



## **Review of 2015 Freedom Pass Renewal**

### **Call for quotations – Specification**

Please note that the term 'consultancy' in this specification is used to describe the applying consultancy or agency to this call for quotations.

#### **1.0 What is the role of London Councils?**

London Councils represents London's 32 borough councils and the City of London. It is a cross-party organisation that works on behalf of all of its member authorities regardless of political persuasion.

London Councils makes the case to government, the mayor and others to get the best deal for Londoners and to ensure that our member authorities have the resources, freedoms and powers to do the best possible job for their residents and local businesses.

London Councils runs a number of direct services for member authorities including the Freedom Pass scheme, Taxicard, London Lorry Control and Health Emergency Badge. It also runs an independent parking appeals service and a pan-London grants programme for voluntary organisations.

#### **2.0. What is the Freedom Pass Scheme?**

The London Freedom Pass Scheme is managed by London Councils on behalf of London's 32 borough councils and the City of London. The Freedom Pass for older and disabled people is funded by the local borough council and gives free travel on most public transport in London 24 hours a day (after 9.30am on most National Rail services within the London area), including all day at weekends and on public holidays. The pass may also be used to travel on local bus services in the rest of England under the terms of the Concessionary Bus Travel Act 2007.

The London Freedom Pass scheme has been operating for 17 years. There are currently 1,200,790 Freedom Pass holders in London; this is made up of 1,046,804 Older Person holders, 147,125 Disabled Person holders and 6,861 Discretionary Disabled holders. Discretionary Disabled passes are issued at the discretion of the local borough to people who do not meet the statutory eligibility criteria and are only valid for travel on public transport in London. The scheme in 2015/16 will cost London boroughs £353m. Freedom Pass holders on average make 287 journeys a year.

### **3.0 Freedom Pass Renewal**

By law Freedom Passes cannot be issued with an expiry date of more than five years. Every five years pass holders must renew their passes to ensure that they still meet the eligibility criteria for the scheme. Interim reviews and reassessments are also carried out during the five year period to identify pass holders who have died, moved out of London, changed address within London or no longer meet the criteria for disabled pass holders as set out in the Transport Act 2000.

The last bulk renewal was in 2010 when pass holders had to reapply through their local Post Office. For the 2015 renewal, holders of the older persons Freedom Pass who had a pass with an expiry date of 31 March 2015 were invited, for the first time, to complete their renewal online or by post. Please note the borough exceptions in Appendix A.

Older Person pass holders were written to over a 6 week period from week beginning 3 November 2014. The letter invited the pass holder to renew via the Freedom Pass website or return their renewal form by post.

The pass holder had two options to renew online:

1. To go online and create an account by registering an e-mail address, creating a password, entering a unique verification code (UVC), which was on the letter they received, and entering their date of birth and the last 4 digits of their Freedom Pass. This brought up the applicant's personal details.
2. To renew online without creating an account. If the person did not have an e-mail address or did not want to create an account, the pass holder had to provide the same information as above except for providing an e-mail address and creating a password. This option was mainly intended to help non-internet users to renew online.

There were benefits to creating an account as the applicant received an e-mail to confirm the application had been received, they could also track the progress of the application online, and received an e-mail when the pass was dispatched. Those who renewed online without creating an account could track progress online, but did not receive any e-mail notifications.

If the pass holders' details had not changed they had to confirm this and the renewal was complete. If the applicant indicates a change of name or address the portal automatically performed a residency check in the background to verify the new details. If they are verified the application is approved. If the check rejects the new details the applicant had the option to scan and upload their evidence online.



For pass holders who could not go online to renew they had the option to return their letter and form in the post. The form had to be signed and proofs provided if their name or address details had changed.

Renewed passes were posted from 5 January 2015 onwards in the order in which the applications were received. All renewed passes were sent by 31 March 2015.

Disabled Pass holders were not invited to apply online for the reissue, but were assessed for continuing eligibility by their borough; boroughs were asked to complete reassessments by 31 December 2014. Boroughs hotlisted (stopped) all passes of those no longer deemed eligible either because they no longer met the eligibility criteria, moved out of London or were deceased. ESP issued replacement 2020 passes to all disabled pass holders who were still active on the database from January 2015.

London Councils contractor, Journeycall, provided contact centre services. The Freedom Pass helpline had a dedicated team to respond to renewal related calls, emails and post.

Please refer to Appendix B for figures of completed renewals, Appendix C for renewals completed by borough and Appendix D for actual vs. forecasted calls and emails received and handled.

