

Briefing Note

Circulation:	Adult Social Care Scrutiny Board
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Subject:	Ideal for All

1. Introduction

The purpose of this briefing is to provide Scrutiny Members with an overview of the:

- Organisation, and,
- Developments relating to contract review and procurement processes.

2. Organisation

Ideal for All (IFA) is a not for profit company and registered charity, run by and for disabled people in Sandwell. It was established in 1996 to deliver a range of health and social care services for disabled people from a fully accessible Independent Living Centre (ILC). The ILC was established as a partnership project between IFA, Sandwell Council and the NHS.

3. Contract Review

3.1 Context

3.1.1 Historically, the Council and NHS partners have jointly invested in services for disabled people provided by IFA. In 2010/11, the core contract totalled £765,852 per annum, including £123,018 for building running, £99,893 for management costs, and the following services:

- Direct Payments Support (Council funded). In 2011/12, the Council renegotiated the separate Direct Payment Support Service.
- PDSI Champion (NHS funded)
- Enablement (Joint funded)
- Engagement (Joint funded)
- Information (Joint funded)
- Specialist Equipment and Duty (Joint funded)
- Supporting Advancement of Young Disabled People (Joint funded)

3.1.2 In October 2011, a desk-top review of IFA's core contract was completed. The review was based on quarterly monitoring returns and benchmarking of other centres.

3.1.3 In December 2011, the report was shared with IFA who strongly refuted the majority of findings in a written response dated January 2012.

3.1.4 The Council and PCT implemented an in-depth contract review process during 2012/13.

3.1.5 A Joint Steering Group was established to oversee the in-depth contract review, reporting to the Cabinet Member for Adult Social Care and PCT Audit Committee.

3.1.6 The approved project plan included the following work streams and key deliverables:

- **Contract extension: *Extend the current core contract to cover the review and procurement period.*** The contract was initially extended from April to June 2012. A further extension was agreed and implemented for the period July 2012 to March 2013. A contract variation was issued to formerly record service changes from the period, 2009-12. No funding reduction was applied in 2012/13. The Cabinet Member for Strategic Resources and NHS partners extended the existing contract up to September 2013 to enable completion of procurement.
- **Performance management: *Implement more robust arrangements.*** A historic lack of contract monitoring was addressed through introducing a performance dashboard (covering all not just core contracted services), and regular meeting system during 2012/13. A fuller understanding of service provision and overall funding picture was gained.
- **Equalities screening: *Assess the equalities impact pre-procurement.*** Screening was informed by an equalities stakeholder event held in August 2012, and an equalities self-assessment completed by IFA. The Equalities Impact Assessment identified key issues around potential impact of service and funding changes.
- **Health Needs Assessment (HNA): *Develop an understanding of the community profile.*** Public Health colleagues completed a first pass HNA. The assessment has helped in: defining the term disability, how it can be applied to Sandwell's population; defining what is meant by 'Independent Living' with regards to disability; providing epidemiological data on the disabled population in Sandwell, and highlighting areas requiring further investigation.
- **Stakeholder engagement: *Conduct an independent analysis of core contracted services from the "customer" perspective.*** A disability consultancy (Linda Lawrie Associates) completed an independent review of services. Stakeholder engagement initially covered an eight week period with a further six weeks for sensory services. The final reports were received in September and December 2012.
- **Audit: *Conduct a review by internal Auditors.*** The original 'desk-top' review expressed concerns about value for money. The Council and PCT internal auditors investigated: (1) The level of funding and investment for IFA and the sources from which the funding was received; (2) The services provided by IFA including a review of (a) what services are provided, (b) who provides the services and, (c) who the services are provided to; (3) The costs associated with each type of service provided; and (4) Whether VFM was being achieved. The final report was shared with IFA in October 2012.

3.1.7 IFA receives additional funding from the Council (Voluntary Sector Main Programme) for Employment and Skills advice.

3.1.8 IFA was previously funded by PCT for delivery of Public Health Community Agriculture (Growing Opportunities) and Multi-Media services. In 2012/13, the Council ceased funding for the Multi-Media service and reduced funding for the Growing Opportunities contract following negotiations with John Garret, Deputy Chief Executive.

- 3.1.9 IFA raises funds from external sources and operates a trading arm, Ideal Quality Services.
- 3.1.10 IFA has secured framework contracts with Dudley and Nottingham Councils for Direct Payment based services.
- 3.1.11 IFA annual income is approximately £1.5million. The majority coming from the Council and NHS. The organisation's reserves stand at approximately £750,000.

3.2 Current Status

- 3.1.1 The core contract and separately agreed Direct Payments Support service contracts were formally extended until 30 September 2013.
- 3.1.2 In June 2013, Sandwell & West Birmingham CCG confirmed its intention to cease investment beyond 30 September 2013.
- 3.1.3 In June 2013, the Council initiated procurement of the re-specified Independent Living Services. The total contract value being £253,269 per annum.
- 3.1.4 In July 2013, the Independent Living Services tender PQQ's were evaluated. From four completed and submitted only one met the minimum requirements.
- 3.1.5 In August 2013, the Cabinet Member for Strategic Resources approved an exemption allowing Officers to proceed with the one shortlisted bidder, Ideal for All.
- 3.1.6 A deadline of 20 August 2013 has been set for agreement of the Independent Living Services specification with Ideal for All.
- 3.1.7 The Direct Payments Support Service tender is currently active. All submissions have been evaluated and shortlisted organisations will be invited to interview during August 2013.

4 Next Steps

- 4.1 The following will be completed by end of September 2013:
 - 4.1.1 Finalise the Independent Living Service procurement
 - 4.1.2 Finalise the Direct Payments Support Service procurement

Source documents:		
<p><i>Core contract:</i></p> <ul style="list-style-type: none"> • Desk-top review • Internal Audit • Independent Stakeholder Review • Health Needs Assessment • Equalities Impact Assessment • Performance management reports and dashboard 	<p><i>Sensory Services review:</i></p> <ul style="list-style-type: none"> • Consultation matrix • Relevant plans / correspondence 	<p><i>Public Health:</i></p> <ul style="list-style-type: none"> • Relevant correspondence