

APPENDIX A

Tender Evaluation Report

Homecare in Somerset
DN645869

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1. Management Summary

The service to be provided within Homecare in Somerset is personal care and support at home (Homecare), for individuals who meet the eligibility criteria for Somerset Council funded care and support. The services included are:

- Homecare for adults.
- Sitting Services.
- Night-time Support.
- Live in Care.

The services will be deliverable 24 hours a day, 365/366 days per year including Bank Holidays and weekends.

The services will be delivered in 6 'Blocks' and has been tendered in 6 corresponding, geographical 'Lots' as follows:

Lot Number	Title
1	Glastonbury and Street – 150 hours p/w
2	Shepton Mallet and Wells – 200 hours p/w
3	Frome – 100 hours p/w
4	Yeovil – 150 hours p/w
5	Bridgwater – 200 hours p/w
6	Minehead – 200 hours p/w

Incumbent providers currently providing Homecare under a Block Contract in Somerset and who therefore have staff who are potentially eligible for TUPE as a result of this tender process are as follows:

- MJ Home Care (Minehead and Bridgwater)
- Bluebird Mendip (Glastonbury/Street)
- Agincare (Shepton Mallet/Wells)
- Redleif Care (Yeovil)

The duration of the Block Contracts will be an initial period of five years ending on the 31st March 2029. The contract will contain an extension period of up to a further 60 months. The contracts will commence on 01.04.2024.

Following a Non-Key Decision approval dated **18.05.2023**; the decision was taken to go out to tender using the Restricted Process (2 Stage – Selection and Award).



2. Procurement Process

This procurement was carried out in accordance with the authority's Contract Procedure Rules and Standing Orders and Public Contracts Regulations 2015 and the Treaty Principles.

Suppliers were invited to submit a response to the Selection Questionnaire (Stage 1 of the 2 Stage process) through the e-tendering system. The Selection Questionnaire and accompanying documents were published on **16.06.2023**.

Bid responses were received by the closing date of **17.07.2023** as follows:

- **84** Bidders responded.
- **77** Bidders submitted a compliant Selection Questionnaire.
- Selection Questions were evaluated as set out in Section 3.3 of Procurement Document A – Information and Instructions.
- **9** Bidders were shortlisted at the Selection Stage

n.b. At the conclusion of this first stage, the intention is to arrive at a short list of the five (5) highest scoring Applicants in each Lot to take forward to the next stage. Where there is more than one (1) Applicant in fifth (5th) place, then all such Applicants will be invited to Tender. However, in the event that the short list of five (5) Applicants includes two (2) or more Applicants with joint scores, the shortlist will not be increased to include any Applicants beyond fifth (5th) place.

9 Suppliers were therefore invited to submit a response to the Invitation to Tender (ITT) (Stage 2 of the 2 Stage process) through the e-Tendering System. The Procurement Documents were published on **24.07.2023**.

Bid responses were received by the closing date of **23.08.2023** as follows:

- 7 Bidders responded.
- 7 Bidders submitted a compliant Bid.
- Bids were evaluated in accordance with the criteria set out in the Procurement Documents (see also, section 2.1 below).

The Commercial and Procurement Team conducted the compliance checks in conjunction with Somerset Council (SC) specialists in various areas where required.

2.1. Evaluation Methodology

Bids were evaluated in accordance with the evaluation criteria set out within the Procurement Documents and as detailed below. Weightings and scores are contained within the Confidential Appendix B.



Evaluation criteria breakdown	Means of evaluation	
	Sub criteria	Main criteria
Quality		60%
Service Delivery	30%	
Systems and processes	20%	
Implementation	20%	
Workforce	15%	
Safeguarding	15%	
Total	100%	
Price		30%
Total cost per hour	100%	
Total	100%	
Social Value		10%
4.6 - Procurement Document F Social Value Calculator	50%	
4.7 Social Value Commitment	50%	
Total	100%	

2.2. Quality

The quality questions were scored and evaluated in accordance with the published criteria.

The quality element of the Tenders were evaluated by a panel of officers and moderated by staff from the Commercial and Procurement Team at Somerset Council (see Confidential Appendix B for the list of evaluators). Each evaluation panel member scored each Bid on an individual basis and prior to the moderation meeting.

Moderated scores are available in Confidential Appendix B, including the recommended award decision.

2.3. Pricing

Pricing was assessed based on a total cost per hour of support for the **Services** included by bidders within the Pricing Schedule. The tendered prices are available in Confidential Appendix B, including the proposed award decision.

2.4. Social Value

The qualitative score for social value was evaluated as per section 2.2 and moderated by Commercial and Procurement.

The value score for social value was calculated by the Commercial and Procurement team in accordance with the published criteria.

Moderated scores are available in Confidential Appendix B, including the proposed award decision.

3. Contractual Position

The Contract will be under the standard SC Service Terms and Conditions. There is a clause within the Contract which allows termination by giving 12 months' notice in writing to the supplier. For any extension to the Contract, discussions with the Supplier will be conducted sufficiently far in advance of the Contract expiry date to arrive at an agreed position.

As part of the bid response, Bidders were invited to offer specific measurable Social Value commitments in addition to the stated requirements of the specification. Delivery of these commitments will be monitored as part of contract management.

This is subject to approval of a **Key Decision** to award supported by this evaluation report.

3.1. Proposed Term

The awarded Contract will be for an initial term of **5** years. The contract will commence on **01.04.2024** and will continue up to the initial term which will expire on **31.03.2029**. A **60 month** contract extension option is available which would take the contract to **31.03.2034**.

3.2. Service Levels and Contract Management

Service levels will be monitored as part of Contract Management and the contract will be managed to ensure that the service meets expectations and to identify further opportunities for cost and service improvement.

4. Risk and Mitigation

Risk: Legal challenge following the outcome of the tender process.

Mitigation: Adherence to the Public Contracts Regulations 2015, Somerset Council's own Contract Procedure Rules and Standing Orders and the Treaty Principles of Transparency, Non-discrimination and Equal Treatment.

5. Next Steps

- Suppliers to be informed of the decision by Commercial and Procurement Team **16.11.2023**
- Standstill period **17.11.2023 – 27.11.2023**
- Contract awarded **28.11.2023**
- Contract Mobilisation/ Implementation **29.11.2023 – 31.03.2024**
- Contract commencement **01.04.2024**

End of Report