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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): ocds-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](mailto:procteam@solihull.gov.uk)

#### **Country**

United Kingdom

**NUTS code**

UKG32 - Solihull

**Internet address(es)**

Main address

[www.solihull.gov.uk](http://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

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## **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.

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## **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](#)

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## **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



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## **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](mailto:procteam@solihull.gov.uk)

Country

United Kingdom

Internet address

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