



Mayor and Cabinet

Report title: Contract award for Maximising Wellbeing at Home Solution - Focused Coaching services for Lots 5 (End of Life Care), 6 (Mental Health) and 9 (Meaningful Life Roles) and permission to seek authorisation to direct award for lot 8 (Learning Disability and / or Autism)

Date 06/12/2023

Key decision: Yes

Class: Part 1

Ward(s) affected: All

Contributors: Associate Director, Community Support and Care, Lewisham Integrated Commissioning Team, Finance Business Partner, Senior Lawyer

Outline and recommendations

This report seeks approval from Mayor and Cabinet to:

1. The award of contract for Solution – Focused Coaching: Specialist advice, support and training to support the effective management of individuals with mental ill health (Lot (6)) to Solution Focused Education. The contract value will be £120,000 per annum, equating to £600,000 over 5 years, and £840,000 over 7 years if the option to extend is utilised. The contract will commence on 03 January 2024.
2. The award of contract for Solution-Focused Coaching: Specialist advice, support and training to support the effective management of individuals into meaningful life roles (Lot 9) to OLightOn Limited. The contract value will be £108,434.80 per annum, equating to £542,174 over 5 years, and £759,043.60 over 7 years if the option to extend is utilised. The contract will commence on 03 January 2024.

Approve the award of contract to the preferred service provider for the provision of Solution-Focused Coaching: Specialist advice, support and training to support individuals in their last year of life (Lot 5), provided the contract value is within authorised limits of £120,000 per annum.

Delegate authority to the Executive Director for Community Services in consultation with Director of Law and Corporate Governance to select the preferred service provider for Solution-Focused Coaching: Specialist advice, support and training to support the effective management of individuals in their last year (Lot 5) in accordance with the selection and award criteria published in the tender documentation and agree final form of contract.

3. Officers entering into negotiations with Kingston University for Solution-Focused Coaching: Specialist advice, support and training to support the effective management of individuals with a Learning Disability and / or Autism (Lot 8) and award the contract provided it is within the authorised limits of £120,000 per annum and that the initial conditions of contract are not substantially altered from the failed procurement.
4. Delegate authority to the Executive Director for Community Services in consultation with Director of Law and Corporate Governance to approve the final agreed terms for Solution-Focused Coaching: Specialist advice, support and training to support the effective management of individuals with a Learning Disability and / or Autism (Lot 8) provided that the initial conditions of contract are not substantially altered from the failed procurement.

Timeline of engagement and decision-making

Date	Engagement / decision making
March 2022	Permission to Procure approved by Mayor and Cabinet.
March – July 2022	Coproduction of service specification
September 2022	Market warming events
September 2022	Tender published (Stage 1)
November 2022	No bids received for lots 5,6,8,9
December 2022	Tender reissued for Lots 5, 6, 8 and 9 (Stage 1)
January 2023	Market warming event
February 2023	SSQ evaluations
March 2023	Tender issued to shortlisted suppliers (Stage 2)
April 2023	Tender closed
May 2023	ITT evaluation panel moderation meeting – Lot 6
May 2023	ITT Evaluation panel moderation meeting – Lot 9
Commencement of new contracts - 03 January 2024	

1. Summary

1.1 Maximising Wellbeing at Home (formerly Homecare) enables residents living in their own home to improve their independence and wellbeing through a person-centred approach provided by Wellbeing Workers working in Wellbeing Teams. This includes an expectation that Clients will be fully involved and treated as an equal partner in their assessment, support planning and ongoing review. Considering the client's views and wishes is critical to the approach and to the successful delivery of this service. 1.2 Wellbeing Workers are those staff who are employed by the four lead Maximising Wellbeing at Home neighbourhood providers. Wellbeing Teams are teams of 4 - 12 Wellbeing Workers who support people to live well and be part of their community. Wellbeing Teams are:

- Neighbourhood based
- Self-managing
- Values-led
- Focussed on co-production, supporting people to make decisions about their life and support
- Committed to wellbeing, both of the people they support and team members

1.2 Solution – Focused coaching will be offered to Wellbeing Teams and Unpaid Carers to enable them to develop their knowledge and skills to support clients by encouraging them to focus on what is possible, rather than on the problem they face or on ideas which are outside of their grasp. Five Solution – Focused coaching services are being procured:

- Supporting those in their last year of life (Lot 5)
- Supporting those with Mental ill-health (Lot 6)
- Supporting those with advanced dementia and behaviours that challenge (Lot 7)
- Supporting those with a Learning Disability and / or Autism (Lot 8)
- Supporting those into Meaningful Life Roles (Lot 9)

- 1.3 On the 21 June 2023, Mayor and Cabinet approved permission to award Maximising Wellbeing at Home contracts (Lots 1-4 and 7). This report seeks approval from Mayor and Cabinet to award contracts for Solution – Focused Coaching: Specialist advice, support and training to support the effective management of individuals with Mental ill-health (Lot 6) and Solution Focused Coaching: Specialist advice, support and training to support individuals into Meaningful Life Roles (Lot 9) following a two stage procurement process to the following organisations:

Lot	Proposing the following organisations are awarded contracts
6	Solution Focused Education
9	OLightOn Limited

The report asks for approval to award lot 5 provided it is within the authorised financial limits and delegates to the Executive Director to select the preferred service provider.

