

CONTRACT AWARD REPORT - PART I

Extra Care Housing Contracts: PEO/24006; PEO/24022; PEO/24023; PEO/24024

Social Inclusion contract: PEO/24007



I. INTRODUCTION

This contract award report is in relation to the procurement of Extra Care Housing and Social Inclusion Services. The scope of the requirement included the following five contracts:

- Lot 1 – PEO/24006 Extra Care Housing North Locality
- Lot 2 – PEO/24022 Extra Care Housing East Locality
- Lot 3 – PEO/24023 Extra Care Housing South Locality
- Lot 4 – PEO/24024 Extra Care Housing West Locality
- Lot 5 – PEO/24007 Social Inclusion

Contract Duration: 4 years with two options to extend for 2 years (4+2+2).

2. BACKGROUND

The procurement included commissioning two services as described below:

Extra Care Housing (*Split into 4 lots to cover 4 Plymouth localities*); this service for older people supports the following outcomes:

- People are supported to continue to live independently;
- People are supported individually so that they can lead as natural and independent a life as possible behind the privacy of their own door;
- People with complex needs associated with dementia and physical and mental disability receive skilled services that help them maintain and enjoy an active life;
- A more independent lifestyle may be facilitated for some, whereas the provision of a continually supportive environment will be a key factor for others;
- People are supported to achieve their desired level of involvement with their local community and the service will work collaboratively with the Social Inclusion service to this aim;
- People are supported to maintain or gain independent living skills following periods of illness and so prevent hospital admission or readmission;
- People are supported to evaluate and manage their own risk and to establish their preferred priorities;
- People passing through the Pathways flats (where applicable) will receive individualised care and support with the aim of achieving a positive outcome for continued independent living;
- The promotion and facilitation of flexible telecare solutions to achieve a wide range of responses to meeting people's needs;

- The allocation of accommodation and the movement of people into/out of the scheme are efficiently and effectively handled and the service will work in partnership with the housing providers and social inclusion provider(s) to achieve this;
- Good partnership working with the Housing Provider and Social Inclusion Services will be achieved to ensure a fully utilised, safe and well-coordinated environment where people enjoy living.

Social Inclusion; this service is delivered to all extra care schemes and provides a broad range of activities for the residents both living within the schemes and some of the surrounding areas where appropriate, to achieve the following:

- Assist residents to achieve and sustain a good level of social inclusion, to maximise their opportunity to enjoy and achieve in life;
- Establish strong links with the local community to optimise social inclusion opportunities for people living outside of the scheme who would benefit;
- Provide assistance in partnership with the Care and Support provider on an individual basis to enable people to access activities and opportunities that are made available at the scheme;
- Provide initially intensive support to orientate new people to the scheme during their first weeks of settling in;
- Establish, manage and support a group of volunteers from the wider community who will enhance the range of social inclusion opportunities available to people living in the scheme and with those other older people who live in the surrounding community and are engaging with the activities and opportunities that you provide both within the scheme and the wider community;
- Respond flexibly to the particular and individual needs of people living within the Extra Care Scheme, which will vary on each scheme.

3. PROCUREMENT PROCESS

The ITT was issued as part of the procurement process which the Council was undertaking under the Open tendering procedure; in accordance with the Public Contracts Regulations 2015.

The Invitation to Tender (ITT) was advertised on the Find a Tender Service (FTS) via the Supplying the South West Proactis procurement portal on 14 March 2024. As an Open Procedure, the number of suppliers invited to participate in the procurement opportunity was not limited and any interested organisation could express an interest to access the procurement documents and submit a bid.

