



# Procurement Summary Report

## TENDER FOR SUPPLY OF STAIRLIFTS, THROUGH FLOOR LIFTS, STEP LIFTS AND EXTERNAL MODULAR ACCESS RAMPS

This report is commercially sensitive (under the Freedom of Information Act 2000 with 2012 updates) and is therefore intended for restricted circulation only. **The report should only be published with the consent of the Lead Council Officer, and after bidder's details and tender submission details (£) have been redacted;** due to the sensitive information it contains relating to the bidder's Tender submissions.

CONTRACT DETAILS	
<b>Lead Officer (Contracting Authority)</b>	Tom Amblin-Lightower
<b>Project ID</b>	DN716014
<b>FTS Reference</b>	N/A
<b>Contract Dates</b>	<u>Start:</u> 01/06/2024 <u>End:</u> 01/06/2027 <u>Extension option:</u> 12 Months plus a further 12 Months
<b>Length of Contract</b>	3 years with an option to extend for 1 year plus an additional 1 year, making a total of 5 years.
<b>Procurement Value (£)</b>	The budget prior to going to market was in the region of £120,000.00 per annum.
<b>Type of Contract</b>	Works
<b>CPV Codes</b>	44115000-9

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## 1.0 Introduction

- 1.1 The purpose of this report is to ensure all the pertinent procedures followed for the selection of the Provider(s) to be awarded the supply of stairlifts, through floor lifts, step lifts and external modular ramps contract are recorded. This is for both the provision of an audit trail, and to enable the appropriate Officer to approve the recommendation as part of the Council's internal governance and accountability arrangements. This report also satisfies the reporting requirements under Regulation 84 of the Public Contract Regulations 2015.
- 1.2 This report is commercially sensitive (under the Freedom of Information Act 2000 with 2012 updates) and is therefore intended for restricted circulation only. **The report should only be published with the consent of the Lead Officer;** due to the sensitive information it contains relating to the bidder's Tender submissions.

## 2.0 The Project

- 2.1 The contract is for the supply and installation of stairlifts, through floor lifts, step lifts, external modular access ramps and enabling works covered by disabled facilities grants or other discretionary grants. In addition to providing stairlift installations to the Private Sector, the successful bidder will also be invited to deliver disabled adaptations to Council owned Housing occupied by council tenants in the district of South Kesteven.

## 3.0 Pre-procurement Process

- 3.1 An initial meeting was held with the Lead Officer to gain an understanding of the requirement and the timescales we were working to. It was established that it would not be possible to utilise a framework as they don't cater to the supply of both stairlifts and ramps, therefore it was deemed this would be an open tender.  
Following a further meeting it was decided to merge two similar procurements, for the supply and fit for private housing and the supply and fit for Council housing.

## 4.0 Project Governance

- 4.1 **Details of Officer that approved the below, along with the relevant dates.**
  - **PID – Graham Watts signed off 13 November 2023**
  - **Budget/spend – Graham Watts**
  - **To make the Tender live – Tom Amblin-Lightowler 18<sup>th</sup> March 2024**
  - **Accept any relevant abnormalities within the Tender – Tom Amblin-Lightowler**
  - **Accept/Reject SQ submissions – Tom Paling**
  - **Accept pricing submitted – Tom Amblin-Lightowler**
- 4.2 **Details of the Key Officers:**

- **Procurement Lead (Welland) – Tom Paling**
- **Lead Officer (Contracting Authority) – Tom Amblin-Lightowler**
- **Budget Holder – Graham Watts**

## 5.0 The Public Procurement Process

5.1 This Tender opportunity was advertised on Contracts Finder. The Contract Notice was dispatched on 18<sup>th</sup> March 2024 and advised that award of the contract would follow an open procedure.

5.2 On publication of the opportunity, organisations were asked to register their interest via the Council's "ProContract" e-Sourcing portal, where Tender documents were available. A total of 27 expressions of interest were received, resulting in 5 Tender submissions.