2. Recommendations

It is recommended that Mayor and Cabinet approve:

- 2.1 The award of contract for Solution – Focused Coaching: Specialist advice, support and training to support the effective management of individuals with mental ill health (Lot (6)) to Solution Focused Education. The contract value will be £120,000 per annum, equating to £600,000 over 5 years, and £840,000 over 7 years if the option to extend is utilised. The contract will commence on 03 January 2024.
- 2.2 The award of contract for Solution-Focused Coaching: Specialist advice, support and training to support the effective management of individuals into meaningful life roles (Lot 9) to OLightOn Limited. The contract value will be £108,434.80 per annum, equating to £542,174 over 5 years, and £759,043.60 over 7 years if the option to extend is utilised. The contract will commence on 03 January 2024.
- 2.3 Approve the award of contract to the preferred service provider for the provision of Solution-Focused Coaching: Specialist advice, support and training to support individuals in their last year of life (Lot 5), provided the contract value is within authorised limits of £120,000 per annum.
- 2.4 Delegate authority to the Executive Director for Community Services in consultation with Director of Law and Corporate Governance to select the preferred service provider for Solution-Focused Coaching: Specialist advice, support and training to support the effective management of individuals in their last year (Lot 5) in accordance with the selection and award criteria published in the tender documentation and agree final form of contract.
- 2.5 Officers entering into negotiations with Kingston University for Solution-Focused Coaching: Specialist advice, support and training to support the effective management of individuals with a Learning Disability and / or Autism (Lot 8) and award the contract provided it is within the authorised limits of £120,000 per annum and that the initial conditions of contract are not substantially altered from the failed procurement.
- 2.6 Delegate authority to the Executive Director for Community Services in consultation with Director of Law and Corporate Governance to approve the final agreed terms for Solution-Focused Coaching: Specialist advice, support and training to support the effective management of individuals with a Learning Disability and / or Autism (Lot 8) provided that the initial conditions of contract are not substantially altered from the failed procurement.

3. Policy Context

- 3.1 The Care Act (2014) had a significant impact on Maximising Wellbeing at Home

providers and commissioners and on people who use Maximising Wellbeing at Home services and their Unpaid Carers. The majority of the Care Act came into effect in April 2015 and put a duty on local authorities to promote wellbeing and meet needs (rather than requiring them simply to provide services). It also requires local authorities to assess and offer support to address the needs of Unpaid Carers, independently of the person they care for. This is aligned with a range of other Unpaid Carer-specific policies which emphasise the value of Unpaid Carers, and the importance of enabling them to have 'a life alongside caring'.

- 3.2 Under the Care Act (2014), local authorities have a duty to prevent, delay or reduce the development of people's social care needs, so far as possible, and to work in an integrated, person-centred way, with all other support agencies including those in the third sector. They also have a duty to provide information and advice for the whole population, not just those who are receiving services that they fund. This means that people funding their own Maximising Wellbeing at Home support are entitled to guidance from the local authority, including on financial matters. The Care Act (2014) also requires local authorities to stimulate and manage their local market to benefit the whole population, not just those in receipt of local authority funded support.
- 3.3 High quality care and support services are dependent upon a highly skilled and valued workforce, appropriately rewarded for their work and the vital impact that it has on people's lives. People with care and support needs should receive personalised and high-quality services to enable them to enjoy fulfilled lives in their own homes and communities. Consistent care should be available to all, irrespective of age, location, or circumstance.
- 3.4 The report supports the following corporate priorities:
 - Cleaner and greener
 - A strong local economy
 - Safer communities
 - Health and wellbeing

4. Background

- 4.1 In 2015, Lewisham Council adopted a Neighbourhood Care Team Model as part of the wider initiative to establish health and care services on a neighbourhood footprint. With health partners, it worked to establish virtual neighbourhood teams of district nurses and social work staff aligned to GP practices, working with other specialist community health and care services such as the South London and Maudsley NHS Foundation Trust to co-ordinate work at a neighbourhood level. The Council appointed a neighbourhood coordinator for each of the four neighbourhoods to coordinate the partnership. A key part of this vision included building strong relationships with the lead Maximising Wellbeing at Home providers.
- 4.2 The Council entered into 2-year contracts (with the option to extend for 1 year) on 01 April 2016 with 4 Maximising Wellbeing at Home providers, one for each of the planned four neighbourhoods. This contract replaced the previous Framework Agreement for Domiciliary Care (2010-2016) which included 18 providers.
- 4.3 The rationale for the significant consolidation of contracted Maximising Wellbeing at Home providers was to appoint one Lead Provider per Neighbourhood who would have the capacity and expertise to lead the delivery of Maximising Wellbeing at Home in that neighbourhood and work closely with the neighbourhood teams. The Service Specification for the Lead Provider contract was developed to enable Adult Social Care and Health to optimise the Maximising Wellbeing at Home service to individuals in their own home by facilitating integrated working across health and social care, offering a localised and personalised experience, and most importantly delivering the outcomes that are important to the Service User.

