

Motability's Grant Competition Final Application Stage

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

May 2022

DRAFT Guidance for Applicants and Application form

[Motability is seeking to carry out a collaborative grant competition process and is therefore sharing early this draft Guidance for Applicants and draft Application Form document, as well as the draft grant terms and conditions and draft IP policy for comment. Lead applicants should return comments to Motability's Innovation Team at innovation@motability.org.uk no later than 5 PM June 15, 2022]

1. Introduction

- 1.1. Motability is inviting you to participate in a competitive grant process to be selected as **Lead Partner for the UK's first Evidence Centre** for inclusive transport (the '**Evidence Centre**').
- 1.2. This document and its related appendices describe the requirements to enable you to apply for Motability's Evidence Centre grant funding (together '**the Grant Application**'). This document is being issued alongside the Grant Terms and Conditions. It is highly recommended that prospective applicants consider all documentation before deciding whether to apply.
- 1.3. This Grant Application is open to any Lead Partner (of a consortium) which successfully passed the Expression of Interest phase of this grant competition. This document contains guidance and outlines the steps in the application process from notification of successfully passing Expression of Interest stage to final award of the grant.

Motability, the Charity and its charitable proposition

- 1.4. Motability is a national disability charity that over the years has supported millions of disabled people to access transport. The Charity's vision is that no disabled person shall be disadvantaged due to poor access to transportation.
- 1.5. The Motability Scheme is the main method by which the Charity strives to achieve this vision (Scheme). In 2020/21, we committed more than £39 million in direct grant-making to support more than 16,000 disabled beneficiaries with the financial cost of their transportation needs.
- 1.6. 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**.

Charitable proposition

- 1.7. 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.
- 1.8. 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.
- 1.9. All applicant organisations expressing an interest are requested to bear this context in mind when applying and developing their interest in this opportunity.

2. About this Grant Programme – the Vision and Mission of the Evidence Centre its strategic aims, structure, and problem/focus areas

Vision and Mission of the Evidence Centre

- 2.1. We know that transport is an enabler for key outcomes in life and society such as access to education or employment, increased wellbeing, and greater feelings of independence. With our ambitious and refreshed strategy, Motability has been considering how we might do more to support the personal transport of disabled people, in line with our charitable objects.
- 2.2. There is an enormous amount of diversity within disability and wide-ranging experiences of transport and transport accessibility. The only way we can truly understand and improve the transport accessibility gap that exists between disabled and non-disabled people is by listening to disabled people and amplifying their voices so that decision-makers understand 'what works' for disability and transport.
- 2.3. There has been lots of fantastic research done in accessible transport already, and some best practice identified, yet much of transport is still inaccessible, resulting in disabled people taking fewer journeys and missing out on key opportunities. To that end, after over a year of scoping and consultation, we have decided to establish an Evidence Centre on inclusive transport which:
 - a. Builds on existing research and turns it into concrete action, providing a forum for stakeholders to share insights and draw out new themes;
 - b. Identifies new and emerging areas of transport where we need to understand more;

- c. And puts disabled people at the front and centre of how transport providers make informed and evidence-based decisions, so that no one is left behind or excluded in future transport shifts
- 2.4. We believe this will be the first Evidence Centre focussed specifically on disability and transport in the UK and are excited about the potential to improve transport for all disabled people, both those we currently serve through the Scheme / our grant-making and those we don't yet reach but hope to in the future.
- 2.5. Our vision for the Centre is that decision-making in UK government, industry and civil society routinely makes appropriate use of its high-quality evidence, best practice, and innovative solutions to inform future disability and transport strategy, policy, and practice. We will encourage Applicants to build upon that vision.
- 2.6. The detailed mission of the Evidence Centre will be shaped by the successful Lead Partner (and its consortium). Motability would wish the Centre 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.
- 2.7. To carry out this mission, the Evidence Centre will need to:
 - a. Understand the problem – generate evidence, fill gaps, and draw out new themes, building on existing insight;
 - b. Evolve policy and/or practice – test and develop new evidence-based approaches;
 - c. Understand solutions – evaluate existing services and share best practice.

Strategic aims of the Evidence Centre

- 2.8. The Lead Partner 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 better service inclusive transport in the UK.
- 2.9. We think potential practices the Centre will need to understand include human-centred design, participatory, user-led research in action, inclusive and co-produced innovation, theories of change and influencing processes and behaviour. To do this, the necessary foundations are 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 systems-level change, and real-world outcomes, not just more reports that sit on shelves.

- 2.10. If we are able to grant fund an Evidence Centre with the capability of achieving its mission, we believe that together we can:
- a. Transform nation-wide understanding of disabled people's lived experiences of transport problems, highlighting systemic issues and opportunities to better serve the inclusive transport market
 - b. 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
 - c. Convene decision makers across the transport and disability sectors to drive systems level change, helping realise our vision that no disabled person is disadvantaged due to poor access to transport

Application model (consortia structure)

- 2.11. **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. Further details can be found in the Grant Terms and Conditions.
- 2.12. The Lead Partner will form a Consortium. It and its Consortium Members will be able to structure their internal arrangements in a manner that best suits the purpose of the Grant. Motability will expect a form of binding legal arrangement is made among the Lead Partner and its Consortium and that it will provide the certainty, stability and underpinning of the vision for the Evidence Centre, and its future, over a seven-year period.
- 2.13. Motability is flexible and open to all feedback and suggestions for a working consortium structure or model, as long as it fits within the parameter of a Lead Partner of a consortium being responsible to Motability under the Grant Agreement.
- 2.14. The Lead Partner will establish a Governance Board of the Consortium on which all Consortium Members will be represented.¹ (Consortium Board)
- 2.15. Motability will have a right of appointment (and removal) of an independent Chairperson to the Consortium Board.
- 2.16. The Lead Partner will (and the Consortium will) fully cooperate with any governance arrangements notified by Motability from time to time, to monitor the work and outputs of the Centre and the Purpose of the Grant.