## 6.0 Invitation to Tender

6.1 The Tender was made up of two questionnaire sets: one questionnaire for the selection criteria questions, and one for award criteria questions.

6.2 The award questionnaire was constructed in sections to facilitate evaluation. Some sections carried a percentage weighting (%). For every weighted section, there was at least one question that carried an individual question sub weighting (%). The overall weighting (%) of questions within a section also totalled 100%.

### 6.3 Selection Criteria

There were some questions to which an adverse answer may have resulted in the elimination of a bidder. Questions that may have resulted in the elimination of a tender submission (marked as P/F (Pass/ Fail)) are detailed in the table below:

SELECTION CRITERIA QUESTIONS		
Section Title	P/F	Question Number
<b>Important: Please Read</b>	-	-
<b>Part 1: Potential Supplier Information</b>		
<b>Section 1 - Potential supplier information</b>	-	-
<b>Section 2 - Bidding model</b>	-	-
<b>Section 3 - Contact details and declaration</b>	-	-
<b>Part 2: Exclusion Grounds</b>		
<b>Section 2 - Grounds for mandatory exclusion</b>	P/F	
<b>Section 3 - Grounds for discretionary exclusion</b>	P/F	
<b>Part 3: Selection Questions</b>		

<b>Section 4 - Economic and Financial Standing</b>	<b>P/F</b>	
<b>Section 5 - Technical and Professional Ability</b>	<b>P/F</b>	
<b>Section 6 - Modern Slavery Act 2015</b>	<b>P/F</b>	
<b>Section 7 – Insurance</b>	<b>P/F</b>	
<b>Section 8 - Skills and Apprentices</b>	-	-
<b>Section 9 - Health and Safety Project Specific Questions</b>	<b>P/F</b>	
<b>Section 10 - Environment Project Specific Questions</b>	<b>P/F</b>	
<b>Section 11 - Equality Project Specific Questions</b>	<b>P/F</b>	
<b>Section 12 - GDPR Questions</b>	<b>P/F</b>	
<b>Declaration</b>	-	-

#### 6.4 Award Criteria

The award criteria questions considered the merit of the eligible Tenders to identify the most economically advantageous Tender.

The Council evaluated the award criteria as follows:

- A quality assessment worth 60%; the following criteria, weighting and methodology were applied:

Each bidder's response to each question was evaluated and marked a maximum of 5 marks as per the below scoring matrix:

In the evaluator's reasoned opinion, the response is an:	
<b>5</b>	<b>Excellent Response</b> The response is excellent in relation to the stated requirements of the question. The response provides an excellent level of detail and demonstrates that the bidder's expertise and approach significantly exceeds the Council's minimum requirements such as to provide added value.
<b>4</b>	<b>Strong Response</b> The response is strong in relation to the stated requirements of the question. The response provides a good level of detail and demonstrates that the bidder's expertise and approach exceeds the Council's minimum requirements.
<b>3</b>	<b>Satisfactory Response</b> The response is satisfactory in relation to the stated requirements of the question. The response provides a satisfactory level of detail and demonstrates that the bidder has the necessary expertise to meet the Council's minimum requirements and has a reasonable understanding of what those minimum requirements are.

<b>2</b>	<b>Weak Response</b> The response is weak in relation to the stated requirements of the question. The response provides a low level of detail and provides less than satisfactory evidence to demonstrate that the bidder has the expertise to satisfy the Council's minimum requirements and/or demonstrates some misunderstanding of those requirements.
<b>1</b>	<b>Poor Response</b> The response is poor in relation to the stated requirements of the question. The response provides a very low level of detail. There is a significant lack of evidence to demonstrate that the bidder has the expertise to satisfy the Council's minimum requirements or really understands what those requirements are.
<b>0</b>	<b>Unacceptable Response</b> The response is unacceptable in relation to the stated requirements of the question. The response provides no detail and fails to provide any evidence that the bidder can meet the requirements of the question. <b>OR</b> No answer has been given.