- 4.4 Three of the four contracts were extended until 31 March 2023. The Neighbourhood 1 contract was not extended, due to quality issues. As a result, the Neighbourhood 1 contract was split between the remaining three remaining lead providers based on postcode.
- 4.5 Throughout its tenure the Maximising Wellbeing at Home Contract has enabled the Council to discharge its responsibilities to provide care to individuals in their own home in an efficient, structured, and timely way.
- 4.6 Adult Social Care Neighbourhood Leads report that there has been an improvement in the provision of Maximising Wellbeing at Home since moving to the Lead Provider model. It has been easier to build relationships with one Lead Provider and ensure that quality concerns are addressed promptly. They have been encouraged by the Provider's willingness to take part in Multi-Disciplinary meetings and pilot new ways of working to benefit their Service Users. Service Users also report benefits from the Neighbourhood Model of Maximising Wellbeing at Home including a more positive experience of service provision and an increase in independence and enhanced quality of life. The re-procurement will build on these foundations.
- 4.7 Insourcing has been considered and an options appraisal was undertaken in 2019 looking at:
- The re-procurement of domiciliary care services via the existing neighbourhood model;
 - Transferring services back 'in house' under the existing Adult Social Care management structure; Option A.
 - The establishment of a Council owned organisation to deliver domiciliary care services; Option B.
- 4.8 The report concluded that transferring services back 'in house' under the existing Adult Social Care management structure (Option A) over a five-year period is estimated to cost £142m, whilst establishing a Council owned organisation to deliver domiciliary care services (Option B) over a five-year period is estimated to cost £118m, compared to delivering the service in its current form (£91m). Both Option A and Option B would also impact on the Councils market shaping duty (Care Act, 2014) to stimulate a diverse range of care and support services to ensure that people and their carers have choice over how their needs are met and that they are able to achieve the things that are important to them. Both Option A and Option B would also be challenging as currently the Council does not employ staff with the necessary knowledge, skills and experience to run such diverse and complex services.
- 4.9 The new Maximising Wellbeing at Home model seeks to maximise benefits to the adult social care Wellbeing Worker workforce in order to both recognise their value and also to provide real career opportunities and embrace them within our Proud to Care Lewisham family.
- 4.10 In parallel, we will also be growing the Personal Assistant market to enable residents to have greater choice and control.
- 4.11 On 9th March 2022, Mayor and Cabinet gave permission to procure 4 Neighbourhood Lead Providers (Maximising Wellbeing at Home) and 5 specialist advice support and training providers to support the four Neighbourhood Lead Providers as shown in the table below:

Lot	Contract	Estimated annual value	Estimated value – 5 years	Estimated value – 7 years
1	Neighbourhood 1	£2,500,000	£12,500,000	£17,500,000
2	Neighbourhood 2	£6,000,000	£30,000,000	£42,000,000
3	Neighbourhood 3	£5,300,000	£26,500,000	£37,100,000
4	Neighbourhood 4	£3,200,000	£16,000,000	£22,400,000

5	Specialist End of Life Care advice, support and training	£120,000	£600,000	£840,000
6	Specialist Mental Health advice, support and training	£120,000	£600,000	£840,000
7	Specialist advice, support and training to support the effective management of individuals with advanced dementia including those presenting with behaviours that challenge	£120,000	£600,000	£840,000
8	Specialist Learning Disability and autism advice, support and training	£120,000	£600,000	£840,000
9	Specialist advice, support and training to enable all those in receipt of commissioned Maximising Wellbeing at Home service to maximise meaningful life roles e.g. enabling community engagement.	£120,000	£600,000	£840,000

4.12 On the 21 June 2023, Mayor and Cabinet:

- Awarded the contract for Neighbourhood 1 to Carepoint Services Ltd (Lot 1), for 5 years with the option to extend for a further 2 years, at an estimated current value of £17,500,000.
- Awarded the contract for Neighbourhood 2 to Eleanor Nursing & Social Care (lot 2), for 5 years with the option to extend for a further 2 years at an estimated current value of £42,000,000.
- Awarded the contract for Neighbourhood 3 to Westminster Homecare (Lot 3), for 5 years with the option to extend for a further 2 years at an estimated current value of £37,100,000.
- Awarded the contract for Neighbourhood 4 to Nomase Care Ltd & Unique Personnel (Lot 4), for 5 years with the option to extend for a further 2 years at an estimated current value of £22,400,000.
- Awarded the contract for Solution-Focused Coaching: Specialist advice, support and training to support the effective management of individuals with advanced dementia (Lot 7) including those presenting with behaviours that challenge to Bluefield Care Services. The contract value will be £120,000 per annum, equating to £600,000 over 5 years, and £840,000 over 7 years if the option to extend is utilised.

4.13 As no bids were received for lots 5,6,8,9, the tender was reissued on the 20 December 2022.

5. Solution – Focused Coaching (Maximising Wellbeing at Home): Overview

5.1 Maximising Wellbeing at Home (formerly Homecare) enables residents living in their own home to improve their independence and wellbeing through a person-centred approach provided by Wellbeing Workers working in wellbeing Teams. This includes an expectation that Clients will be fully involved and treated as an equal partner in their assessment, support planning and ongoing review. Considering the Clients views and wishes is critical to the approach and to the successful delivery of this service.