¹ Other than this requirement of representation of all Consortium Members on the Governance Board of the Consortium, it will be for the Lead Partner and the Consortium Members to arrange their own internal governance regulation.

11 problem areas

- 2.17. Motability has outlined an initial set of problem areas that are framed around experiences, environments and modes. Although we feel strongly about the significance of the 11 problem areas, which emerged from research we conducted in 2020, they are a springboard for ideas, and it is not mandatory for the Evidence Centre to pursue these areas. We anticipate an early period of validation with stakeholders.
- 2.18. The 11 problem areas are outlined below:
- 2.19. **Experiences:**
1. How to join existing data sources and generate new information that could **personalise transport planning** for disabled people across a number of transport modes and locations;
 2. Understanding better the experiences of people living with **mental health conditions** and **invisible disabilities** which are generally underrepresented and studied in existing literature;
 3. The longer term **impacts of the Covid-19 pandemic** on disabled peoples' usage, behaviours and preferences when it comes to transport;
 4. How to improve disabled peoples' experiences of **public transport**;
- 2.20. **Environments:**
5. The introduction of **low-traffic neighbourhoods (LTNs)** and impacts on disabled pedestrians and drivers, particularly from a 'door to door' and 'last mile' perspective;
 6. How to address **street-level built environment barriers** to disabled people getting out and about;
 7. The crossover between **disability, ageing, and rural living**, and the unique mobility challenges these groups face;
- 2.21. **Modes:**
8. The future of **autonomous vehicles** and implications for disabled drivers, passengers, and shared journeys;
 9. The future of the **electric vehicle** transition and how to ensure accessibility is built into charging infrastructure and vehicle design;
 10. How to improve access to **appropriate, quality and affordable wheelchairs** and powered wheelchairs;
 11. How to design **active travel** solutions that work for a wide range of disabilities and lived experiences.
- 2.22. Given the seven-year duration of the Evidence Centre we expect the Lead Partner to react to changes in any identified problem areas and beyond. The Lead Partner will, via the Consortium Board, make decisions about priorities and funding allocations to address problem areas. We do not expect the consortium to know, at final application stage exactly what programmes it will

deliver over the seven years of the Evidence Centre. We will however assess the Lead Partner’s ability to set up and deliver programmes in the optimal way, via an exemplar project, as well as (among other things) how they might address these initial 11 problem areas and how they would mobilise the Evidence Centre.

3. What funding is available?

- 3.1. 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. Further information on funding matters can be found in the Grant Terms and Conditions.
- 3.2. We will pay the Grant to an account specified by the Lead Partner in line with the payment schedule set out in the successful Grant Application.²

4. Who can apply?

- 4.1. The Expression of Interest (EOI) stage of the competition closed on 27 May 2022 and all EOI applicants have been notified whether they have been successful. **Only those applicants who have been shortlisted at EOI stage will be invited to submit Final stage Grant Applications.**

Application timescales

- 4.2. Applicants will need to submit responses within the timetable set out below. Note these are indicative and subject to change.

Table 2

Activity	Explanation	Date
Invitation to submit application launches	Successful EOI candidates shortlisted and invited to submit applications	1 July

² The payment schedule is subject to formal agreement with Motability. Only when the payment schedule is in an agreed form, will it be inserted into the final version of the successful Grant Application. The agreed form Application with payment schedule will be set out at Annexure 1 of the Grant Letter. Please see further the Grant Terms and Conditions documentation.

Interviews	Online meetings with selected consortia	w/c 11 July
Application stage	Grant Competition formally launches and applicants have six weeks to submit final stage applications. Note that the deadline for asking clarification questions will close four working days before the Application deadline.	1 July – 12 August
Application evaluation & Governance	Formal evaluation & moderation of applications and governance	15 August – 22 September

Role of the interviews

- 4.3. The purpose of the interviews with shortlisted EOI applicants successful at EOI stage is to better understand the ideas, people, and leadership behind the consortia. More information on the interview process is provided in Appendix 1 to this Guidance document.

