Call for Expression of Interest

In an Open Grant Competition

To select a Lead Consortium Partner to establish the UK’s first Evidence Centre for inclusive transport

May 2022

# Introduction

## Motability is inviting you to participate in a competitive process to be selected as **Lead Partner for the UK's first Evidence Centre** for inclusive transport (the ‘**Evidence Centre’**).

## This document and its related appendices describe the requirements to allow you to express your interest to Motability.

## This document also sets out the intended process Motability will follow to take forward expressions of interest, shortlist candidates for interview and invite interested parties to the Second (Application) Stage of the process.

## While this documentation seeks to detail as much of the process as possible at Expression of Interest (‘EOI’) launch, some elements of the later stages of the competition are not yet designed in detail. Any updates to the Second Stage of the competition will be communicated and released in good time.

## We have designed this expression of interest process on the basis of your feedback and worked to take account of the needs and priorities of a very wide range of different organisations as well as our own; we hope that it feels inclusive for everyone who is interested in working with us.

Motability, the Charity, and the Evidence Centre

## The Charity’s vision is that no disabled person shall be disadvantaged due to poor access to transportation.

## The Motability Scheme is the main method by which the Charity strives to achieve the vision (Scheme). In 2019/20, we committed more than £71 million in direct grant-making to support more than 25,000 disabled beneficiaries with the financial cost of their transportation needs.

## However, an increasing element of our grant-making is outside the Scheme and we are investing steadily in our **innovation activities**. Motability therefore seeks to enable a greater understanding of accessibility issues in transport and identify opportunities to better service an inclusive transport market through the **development of a dedicated Evidence Centre**.

## Motability has ring-fenced £20 million in grant funding over a seven-year period which it wishes to make available to a Lead Partner who will be required to form a consortium of stakeholders tasked with delivering the Evidence Centre. The Lead Partner and its consortium will be expected to work with a diverse range of expert partners across a range of sectors, including academia, transport, innovation, and the disability community to research, promote, advance, develop and implement transport in the UK.

Motability, Charitable Objective

## As a charity, Motability must always act within its charitable objective and in the best interests of its beneficiaries, who are all disabled people in need of assistance with their personal transportation. Motability must account publicly for its actions, reporting on its charitable activity and the resulting public benefit. This is part of the Motability charitable proposition.

## Motability’s charitable proposition must be transparent to all Scheme customers and the wider public, particularly the charitable work of Motability beyond the Scheme, including its innovation activities.

## All applicant organisations expressing an interest are requested to bear this context in mind when applying and developing their interest in this opportunity.

# The Evidence Centre for Inclusive Transport

Background Information

## Motability’s strategy for the Evidence Centre is set out at https://www.motability.org.uk/impact-and-innovation/innovation/evidence-centre-for-inclusive-transport/

## All applicant organisations are advised to carefully read the Market Briefing Pack and Key Commercial Terms.

## You are also strongly encouraged to actively consider the Transport Accessibility Gap Report and the 11 problem areas that the Evidence Centre intends to address.

## Applicants are strongly encouraged to read the background information on the Motability Evidence centre website https://www.motability.org.uk/impact-and-innovation/innovation/evidence-centre-for-inclusive-transport/ and should submit questions via the mailbox where further questions exist.

Aims of the Evidence Centre

## Motability believes that no disabled person should be disadvantaged by poor access to transport. It has been shown that disabled people make 38% fewer journeys than non-disabled people – a figure that hasn’t changed in a decade. This is called the “transport accessibility gap.”

## Being unable to access transport contributes to wider disadvantages for disabled people, such as being less likely to be in work and more likely to live in poverty.

## However, driving isn’t the right solution for everyone, and as the UK Government prepares the country for Net Zero carbon emissions, people will need to use more public transport and active travel and hence more research is required in this area to diminish barriers to use.

## The fact disabled people take 38% fewer journeys and that this has not changed in ten years shows that there is still much more to know and do about what disabled people need to make the same journeys as non-disabled people. There are also new and emerging modes of transport which have not yet been investigated.