5.2 Wellbeing Workers are those staff who are employed by the four lead Maximising Wellbeing at Home neighbourhood providers. Wellbeing Teams are teams of 4 - 12 Wellbeing Workers who support people to live well and be part of their community. Wellbeing Teams are:

- Neighbourhood based
- Self-managing
- Values-led

- Focussed on co-production, supporting people to make decisions about their life and support
- Committed to wellbeing, both of the people they support and team members

5.3 Solution – Focused coaching will be offered to Wellbeing Teams and Unpaid Carers to enable them to develop their knowledge and skills to support Clients by encouraging them to focus on what is possible, rather than on the problem they face or on ideas which are outside of their grasp. Five Solution – Focused coaching services are being procured:

- Supporting those in their Last Year of Life (Lot 5)
- Supporting those with Mental Ill-Health (Lot 6)
- Supporting those with Advanced Dementia and Behaviours that Challenge (Lot 7)
- Supporting those with a Learning Disability and / or Autism (Lot 8)
- Supporting those into Meaningful Life Roles (Lot 9)

5.4 The six core elements of the service include:

#	Core element
1	<p>Seven step approach repeated bi-annually in collaboration with officers from the Local Authority and other relevant partners</p> <ul style="list-style-type: none"> • Step 1: Yourself – How can you build on the strengths and qualities that you already have? What else could you do improve your knowledge, skills or confidence? • Step 2: Technology – Are there any apps or technology that could help? • Step 3: Equipment and adaptations – Are there any products or equipment that could help? Are there any physical changes that could be made to your home or environment that could help? • Step 4: Family, Friends and Neighbours – Is there anything that your family, friends or neighbours could help with? • Step 5: Community – Are there places, groups or events happening in your community that could help? • Step 6: Services or Setting – Are there any general health or social services that could help? What is available through universal services? • Step 7: Choose your Wellbeing Team
2	<p>Working closely with the four Lead Neighbourhood providers. The Service must work closely and collaboratively with the four Lead Neighbourhood organisations delivering the Maximising Wellbeing at Home service to ensure Wellbeing Teams and Unpaid Carers are supported to manage Clients with advanced dementia and behaviours that challenge. The Service must also commit to:</p> <ul style="list-style-type: none"> • Ensuring service provision is sufficient to meet assessed level of assessed need • Supporting the delivery of an integrated health and care offer to Clients by referring to appropriate services and engaging meaningfully in relevant meetings, joint assessments and collaborative interventions. • Improving communication between organisations, reduce duplication and build a support team around the individual to prevent or delay their need increasing and enable wellbeing, choice and independence. This will result in the right level of support in the community for all adults requiring services as well as a reduction in the number of reviews and unnecessary handoffs. • Work closely with the Relationship Manager to ensure referrals are being made to appropriate services e.g., Carer Information, Advice and Wellbeing Officers • Support Neighbourhood branch offices to become a hub of activity for each Neighbourhood celebrating and promoting the industry as a career of choice amongst local residents
3	<p>Person Centred and Outcome focused</p> <ul style="list-style-type: none"> • The Service management and Wellbeing Teams will be required to meaningfully involve people with lived experience and Unpaid Carers in their service delivery and management. This will help to further embed the development and delivery of person centred, outcome focused support planning initiatives. • The Service must review on a regular basis level of need by repeating Activities of

#	Core element
	<p>Daily Living (ADLs) and Instrumental Activities of Daily Living (IADLs). ¹</p> <ul style="list-style-type: none"> • The Service must coordinate and analyse bi-annually the Adult Social Care Outcomes Toolkit INT4 and deliver an action plan to improve satisfaction • The Service must also coordinate and analyse annually Client and Wellbeing Worker annual satisfaction surveys and again deliver an action plan to improve satisfaction year on year. • Aim to achieve Outstanding by the CQC within three years and retain this rating for the remainder of the contract duration
4	<p>Promoting choice and control</p> <ul style="list-style-type: none"> • Clients choose their own Wellbeing Team (can be up to 12 Wellbeing Workers) using video introductions and one-page profiles. At least two teams from other Maximising Wellbeing at Home organisations in the Neighbourhood must be included in the offer to the Client. • Once the Wellbeing Team has been selected, they collaboratively design an ideal week with the Client, where visits have an indicative time related to what they are trying to achieve in that visit.
5	<p>Supporting Wellbeing Workers in Wellbeing Teams</p> <ul style="list-style-type: none"> • Solution-Focused Wellbeing Coaches will enable Wellbeing Workers to adopt a more rehabilitative approach to service delivery. Learning from Denmark showed this improved the status of the sector, whereby Wellbeing Workers are seen as coaches undertaking more positive, motivational work that is distanced from the 'current image of the sector' • The Lead Neighbourhood provider organisation will ensure Wellbeing Teams are enabled to develop by promoting regular team meetings to avoid isolated working conditions, and more training and flexibility to work autonomously and flexibly to meet the person's needs • The employer will also ensure the Service is: <ul style="list-style-type: none"> ○ Fully compliant with UNISON's Ethical Care Charter ○ Fully committed to work towards parity of esteem with equivalent roles in the NHS ○ Committed to promoting Wellbeing Workers as a career of choice for Lewisham residents ○ Committed to embedding the LondonADASS Big Promise within service delivery
6	<p>Working closely with the other Solution-Focused Wellbeing Coaching services:</p> <ul style="list-style-type: none"> • End of Life Care • Mental Health • Advanced Dementia and Behaviours that challenge. • Learning Disability and Autism • Meaningful Life Roles <p>The service must commit to working closely with the other Solution-Focused Wellbeing Coaching services ensuring Wellbeing Teams and Unpaid Carers receive consistent advice across the five Solution-Focused Wellbeing Coaching services</p>