5. How to apply?

Instructions

- 5.1.1. Completed application forms and any required templates and annexes should be submitted to Motability via email. Responses should be received no later than **5pm 12 August 2022** including documents sent by email to innovation@motability.org.uk

Applicant clarification questions

- 5.2. Applicants are strongly encouraged to read this document and any annexes and instructions published as part of this Invitation to Submit Final Stage Grant Applications and all published FAQs and answers before submitting questions. If submitting questions requesting clarification of any aspect of the Grant Competition, please contact us via email at innovation@motability.org.uk using the following format:
- a. applicant name;
 - b. date submitted;
 - c. document name and reference number or title; and
 - d. details of the question or section requiring clarification

- 5.3. All clarification questions must be received in the mailbox by the clarification deadline detailed in the Timetable.
- 5.4. To ensure that all Applicants have equal access to information about the Grant Competition, Motability will publish clarification questions and answers via FAQ up until the Final Application stage. During the Final Application stage Motability will no longer post FAQs on the website, but instead directly email answers to the key contact person for all of the lead applicants in the Final Application stage. The name of the Applicant who submitted the question shall not be published.
- 5.5. If an Applicant considers its question to be commercially sensitive, it must clearly mark it as such, citing the reasons why the question is commercially sensitive.
- 5.6. Motability will consider the Applicant's clarification question and decide whether it is appropriate to disclose the question and Motability's answer to other Applicants. If Motability decides that the clarification question is not commercially sensitive and/or answering the question is appropriate to all Applicants and is in the best interests of good administration, equal treatment and transparency, Motability may publish its answer to the clarification question to all Applicants. Motability's decision on this point is final.

Clarification process during evaluation

- 5.7. During the evaluation process there may be instances where clarification is required regarding a specific element of the Grant Application, e.g., where an applicant has made an obvious typographical error, (e.g., missing a zero from the costing); where the error is known to Motability; where the intended contents of the application is clear and correcting the error does not affect the score by improving the application response.
- 5.8. There is no duty on behalf of Motability to allow an Applicant to clarify areas of its application which are genuinely unclear from the face of the document and in some cases, Motability may take legal advice before doing so.
- 5.9. **The Applicant shall reply to Motability's request(s) for clarification within 2 working days via email.**

6. Expected applicant behaviours

Exclusivity

- 6.1. **A Lead Partner and a Consortium Member may not apply for the Grant more than once during this process i.e. it may not also be a Lead Partner or a Consortium Member in a separate application.** These

parties are therefore expected to have identified their preferred consortium for the Application and to have entered into their own in principle agreement in support of their one Application.

- 6.2. Motability has issued a number of FAQs explaining its reasons for this [see <https://www.motability.org.uk/impact-and-innovation/innovation/evidence-centre-frequently-asked-questions/> e.g. FAQ 5, FAQ 7 and FAQ 21]

Conflict of interest

- 6.3. These conflict of interest provisions are required to be observed to avoid any actual or any perceived conflict of interest process whether related to the competitive Grant Application process or the Grant Award activities.
- 6.4. You (and your Consortium Members) will be expected to adopt and maintain a fit for purpose conflict of interest policy and declaration of interests register during the Application process and, if successful, thereafter in relation to the Grant Award activities.
- 6.5. You will be expected to avoid any conflict of interest between other Consortium Members, third parties or Motability affiliates.
- 6.6. You will not participate in any temporary Advisory Panel or any permanent Advisory Committee to Motability in connection with the Grant award or Grant activities unless you/he/she/they has/have Motability's prior written consent.
- 6.7. If you are part of a group of companies then these conflict of interests provisions will also apply to any group company; if you are an individual then those conflict of interest provisions will apply to family members.
- 6.8. Motability reserves the right at any time to exclude any party from the Grant Application 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 your 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 bid in a detrimental way and/or may lead to a removal from this process.**

Changes to application & change of control

- 6.9. **If, at any time, there is a change in structure, composition, membership or control of an Applicant (or Consortium Member), or a material change in their economic and financial standing, then the Applicant (as responsible Lead Partner) should immediately, without any delay, inform Motability in writing (by email sent to innovation@motability.org.uk).**

- 6.10. Motability may take steps to re-evaluate the Application or deselect the Application or do such other thing as it sees fit in all the circumstances, based on its assessment of such information.

Confidentiality

- 6.11. We will not disclose to any third party (other than Motability group companies, personnel, governors, advisers, or a party who is contracted to Motability and has a legitimate interest) any confidential information contained in this Application. However, we may share with third parties that your Application has been submitted and share information that is not expressly marked as confidential.

If you **DO NOT** want your Application to be shared with a particular organisation, please highlight this in your email when you make your submission including a short rationale.

- 6.12. All documentation we have provided to you to support your Application and the associated grant competition process, 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.

7. How do we assess Applications?

Role of the selection panel

- 7.1. **The competition and evaluation process will be supported by an independent selection panel and competition advisors who are disability and transport experts.** They will support Motability by setting direction and assisting in grant awardee selection.
- 7.2. The selection panel will be responsible for evaluating applications and making the final grant award decision. They will record the rationale for their scoring against the evaluation criteria and give clear and specific reasons for the outcome of each application.
- 7.3. Evaluators will undertake training specifically tailored to this Grant Competition prior to evaluating applications.

Role of the competition advisors

- 7.4. Motability has appointed a set of competition advisors to act as a trusted advisors to the selection panel, providing initial advice on Applications to ensure that the voice of disabled people is amplified throughout the competition process and that the competition stays true to the procurement goals we have established.

- 7.5. Motability have selected five advisors with a mix of experience and backgrounds to make sure as many disability and transport perspectives as possible are represented.

The Evaluation Process

- 7.6. The evaluation process will be undertaken in two parts: the quality evaluation and the financial evaluation.
- 7.7. Motability is pursuing a two-part evaluation for the final application to ensure qualitative elements as well as value for money are sufficiently explored by the selection panel. That being said, the quality evaluation is of primary importance to Motability, and as such will make up 80% of the total score, with 20% allocated to the financial evaluation.

