based assessments, and strategic and administrative support for Freedom Passes, Blue Badges and Taxi Cards.
2. This brief sets out:
   1. Context and further information about the opportunity; and
   2. The process and next steps.

# Context

1. The Accessible Transport Unit (ATU) deals with applications for Freedom Passes, Blue Badges and Taxi cards. Part of the assessment process involves either a face to face or paper based mobility assessment to be carried out by an Occupational Therapist to determine whether eligibility criteria is met. Lambeth is looking to outsource these mobility assessments.

1. The service requires both strategic and administrative support as detailed further in the method and requirements section of this paper.
2. We are currently dealing with approximately 1,700 assessments per year, although this can vary and includes both face to face and desk based assessments. **The number of assessments under this appointment is not guaranteed.**
3. Please note a new category will be introduced for all Freedom Pass Applications in 2019 for hidden disabilities this could see the assessment figure rise.
4. We expect any provider to:
   * Be fully GDPR compliant and use Lambeth approved methods of data transfer
   * The provider must have a comprehensive registration and training programme for any staff who work for Lambeth and have sufficient qualifications and experience prior to undertaking work for Lambeth.
   * All Mobility Assessors must:

* Be HCPC qualified Occupational Therapists or Physiotherapists
* Provide details of an enhanced DBS dated in the last three years
* Provide details of 3 referees from current or former managers
* Minimum of 5 years’ experience in their profession
* Professional indemnity insurance to the value £2,000,000
* Provide evidence of accreditation/training and qualifications with quotation
  + Only supply qualified Health Professionals that is, either an Occupational or Physio Therapist who is currently registered with the Health Professional Council.

1. The Service Provider shall not sub-contract any part of the Service provided to Lambeth.

# Method & Requirements of the Brief

1. Any provider must provide an end to end service which includes:
2. Provision of remote administrative support staff to manage the service from the point of Lambeth referral for assessment. This administration support should include:

* Reviews of applications referred to provider
* Transfer of application documents and information
* Uploading of decisions to Lambeth systems including I@W and Mosaic
* Creating of successful applicants on London Council’s systems and Blue Badge databases
* Liaison with Lambeth Accessible Transport officers and Mobility Assessors
* Work on Freedom pass reviews, including re-issuing of Freedom Passes and Taxicards via London Councils

1. Provision of experienced desk based assessors to provide paper screening of applications and provision of experienced mobility assessors who are Occupational Therapists or Physiotherapists to conduct face to face assessments. A 4-stage methodology and assessment models and tools must be designed to evaluate eligibility criteria as set out in the DfT Local Authority Guidance for Blue Badge and Concessionary Travel.

* Stage 1 – desk-based assessment using desk based screening tools and scoring matrix
* Stage 2 – further information requests to be made if further information is required but a face to face assessment may not be necessary
* Stage 3 – face to face mobility assessment appointments made and held including all appointment letters to be sent by the provider. Assessments to be held at Lambeth Civic Centre. An agreed scoring matrix should be used to provide an objective assessment of the applicant’s limitations. A recommendation report to award or decline and associated letters must be provided following each assessment.
* Stage 4 – Appeals will be made to Lambeth who will refer to the provider. All appeal communications to be handled by the provider and any face to face appeal assessments to be carried out by an alternative assessor.

1. Customer contact and support in the form of:
   * Provision of dedicated telephone lines to answer applicant and customer queries regarding mobility assessment appointments
   * Preparation of all assessment reports, appointment letters, outcome notices and other associated documentation.
   * Response to appeals, complaints and LGO investigations
2. Provision of robust management and clinical governance framework that is in line with best practice and ensures compliance to DfT guidelines
3. Being responsive to changes requested by Lambeth
4. Strategic Support, which should include:

* Attendance at quarterly contract meetings and monitoring of KPIs (4 meetings)
* Attendance at London Councils quarterly Freedom Pass and Taxi card BOLG meetings with reports on issues relevant to Lambeth Council (4 meetings)
* Development of the assessment service in partnership with the Mobility Assessment Contractor
* Service development in relation to any new central government policy initiatives including guidance on administrative and clinical changes to DfT criteria especially upcoming change ref Hidden Disabilities

And at an hourly rate:

* Provision of Strategic advice and support of policy, budget and service development
* Liaison with London Councils, TFL and other key stakeholders as required
* Liaison with local disability groups as required.
* Member briefings as required