5.5 Shared approach to recruitment – Proud to Care Lewisham Family

Within Lewisham, we have agreed a shared three step approach to the recruitment of Wellbeing Workers. The Service Provider must fully engage and comply with the Proud to Care Lewisham Family three step approach. This three-step approach which is fully compliant with the UNISON Ethical Care Charter consists of:

Step 1 – Recruitment into our Proud to Care Lewisham Family through a values-based approach. This step is coordinated by our Proud to Care Lewisham apprentices in collaboration with Lewisham Works. Values based recruitment is an approach which attracts and recruits Wellbeing Workers on the basis that their individual values and

¹ Key life tasks that people need to manage, in order to live at home and be fully independent.

behaviours align with the values of Lewisham Council and the NHS Constitution. The key elements of step 1 include:

- Pool of interviewers drawn from registered managers² based locally, unpaid carers and people with lived experience
- Interviews focus on whether the values of prospective applicants align with those of the Proud to Care Lewisham Family. During step 1, interviews do not focus on the organisation that the individual will be matched to.
- Applicants who successfully pass step 1 are then added to our Proud to Care Lewisham Family

Step 2 – Recruitment of applicants to Maximising Wellbeing at Home organisations. Within step 2, each Maximising Wellbeing at Home organisation based in Lewisham has the opportunity to advertise vacancies to all candidates in the Proud to Care Lewisham Family. As the prospective employer, the Maximising Wellbeing at Home organisation must ensure the recruitment approach that the organisation adopts during step 2 is fully compliant with CQC regulations.

To participate in step 2, the Service Provider must sign up to full compliance with the UNISON Ethical Care Charter. Compliance with the Charter ensures all Wellbeing Workers are enabled to:

- Provide appropriate support and given time to talk to their clients
- Ensure they are not forced to rush their time with clients or leave their clients early to get to the next one on time through more control of their rotas
- Be paid for their travel time, their travel costs and other necessary expenses such as mobile phones
- Be covered by an occupational sick pay scheme to ensure they do not feel pressurised to work when they are ill in order to protect the welfare of their vulnerable clients.
- Receive sustainable pay, terms and conditions and access to training
- Work in Wellbeing Teams enabling clients to be allocated the same Wellbeing Workers
- Have confidence in raising concerns about their clients' wellbeing through robust local provider procedures
- Develop professionally and provide high quality care through access to the Proud to Care Lewisham training programme
- Develop individually and within their wellbeing team through regular meetings with team and co-workers to share best practice and limit their isolation. Each Wellbeing Team will be allocated an internal coach by their employer to support ongoing development of the team.
- Be paid at least the London Living Wage

Step 3 – Supporting the Maximising Wellbeing at Home pool of Wellbeing Workers. If Wellbeing Workers do not feel that the role they are currently employed in is meeting their needs, they can resign from that organisation and re-enter the Proud to Care Lewisham pool where they will be matched to another Maximising Wellbeing at Home provider. The key elements of step 3 include:

- Submission of resignation by the Wellbeing Worker
- Wellbeing Worker exit interview undertaken by Proud to Care Lewisham Apprentice
- Maximising Wellbeing at Home provider exit interview undertaken by Proud to Care Lewisham Apprentice
- Feedback (anonymised) from exit interviews added to the Proud to Care Lewisham dashboard

² Drawn from Maximising Wellbeing at Home providers based in Lewisham

- Wellbeing Worker then matched with a different Maximising Wellbeing at Home provider

6. Evaluation of Bids

- 6.1 As set out above, following the initial procurement no bids were received for lots 5,6,8,and 9, therefore a tender for these lots was re-issued on 20 December 2022 via the Council's online tendering system (Proactis procurement portal), publishing the opportunity on Contracts Finder and Find a Tender service.
- 6.2 The table below summarises key dates and number of tenders received for the retendered Lots 5,6,8,9

Activity	Date	Bids Lot 5	Bids Lot 6	Bids Lot 8	Bids Lot 9
Tender published	20/12/2022	-	-	-	-
SSQ closed	25/01/2023	-	-	-	-
Stage 1 SSQs received		4	5	4	6
SSQ evaluation completed	09/02/2023 – 13/02/2023	-	-	-	-
SSQs not shortlisted		3	3	3	5
Stage 2 Tenders shortlisted		1	2	1	1
ITT published	16/03/2023	-	-	-	-
ITT closed	17/04/2023	-	-	-	-
Tenders received		1	2	0	1
ITT evaluation completed	15/05/2023 – 26/06/2023	-	-	-	-