Quality evaluation

- 7.8. The responses to the qualitative questions in the Annex 1 will be evaluated and independently scored against the criteria and weightings using the scoring protocol set out below.
- 7.9. Applicants should note that following independent evaluation applications will be moderated to ensure the evaluation panel arrives at a consensus score.
- 7.10. All scores will be checked and discussed, even where the same score has been reached by all selection panel members.
- 7.11. If an application scores a “0 – Unacceptable” on any question following moderation, the Selection Panel will cease to score the following answers as the application will be ineligible to receive funding
- 7.12. Applications will be evaluated under the headings shown in Annex 1. The criteria, response guidance, and weightings attributable to each of the criteria are also given in this document. The document shall be completed only once and submitted in line with instructions.

Table 2

Score	Assessment	Interpretation
100	Excellent	Exceeds the requirement. Exceptional demonstration by the Applicant of the relevant ability, understanding, experience, skills, resource, or quality measures required. Evidence identifies factors that will offer significant added value.
90	Good	Satisfies the requirement and offers some additional benefits. Above average demonstration by the Applicant of the relevant ability, understanding, experience, skills, resource, or quality measures required. Evidence identifies factors that will offer some added value.

80	Acceptable	Satisfies the requirement. Demonstration by the Applicant of the relevant ability, understanding, experience, skills, resource, or quality measures required.
60	Minor Reservations	Minor reservations with the response. Some minor reservations about the Applicant's relevant ability, understanding, experience, skills, resources, or quality measures required.
40	Major Reservations	Major reservations with the response. Serious concerns about the Applicant's relevant ability, understanding, experience, skills, resources, or quality measures required.
0	Unacceptable	Does not meet the requirement. Does not comply and/or insufficient information provided to demonstrate that the Applicant has the relevant ability, understanding, experience, skills, resources, or quality measures required. Little or no evidence to support the response.

Financial evaluation

- 7.13. As part of the application stage, **we will seek to establish the proposed costs of the Evidence Centre as well as the approach to costing an Exemplar Project with a value of £1m.**
- 7.14. The Applicant's costing proposal should be included in the Costing Annex. The Costing Annex contains two template spreadsheets both of which should be completed. Both templates will be assessed in line with the guidance provided and will be used to test the feasibility of responses provided to qualitative questions in section 2 – delivery and section 3 - Impact.
- a) **The Evidence Centre Cost Breakdown Template** - seeks to establish the costings of the Evidence Centre over the initial three (3) years of mobilisation and operation.
 - b) **The Exemplar Project Template** - seeks to establish the Lead Partner's approach to how it would cost a project with a value of £1m.

[Note that these templates are in draft. In line with Motability wishing to run a collaborative Grant Competition process Lead applicants are invited to submit comments on this approach. **Lead applicants should return comments to Motability's Innovation Team at innovation@motability.org.uk no later than 5 PM June 15, 2022**]

- 7.15. Annex 2 includes detailed instructions which Applicants are strongly recommended to read and comply with.
- 7.16. Applicants must not amend the layout/headings of the spreadsheet unless instructed to do so.

- 7.17. Once completed save and email the completed Annex 2 including your organisation's name in the title of the costing proposal.
- 7.18. Motability will review the costing proposal to ensure that it has been submitted according to instruction and to ensure that Motability understands the proposal. Where Motability is not clear as to the content or identifies errors, or simply requires clarification to the Application, a request for clarification will be made via email. The Applicant is requested to respond within 2 working days, via email.

8. Application process controls

Due Diligence

- 8.1. 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 fulfil their obligations.
- 8.2. Applicants will have completed general due diligence checks as part of the EOI process. At Application stage further due diligence (as well as the quality and financial evaluation mentioned in this document) will be carried out in relation to organisational policies and reputational due diligence on key individuals; CVs and policies will be asked for as part of this due diligence. And, if material changes are made to the application or makeup of the consortium, parts of the due diligence at EOI stage may need to be carried out again in select areas or for specific organisations.
- 8.3. Motability will expect to see a letter of support from a senior member of the Lead Partner's organisation to provide assurance the Centre is deliverable within the organisation's capabilities and resources.
- 8.4. **It is important to note** that biographies for the leadership team and organograms of overall Consortium structure and associated organisational and key individual roles is required for submission alongside the Application Form as Annex 3.
- 8.5. **It is important to note** that policies used in the lead partner's organisation related to key issues may be required for submission alongside the Application Form as Annex 4.
- 8.6. Lead Partners are also requested to submit a letter indicating that it and all Consortium Members will abide by the Lead Partner's designated policies when working as part of the Evidence Centre, signed by all Consortium Members.

9. Award process and feedback

How decisions will be made

- 9.1. Motability's Board of Governors will make the final decision on any successful Application. Such decision will be binding and not subject to internal appeal at Motability.
- 9.2. Our Board will be advised by the selection panel and competition advisors when making the final decision on the grant award.

Communication of successful applications

- 9.3. The successful Applicant will be notified by Motability of its decision in writing.
- 9.4. The successful Applicant will be expected to enter into a formal Grant Agreement with Motability within [6 weeks] of such notification, otherwise the Grant Award will lapse or may be awarded to another party.
- 9.5. No announcement will be made until the Grant Agreement is entered into and the Grant Award thereby made.

