

**REPORT TO:** CABINET MEMBER – ENVIRONMENTAL

**DATE:** 12<sup>th</sup> JANUARY 2010

**SUBJECT:** **SPECIALIST TRANSPORT BUS & TAXI FRAMEWORK CONTRACT – ACCELERATED RESTRICTED PROCEDURE**

**WARDS AFFECTED:** None

**REPORT OF:** J G Black  
Operational Services Director

**CONTACT OFFICER:** Andrew Walker  
0151 288 6159

**EXEMPT/CONFIDENTIAL:** No

**PURPOSE/SUMMARY:**

To request approval to use an accelerated restricted procedure and obtain Delegated Authority to invite tenders, following an evaluation of the pre-qualification questionnaire (PQQ) stage of the process, for procurement of a new Bus & Taxi framework contract.

**REASON WHY DECISION REQUIRED:**

To ensure that appropriate contractual arrangements are in place for the continuing provision of specialist transport services.

**RECOMMENDATION(S):**

That the Cabinet Member – Environmental agrees;

- i) the use of an accelerated restricted procurement procedure to establish a new Bus & Taxi framework contract
- ii) to delegate authority to the Operational Services Director to invite tenders for a new Bus & Taxi framework contract following evaluation of pre-qualification questionnaires under an accelerated restricted procurement process.

**KEY DECISION:** No

**FORWARD PLAN:** N/A

**IMPLEMENTATION DATE:** 23<sup>rd</sup> January 2010

**ALTERNATIVE OPTIONS:**

Due to the value of this contract a formal procurement exercise is necessary. Whilst an open procedure could be used, the accelerated restricted process will result in the evaluation of bids from a select list of organisations that are capable of delivering the contractual requirements for specialist transport provision with effect from September 2011 and over the coming years.

**IMPLICATIONS:****Budget/Policy Framework:**

**Financial: N/A**

<b><u>CAPITAL EXPENDITURE</u></b>	<b>2010/ 2011 £</b>	<b>2011/ 2012 £</b>	<b>2012/ 2013 £</b>	<b>2013/ 2014 £</b>
Gross Increase in Capital Expenditure				
Funded by:				
Sefton Capital Resources				
Specific Capital Resources				
<b><u>REVENUE IMPLICATIONS</u></b>				
Gross Increase in Revenue Expenditure				
Funded by:				
Sefton funded Resources				
Funded from External Resources				
When?				

**Legal:** N/A

**Risk Assessment:** N/A

**Asset Management:** N/A

**CONSULTATION UNDERTAKEN/VIEWS:**

Legal Department  
Finance Department

**CORPORATE OBJECTIVE MONITORING:**

<b><u>Corporate Objective</u></b>		<b><u>Positive Impact</u></b>	<b><u>Neutral Impact</u></b>	<b><u>Negative Impact</u></b>
1	Creating a Learning Community		✓	
2	Creating Safe Communities		✓	
3	Jobs and Prosperity		✓	
4	Improving Health and Well-Being	✓	✓	
5	Environmental Sustainability		✓	
6	Creating Inclusive Communities	✓		
7	Improving the Quality of Council Services and Strengthening local Democracy		✓	
8	Children & Young People	✓		

**LIST OF BACKGROUND PAPERS RELIED UPON IN THE PREPARATION OF THIS REPORT**

OGC Procurement Policy Note 1/09 (Use of Accelerated Restricted Procedure)

## Background

1. The current separate Bus & Taxi framework agreements are both due to finish in August 2011. As both agreements are due for renewal at the same time an opportunity exists to combine the requirements for Taxi and Bus/Coach provision into a single contract. This will enable 'larger' transport companies to submit a single comprehensive tender and should also allow for improved economies of scale.
2. The 'Framework Agreement' approach allows companies to offer a particular service for a particular price. This gives greater flexibility to the Specialist Transport Unit as differing providers can be utilised for specific transport requirements, based upon the cheapest cost offered for any given service requirement. However, there are also a range of operational, financial, procedural and technical issues which must be met by all those wishing to supply services to the Council.
3. Under an open procedure, tenders can be submitted by any organisation regardless of their financial standing, capacity, and/or ability to demonstrate that they have the expertise to deliver the services required by this framework agreement. This could result in numerous bids being received, of which a number could be from unsuitable organisations, which would all have to be evaluated thoroughly.
4. A timetable has been produced together, with a recommendation from the Specialist Transport Unit and Central Purchasing to use the accelerated restricted procedure rather than the open procedure for procuring this contract.
5. An accelerated restricted procedure is carried out in two stages. An evaluation of the first stage, a pre-qualification questionnaire (PQQ), enables the Authority to identify the organisations to include in the subsequent Invitation to Tender (ITT) stage. The PQQ evaluation criteria will be weighted as follows;
  - Technical Experience & References (Percentage score)
  - Implementation (Percentage score)
  - Financial (Pass/Fail)
  - Insurance (Percentage score)
  - Equal Opportunities (Pass/Fail)
  - Health & Safety (Pass/Fail)
  - Professional Conduct (Pass/Fail)
6. Due to the timescales for completing the formal procurement exercise it is proposed that authority to establish the Invitation to Tender list be delegated to the Director of Operational Services, following evaluation of PQQ. The draft timetable for the various stages of the procurement process is attached as appendix A.

7. If Delegated Authority is approved, the outcome of PQQ evaluation and details of the organisations invited to tender will be reported to the Cabinet Member – Environmental retrospectively.
8. It is anticipated that a further report will be presented to the Cabinet Member – Environmental in March 2011 to provide details of the outcome of tender evaluation and to seek a recommendation to award a contract.

# APPENDIX A

## Cabinet Member – Environmental 12<sup>th</sup> January 2010 STU Framework Contract Accelerated Restricted Procedure

### Draft Timetable for Procurement

Milestones	Dates
1. OJEU Notice Preparation / Approval	23 <sup>rd</sup> December 2010
2. PQQ Preparation / Approval	23 <sup>rd</sup> December 2010
3. Issue OJEU notice & PQQ	5 <sup>th</sup> January 2011
4. Report to Cabinet Member - Environmental to seek delegated authority to approve shortlist post PQQ evaluation	12 <sup>th</sup> January 2011
5. Closing date for returned PQQ's	19 <sup>th</sup> January 2011
6. Evaluation of PQQ's - Completed	28 <sup>th</sup> January 2011
7. Notify bidders failing PQQ stage	31 <sup>st</sup> January 2011
8. Assuming Director has delegated authority - approve shortlisted bidders	31 <sup>st</sup> January 2011
9. Invite Short Listed Tenderers to Bidders Day	31 <sup>st</sup> January 2011
10. Bidders Day/Issue Tender Documents	16 <sup>th</sup> February 2011
11. Tender Submissions being prepared	31 <sup>st</sup> January to 24 <sup>th</sup> February 2011
12. Closing Date for Points of Clarifications to be raised	18 <sup>th</sup> February 2011
13. Closing Date for Return of Tender Submissions	25 <sup>th</sup> February 2011
14. Evaluate Tenders - Complete	25 March 2011
15. Cabinet Member - Environmental meeting	20 <sup>th</sup> April 2011
16. Cabinet meeting	19 <sup>th</sup> May 2011
17. Commence Alcatel Standstill Process - intention to award	6 <sup>th</sup> June 2011
18. End of Alcatel Period - 10 day standstill	17 <sup>th</sup> June 2011
19. Official Award - if no challenge received	20 <sup>th</sup> June 2011
20. Mobilisation Period	20 <sup>th</sup> June to 31 <sup>st</sup> August 2011
21. Contract Commencement	1 <sup>st</sup> September 2011