#### **4.0 Specification Introduction**

London Councils objectives are to:

- Review the overall success of the 2015 Freedom Pass renewal campaign
- Compare the different processes and approaches to the renewal of London Councils, LB Barking and Dagenham, LB Camden and LB Sutton. Please refer to Appendix A on the various renewal processes.
- Explore pass holders' satisfaction with the renewal process and gain feedback from a limited sample of people who renewed their Freedom Pass using the different approaches outlined.
- Examine borough officers' and stakeholders' satisfaction with the renewal process for Older Persons and Disabled Persons.
- Identify lessons learnt and areas for improvement and for future annual renewals.

Factors to be considered:

- The number and percentage of passes successfully renewed by Older and Disabled Persons in London

- Accuracy of residential and identity checks on pass holders
- Accuracy of passes issued i.e. passes sent to incorrect addresses, addresses where the pass holder is no longer resident, holders who are no longer eligible or who do not meet the disabled criteria
- Cost and potential cost avoidance for future renewals
- Partnership with boroughs, stakeholders and contractors
- Areas of success and innovation
- Equal opportunity for all pass holders to submit a renewal
- Success of the publicity campaign
- Performance of ESP and JourneyCall

Possible measures to be considered:

- Complaints received.
- Number of renewed passes returned as undelivered.
- How many Camden passes were returned as undelivered.
- Online survey results from the renewal website.

#### **5.0 Submission of quotations:**

Please send your quotations by email to Hannah Davies in the format set out below. Please also set out your proposed methodology and describe how the skills and experience of your consultancy and nominated consultant(s) will allow for the delivery of the required services to a high standard. You may enclose CVs, examples of similar projects, and evidence of where you think you can add value.

- **Personnel**
- **Methodology**
- **Timescale**
- **Cost**

**Quotations submission deadline: 14:00 hrs. on 20 July 2015.**

#### **6.0 Required Outputs**

A report covering the following (Word and PDF copies to be provided):

An executive summary  
Introduction  
Methodology  
Research and survey findings

Detailed analysis  
 Conclusions  
 Recommendations  
 Action plan  
 Case Study

**7.0 Timetable:**

The timetable for the project is as follows:

**Stages 1: Issue and Evaluation of Spec**

01/07/2015	Specification issued to prospective consultants
20/07/2015	Deadline for consultant responses
22/07/2015	Consultant proposals to be evaluated
24/07/2015	Completion of evaluation process and recommendation of preferred bidder

**Stage 2:**

03/08/2015	Project start date
04/09/2015	Deadline draft report / Presentation
18/09/2015	Final report deadline / Presentation

**8.0 Tender/bid Evaluation:**

Responses to this call for quotations will be evaluated subject to the following weightings: 35% on methodology; 35% in relevant experience; and 30 % on cost (including an evaluation on the number of days assigned to the project).

**9.0 Budget:**

The budget for this project will be up to £15,000. Please provide an itemised budget; including day rates, cost of staff and any other associated costs.

**10.0 Data Protection:**

London Councils data protection policy for Freedom Pass notifies pass holders that: *'London Councils and the London Borough in which you live will be responsible for your information which they, and their agents, will use to administer the Freedom Pass scheme, for customer services and for research. Your information will not be used for*



*marketing and will only be shared with other organisations (e.g. other local authorities, Transport for London, government departments and law enforcement agencies) to provide the services or where it is legal to do so (e.g. to detect and prevent crimes and protect public funds). Your information may be matched with data from other sources, including CCTV or ticket usage data.'*

**11. Contact details:**

The site is the office of London Councils, Southwark Street, London, SE1 0AL. The main contact is Hannah Davies within the Freedom Pass Team.

Email: [hannah.davies@londoncouncils.gov.uk](mailto:hannah.davies@londoncouncils.gov.uk)

Tel. 020 7934 9833

Web: <http://www.londoncouncils.gov.uk/>

## **Appendix A**

### **Borough Exceptions to the renewal**

#### London Borough of Barking and Dagenham

The letter sent to Barking and Dagenham residents advised that pass holders could not go to their local one stop shop for help unless they were going to a library to use a computer to renew online.

#### London Borough of Camden

Camden undertook internal verification of residency details and passes were automatically reissued to people that passed the checks from January 2015. Those that did not pass the checks were written to and asked to submit evidence to Camden to prove their qualification for the scheme.

#### London Borough of Croydon

The letter sent to Croydon residents encouraged pass holders to attend their local library or Croydon offices for help renewing online.

#### London Borough of Sutton

Sutton invited pass holders to renew their passes through the online portal or through their library networks. The letters sent to Sutton residents did not include a renewal form to return by post but provided dates of when residents could visit their local library for help.