

**Invitation to
Tender for the Provisions
of
Debt and Money Advice;
Housing Advice;
Welfare Benefit Advice
and
Employment Advice
Services
(Specification)**

1. Purpose

The purpose of this document is to provide all the information required to enable Bidders to fully understand the requirement and to prepare a robust and accurate bid in terms of price and quality.

Within this specification document the services West Oxfordshire District Council is inviting to Tender is broken down into four lots:

- Lot 1: Provision of Employment Advice Services (finding employment, Rights at Work, Problems at Work, Work Place Discrimination.)
- Lot 2: Provision of Housing Advice (Court Advocacy, Difficulty in keeping up with mortgage repayments and independent advice on appeals.)
- Lot 3: Provision of Welfare Benefit Advice (appealing benefit decisions in an impartial and professional manner.)
- Lot 4: Provision of Debt/Money Management Advice (Bankruptcy, Individual Voluntary Arrangements, Debt Relief Orders, Financial Advice.)

For each Lot it is intended to agree a contract for a period of 18 months.

This document will describe the outcomes required and indicate the services to be delivered to meet the objectives and outcomes of the Council. In addition, this document also outlines how the outcomes will be monitored.

The Council is keen to ensure adequate funding for these services in spite of the continued pressure of budgets and is seeking the following key outcomes from its proposed model provision:

- Consistency across the district in the quality and advice and scope of advice
- Strengthened business continuity through staff and volunteers being able to work across locations should issues arise with absence and/or recruitment
- Services that compliment and add value to those already administered by West Oxfordshire District Council

2. Background

The Services that the Council wishes to commission is for the whole area of West Oxfordshire District council.

West Oxfordshire is a rural area covering 71,494 hectares. With around 105,000 people living in the district, it is the second most sparsely populated of the 67 local authorities in South East England. A third of the district is in the Cotswold Area of Outstanding Natural Beauty and 2% lies within the Green Belt surrounding Oxford city.

- The district has 83 parishes, ranging from towns to hamlets
- The district's population is spread out over a wide area; however, it is mainly concentrated in the towns of Witney and Carterton. Other towns are Burford, Charlbury, Chipping Norton and Woodstock.

- Approximately 41% of the total population live in the district's two largest towns – Witney (over 27,000) and Carterton (over 16,000)
- The proportion of old people in West Oxfordshire is above average with 18% aged over 65 compared with 16% nationally.
- The proportion of people in employment or self-employment is approximately 58,000
- The largest population of people in West Oxfordshire who were born outside of the UK are from Poland, Germany, Ireland and the USA

3. Our Requirements

This section sets out the common overarching requirements of all 4 lots:

Hours of Operation:	This is for the service provider to determine – however, please note that West Oxfordshire District Council requires as a minimum normal office hours (Monday to Friday 0900 to 1700)
Accessibility:	<p>Providers will ensure their services are widely publicised giving details of how their services can be accessed.</p> <p>Products and materials should be as accessible as possible for all potential users.</p> <p>Websites should be developed according to current standards.</p> <p>Printed materials should be available in an easy to read format and telephone services should also be available to those with hearing impairments.</p> <p>As required under the Equality Act 2010, reasonable adjustments should be made to ensure that people with a disability have equal access to advice and information.</p> <p>Some groups in need of information and advice may have particular requirements; advice and guidance services must ensure that due regard is given to the needs of these groups, including but not limited to:</p> <ul style="list-style-type: none"> • People who do not have English as a first language • People who are socially isolated • People with physical disabilities • Members of the traveller community
Service Prioritisation:	It will be expected that all West Oxfordshire

	District Council's referrals will be reviewed and appropriate contact made with the customers within 2 working days of receipt of the referral
Service Development:	The service provider(s) should look to innovate and improve service delivery/development throughout the length of the contract
Quality Provision & Standards:	<p>Providers will ensure that all paid staff and volunteers who advise customers reach and then maintain a good working knowledge of the theory and best practise in relation to any area in which they are providing advice.</p> <p>Training needs will be identified at regular supervision and/or appraisal sessions.</p> <p>Providers must have quality assurance procedures in place and provide details of these to West Oxfordshire District Council.</p> <p>Providers must demonstrate a commitment to maintaining appropriate levels of quality in these areas</p>
Business Continuity:	Providers must provide a detailed business continuity plan as part of the response to the specification to ensure there is no disruption to service provision due to any type of internal or external factors
Experience and Capabilities:	Providers are required to outline what experience they have in delivering the services they are bidding for; giving detailed examples on types of service delivery.
Management Information:	<p>Providers will be required to have an effective computerised system to monitor and provide key performance information on a monthly, quarterly and/or annual basis as agreed. Areas to be monitored include:</p> <ul style="list-style-type: none"> • Number of sessions delivered and the method of delivery (e.g. appointments, drop-in, telephone etc) • Number of new customers and number of repeat customers

