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Contract

SOL-Money Management (Appointee and Deputy) Services 2024

Solihull Metropolitan Borough Council

F03: Contract award notice

Notice identifier: 2024/S 000-022475

Procurement identifier (OCID): ocids-h6vhtk-044738

Published 19 July 2024, 12:25pm

Section I: Contracting authority

I.1) Name and addresses

Solihull Metropolitan Borough Council

The Council House. Manor Square

Solihull

B91 3QB

Contact

Corporate Procurement Service (Alastair Jewson)

Email

procteam@solihull.gov.uk

Country

United Kingdom

NUTS code

UKG32 - Solihull

Internet address(es)

Main address

www.solihull.gov.uk

Buyer's address

<http://www.csw-jets.co.uk/>

I.4) Type of the contracting authority

Regional or local authority

I.5) Main activity

General public services

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

SOL-Money Management (Appointee and Deputy) Services 2024

Reference number

SOL - 18477

II.1.2) Main CPV code

- 66000000 - Financial and insurance services

II.1.3) Type of contract

Services

II.1.4) Short description

Solihull Council in meeting various responsibilities under the Care Act 2014 and the Mental Capacity Act 2005, seeks to support residents to access 'money management support' where the people lack capacity to manage their own financial affairs. These are predominantly adults with learning disabilities or who are living with dementia or physical/sensory disabilities and mental health issues and who are known to social care teams. The Council wants to commission a Money Management Service that covers the provision of appointee and Property and Affairs deputy for people ("Clients") without suitable family or friends to provide such support to ensure that their financial matters are maintained and protected to improve their health and wellbeing and promote independence. This will include people living in their own homes, which could be a shared ownership property, rented accommodation, a supported living setting or registered residential care. The contract term is anticipated to ru

II.1.6) Information about lots

This contract is divided into lots: No

II.1.7) Total value of the procurement (excluding VAT)

Value excluding VAT: £627,680

II.2) Description

II.2.2) Additional CPV code(s)

- 79100000 - Legal services
- 85000000 - Health and social work services
- 66000000 - Financial and insurance services
- 79112000 - Legal representation services

II.2.3) Place of performance

NUTS codes

- UKG32 - Solihull

Main site or place of performance

Solihull.

II.2.4) Description of the procurement

Solihull Council in meeting various responsibilities under the Care Act 2014 and the Mental Capacity Act 2005, seeks to support residents to access 'money management support' where the people lack capacity to manage their own financial affairs. These are predominantly adults with learning disabilities or who are living with dementia or physical/sensory disabilities and mental health issues and who are known to social care teams. The Council wants to commission a Money Management Service that covers the provision of appointee and Property and Affairs deputy for people ("Clients") without suitable family or friends to provide such support to ensure that their financial matters are maintained and protected to improve their health and wellbeing and promote independence. This will include people living in their own homes, which could be a shared ownership property, rented accommodation, a supported living setting or registered residential care. The contract term is anticipated to run for 3 years from 1 July 2024 to 30 June 2027, with an option to extend for up to 4 years (potentially to 30 June 2031). The total contract value is approximately £627,680 (subject to demand). Appointee fees will be fixed and are determined by the Council; therefore, evaluation will be based on criteria which will be 95% Quality, and 5% Social Value. Tenderers are required to have a minimum annual turnover of £189,040 which is calculated on the basis of up to two times the anticipated annual value of the contract (Year 1) and the level of associated risk. Schedule 3 services are not subject to the full regime of PCR 2015 but are instead governed by the Light-Touch Regime (LTR) Regulations 74 to 77 of the Public Contract Regulations (PCR) 2015. Neither the inclusion of a bidder selection stage, nor the use of any language or terms found in the PRC 2015, nor the description of the procedure voluntarily adopted by the Contracting Authorities ('Open', 'Restricted', etc., or any other description), nor any other indication, shall be taken to mean that the Contracting

Authorities intends to hold itself bound by PCR 2015, save by the provisions applicable to services coming within the scope of Schedule 3 of PCR 2015. The Contracting Authority will run a transparent tender process, treating all bidders equally and will follow the basic principles of the procedures to test the capacity, capability, technical and financial competence of bidders. The Council reserves the right to not use or to modify the standard standstill period.

II.2.5) Award criteria

Quality criterion - Name: Outcomes 19% /Compliance 18% /Risk Management 17% /Quality Assurance 16% /Mobilisation 11% /Service Overview 9% /Environmental Sustainability 5% /Social Value - 5%. / Weighting: 100%

Cost criterion - Name: Fixed prices - not evaluated / Weighting: 0%

II.2.11) Information about options

Options: No

II.2.13) Information about European Union Funds

The procurement is related to a project and/or programme financed by European Union funds: No

II.2.14) Additional information

Tenderers are required to have a minimum annual turnover of £189,040 which is calculated on the basis of up to two times the anticipated annual value of the contract (Year 1) and the level of associated risk. Please refer to tender documents.

Section IV. Procedure

IV.1) Description

IV.1.1) Type of procedure

Restricted procedure

IV.1.8) Information about the Government Procurement Agreement (GPA)

The procurement is covered by the Government Procurement Agreement: Yes

IV.2) Administrative information

IV.2.1) Previous publication concerning this procedure

Notice number: [2024/S 000-007664](#)

Section V. Award of contract

Contract No

SOL - 18477

Lot No

1

Title

SOL - Money Management (Appointee and Deputy Services) 2024

A contract/lot is awarded: Yes

V.2) Award of contract

V.2.1) Date of conclusion of the contract

19 July 2024

V.2.2) Information about tenders

Number of tenders received: 2

Number of tenders received from SMEs: 2

Number of tenders received from tenderers from other EU Member States: 0

Number of tenders received from tenderers from non-EU Member States: 2

Number of tenders received by electronic means: 2

The contract has been awarded to a group of economic operators: No

V.2.3) Name and address of the contractor

Warwickshire Independent Advocacy Alliance

4-6 Clemens Street

Leamington Spa

CV31 2DL

Country

United Kingdom

NUTS code

- UKG33 - Coventry

National registration number

03942462

The contractor is an SME

Yes

V.2.4) Information on value of contract/lot (excluding VAT)

Initial estimated total value of the contract/lot: £627,680

Total value of the contract/lot: £627,680

Section VI. Complementary information

VI.4) Procedures for review

VI.4.1) Review body

Solihull Metropolitan Borough Council

solihull Metropolitan Borough Council, Council House, Manor Square

Solihull

B91 3QB

Email

procteam@solihull.gov.uk

Country

United Kingdom

Internet address

<https://www.solihull.gov.uk/>