## Our research and engagement with the disability and transport sectors shows that this area is incredibly complex, and too big for any one organisation to tackle. There are many different transport operators across road, rail, and air, governed by different bodies, and the needs of disabled people are also incredibly diverse. We identified the need for an Evidence Centre after undertaking research with thousands of disabled people about their travel experiences in 2020. We have spoken to more than 30 relevant organisations and held over 100 conversations while developing the business case for the Evidence Centre. After extensive scoping, we believe that the scale of the research, innovation, and collaboration needed to make transport accessible merits significant investment.

## Motability is planning to fund the Evidence Centre with £20 million over seven years and is running an open competition to find the best organisations to manage and progress the Evidence Centre. We believe the best results will be achieved by appointing a Lead Partner to run the Centre with oversight from Motability. The Lead Partner will establish a consortium of relevant members if they feel they don’t have the best fit of capabilities to meet the Evidence Centre objectives in house.

## The Evidence Centre will build on existing research and evidence, fill in the gaps, draw out new themes and investigate new modes of transport. It will work with disabled people, disabled people’s organisations, transport providers and policy makers to learn from existing solutions and develop new innovative ones, leveraging findings from the Centre to improve transport accessibility for everyone.

## Our vision is that decision-making in UK government, industry and civil society routinely makes appropriate use of high-quality evidence, best practice, and innovative solutions to inform future disability and transport strategy, policy, and practice. The mission of the Centre will be to become a convenor for transport accessibility, combining deep subject matter expertise and credibility on how different forms of transport are evolving with a real-world understanding of the lived experiences of different disabilities and long-term health conditions.

## To carry out this mission, the Evidence Centre will need to:

* Understand the problem – generate evidence, fill gaps, and draw out new themes, building on existing insight
* Evolve policy and/or practice – test and develop new evidence-based approaches
* Understand solutions – evaluate existing services and share best practice

## We have an initial set of 11 problem areas, framed around experiences, environments, and modes. We think potential practices the Evidence Centre will need to undertake include human-centred design, participatory research in action, inclusive and co-produced innovation, and influencing processes and behaviour. To do this, the necessary foundations have to be a diverse representation of lived experiences, cross disciplinary collaboration, and capacity building in transport to apply and action insights. Values which we want the centre to have include being problem-led, focussing on system-level changes, and real-world outcomes, rather than only producing more reports or words on a page.

## If we are able to set up an Evidence Centre with the capability of achieving this mission, we believe that together we can:

* Transform nation-wide understanding of disabled peoples’ lived experiences of transport problems, highlighting systemic issue and opportunities to better serve the inclusive transport market
* Seize the timely opportunity arising from technology enabled advances in transport and low carbon ambitions to ensure the ‘revolution in mobility’ improves, rather than further diminishes, the accessibility and reliability of transport for disabled people
* Convene decision makers across the transport and disability sectors to drive system level change, helping realise our vision that no disabled person is disadvantaged due to poor access to transport

What Motability looks for a Partner/Applicant Organisation

## The involvement, representation and meaningful engagement of disabled people and Disabled People’s Organisations (DPOs) will be fundamental to the success of the Evidence Centre. We therefore foresee the Evidence Centre facilitating co-production testing new ideas and learning from disabled people (for example, working with community groups to design research, interpret data, and disseminate findings).

## Motability is seeking a credible consortium, managed by a Lead Partner, with the values, drive, motivation, capacity, capability, expertise, and experience to spear-head this initiative, attract a consortium around it, and build the UK’s first Evidence Centre for inclusive transport.

## Motability is looking for partners who can deliver quick wins as well as long-term solutions and show that they have the leadership qualities to bring disabled people, disabled people’s organisations, transport providers and policy makers together to implement change at scale. Motability recognises that a range of partners with different skill sets and skill mixes is required, given how much collaboration is needed to affect change in accessible transport.