- 6.3 The procurement for Lots 5, 6,8, and 9 were carried out via two stage restricted process with the aim of awarding the successful provider the contract for that Lot.
- 6.4 Stage 1 (Standard Selection Questionnaire) was issued on 20 December 2023. Tenders were required to submit a completed Standard Selection Questionnaire (SSQ) which included additional questions on tenderers technical capability in providing Solution Focused coaching (for Lots 6, 8 and 9). Following compliance checks conducted by Procurement Team, the technical questions were evaluated by an Evaluation Panel made up of officers from Commissioning, Primary Care, Culture and Community Development, Unpaid Carers and Adult Social Care in order to shortlist to the Invitation To Tender (ITT) second stage. The table below provide a summary of the SSQ submissions for lots 5, 6, 8 and 9.

Lot	Number of SSQ submissions	Number of SSQ submissions shortlisted by the evaluation panel
Lot 5	Four SSQ submissions received	One SSQ was shortlisted and invited to the second stage of the tender
Lot 6	Five SSQ submissions received	Two SSQ submissions were shortlisted and invited to the second stage of the tender – see part 2 of the report
Lot 8	Four SSQ submissions received	One SSQ submission was shortlisted and invited to the second stage of the tender, however, they did not then submit for stage 2 – see part 2 of the report
Lot 9	Six SSQ submissions received	One SSQ submission was shortlisted and invited to the second stage of the tender – see part 2 of the report

- 6.5 Stage 2 (Invitation to Tender) for Lots 5, 6,8 and 9 was issued to the shortlisted tenderers on 16 March 2023.
- 6.6 Evaluation of Quality (50%). Tenderers were asked to submit a description of their

proposals in the form of Method Statements in order to test their understanding of the service requirements. The Methods Statements were assessed under the following quality criteria, and those provided by the successful tenderer(s) will form part of the contracted documentation against which their performance will be monitored.

- Mobilisation (4%)
- Operationalising the Solution-Focused Wellbeing Coaching (8%)*
- Supporting operationalisation of the Maximising Wellbeing at Home Service (6%)
- Project Management and Sustainability (4%)
- Culturally competent service (5%)
- Career progression pathway for those wanting to specialise (4%)
- Embedding an evidence-based approach to assessing need (6%)
- Safeguarding (4%)
- Social Value (5%)
- Interviews (4%)

6.7 The scoring for the evaluation quality was on a scale of 0 – 10, with 0 being non-existent and 10 being perfect. The table below provides a description of each score:

Score	Level	Standard
0	Non-existent	Proposal absent
1	Inadequate	Proposal contains significant shortcomings and/or is inconsistent or in conflict with other proposals
2	Very poor	Proposal contains many shortcomings and/or is inconsistent or in conflict with other proposals
3	Poor	Proposal falls well short of achieving expected standard in a number of identifiable respects
4	Weak	Proposal falls just short of achieving expected standard in a number of identifiable respects
5	Barely adequate	Proposal just meets the required standards in nearly all major aspects, but is lacking or inconsistent in others
6	Adequate	Proposal meets the required standards in nearly all major aspects, but is lacking or inconsistent in others
7	Good	Proposal meets the required standard in all major material respects
8	Very good	Proposal meets the required standard in all major material respects and in a few of the minor requirements
9	Excellent	Proposal meets the required standards in all major material respects and nearly all of the minor requirements
10	Perfect	Proposal meets the required standards in all major material respects and all of the minor requirements

The evaluation criteria marked with an asterisk (*) in section 6.6 above was assigned a minimum score of six (6). All other criteria had a minimum score of five (5). Any Tender which failed to attain these minimum scores was deemed invalid and not considered for contract award.

6.8 Evaluation of Financial (50%). Bidders were evaluated on their total price over the 5 year contract duration and the number of hours coaching they would offer over the 5 years.

6.9 Synopsis of bids

Lot 5: There has been a delay with evaluating this lot however officers have recommended that Mayor and Cabinet award this contract subject to financial limits and delegate to the Executive Director to select the preferred Service Provider.

Lot 6: Two ITT submissions were received. The next table summarises the scoring given to these two providers:

Lot 6	Solution Focused	Tenderer 2
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	Education	
Quality score met?	Yes	Invalid Bid
Quality score	34.88	Invalid Bid
Quality score ranking	1	Invalid Bid
Price score	50	Invalid Bid
Price ranking	1	Invalid Bid
Overall score	84.88	Invalid bid

Solution Focused Education achieved the highest combined price and quality score for Lot 6 and it is recommended that they are awarded the contract.

Lot 8: Zero ITT submissions were received.

Lot 9: One ITT submission was received. The next table summarises the scoring given to this provider.

Lot 9	OLightOn Limited
Quality score met?	Yes
Quality score	32.03
Quality score ranking	1
Price score	50
Price ranking	1
Overall score	82.03

OLightOn Limited were the only bidder. The evaluation panel concluded that OLightOn Limited met the requirements of the specification and were confident that they can provide the service based on their submission..