# Responding to the Brief & Timescales

1. The proposed period of the contract would be from the start date agreed once the contract has been awarded. It is hoped that the start date would be on 3rd December 2018 if this procurement proceeds in full and is intended to run for at least one year.
2. A timetable for the selection process is detailed below (please note these dates may be varied at the council’s own discretion)

|  |  |  |
| --- | --- | --- |
| **Stage** | **Component** | **Indicative timescale** |
| Request for quotation | Publication of Request for Quotation | 5 November 2018 |
| Deadline for receiving questions | 9 November 2018 |
| Proposal submission deadline | 12 noon 19 November 2018 |
| Selection | Evaluation Period | 19 – 23 November 2018 |
| Successful applicant selected and confirmed | 23 November 2018 |
| Contract Commencement | Successful applicant commences contract | 3 December 2018 |

**Information Requirements**

1. Your proposal should consist of your response to the Method Statement Questions below (item 21) and your completed Price Proposal (item 26). Your response to the Method Statement Questions must be kept to a maximum 10 sides of A4 (Ariel, Font Size 11, single line spacing) with clear indication of which question you are responding to. Any submissions that exceed this limit will not be evaluated. A draft copy of the terms and conditions applicable for this contract is also attached for your information.
2. Based on an estimate of 1,700 assessments (assessment numbers are variable and not guaranteed), could you please submit your proposed bid to undertake this work including your table of rates for the different functions, such as appeals and complaints. Please supply for both a 12 and 18-month contract period if the table of rates would be different dependent on the length of contract. Please note the price proposal submitted will form the basis of rates for the contract term, with the number of assessments over the term variable and not guaranteed.

# Tender Evaluation

1. The ratio that will be used to evaluate the proposals is as follows:
   1. Price – 70%
   2. Quality – 30%

|  |  |  |  |
| --- | --- | --- | --- |
| **Type** | **Questions** | **Marks Available** | **Weighting** |
| **Service Management and Delivery** | 1) Please describe how you will provide end to end support for Blue badges, Freedom Passes and Taxi Cards with reference to the points above. | 0-5 | 2 |
|  | 2) Please detail how this contract will be resourced (to ensure workloads are effectively managed and the required expertise is provided) with reference to the points above. | 0-5 | 5 |
| 3) Please describe your experience in using a 4-stage methodology to evaluate eligibility criteria as set out in the DfT Local Authority Guidance for Blue Badges and Concessionary Travel. | 0-5 | 5 |
| 4) Please provide details and your expertise in strategic support with reference to point 15 above. | 0-5 | 1 |
| **Provision & Quality of Service** | 5) Please provide details of your experience and expertise in providing this type of work undertaken for other local authorities that will be applied to this contract. | 0-5 | 7 |
| 6) Please provide details of the qualifications of mobility assessors working on the contract (see point 7 above) | 0-5 | 5 |
| 7) Outline details of your registration and accreditation/training programme for any staff working on the contract. | 0-5 | 2 |
| 8) Please outline what monitoring will be in place to ensure that the Council meet our key performance indicators as set out in appendix a. | 0-5 | 2 |
| 9) What are your proposals to provide data security while at the same time ensuring business continuity? Please make reference to GDPR regulations. | 0-5 | 1 |
| **Total (Quality Score)** | |  | 30 |

1. The components will be evaluated by the panel and the appropriate score will be agreed. The score achieved for this section will be weighted at 30% to give the final score for quality (Quality Score).

* The Quality Score will be added to the Price Score to determine the Final score.
* The council reserves the right to challenge any information provided in response to the RFQ and request further information in support of any statements made therein.
* Potential Providers’ responses must clearly demonstrate how they propose to meet the requirements set out in the questions and address each element in the order they are asked.
* Potential Providers’ responses should be limited to, and focused on each of the component parts of the question posed. They should refrain from making generalized statements and providing information not relevant to the topic.
* Whilst there will be no marks given to layout, spelling, punctuation and grammar, it will assist evaluators if attention is paid to these areas including identifying key sections within responses.