Grant Terms and Conditions and IP Policy

- 9.6. The Grant funding for the Centre that will be awarded by Motability will be restricted funding and will be governed by a formal Grant Agreement.
- 9.7. The successful Applicant who will secure the Grant Award and become the Lead Partner for the Evidence Centre will be required to adhere to Motability's terms and conditions of Grant.
- 9.8. **An indicative Grant Agreement with the terms and conditions of Grant is included in the pack accompanying this Guidance for Applicants document.³**
- 9.9. **Motability has also published an indicative IP Policy. It will form part of the Grant Agreement.**
- 9.10. **Please read these documents carefully.**
- 9.11. **Please ensure that you are able to satisfy the requirements of the Grant Agreement (and IP Policy) before applying.**

³ Applicants should note that a) an application form is an offer to enter into the grant agreement, and b) no amended grant T&C will be accepted, however we will consider requests for minor changes by 15 June 2022.

- 9.12. Any binding commitment of Grant will result only from execution of a formal Grant Agreement and any other necessary documentation by the successful Lead Partner and Motability.

Matters to be resolved post award

- 9.13. Motability would expect the selected Consortium to work closely with Motability's in-house Evaluation Team to develop a **detailed Outcomes Framework** for the Evidence Centre, ahead of Centre launch.
- 9.14. As per the indicative Grant Agreement, Motability will develop branding guidelines for the Evidence Centre. **Branding for the Evidence Centre will be finalised following discussions between the Motability Communications Team and the successful lead partner, on behalf of Consortium members. The branding proposal for the Evidence Centre will need to safeguard Motability's interests and align to the objectives of the Evidence Centre and the terms and conditions in the Grant Agreement to be accepted.**
- 9.15. Lead applicants are asked to **outline the approach to mobilisation of the Evidence Centre (see question 5.1 of the evaluation criteria)**. Motability will work with the Lead Partner to ensure that proposals submitted are fit for purpose and meet the aims of the Evidence Centre.

Communication to unsuccessful Applicants

- 9.16. Any unsuccessful Applicant will be notified by Motability of its decision in writing.
- 9.17. Motability will aim to provide feedback to all Applicants. However, it may not always be possible to give detailed or specific information to an Applicant, due to resources, policy effectiveness, data protection/confidentiality or other reasons and Motability therefore reserves its position in this respect.
- 9.18. If you feel that the feedback provided alongside our decision is factually incorrect then you can contact the member of our team named in the decision letter. However, our decision will be binding and not subject to internal appeal at Motability.

Exclusions

- 9.19. The details provided in this Guidance for Applicants document comprises information which we believe may be relevant for the purposes of your Grant Application. Motability makes no representation or warranty as to its 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.

- 9.20. All matters relative to this Grant Application process shall, pending exchange of the Grant Agreement with a successful Applicant, remain strictly subject to contract.
- 9.21. The content of this document and any supporting information submitted by us at any time related to the Grant Application process is provided for information purposes only.

10. Appendix 1 - Role of the interview process

- 10.1. This section sets out in detail how the interviews will run, how the information will be used and what happens were issues to arise.

Purpose of the interview

- 10.2. The purpose of the interviews, which will take place in early to mid-July with Lead Partners and Consortium Members that were successful at EOI stage, is to better understand the ideas, people and leadership behind the consortia.
- 10.3. Questions will focus on why Lead Partners and Consortium Members are interested in applying for the Evidence Centre, the Consortium's high level vision, the capabilities of the Lead Partner and how they are bringing Consortium Members together, what value supporting members add to the Consortium, the Consortium's 'take' on the 11 problem areas, what Consortium Members feel is unique about their particular approach, and the personal leadership of the Consortium – e.g. the passions and interests of the people leading from their respective organisations.
- 10.4. We would expect to have a representative of each organisation in the Consortium present at the interview. It is important to note that at the time of interview, there may be supporting partners that were successful at EOI stage as part of multiple consortia. These supporting partners have the option of either deciding by the interview date which Lead Partner/Consortium they want to exclusively apply with, and only attend that interview, or attend multiple interviews as part of multiple consortia. However, per the FAQs linked from the Evidence Centre web page, by August 12 (final application deadline), supporting partners must deciding to only apply as part of one Consortium.

How the information will be used

- 10.5. The information provided during the interview will inform the understanding Motability's selection panel have of the respective applications and the ideas, people and organisations behind them. The information provided will not serve as formal criteria for the decision-making process.
- 10.6. Feedback will be provided from Motability's selection panel to interviewees by way of Motability's Innovation Team. The feedback will not focus on performance, rather areas of concern or uncertainty that the selection panel would want to see addressed at Final Application stage.

What happens if issues arise

- 10.7. If, for whatever reason, a Consortium has an interview at which issues arise, resulting in a negative experience, they should send details of their complaint to innovation@motability.org.uk
- 10.8. The Innovation Team at Motability is running the competition process and is not a part of the selection panel, and will therefore be able to take independent steps to feedback and address your issues.

How participants should prepare for the interview

- 10.9. The Lead Partner should prepare for the interview by determining who will attend, how they will introduce respective roles and responsibilities, and jointly approach the rough questions outlined under the 'purpose of the interview' section. Attending representatives should also let the Motability Innovation Team know if they have any accessibility requirements for what will be an online Zoom interview.