6.10 For further details on the tender evaluation for each lot please see the corresponding Part 2 report, Section 6.

6.11 Rationale for Direct Award of Lot8

No bids were received following two procurement exercises for Lot 8. This was due to several factors:

- Solution – Focused coaching to Maximising Wellbeing at Home is an innovative model of which Lewisham Council is the first to implement. The model requires Wellbeing Workers be coached so that they adopt a more solution focused approach to the provision of care. Due to the innovative nature of this approach, the number of potential bidders confident in delivering the service is limited. This was highlighted during both failed procurements.
- The application of Solution – Focused coaching to staff working within Learning Disability and / or Autism settings is limited. This was again highlighted during both failed procurements.

6.12 It is thus proposed that officers are authorised to negotiate directly with the University of Kingston in relation to Lot 8. Criteria for direct award are summarised in the table below:

Criteria	Lot 8 (Learning Disability and / or Autism)
	<ul style="list-style-type: none"> • Proven track record of training and supporting staff to deliver high quality services to those with a Learning Disability and / or Autism. • Minimum quality score (Method Statements) of 40/50 i.e., 80% • Coaching hourly rate of £50 or less • Capability to undertake research of the service and publish findings to increase awareness of the approach and the evidence base underpinning the approach

7. Financial implications

7.1 The recommendations in section 2 of report are fully funded from the Community Directorate budget for the duration of the contract. The funding is aligned to the

government policy initiative around Market sustainability and fair cost of care. Lewisham council by implementing this contract is ahead of its peers in meeting this government agenda. To ensure that budget efficiency and affordability is maintained, the contract embeds a capitated budget model that will minimise waste while ensuring a high-quality service for Lewisham's vulnerable residents. Processes are being put in place with our Provider partners to ensure successful delivery.

8. Legal implications

Lot 6 and Lot 9

- 8.1 The Council's Constitution contains requirements about how to procure and manage contracts. These are in the Contract Procedure Rules (Constitution Part IV). Some of the requirements in those Rules are based on the Public Contracts Regulations 2015 as amended by the Public Procurement (Amendment etc) (EU Exit) Regulations ("the Regulations") with which the Council must comply. Given the value of the contracts the Regulations apply.
- 8.2 The report proposes the establishment of two contracts for 5 years with an option to extend for up to a further 2 years. The potential value of the contracts including the extensions are above £500,000, which means that they are a Category A contract for the purposes of the Council's Contract Procedure Rules and ones which are to be awarded by Mayor and Cabinet.
- 8.3 This contracts have been externally and openly advertised as required by the Regulations and the Council's Constitution.
- 8.4 The report explains the evaluation approach and process applied to the bids and the reasons for recommending the successful bids for approval. The Invitation to Tender set out that tenderers had to reach specified scores. The process followed, including exclusion of tenderers who did not reach the minimum score, was in compliance with the advertised and required procedures.

Lot 5

- 8.5 This report proposes that Mayor and Cabinet approve the award of a contract for the provision of Solution-Focused Coaching: Specialist advice, support and training to support the effective management of individuals in their last year (Lot 5). This report further proposes that Mayor and Cabinet instruct the Executive Director for Community Services in consultation with the Director of Law and Corporate Governance to give effect to this decision by applying the selection criteria to determine and enter into contract with the preferred service provider.
- 8.6 The decision to award the contract contained in this report is a Key Decision as it has a value of more than £700,000. It is therefore required to be contained in the current Key Decision Plan and the Council's Key Decision procedure must be followed.
- 8.7 Provided that the final contract value is within authorised limits set out in this report and the preferred service provider is selected in accordance with the selection criteria published in the tender documentation, then the selection by Executive Director for Community Services of the preferred service provider in accordance with Mayor and Cabinet's direction will not be a Key Decision. For audit purposes a written record should be kept setting out how the selection process has been applied and the preferred service provider selected, and officers from Legal Services should be consulted as necessary throughout the selection and award process.

Lot 8

- 8.8 Under the Regulations, regulation 32, a contracting authority may directly negotiate with a service provider without prior publication where no tenders, no suitable tenders, no requests to participate or no suitable requests to participate have been submitted in response to an open procedure or a restricted procedure, provided that the initial conditions of the contract are not substantially altered. As there have been 2 failed procurements where there have been no suitable tenders, regulation 32 may be used and direct negotiations can take place subject to Mayor and Cabinet approval.
- 8.9 This report proposes that Mayor and Cabinet approve the award of a contract for the provision of Solution-Focused Coaching: Specialist advice, support and training to support the effective management of individuals with a Learning Disability and / or Autism (Lot 8). This report further proposes that Mayor and Cabinet instruct the Executive Director for Community Services in consultation with the Director of Law and Corporate Governance to give effect to this decision provided that the contract value is within authorised limits and that the initial conditions of the contract are not substantially altered.
- 8.10 Provided that the final contract value is within authorised limits set out in this report and the initial conditions of the contract are not substantially altered then the selection by Executive Director for Community Services of the preferred service provider in accordance with Mayor and Cabinet's direction will not be a Key Decision. For audit purposes a written record should be kept setting out how the process has been applied and the preferred service provider selected, and officers from Legal Services should be consulted as necessary throughout the selection and award process.