	<ul style="list-style-type: none">• Breakdown of the types and levels of support given• Number of customers taking up services and the pattern of take-up across the different advice areas (if award given for different Lots)• Breakdown of referral type (e.g. self-referral or from West Oxfordshire DC etc)• Profile of users monitored by ethnicity, gender, age etc• Profile of referrals to other agencies/support services• Any other relevant information which would add value
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The Council understands that a customer rarely presents themselves with a solitary issue and therefore the expectation is any potential bid would ensure a holistic approach to address the customers full need requirements

4. Service Specification

Lot 1:	Provision of Employment Advice Services
<p>Your submission will need to demonstrate effective service delivery in the following areas:</p> <p>1. An accessible and well evidenced model of service delivery which maximises service utilisation by all sectors of the community.</p> <p>This section will need to include:</p> <ul style="list-style-type: none">• How service users will know about and access the service (i.e. publicity, referral arrangements, opening times, appointments, telephone, face-to-face, emails etc)• A description of what is 'on offer' for the user of your service – e.g. for the individual seeking advice on work related issues, If necessary/helpful use a 'step-by-step' approach to describe the service on offer from referral to end.• How you will prioritise service delivery and service development• How your service will ensure representative service take up from different gender, age groups, ethnic minority groups and people with disabilities• What outcomes you will deliver (please describe in terms of generally for the district, the number of people and the outcomes of individuals)• Publicity – services need to be well publicised and promoted to ensure service take up is representative of the local community and that services are fully utilised. This may entail monitoring how people have heard about the service and considering branding and forms of publicity to build up customer confidence. <p>2. A successful and well evidenced model of service delivery which maximises outcomes in particular employment issues</p> <p>We wish to procure an employment advice service which is delivered through a range of methods including:</p> <ul style="list-style-type: none">• Face to face triage/drop in surgeries• Face to face appointments• Telephone• Email and letter <p>It is important that you provide details on your model of employment advice services. This will entail telling us about the range of tools you use to assist customers with such things as finding employment, Rights at Work, Problems at Work, Work Place Discrimination.</p> <p>Please tell us how you will know if your Employment Advice Service is successful for example:</p> <ul style="list-style-type: none">• The number of people you will help• The number of positive outcomes you will achieve• The diversity of people you will help; particularly in relation to age, ethnicity and disability• The outcomes for people you will help and how you will measure this	

Lot 2:	Provision of Housing Advice
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Your submission will need to demonstrate effective service delivery in the following areas:

1) An accessible and well evidenced model of service delivery which maximises service utilisation by all sectors of the community.

This section will need to include:

- How service users will know about and access the service (i.e. publicity, referral arrangements, opening times, appointments, telephone, face-to-face, emails etc)
- A description of what is 'on offer' for the user of your service – e.g. for the individual seeking advice how to appeal Council decisions. If necessary/helpful use a 'step-by-step' approach to describe the service on offer from referral to end.
- How you will prioritise service delivery and service development
- How your service will ensure representative service take up from different gender, age groups, ethnic minority groups and people with disabilities
- What outcomes you will deliver (please describe in terms of generally for the district, the number of people and the outcomes of individuals)
- Publicity – services need to be well publicised and promoted to ensure service take up is representative of the local community and that services are fully utilised. This may entail monitoring how people have heard about the service and considering branding and forms of publicity to build up customer confidence.

2) A successful and well evidenced model of service delivery which maximises outcomes in particular employment issues

We wish to procure an housing advice service which is delivered through a range of methods including:

- Face to face triage/drop in surgeries
- Face to face appointments
- Telephone
- Email and letter

It is important that you provide details on your model of housing advice services. This will entail telling us about the range of tools you use to assist customers with such things as **Court Advocacy, Difficulty in keeping up with mortgage repayments and independent advice on appeals**, against Housing/Allocation decisions.

Please tell us how you will know if your Housing Advice Service is successful for example:

- The number of people you will help
- The number of positive outcomes you will achieve
- The diversity of people you will help; particularly in relation to age, ethnicity and disability
- The outcomes for people you will help and how you will measure this

Lot 3:	Provision of Welfare Benefit Advice
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Your submission will need to demonstrate effective service delivery in the following areas:

1) An accessible and well evidenced model of service delivery which maximises service utilisation by all sectors of the community.

This section will need to include:

- How service users will know about and access the service (i.e. publicity, referral arrangements, opening times, appointments, telephone, face-to-face, emails etc)
- A description of what is 'on offer' for the user of your service – e.g. for the individual seeking advice how to appeal Council decisions. If necessary/helpful use a 'step-by-step' approach to describe the service on offer from referral to end.
- How you will prioritise service delivery and service development
- How your service will ensure representative service take up from different gender, age groups, ethnic minority groups and people with disabilities
- What outcomes you will deliver (please describe in terms of generally for the district, the number of people and the outcomes of individuals)
- Publicity – services need to be well publicised and promoted to ensure service take up is representative of the local community and that services are fully utilised. This may entail monitoring how people have heard about the service and considering branding and forms of publicity to build up customer confidence.