How the interview process will work

- 10.10. Expression of Interest (EOI) decisions will be sent to Lead Partners on approximately July 1, 2022, from innovation@motability.org.uk, along with a request for availability for a 1.5 hour interview over Zoom w/c July 11 for consortia successful at EOI stage.
- 10.11. Interviews will be led by a subset of selection panel members, made up of Motability's Governors and CEO, and moderated by a member of Motability's Innovation Team.
- 10.12. It is important to note that Motability's selection panel may want to meet once more with Applicants after receiving Final Applications, if they have additional questions not addressed by the Final Application. We are holding w/c September 12 for this purpose.



Grant Application Form

1. Evaluation criteria

Introduction

- 1.1. Motability is pursuing a two-part evaluation for the final application, a quality evaluation and a financial evaluation. This will ensure qualitative elements as well as value for money are sufficiently explored by the selection panel.
- 1.2. The quality evaluation will comprise of the selection panel evaluators scoring the responses to the following questions in Annex 1:
 1. Organisations and Consortium Information
 2. Delivery of the Evidence Centre
 3. Pathways to Impact
 4. Stakeholder Engagement
 5. Grant mobilisation
- 1.3. The financial evaluation will comprise of the selection panel scoring the responses to the two costing templates in Annex 2, along with corresponding commentary to provide further context and explanation.
- 1.4. The quality evaluation is of primary importance to Motability, and as such will make up 80% of the total score, with the remaining 20% has been allocated to the financial evaluation.

Purpose

- 1.5. Annex 1 sets out the proposed quality evaluation criteria for the application stage of the evidence centre competition as well as:
 - Background and guidance for each grouping of criteria (to allow some flexibility as to how the applicants respond to questions within the grouping)
 - Proposed indicative weightings of each question
 - Word count of responses required
- 1.6. Note that the following guidance will be included against each question:
- 1.7. *Insert your response directly below, Calibri Font size 11. Your response must not exceed the word count limit. Compliance with the word limit requirement shall be checked. Any words over the prescribed limit shall not be evaluated. Side margins must not be altered. Diagrams are permitted.*
- 1.8. *The selection panel must be confident that the response demonstrates that the development phase for the evidence centre shall go live subject to Grant Agreement on XXX.*

- 1.9. Annex 2 sets out the proposed financial evaluation criteria for the application stage of the evidence centre competition outlining:
- Background as to how to fill out the cost templates and what is expected to be included
 - Proposed indicative weightings of each question
- 1.10. **Responses to these Annexes and all associated templates, taken together, will form part of the Grant terms and conditions and thereby any Grant Agreement.**

2. Annex 1 - Quality

<p>1. Organisations and Consortium Information</p> <p>Guidance notes</p> <p>The grant competition is looking for a Lead Partner to form a consortium to operate the Evidence Centre. These questions seek information about the Consortium you propose to create, the experience and expertise of the organisations involved and their capabilities, and how you and this consortium would deliver on the strategic aims of the Evidence Centre.</p> <p>Your answers to the questions could include:</p> <ul style="list-style-type: none"> • Information on the different organisations which are involved in the Consortium, including an outline of their roles and responsibilities in developing and delivering the Evidence Centre • An overview of the activity which the organisations in the Consortium are currently undertaking, or have done previously, which relate to disabled people and accessible transport • Any governance structures which will be implemented to manage the Consortium, in line with the market briefing pack’s steers on governance, and how these structures will best meet the aims of the centre • A proposal on how the organisations involved in the Application plan to collaborate at all stages of the Evidence Centre’s development and delivery to take a UK wide approach • How the Consortium will adapt to face new accessible transport challenges (this can include how it will onboard new / future members if required) • Applicants should include details of how Consortium Member organisations previously have and will over the seven years of funding address equality, diversity and inclusion (EDI) • Note: ‘whole systems’ in 1.3 refers to the eco-system of organisations, stakeholders, government and wider industry in the transport and disability sectors <p>There are 3 questions in the Organisations and Consortium information section.</p> <p>The weighting of this section is 20% of the total marks. Weighting per question is detailed below.</p>		
<p>1.1 Detail the organisations which are involved in the Consortium, their proposed roles and responsibilities in developing and delivering the Evidence Centre and the equality, diversity and inclusion principles and policies of the organisations involved in the consortium. [Accompanied by Annex 3 Organogram].</p>	<p>Available Score</p>	<p>Weighting</p>

Maximum 1,000 words	Not scored - For info only	N/A
1.2 Provide an overview of activities which the proposed consortium members currently undertake, or have previously undertaken, in the disability and/or transport sectors and why they have been selected. Include details of any results and impact that these activities have achieved in improving outcomes for disabled people and how equality, diversity and inclusion practices have been included within these activities.	Available Score	Weighting
	0 - 100	10%
maximum 750 words		
1.3 Outline how this Consortium represents a whole systems approach to meeting the requirements of disabled people. Include any relevant examples of future planned / forward looking cross-organisational work that will bring together initiatives which were previously operating separately, or worked across existing siloes.	0- 100	10%
maximum 750 words		
2. Delivery of the Evidence Centre		
Guidance notes		
<p>These questions seek to understand your proposed delivery model, how it shall be implemented and the activities that will be undertaken as a result of receiving grant funding. They are also to establish how the delivery model will be set up to adapt over time, including bringing on new subcontractors to deliver specific projects (or use grant funding as appropriate).</p>		
Your answers to the questions should include		
<ul style="list-style-type: none"> • An overview of the proposed delivery model and how consortium members will collaborate and lead • Your view on the main problem areas facing disabled people, including key activities, outputs, and outcomes (both quick wins and longer term projects) that you expect the Evidence Centre to achieve at its core, across the three areas of understanding the problem, evolving policy and practice, and understanding solutions • A completed exemplar project which sets out your approach to delivering a project to address a specific issue in the transport and disability sector • An outline of why your proposed delivery model is impactful and will drive real change in the sector • How you would utilise subcontractors and/or grant giving to address particular problem areas • Your approach to ongoing monitoring and evaluation of projects within the Evidence Centre and activities at the centre-level, e.g. measuring impact of engagement and dissemination • Details of your approach to resourcing the Centre, including how you will ensure diversity and inclusion in staffing and projects • A detailed delivery plan and detailed timeline • A risk register for the mobilisation period • We have provided several templates which we require you to fill out. These are: Project Plan template, Resourcing template and a Risk Register 		