The award criteria questions were split into the following sections:

Section Title	Question Number	Question Sub Weighting (%)
<b>Award Criteria – Quality</b>	1	20%
	2	20%
	3	15%
	4	15%
	5	15%
	6	15%

Bidders were advised that irrespective of the methodology described above, an agreed score for any of the quality questions of '0' or '1' would result in the elimination of their Tender, as the Council requires a minimum quality threshold.

- A price assessment worth 40%; the following criteria were applied:

Price scores were calculated based on the bidder with the lowest overall compliant price being awarded the full score of 40%. The remaining bids were scored in accordance with the following calculation:

$$= \left( \frac{\text{lowest submitted price}}{\text{potential supplier's submitted price}} \right) \times \text{price weighting}$$

6.5 Bidders were required to submit responses by no later than 3<sup>rd</sup> May 2024.

## **7.0      Review of the Selection Criteria**

7.1      The selection questionnaire responses were reviewed by Tom Paling, Contract & Supply Specialist, Welland Procurement.

## **8.0      Evaluation of the Award Criteria**

8.1      An evaluation panel was constructed to ensure that individuals assigned to evaluate questions were the most suitable and relevant to the criteria being examined, based upon qualifications and experience. Each question was evaluated by four evaluators and their scores, and comments recorded (see appendix B for details).

8.2      Subjective evaluation was undertaken, and initial scores to a maximum of 5 marks were awarded using the scoring matrix above.

8.3      A process of moderation for each individual evaluator's scores was undertaken by Welland Procurement. The responses were discussed at a moderation meeting held on 16<sup>th</sup> May 2024 attended by all evaluators and chaired by the moderator.

The moderation meeting enabled the panel to review the scores awarded by each evaluator and agree a moderated score for each question. The meeting also ensured that scoring had been consistent and key points in each question had been accounted for. Average scoring was not used.

In all such cases, following discussion, the moderator concluded the most appropriate mark to be awarded.

8.4      Following the moderation meeting, the following bidders were identified as failing to meet the minimum threshold (%) for the award criteria:

- Bidder 3

## **9.0      Results**

9.1      The evaluation scoring process was devised based upon a maximum score of 100% being available to each bidder as stated in the Tender documentation and outlined above.

9.2      Following the completion of the evaluation and moderation process the scores awarded to the participants were as follows:

1 <sup>st</sup>	Bidder 2	79.02%
2 <sup>nd</sup>	Bidder 5	74.20%
3 <sup>rd</sup>	Bidder 4	72.76%
4 <sup>th</sup>	Bidder 1	63.55%

## 10.0 External Financial Checks

10.1 Financial checks were carried out by the Council on the preferred Provider(s) on 21 May 2024. Please see below for details:

Bidder	Risk Indicator	Description of Risk Indicator
EMS Lifts (Bidder 2)	100	Very Low Risk - Ok to offer your best terms

## 11.0 Risk Implications

11.1 The procurement process has been conducted in accordance with best practice and the Public Contract Regulations 2015, ensuring the principles of transparency, equity and fairness have been adhered to.

## 12.0 Recommendation

12.1 Following the completion of the procurement process, it is recommended that EMS Lifts Ltd are awarded the contract.

12.2 All evaluators were required to complete and return a conflict of interest form. No conflicts of interest were declared.

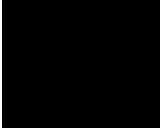
## 13.0 Next Steps

13.1 **The Lead Council Officer must ensure the internal governance/approval process is followed, prior to returning this summary report to Welland Procurement.**

13.2 This summary report does not supersede or replace any internal governance/approval process the Council may have.

13.3 Once the recommendation has been approved by the appropriate approvers, the preferred bidder and all unsuccessful bidders will be notified of the outcome simultaneously. Subject to the satisfactory return of due diligence, the Council intends to execute the Contract.