The Council split its requirement into lots:

1. **Lots One – Four** – Extra Care Housing
2. **Lot Five** – Social Inclusion

The indicative timetable published for the Tender was as follows:

Activity	Date/Target Date
FTS Contract Notice Published	14/03/2024
Contracts Finder Notice Published	14/03/2024
Dispatch of ITT	14/03/2024
Deadline for Tenderer ITT Clarifications	23/04/2024
Deadline for Council Responses to Clarifications	30/04/2024

Return of ITT	Midday 07/05/2024
Notification of successful Tenderer	02/07/2024
Regulation 87 standstill period (10 calendar days)	02/07/2024 – 12/07/2024
Contract Award	15/07/2024
Estimated Service Commencement	01/09/2024 (During procurement this was amended to 06/04/2025)

4. TENDER EVALUATION CRITERIA

The selection criteria used to appoint suppliers to the framework agreement was as follows:

4.1 Supplier Selection Criteria (Suitability Assessment Stage)

The Council proposes to use the following criteria to evaluate SA submissions for Lots 1-4

Section	Title	Type of Question	Weighting (%)
1	Supplier information	Information only	Not evaluated and scored
2	Grounds for Mandatory Exclusion	Pass/fail	In the event of a supplier being awarded a 'fail', the remainder of their submission will not be evaluated and they will be eliminated from the process.
3	Mandatory and discretionary grounds relating to the payment of taxes and social security contributions	Pass/fail	In the event of a supplier being awarded a 'fail', the remainder of their submission will not be evaluated and they will be eliminated from the process.
4	Grounds for Discretionary Exclusion	Pass/fail	In the event of a supplier being awarded a 'fail', the remainder of their submission will not be evaluated and they will be eliminated from the process.
5	Economic and Financial Standing	Pass/Fail	In the event of a supplier being awarded a 'fail', the remainder of their submission will not be evaluated and they will be eliminated from the process.
6	Parent Company Details	Pass/Fail	In the event of a supplier being awarded a 'fail', the remainder of their submission will not be evaluated

			and they will be eliminated from the process.
7	Technical & Professional Ability	Pass/Fail	In the event of a supplier being awarded a 'fail', the remainder of their submission will not be evaluated and they will be eliminated from the process.
8	Insurances	Pass/Fail	In the event of a supplier being awarded a 'fail', the remainder of their submission will not be evaluated and they will be eliminated from the process.
9	Modern Slavery Act	Pass/fail	In the event of a supplier being awarded a 'fail', the remainder of their submission will not be evaluated and they will be eliminated from the process.
10 OPTIONAL QUESTIONS			
10.1	Health & Safety	Pass/Fail	In the event of a supplier being awarded a 'fail', the remainder of their submission will not be evaluated and they will be eliminated from the process.
10.2	Equality and Diversity	Pass/Fail	In the event of a supplier being awarded a 'fail', the remainder of their submission will not be evaluated and they will be eliminated from the process.
10.3	Quality Management	Pass/Fail	In the event of a supplier being awarded a 'fail', the remainder of their submission will not be evaluated and they will be eliminated from the process.
10.4	Business Capability	Pass/Fail	In the event of a supplier being awarded a 'fail', the remainder of their submission will not be evaluated and they will be eliminated from the process.
10.5	Safeguarding	Pass/Fail	In the event of a supplier being awarded a 'fail', the remainder of their submission will not be evaluated and they will be eliminated from the process.
10.6	Data Protection	Pass/Fail	In the event of a supplier being awarded a 'fail', the remainder of

			their submission will not be evaluated and they will be eliminated from the process.
--	--	--	--

In the event of the Supplier being awarded a 'fail' on any of the above criteria, the remainder of their SA will not be evaluated and they will be eliminated from the process.

4.2 Supplier Award Criteria (ITT Stage)

4.2.1 Disqualification Criteria

If any of the following apply then the **tender** should be disqualified:

- Delivery of all elements of the specification not included;
- Schedule 5 and 6 certificates/declarations not completed and/ signed;
- Price above Affordability Criteria;
- Price breakdown (costs) unrealistic and service not sustainable;
- Unacceptable amendments to Terms and Conditions.