<p>There are four questions in the Delivery of the Evidence Centre section.</p> <p>The weighting of this section is 40% of the total marks. Weighting per question is detailed below.</p>		
<p>2.1 Describe, in detail, the proposed delivery and governance model for the Evidence Centre and how consortium members will collaborate and demonstrate personal leadership in their area of specified expertise. Include an outline of why your proposed delivery model is impactful and will drive real systems change in the sector.</p> <p>maximum 750 words</p>	<p>Available score</p>	<p>Weighting</p>
	<p>0-100</p>	<p>10%</p>
<p>2.2 Explain your view of the main problem areas faced by disabled people when it comes to accessible and inclusive transport. Outline specific issues and areas in the transport and disability sector.</p> <p>maximum 750 words</p>	<p>Available score</p>	<p>Weighting</p>
	<p>0 - 100</p>	<p>7.5%</p>
<p>2.3 Explain the activities that will be undertaken and how they will achieve the targeted outputs and outcomes you've identified to tackle the problem areas outlined above. Include an outline of short-term 'quick wins' versus sought longer-term, systematic changes.</p> <p>maximum 750 words</p>	<p>Available score</p>	<p>Weighting</p>
	<p>0 - 100</p>	<p>7.5%</p>
<p>2.4 Detail your approach to monitoring and evaluation, e.g. how to measure the impact of the Evidence Centre project activities, outputs, and outcomes.</p> <p>maximum 500 words</p>	<p>Available score</p>	<p>Weighting</p>
	<p>0-100</p>	<p>5%</p>
<p>2.5 Detail how the Consortium will mobilise the Evidence Centre in time for expected launch date of January 2023, including:</p> <ol style="list-style-type: none"> 1. A completed project plan including information on the various workstreams required, outlining key milestones and timeframes. This should detail how you will mobilise the Evidence Centre to begin undertaking activities. 2. A completed resourcing template and strategy. This should include all staff roles which are required for the delivery of the Evidence Centre, including those yet to be recruited, as well as the proposed staffing mix from an EDI perspective, and the equality, diversity and inclusion principles applied for future recruitment. 3. A completed Risk Register, which should include any mitigations which will be put in place to manage this risk. 	<p>Available score</p>	<p>Weighting</p>
	<p>0-100</p>	<p>10%</p>

<p>Note to Lead Partners/Applicants: Motability will provide templates for these three documents in the final invitation to submit.</p> <p>We have provided several templates which should be used to answer question 2.5. These are: Project Plan template, Resourcing Template and a Risk Register. Complete and submit this as directed in the Guidance for Applicants on the Final Stage Grant Application document.</p>		
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3. Pathways to Impact

Guidance notes

These questions seek to understand how your proposed approach to developing and delivering the Evidence Centre will offer maximum impact for the disabled people in the UK and provide social value for money. We are particularly interested in how the delivery model will ensure long term sustainability of the Evidence Centre.

Your answers to the questions should include

- How the Centre will create practical tangible benefits through the application of research and the development of pilot solutions
- How you will ensure the creation, communication, and application of the Centre's outputs have the greatest impact and the implementation channels the Consortium will use to effectively support dissemination and engagement of these outputs
- How you will achieve maximum benefit through the use of subcontracting and/or grant making as appropriate. Note that responses which reply on a pure subcontracting or grant making response will score lower as the Centre should always have a delivery core
- Your desired approach to developing and commercialising Intellectual Property
- An outline of how decision making will factor value for money considerations
- How the service delivery model will ensure that expenditure is focused on achieving outcomes and not overheads

There are 2 questions in the Pathways to Impact section.

The weighting of this section is 20% of the total marks. Weighting per question is detailed below.

<p>3.1 Explain how your delivery model and existing processes and resources will ensure the Consortium will disseminate outputs in a way that maximises strategic impact for disabled people and other beneficiaries.</p> <p>maximum 500 words</p>	<p>Available Score</p> <p>0- 100</p>	<p>Weighting</p> <p>10%</p>
<p>3.2 Explain how your approach will improve evidence generation, support the application of research, and result in practical outcomes being implemented throughout the accessible transport sector.</p>	<p>Available Score</p>	<p>Weighting</p>