## This might include:

* Core partners closely involved in setting strategic direction, and leading on initiatives
* Supporting partners consulted to set strategic direction, and supporting key initiatives
* Sub-contractors hired for specialist support for particular initiatives

For more information on prospective consortium models please see the Market Briefing Pack on the Evidence Centre website https://www.motability.org.uk/impact-and-innovation/innovation/evidence-centre-for-inclusive-transport/

## While Motability requires a Lead Partner, the consortium could take many forms. Therefore, the above structure is only a suggestion and should not be taken as the only model open to consideration. Motability is receptive to model proposals if a consortium feels there is a better alternative. It is likely that what we have termed a “Core Partner” will serve as the Lead Partner of the consortium, however we are willing to discuss alternatives during the competition.

# Structure of the Evidence Centre

## Motability is seeking a Lead Partner for the Evidence Centre. It is the Lead Partner who will enter into the Grant Agreement with Motability. The Lead Partner will be responsible under the Grant Agreement to deliver the outcomes of the Evidence Centre for Motability.

## The Lead Partner will form a consortium with other relevant organisations. This consortium may take a number of forms e.g., a contractual agreement between the lead partner and the consortium members, or the formation of a company with a joint venture/shareholders agreement.

## Motability recognises that a form of consortium agreement between the lead partner and its consortium partners will be necessary. Motability will not prescribe the form for this agreement and is not party to it.

## The Lead Partner and its consortium members will be able to structure its internal arrangements in a manner that best suits the purpose of the Grant. However, Motability will expect a form of binding legal arrangement that provides the certainty, stability and underpinning of the vision for the Evidence Centre, and its future, over a seven-year period. Motability is flexible and open to all feedback and suggestions, as long as it fits within the parameter of a Lead Partner of a consortium being responsible to Motability under the Grant Agreement.

## Motability require that an agreement in principle is entered into by the Consortium Members and the Lead Partner by the point that Second (Application) Stage submissions are made (this can be in the format of an MOU or letter of intent). This is to provide some certainty as to the make-up of the potential consortium during the later stages of the competition process.

## Motability also expect the Lead Partner and the consortium members to form a Consortium Board to provide strategic governance of the Evidence Centre and oversee the delivery of its purpose and outcomes (**Consortium Board**). Motability will have a right to appoint (and remove) an independent chairperson to the Consortium Board.

## Motability intends to establish an **Advisory Committee** to provide it with a broader spectrum of disability and transport sector views and perspectives, in addition to those of the Consortium Board. The Advisory Committee will be appointed by the Motability Board and it will provide advice to Motability’s Board of Governors on the performance of the Evidence Centre.

# Working Arrangements

## Motability is funder to the Evidence Centre through its grant award. Motability has an established Grant Making and Innovation Board Committee (GMIC) that reviews certain of its grant making and innovation activities. Motability’s Board of Governors has tasked its GMIC to exercise oversight of the Motability funded Evidence Centre, once established.

## Motability expects that the Consortium Board will report to the Lead Partner of the Consortium on grant management and the progress with the Evidence Centre deliverables and outcomes.

## Motability expects the GMIC, the Lead Partner and the Advisory Committee to Motability to meet once every quarter, review regular quarterly reports and financial statements and other information from the Consortium Board (including IP and commercialisation reporting), be satisfied that grant activities are in compliance with the purpose of the grant, and to support the evaluation of their impact.

## Motability will enter into a grant funding agreement with the Lead Partner, which will govern reporting and assessment against the Evidence Centre project plan. Motability will employ a programme advisor as the key management working interface between the Evidence Centre and Motability.

# Evaluation of the impact of the Evidence Centre

## A key area under consideration is the appropriate benefits measurement framework to identify the overall impact of the Evidence Centre on closing the transport accessibility gap. Existing evidence centres have struggled to measure their overall impact, which means there is minimal available best practice.

## Motability expects the successful Lead Partner (with the support of its consortium) to propose its own evaluation methodology and approach (to measure the success of the evidence centre on an ongoing basis) as part of its proposals. Applicants’ proposals for evaluation methodology will be scored as at Application Stage of the competition (see evaluation criteria in the market briefing pack) and should be comprehensive and complement the activities carried out under the grant.