4.2.2 Affordability Criteria

Lot 1- 5 contracts will be tendered for up to 8 years (4+2+2). The total maximum contract value for Lot 1 is £4m, Lot 2 is £4.6m, Lot 3 is £10m, Lot 4 is £13m and Lot 5 is £1.9m. For all Lots the total value may change over the course of the contract due to potential inflationary uplifts and scope within the contract lifetime to add up to 2 additional ECH schemes within the City.

4.2.2.1 Total Price

Lots 1-4: Tenders exceeding the maximum hourly rate of £21.07 will be disqualified.

Lot 5: The estimated maximum contract value for the initial 4-year contract period for Lot 5 is £785,000. Tenders exceeding this estimated value will be disqualified from the tender.

For Lot 5, the Tenderer's Total Tender Sum will be evaluated using the scoring system below:

$\left(\frac{\text{Lowest Tenderer's Total Price}}{\text{Tenderer's Tender Total Price}} \right) \times \text{Weighting} = \text{Weighted Score}$
--

4.2.3 Tender evaluation

Tenders will be evaluated using the following scoring framework:

LOTS 1 – 4 Extra Care Housing

Weighting %	Evaluation Criteria
COMMERCIAL RESPONSE	
0%	Price
TECHNICAL RESPONSE – METHOD STATEMENTS	
25%	MS 1 Service Delivery Model Please describe your service delivery model including your vision and ambition for the extra care service.
25%	MS 2 Partnership Working Please tell us why partnership working is key to providing an effective and quality extra care service and how you would go about embedding this.
15%	MS 3 Skills, Knowledge & Experience Please describe your skills, knowledge and experience in working with people who require care which supports the delivery of a quality service.
15%	MS4 Workforce Development Please tell us how you will ensure a skilled, trained and resilient workforce, with a robust management structure.
15%	MS5 Service Improvement & Engagement How will you ensure continuous monitoring and improvement in terms of quality of provision, including listening to the voices of those with lived experience to support service improvement
TECHNICAL RESPONSE – SOCIAL VALUE	
5%	Social Value Schedule 4 SV1 and SV2 The key requirements are described within the SV return document which are specific to each SV measure.

LOT 5 Social Inclusion

Weighting %	Evaluation Criteria
COMMERCIAL RESPONSE	
20%	Price Total cost for initial 4-year contract period
TECHNICAL RESPONSE – METHOD STATEMENTS	
20%	MS 1 Service Model Please describe your service delivery model including your vision and ambition for the social inclusion service.
20%	MS 2 Engagement How will you engage with people who use the service in the design, delivery and continuous improvement of the service.
15%	MS 3 Skills, Knowledge & Experience Please describe your skills, knowledge and experience in working with people and providing a quality social inclusion service.
10%	MS 4 Partnership Working Please tell us why partnership working is key to providing an effective and quality social inclusion service and how you would go about embedding this.
10%	MS5 Workforce Please tell us how you will ensure a sufficient and successful staff team to deliver the social inclusion service.

TECHNICAL RESPONSE – SOCIAL VALUE	
5%	Social Value Schedule 4 SV1 and SV2 The key requirements are described within the SV return document which are specific to each SV measure.

Your Method Statement responses will be evaluated using the scoring system as follows:

Scoring Table 1

Response	Score	Definition
Excellent	5	Response is completely relevant and excellent overall. The response is comprehensive, unambiguous and demonstrates a thorough understanding of the requirement/outcomes and provides details of how the requirement/outcomes will be met in full.
Very good	4	Response is particularly relevant. The response is precisely detailed to demonstrate a very good understanding of the requirements and provides details on how these will be fulfilled.
Good	3	Response is relevant and good. The response is sufficiently detailed to demonstrate a good understanding and provides details on how the requirements/outcomes will be fulfilled.
Satisfactory	2	Response is relevant and acceptable. The response addresses a broad understanding of the requirements/outcomes but lacks details on how the requirement/outcomes will be fulfilled in certain areas.
Poor	1	Response is partially relevant and/or poor. The response addresses some elements of the requirements/outcomes but contains insufficient/limited detail and explanation to demonstrate how the requirements/outcomes will be fulfilled.
Unacceptable	0	No or inadequate response. Fails to demonstrate an ability to meet the requirement/deliver the required outcomes.