2) A successful and well evidenced model of service delivery which maximises outcomes in particular employment issues

We wish to procure an advice service which is delivered through a range of methods including:

- Face to face triage/drop in surgeries
- Face to face appointments
- Telephone
- Email and letter

It is important that you provide details on your model of advice services. This will entail telling us about the range of tools you use to assist customers with such things as supporting a customer in **appealing benefit decisions in an impartial and professional manner; as well as maximising welfare benefit take-up.**

Please tell us how you will know if your Advice Service is successful for example:

- The number of people you will help
- The number of positive outcomes you will achieve
- The diversity of people you will help; particularly in relation to age, ethnicity and disability
- The outcomes for people you will help and how you will measure this

Lot 4:

Provision of Debt/Money Management Advice

Your submission will need to demonstrate effective service delivery in the following areas:

1) An accessible and well evidenced model of service delivery which maximises service utilisation by all sectors of the community.

This section will need to include:

- How service users will know about and access the service (i.e. publicity, referral arrangements, opening times, appointments, telephone, face-to-face, emails etc)
- A description of what is 'on offer' for the user of your service – e.g. for the individual seeking advice how to appeal Council decisions. If necessary/helpful use a 'step-by-step' approach to describe the service on offer from referral to end.
- How you will prioritise service delivery and service development
- How your service will ensure representative service take up from different gender, age groups, ethnic minority groups and people with disabilities
- What outcomes you will deliver (please describe in terms of generally for the district, the number of people and the outcomes of individuals)
- Publicity – services need to be well publicised and promoted to ensure service take up is representative of the local community and that services are fully utilised. This may entail monitoring how people have heard about the service and considering branding and forms of publicity to build up customer confidence.

2) A successful and well evidenced model of service delivery which maximises outcomes in particular employment issues

We wish to procure an advice service which is delivered through a range of methods including:

- Face to face triage/drop in surgeries
- Face to face appointments
- Telephone
- Email and letter

It is important that you provide details on your model of advice services. This will entail telling us about the range of tools you use to assist customers with such things **Bankruptcy, Individual Voluntary Arrangements, Debt Relief Orders, Financial Advice and Budgeting Advice.**

Please tell us how you will know if your Advice Service is successful for example:

- The number of people you will help
- The number of positive outcomes you will achieve
- The diversity of people you will help; particularly in relation to age, ethnicity and disability
- The outcomes for people you will help and how you will measure this

5. Performance Requirements and Contract Monitoring

The contract will be monitored by West Oxfordshire District Council. The detail of the performance measures will be agreed at the contract award stage of the procurement. However, the following measurements and tools are likely to be used in assessing the performance of the services:

- Service user feedback
- Case Studies
- Service Visits
- Outcome monitoring

Reporting mechanisms may include the following:

- Quarterly monitoring reports on an agreed form layout
- Quarterly monitoring meetings between the service provider and West Oxfordshire District Council representative
- Monitoring of complaints, their progress and outcomes

You will need to demonstrate that you have the appropriate systems in place for:

- Computerised outcome and output monitoring – management information systems which can be interrogated and used to provide intelligence for service improvement and development
- Receiving, responding to, recording and monitoring service users complaints and customer feedback

Please detail the performance management systems to be used in delivering this contract within the Contractor's Proposals.

West Oxfordshire District Council's named Authorised Officer (s) will be responsible for monitoring the level of service throughout the contract. The Authorised Officer(s) will liaise with all Council Officers directly involved with the Contract to ensure that the Contractor provides the required level of service.

6. Schedules and Frequencies

Payment will be in quarterly instalments in advance. All payments other than the first will be made following receipt of summary spend information. In the event of significant under spending the Council will require proposals to be agreed for the re-use of under spend before releasing it or may retain funding. Any funding retained will be transferred to the Council's Grant funding pot where it will be available for all third sector organisations to apply against for additional money to help fund on-going and/or new projects.

7. Roles and Responsibilities

The Contract will be responsible for ensuring that the provider receives payment in a timely manner, arranging and chairing any necessary meetings including monitoring meeting and ensuring that the contract achieves Value for Money for the Council and its residents.

The Provider will be responsible for ensuring that the service delivered fulfils all requirements of the service specifications mentioned above including management of all staff employed, dealing with complaints and providing all necessary monitoring requested by the authority including attendance at monitoring meetings

8. Costing:

Lot:	Value of Contract (per annum)
1:	£10,000
2:	£10,000
3:	£20,000
4:	£30,000