## We expect the successful grant applicant to work with Motability evaluation teams to finalise the benefit measurement framework and evaluation measurement approach as well as support general evaluation activity. Applicants must therefore commit to the following:

## **Cooperation with the evaluation team to ensure research programme areas are evaluable –** once an application has been approved by Motability, the applicant will need to cooperate with the evaluation team to ensure their research programme activities are evaluable.

## **Collection and reporting of research programme progress data–** allsuccessful applicants will be required to collect and report specific information on their research programme areas.

## Conduct periodic evaluation activities of their research programme activities (either via internal capacity or externally commissioned capacity).

## Motability reserves the right to carry out independently conducted evaluations of the Evidence Centre and we would expect collaboration as part of this. We would endeavour for these to be complementary to and build upon evaluation activity already carried out by the consortium.

## For an example of initial thinking about benefit measurement please see the benefits framework table of outputs, outcomes and impacts on page 29 of the Market Briefing Pack on the Motability Evidence Centre website

# High Level Competition Process

## A note on ‘Lead Applicant’, ‘Applicant’, ‘Consortium’ terminology used in this document:

### Lead Applicant – the organisation responsible for collating and submitting Expression of Interest responses on behalf of the applying consortium.

* Applicant – is used where it refers to organisations within the potential consortium. I.e., it means any applicant using this document who may or may not be part of a consortium yet. The applicant will need to complete certain sections of the response at point of submission however the Lead Applicant is responsible for collation and submission.
* Consortium member – Refers to the other members of the consortium once the Consortium is formed (informally or formally).

## The competition process will follow two stages. The first (Expression of Interest, or ‘EOI’) stage will result in down-selection of Applicants to be invited to (non-evaluated) interviews (familiarisation sessions) to clarify any topics before invitation to the Second (Application) Stage. Note all dates are indicative at time of launch and may be changed.

Market engagement

## Market engagement commenced on March 4 with a launch event, briefing pack, and key commercial terms document. The purpose of these documents was to clarify the requirements for the Evidence Centre, understand the market appetite and explain the end-to-end competition process including the selection approach. More information can be foundon the Motability Evidence Centre website.

Stage 1 - Expression of interest

## This Expression of Interest document has been shared at the formal launch of the expression of interest stage on March 18. After the Expression of Interest stage closes at 5pm on May 27 an assessment of technical capability will take place and financial and non-financial due diligence will be undertaken. At this stage Applicants may be asked to clarify points in their submissions. After evaluation and due diligence is complete successful and unsuccessful applicants will be notified in writing of the outcome.

Stage 2 - Application form stage

## Applicants who are successful at Expression of Interest stage will be invited to the Application stage which will launch around July 1. At this point a full set of competition documents and guidance will be issued. Shortlisted Lead Applicants will also be invited to a non-evaluated interview which will take place shortly after the Second (Application) Stage documents are issued (See section 12 for further detail).

## The Application Stage is designed to test applicants’ proposals for the delivery of the Evidence Centre, as well as pricing, to ensure the maximum value is achieved from the Evidence Centre. Indicative evaluation criteria have been shared via the market briefing pack on the Evidence Centre website. After the launch of the Application stage of the competition further engagement may take place to clarify any information if required. The mailbox will continue to be open during this stage of the competition (see section 8 for more detail).

The high-level process across the entire competition is as set out below.



# Competition Timetable

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| --- | --- |
| Date*Dates indicating a range or marked ‘c.’ are indicative* | Action |
| 18 March 2022 | Expression of Interest (EOI) issued by Motability  |
| 27 May 2022 | Responses to EOI Invitation to be submitted to Motability by 5pm |
| c. 1 July 2022 | Successful and unsuccessful EOI Applicants notified – successful Applicants invited to familiarisation sessions |
| c. 1 July 22 | Second (Application) Stage packs issued to preferred Lead Partners |
| c. 12 August 2022 | Indicative deadline for submission of Second (Application) Stage applications  |
| September 2022 | Notification to successful Lead Partner and award of Grant to commence January 2023 |

# Dialogue & clarification during the Expression of Interest process

## Applicants with **clarification questions** should email innovation@motability.org.uk. Motability will update an FAQ document with any responses and issue it to all Applicants who have attended the launch event.