9. Equalities implications

- 9.1 The recommendations made in this report relate to one specific group - adults who have been identified and assessed as being in need of services in order for them to maintain their independence and remain in their own home. Implementing these recommendations will not have an impact on individual client choice or on the manner in which support is delivered and the quality of that care.
- 9.2 The service specification includes a commitment to embedding the LondonADASS Big Promise within service delivery
https://www.youtube.com/watch?v=iZWclcGpwfY&list=PLio1_qJY3EazD4z2SCKGPqUPUhAfGOYUd and ensure the nine protected characteristics are embedded within service delivery
- 9.3 The COVID-19 pandemic has shone a spotlight on the health inequalities experienced by those from Black, Asian and Minority Ethnic communities. Embedding community voice and lived experience, particularly for those from Black, Asian and Minority Ethnic minority communities, into the procurement process of the Maximising Wellbeing at Home model will be a critical part of ensuring that any existing equalities are taken into account in developing the new service. The findings of the Birmingham and Lewisham African Caribbean Health Inequalities Review (BLACHIR) reported to the Lewisham Health and Wellbeing Board in March 2022 have also been considered within the procurement process for the service.

10. Climate change and environmental implications

- 10.1 The Council's environmental objectives will be addressed in the contract documentation and form part of criteria used at evaluation.

11. Crime and disorder implications

- 11.1 There are no specific crime and disorder implications arising from this piece of procurement. However, contract compliance measures around safeguarding,

assertiveness and anti-bullying initiatives have been built into the service specification.

12 Health and wellbeing implications

- 12.1 It is expected that the new model of Maximising Wellbeing at Home in Lewisham will focus on increasing Service User's independence by giving them more choice and control in arrangements for their care and allowing Wellbeing Workers sufficient time to work with Service Users to enable them to regain skills and develop strategies that allow them to remain in their own home.
- 12.2 Maximising Wellbeing at Home provision will be an integral part of the Care at Home initiative. As Care Workers begin to work much more closely with Community Nurses, Primary Care and Therapists it is hoped that this will reduce demand on in-patient beds (avoid admissions) and also lead to less delayed discharges.

13. Social Value

- 13.1 The Council's Sustainable Procurement Code of Practice will be applied to this contract. This sets out various social, environmental and economic considerations to be applied. The purpose is to ensure that products and services are sourced and produced responsibly; to maximise resource and energy efficiency in the manufacturing and supply of goods and services in order to minimise environmental impacts; and to deliver outstanding value for money over the entire lifetime of the contract.
- 13.2 Social Value formed 5% of the award criteria for each of the lots. The awarded tenderers made various social value commitments as part of their tender submissions. These commitments will form part of their contract and will be monitored to ensure delivery.
- 13.3 In addition, the service will ensure minimum pay rates in line with prevailing London Living Wage (LLW) or above where applicable.
- 13.4 All contracts will be fully compliant with the UNISON Ethical Care Charter

14. Contract Management

- 14.1 A Contract Classification is determined by a combination of the level of contract risk, criticality and financial value. The classification for this contract requires a minimum of monthly contract management meetings with the provider and quarterly meetings for output monitoring.

15. Background papers

Title of Document	Date	File Location	Contact Officer
Mayor & Cabinet (Contracts) Report: Award of Home Care Services (Lead Provider) Contract	9.12.2015	Governance Support	Emma Aye-Kumi
Mayor & Cabinet (Contracts) Report: Provision of Homecare Services (Lead Provider) – Extension of Contract	6.12.2017	Governance Support	Emma Aye-Kumi
Mayor & Cabinet (Contracts) Adoption of the Ethical Care Charter	20.9.2018	Governance Support	Emma Aye-Kumi
Mayor & Cabinet: Report on Care at Home	21.11.2018	Governance Support	Emma Aye-Kumi
Mayor & Cabinet Report: Provision of Homecare Services (Lead Provider)	12.12.2018	Governance Support	Emma Aye-Kumi

– Extension of Contract			
Mayor & Cabinet Report: Provision of Homecare Services (Lead Provider) – Extension of Contract	30.10.2019	Governance Support	Emma Aye-Kumi
Mayor & Cabinet Report: Future Home Care Arrangements	11.03.2020	Governance Support	Emma Aye-Kumi
Mayor & Cabinet Report: COVID related contract extensions	24.03.2021	Governance Support	Emma Aye-Kumi
Mayor & Cabinet Report: Future Home Care Arrangements (New Model and Procurement Process)	09.03.2022	Governance Support	Emma Aye-Kumi
Executive Director Report: Permission to Invite Tenders to Second Procurement Stage, Maximising Wellbeing at Home services.	15.12.2022	Governance Support	Tristan Brice
Mayor & Cabinet Report: Permission to extend the current lead home care provider contracts until 31 August 2023	08.03.2023	Governance Support	Emma Aye-Kumi
Permission to award Maximising Wellbeing at Home contracts (Lots 1-4, 7) Part 1	21.06.2023	Governance Support	Emma Aye-Kumi

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