## 14.0 Governance

14.1 Signed (Procurement Lead) .....   
Name: Tom Paling  
Job Title and Authority: Contract & Supply Specialist  
Date: 21<sup>st</sup> May 2024

14.2 Signed (Lead Council Officer) 

Name: Tom Amblin-Lightowler

Job Title and Authority: Environmental Health Officer

Date: 31<sup>st</sup> May 2024



14.3 Signed (Chief Officer/Approver/Budget Holder)

Name: Graham Watts

Job Title and Authority: Assistant Director (Governance and Public Protection) and Monitoring Officer

Date: 3 June 2024

## Appendix A – Tender Award Questions

Question
<p>1. Please detail how you will manage the contract; please provide the following as a minimum:</p> <ul style="list-style-type: none"><li>• The main contact for your organisation on this project</li><li>• A staffing structure for all members of staff on this contract</li><li>• Details of how you will provide regular updates and communications with the contracting authority.</li></ul>
<p>2. Please detail how you intend to meet the Key Performance Indicators of this contract.</p>
<p>3. Please explain how you would manage health and safety on this contract. Please demonstrate how all members of staff are made aware of, and trained to adhere to, health and safety measures on site. Please also attach your organisation's health and safety policy.</p>
<p>4. Please provide details of your organisation's Complaints Procedure and Dispute Resolution Processes. Please also provide an example of where you have successfully resolved a complaint.</p>
<p>5. Please provide an indicative risk register for this project in line with the specification. Please also explain how you would mitigate each identified risk.</p>
<p>6. Social Value</p> <p>As part of your response, please provide your approach to the following social value priorities:</p> <ul style="list-style-type: none"><li>• Sustainability and Environment</li><li>• Local Workforce</li><li>• Local Economy</li><li>• Bidders' responses should include:<ul style="list-style-type: none"><li>• The key steps required to deliver each of the Social Value measures to demonstrate that achievement of the targets set is reasonable.</li><li>• Timeframes for delivery of Social Value targets including key milestones to deliver each measure proposed.</li><li>• Clear explanation as to how the Social Value offered will apply directly to this contract and benefit the local communities.</li><li>• Resources required to ensure delivery of all the Social Value measures.</li><li>• Details as to how the delivery of all the Social Value commitments made will be monitored and measured throughout the contract term to provide clear and regular updates to the Council.</li><li>• Considerations to be made to the local authority's outputs and outcomes to be achieved as part of this project.</li></ul></li></ul>

## Appendix B – List of Evaluators

Name	Job Title	Authority
Tom Amblin-Lightowler	Environmental Health Manager	South Kesteven District Council
Phil Reynolds	Project Officer – Technical Services	South Kesteven District Council
Jo Short	Grants Surveyor – Private Sector Housing	South Kesteven District Council
Vivienne Cann	Senior Housing Grants Officer	South Kesteven District Council

### Appendix C – Final Scores

Question	Weight (%)	AMMCASS	EMS Lifts	J & D Mobility Services	Obam Stairlifts
<b>QUALITY QUESTIONS</b>	<b>60%</b>				
1	20%	12%	16%	12%	16%
2	20%	12%	12%	16%	8%
3	15%	12%	9%	12%	6%
4	15%	9%	12%	9%	9%
5	15%	9%	9%	12%	6%
6	15%	9%	9%	9%	12%
<b>Sub Total (out of 100%)</b>		<b>63%</b>	<b>67%</b>	<b>70%</b>	<b>57%</b>
<b>Sub Total (out of 60%)</b>		<b>37.80%</b>	<b>40.20%</b>	<b>42.00%</b>	<b>34.20%</b>
<b>PRICE ASSESSMENT</b>	<b>40%</b>				
<b>Sub Total (out of 40%)</b>		<b>25.75%</b>	<b>38.82%</b>	<b>30.76%</b>	<b>40.00%</b>
<b>TOTAL</b>		<b>63.55%</b>	<b>79.02%</b>	<b>72.76%</b>	<b>74.20%</b>

### Appendix D – Pricing Evaluation

Bidder	Total cost	% Score (out of 40%)
AMMCASS	£260,065.00	25.75
EMS Lifts	£172,537.50	38.82
J & D Mobility Services	£217,755.00	30.76
Obam Stairlifts	£167,438.00	40.00