## If you do not wish your questions and responses to be issued to all, please **mark as confidential**.

## Motability reserves the right to determine whether or not to publish your question and our response to all Applicants.

## Potential Applicants can also request to join the closed LinkedIn group to connect with other potential interested parties at <https://www.linkedin.com/groups/9163082/>

# Expression of Interest Selection Criteria

## The Expression of Interest stage of the competition applies a selection process designed to assess the suitability of a consortium to deliver the requirements and objectives of the Centre and to understand the nature and legal status of the consortium members.

## The consortium must pass Expression of Interest stage to continue to the Second (Application) Stage but will not receive an improved score in the application process after surpassing the minimum threshold (i.e., consortia will not be ranked).

## Section 10 instructions to applicants sets out which information must be submitted.

## Any non-compliant applications may not be taken forward in the process. Motability reserves the right, in its sole discretion, to determine any non-compliant applications and not evaluate these. Motability also reserves the right to explore with any applicant organisation whether it may have a conflict of interest and to determine to remove it from the process where it determines, in its sole discretion, that a conflict of interest has arisen.

## Applicants may be excluded if they provide insufficient or false information or if they do not satisfy the criteria set out in this document. Applicants should note that any Expression of Interest must meet the minimum defined requirements as set out in this document. Responses should answer each section in the Annexes specifically and in full.

Technical experience required

## At Expression of Interest stage Lead Applicants need to evidence they possess the required capability within the consortium to deliver the Evidence Centre. Details of up to three grants or contracts, in any combination from either the public or private sector; voluntary, charity or social enterprise (VCSE) that show the applicant has the right experience, capability and capacity to deliver the aims of Evidence Centre will need to be provided, with at least one example stemming from a research grant/contract.

## Examples will need to show how consortium members have worked with people with lived experience of disability and what systems they have in place for involving disabled people.

## The three examples can come from any consortium member. References should be provided to accompany the submission.

## If a consortium cannot meet the criteria for the 3 grant/contract examples an explanation must be provided along with suitable alternatives.

## Lead Applicants should complete their technical responses in Annex 3 where further guidance is included. If consortium members have any queries on the Expression of Interest process or the selection criteria questions should be email to innovation@motability.org.uk.

# Instructions for EOI

## Lead Applicants are responsible for submitting all applications on behalf of the consortium.

## Applicants must complete and submit the three Annexes attached to this Expression of Interest document by the deadline identified in section 18. These annexes should be submitted by the Lead Applicant in the consortium on behalf of the consortium members. These are:

## **Annex 1 – Non-Financial Due Diligence Questionnaire** (to be completed on behalf of all consortium members by the Lead Applicant)

## **Annex 2 – Financial Analysis Template** (to be completed by Lead and Supporting Consortium Partners only, not Subcontractors. Lead Applicant to submit)

## **Annex 3 – Technical Capability Questionnaire and consortium structure** (Can reference technical ability from any consortium member, Lead Applicant to submit).

## The annexes include detailed response guidance and instructions (including formatting requirements) which must be adhered to.

## References for case studies must be included in the template in Annex 3 when submitting the Expression of Interest response.

# Due Diligence approach

## Motability must be satisfied that applicants are of sound financial standing, are capable of responsible financial management, and there are no material risks to their liquidity, solvency, or any other element of their financial standing. This is to ensure that there is no risk a consortium which ultimately receives the grant is unable to perform their obligations.

## Motability recognises that some applicants (especially VCSEs) may have not completed financial analysis templates before and may require assistance and/or more time to complete. If this occurs a message should be sent via the mailbox requesting assistance. Motability will consider extensions/assistance however this will be at its sole discretion.