Tenderers must achieve a score of 2 or more for each scored item. Any scored criteria item receiving less than 2 will result in the Tender being rejected and Tenderer being disqualified from the process.

4.3 Evaluation of self-certified sections on Contract Award

Self-certified sections (including insurances and polices/procedures) will be evaluated for the successful bidder only at contract award.

These documents will be evaluated against current legislative requirements and the minimum criteria detailed in Annex A of the SA Scoring will be as follows:

Definition	Criteria	Consequence
Award	Documents fully comply with criteria detailed in SA Annex A.	Contract awarded to successful tenderer
Award subject to	Documents mostly fully comply with criteria detailed in SA Annex A and only minor amendments are required to bring them to full compliance.	Contract awarded to successful tenderer subject to them updating documents to a satisfactory standard before contract commencement

Fail	Documents do not or only partially comply with criteria detailed in SA Annex A and major amendments are required to bring them to full compliance.	Successful bidder will be disqualified from the process. Consideration will be given to approaching the next placed bidder.
------	--	---

5. SUMMARY OF EVALUATION

Following advertisement of the Procurement opportunity as set out in Section 3 above, 49 submissions were received by the deadline of 12:00 on 07/05/2024 across all 5 Lots, 11 of which were incomplete and disqualified from the process. 38 tenders proceeded to Part 1: Suitability Assessment.

Part 1: Suitability Assessment (SA)

The 38 complete Tenders were assessed using the Suitability Assessment evaluation criteria and methodology set out in Section 4 above. 16 of these tenders were disqualified at the Suitability Assessment stage.

Part 2: Contract Award

The 22 Tenders which passed the Suitability Assessment were then assessed using the Contract Award evaluation criteria and methodology set out in Section 4 above.

The highest scoring Tender for each Lot will be awarded the contract as set out in the Recommendations below.

Details of the tendering organisations and their scores are provided in “ECH & SI Contract Award Report Part 2”.

6. FINANCIAL IMPLICATIONS

Financial provision has been made for the extra care contracts within the Adult Social Care revenue budget.

The duration of the Extra Care contracts awarded will be 4 years, and the Council will then have an option to offer an extension for a further 2 extensions of 2 years each.

The Council has undertaken this procurement to ensure that the services commissioned are of good quality and offer value for money in the use of public funds.

7. RECOMMENDATIONS



It is recommended that the following contracts will be awarded to Suppliers listed below for each Lot on Service Agreement Terms & Conditions:

- Lot 1 – PEO/24006 Extra Care Housing North Locality contract to be awarded to Care Outlook Ltd.
- Lot 2 – PEO/24022 Extra Care Housing East Locality contract to be awarded to Radis Community Care.
- Lot 3 – PEO/24023 Extra Care Housing South Locality contract to be awarded to Care Outlook Ltd.
- Lot 4 – PEO/24024 Extra Care Housing West Locality contract to be awarded to Care Outlook Ltd.
- Lot 5 – PEO/24007 Social Inclusion contract – not awarded

This award will be provisional and subject to the receipt from the highest scoring supplier of the satisfactory self-certification documents detailed in the suitability assessment questionnaire. These awards are also subject to completion of a Regulation 87 standstill period (10 calendar days).

8. APPROVAL

Authorisation of Contract Award Report

Author (Responsible Officer / Project Lead)			
Name:	Hannah Shaw		
Job Title:	Senior Commissioning Officer		
Additional Comments (Optional):			
Signature:		Date:	25/11/2024
Head of Service / Service Director [Signature provides authorisation to this award report and award of Contract]			
Name:	Gary Walbridge		
Job Title:	Strategic Director for Adults, Health & Communities		
Additional Comments (Optional):			
Signature:		Date:	19/12/2024