maximum 500 words	0- 100	10%
<ul style="list-style-type: none"> Stakeholder Engagement <p>Guidance notes</p> <p>These questions seek to understand how relevant stakeholders were engaged in the development of your application for grant funding from Motability, and how they will be involved over the life of the Evidence Centre. We are particularly interested in how people with a diverse range of lived experiences of disability have been involved throughout the development process, and how you intend to engage them in an ongoing way.</p> <p>Your answers to the questions should include:</p> <ul style="list-style-type: none"> An outline of how stakeholders were involved in the design of your approach, including specific details of the organisations and individuals who were engaged. How you will ensure diversity and inclusion are factored into future communications, dissemination, and stakeholder engagement activities Your approach to ensuring stakeholders across the transport system are engaged and relationships developed/managed throughout the life of the centre and beyond Your approach to ensuring the application of findings and insights generated by stakeholder engagement in the centre’s activities, especially the insights from those with lived experiences Note: ‘whole transport system’ in 4.1 refers to the eco-system of organisations, stakeholders, government and wider industry in the transport and disability sectors <p>There are 2 questions in the Stakeholder and Service User engagement section.</p> <p>The weighting of this section is 15% of the total marks. Weighting per question is detailed below.</p>		
<p>4.1 Explain how stakeholders from across the whole transport system will be engaged in the planning, set up and delivery of the Evidence Centre.</p> <p>maximum 500 words</p>	Available score	Weighting
	0-100	5%
<p>4.2 Outline how you will involve and collaborate with people who have a lived experience of disability when developing your approach and delivering the Centre. This could include details of the following:</p> <ul style="list-style-type: none"> •How people with a diverse range of lived experiences have been involved and collaborated in the development of the Evidence Centre •How you anticipate a diverse range of people with lived experiences will continue to be involved and collaborate in the delivery of the Evidence Centre •How you plan to engage and collaborate with disabled people from a diverse range of backgrounds and lived experiences •How you plan to leverage previously undertaken research and findings including insights around lived experiences in the transport and disability sector <p>maximum 750 words</p>	Available score	Weighting
	0 - 100	10%

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5. Grant mobilisation

Guidance notes

The mobilisation of the Centre is a key part of the programme. These questions seek to understand the approach to ensuring the Centre is fully operational and ready to deliver by approximately January to March 2023) and all supporting resources and processes are ready and in place.

Your answers to the questions should include

- Your approach to recruiting and training the right people at the right time to support the delivery model you have identified
- Implementing quick-win projects identified in the planning phase
- The approach to managing risk (especially delays) during the mobilisation phase
- Details of the desired approach to working with the Motability team during the mobilisation phase

There is 1 question in the Mobilisation section.

The weighting of this section is 5% of the total marks. Weighting per question is detailed below.

5.1 Outline the approach to mobilisation of the Evidence Centre, including how the Consortium would rapidly implement quick-win projects and work with the Motability team and mitigate risk of delay.	Available Score	Weighting
	0- 100	5%
maximum 500 words		

3. Annex 2 – Financial evaluation: costing template

6. Costing

Guidance notes

Costing will be evaluated separately from quality and given its own % score because although the quality of applications and delivery of the centre is our primary interest, we want to ensure that value for money is still being achieved and that the quality responses provided in Annex 1 are feasible and deliverable. The scores of the quality and financial evaluations will then be combined to give a weighted final score for final evaluation purposes. Quality-cost will be weighted 80:20

Please detail as part of your submission how you will ensure that any existing assets, resources, or capital expenditure are not subsidised via the Evidence Centre grant funding.

As part of the submission applicants must complete the costing templates and a description document. This is to measure applicants approaches to costing and managing an exemplar project and how the costs of the Evidence Centre will be managed over the first 3 years. Guidance on how to populate these templates can be found within the costing templates.

Motability recognises that organisations with different forms/statuses will have different limitations on what they are able to recover via charitable grant funding. The affected Consortium member or Lead Partner is responsible for seeking legal and financial advice on such matters and to reflect these matters back in the two templates.

There are 2 question in the financial evaluation.

The weighting of this section is 20% of the total marks. Weighting per question is detailed below.

<p>6.1 Please complete the attached Evidence Centre 3-year cost breakdown template. Please indicate any areas of discount, economies of scale or the application of low bono rates within the costing template.</p> <p>Note the template will capture:</p> <ul style="list-style-type: none"> • Staff costs • Training costs • Frontline and back-office costs • Management costs • Overheads (<i>please provide evidence or justification that costs are specific to Evidence Centre activities</i>) <p>We understand this is over a prolonged timeframe and costing could be subject to changes in circumstance or strategy, however this indicative template is to provide some indication and the chance for justification of Evidence Centre costing.</p>	<p>Available Score</p>	<p>Weighting</p>
	<p>0- 100</p>	<p>50% (10% of total score)</p>
<p>6.2 Please complete the attached exemplar project costing template. This exemplar project template submission is to set out your approach to pricing a specific project and the defined objectives as outlined in the template description. Please indicate any areas of discount, economies of scale or the application of low bono rates within the costing template.</p> <p>Note the template will capture:</p> <ul style="list-style-type: none"> • Staff costs by staff members • Training costs • Frontline and back-office costs • Management costs • Overheads (<i>please provide evidence or justification that costs are specific to Evidence Centre activities</i>) 	<p>Available Score</p>	<p>Weighting</p>
	<p>0- 100</p>	<p>50% (10% of total score)</p>

4. **Annex 3 – Biographies and Organograms**

- 4.1. Please include biographies for the leadership team and organograms of the overall Consortium structure and organisational and individual roles.

5. **Annex 4 – Policies**

- 5.1. Please submit links to/attachments containing the following policies:
 - 5.1.1. *[List of policies to be provided].*