## Only applicants who expect to be Lead Partners and Supporting Partners will need to complete a completed Financial Analysis Template (Annex 2). Only the lead applicant needs to complete and submit the non-financial due diligence template, although this is information about all consortium members (Annex 1). See section 10 for more detail on which sections applicants need to complete.

## Applicants will be required to complete a financial analysis template (see annex 2). Where an applicant does not satisfy Motability’s requirements further assurances may be sought, or the applicants may be excluded from the competition process.

## As part of the Expression of Interest the lead applicant will also need to complete the general (non-financial) due diligence checks questionnaire included at annex 2 – these are standard checks in our grant making process including but not limited to conflicts of interest, reputational standing, and any other areas of concern. The information the lead applicant is required to provide is information about all consortium members.

# Familiarisation session

## Motability will arrange a 1:1 interview session with the Lead Applicants selected at Expression of Interest stage to participate further in the competition.

## This session will be with one or more senior Motability appointed representatives. It will take place virtually or in person at Motability’s offices and will last for approximately one hour.

## The Lead Partner may invite representatives of other parties in its intended consortium at this session. Attendees will need to be agreed in advance with Motability.

## This will be an informal session and no prior preparation is necessary. It will provide an opportunity for Motability to better understand your engagement in the competition and your motivations, thoughts, and ideas for the Evidence Centre.

## The session will not form part of the evaluation process.

# Temporary Competition Advisory Panel

## The competition process will be supported by a temporary advisory panel of disability and transport experts. They will support Motability by setting direction and assisting in applicant selection. Once the Evidence Centre is mobilised a permanent Advisory Committee (see section 3.7) will be in place to provide ongoing advice to Motability on the performance of the Evidence Centre.

## Conflict of interest – Any member of the consortium will not be able to be on the temporary panel. This is to avoid any conflict or perceived conflict of interest during the grant competition process.

# Non-binding nature of Expression of Interest

## The successful Applicant who will become the Lead Partner for the Evidence Centre will be required to adhere to Motability terms and conditions of the Grant.

## Indicative key commercial terms of such Grant are included [in the pack accompanying this Expression of Interest document].

## Any binding commitment will result only from execution of a formal grant agreement and any other necessary documentation by the successful Lead Partner and Motability.

# Confidentiality

## We will not disclose to any third party any confidential information contained in, relating to, or arising out of this Expression of Interest. However, we may share with third parties that your Expression of Interest has been registered and share information that is not expressly marked as confidential.

If you **DO NOT** want your Expression of Interest to be shared with a particular organisation, please highlight this in your email when you submit the Expression of Interest.

## All documentation we have provided to you to support your Expression of Interest if marked or indicated as confidential should be treated in the strictest confidence at all times and you must ensure it is treated as such by all your employees and agents involved in this process.

# Removal from the Expression of Interest process

## Motability reserves the right at any time to exclude any party from the Expression of Interest process if it sees fit. It is recognised that this could be for a number of reasons including but not limited to providing insufficient information during the process to support an application, conflict of interest, a reputational incident, or a change of control of lead partner or consortium member during the process. All applicant organisations must therefore notify Motability in advance of any matter that it feels may be likely to affect its application in a detrimental way and/or may lead to a removal from the Expression of Interest process.

# Exclusions

## The details provided in this document comprise information, which we believe may be relevant for the purposes of your response. Motability makes no representation or warranty as to their accuracy or completeness and neither shall we have any liability to you, or any of your representatives, resulting from reliance upon, or use of, such information.

## All matters relative to this process shall, pending exchange of formal agreements with a successful Applicant, remain strictly subject to contract.

## The content of this document and any supporting information submitted by us at any time related to the Expression of Interest is provided for information purposes only.

# Responses

## Responses should be submitted to Motability via email. A completed application submission requires all three annexes to be submitted. Responses should be ***received*** no later than **5pm 27 May 2022** including documents sent by email to innovation@motability.org.uk.