1. Potential providers will be marked in accordance with the following marking scheme:

|  |  |
| --- | --- |
| 0 | Failed to address the question/issue. |
| 1 | An unfavourable response/answer/solution. There is limited or poor evidence of skill/experience sought; a high risk that relevant skills will not be available. |
| 2 | Less than acceptable. The response/answer/solution/information lacks convincing evidence of skill/experience sought; lack of real understanding of requirement or evidence of ability to deliver; medium risk that relevant skills or requirement will not be available. |
| 3 | Acceptable response/answer/solution/information to the particular aspect of the requirement; evidence has been given of skill/experience sought. |
| 4 | Above acceptable – response/answer/solution/information demonstrates real understanding of the requirement and evidence of ability to meet it (based on good experience of the specific provision required or relevant experience of comparable service or supply. |
| 5 | Excellent – response/answer/solution provides real confidence based on experience of the service or supply provision required. Response indicates that the supplier will add real value to the organisation with excellent skills and a deep understanding of the service or supply requested. |

1. **Price Evaluation Process**

For price, each submission will be assessed on the total cost of delivering the breakdown of estimated annual cases, using the following equation:

Price Score = (100% - (A-B)/B)\*70

where A = Tendered price and B=lowest price

The Quality Score will be added to the Price Score to determine the Final score. The Council will select a supplier on a most economically advantageous tender (MEAT) basis.

Please complete the price tables below detailing the breakdown of cost for the service. The prices submitted will be for evaluation only. The quantities stated are only indicative. The contract value will be determined by the volume of work issued by the Council. Please submit tables for 12 months (please insert your pricing detail in the green sections).

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Description** | **Estimated Quantity**  **(x)** | | **Price Per Item, Day or Instance**  **(y)** | **Total Price**  **(x \* y)** |
|  | |  | | |
| **Fully administered service including:** |  | |  |  |
| **Desk based assessment of applications** | 750 | |  |  |
| **2nd stage additional information request and processing** | 170 | |  |  |
| **Face to face assessment clinic (for both new and appeal cases)** | 780 | |  |  |
| **Local administration strategic support** |  | |  | [Insert Lump Sum] |
| **Hourly rate strategic support** | 50 hours | |  |  |
| **Total Contract Cost** (X \* Y) \* 12 months **(For Evaluation)** | | | |  |

Please complete the price table below detailing the breakdown of cost for the service for the 18 month period. (please insert your pricing detail in the green sections).

**Your responses should be emailed to** [**mbrophy@lambeth.gov.uk**](mailto:mbrophy@lambeth.gov.uk) **by 12 noon on the 19 November 2018.**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Description** | **Estimated Quantity**  **(x)** | | **Price Per Item, Day or Instance**  **(y)** | **Total Price**  **(x \* y)** |
|  | |  | | |
| **Fully administered service including:** |  | |  |  |
| **Desk based assessment of applications** | 1125 | |  |  |
| **2nd stage additional information request and processing** | 255 | |  |  |
| **Face to face assessment clinic (for both new and appeal cases)** | 1170 | |  |  |
| **Local administration strategic support** |  | |  | [Insert Lump sum] |
| **Hourly rate strategic support** | 75 hours | |  |  |
| **Total Contract Cost** (X \* Y) \* 18 months **(For Evaluation)** | | | |  |

**Appendix A – Key Perfomance Indicators**

|  |
| --- |
| **The following KPIs will be applicable**   * The Service Provider will complete 95% of all Stage 1 Paper Assessments within a 10 working day period from the date of receipt by the Service Provider of the correctly completed application forms, if no further actions are considered necessary. * Where Stage 2 Further Information is considered necessary by the Service Provider then 95% of all requests for further information must be undertaken within a 5 working day period from the date of the 1st stage screening.  Once received, 95% of all the Stage 2 Further Information assessments must be processed within a further 10 working day period.  If the requested information has not been received from the customer/specialist/GP within 45 days of the request then the application is to be terminated and the applicant advised to re-apply. * The Service Provider will complete 70% of all clinical assessments within 20 working days from the date of the 1st stage screening by the Service Provider of the completed application form, subject to applicant availability and availability of venues. * The Service Provider will complete 95% of all appeal assessments within 30 working days from the date of receipt by the Service Provider of the completed appeal form and supporting new evidence * The Service provider will respond to all complaints within 10 days of receipt from the date of receipt by the Service Provider * The Service Provider will respond to all requests for information for the LGO within 2 working days from the date of receipt by the Service Provider * The Service Provider will respond within 1 working days from receipt by the Service Provider where possible, to urgent requests for information by LGO. London Borough of Lambeth will alert the Service Provider via phone call if an urgent LGO case need responding to. * Document OTREFER will be completed by the Service Provider within 7 days. * Document OTAPPEALS will be completed by the Service Provider within an average 7 days over a given 3-month period. * The Service Provider will ensure that 70% of documents to be updated on Lambeth operating systems within 4 working days, with 100% being updated within 5 working days. |