
The Mayor's Care and Support Specialised Housing Fund

Quick Guidance for IMS 'Experts'

Version 1.0 (GLA)

Version	Date Issued	Details
1.0	26/10/2012	First issue
1.0 (GLA)	26/10/2012	First issue

Introduction

A. Purpose of this guidance

The purpose of this document is to provide a quick guide to the key changes for experienced Investment Management System (IMS) users who are bidding for funding through the Care and Support Specialised Housing Fund programme 2013-18 on IMS.

IMS guidance can be found at the following address on the Greater London Authority website. <http://www.london.gov.uk/priorities/housing/affordable-housing>

The GLA share the IMS with the Homes and Communities Agency, and apart from different geographical areas use of the system remains effectively the same. Therefore in the guidance below you may see references to geographical areas that are outside London.

More detailed guidance on bidding for Care and Support funding can be found at the following address: <http://www.london.gov.uk/priorities/housing/mayors-care-and-supported-housing-fund>

B. Mayor's Care and Support Specialised Housing Fund - Bidding in IMS

The Mayor's Care and Support Specialised Housing Fund will operate within the GLA's IMS Offers environment.

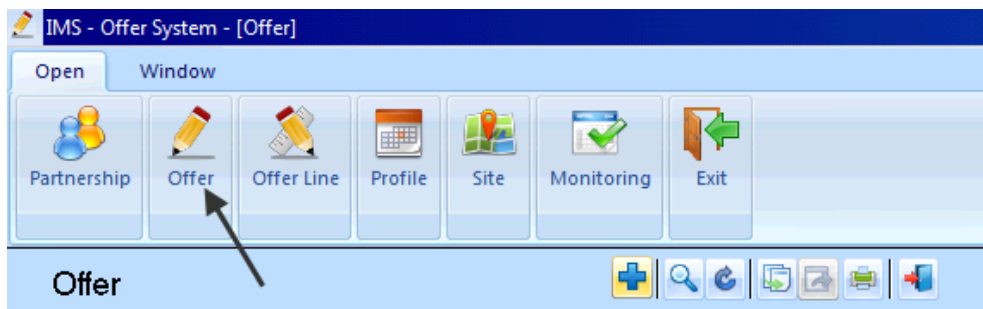
- Bidding is currently open until noon on the 18th January 2013.
- Bidding is open to all organisations who are, or intend to become, qualified as GLA Investment Partners.
- It is not intended that all of the programme will be allocated in this first bid round. At this stage bids should only be made on named schemes where plans are far enough advanced to give some certainty of delivery and where local authority agreement for the proposals has already been achieved.
- In this early round of bidding, priority will be given to schemes which have already achieved, or are well advanced in the process of achieving, planning consent and confirmation of any necessary revenue funding, and in particular those which can start on site in the first year of the fund (2013/14).
- Each scheme forming part of the bid should be listed under a separate Offer Line.

C. User Support

For help accessing the IMS system or to report a problem, please contact the GLA helpdesk by telephone on 0207 9834333, or by email at TGServiceDesk@london.gov.uk

1. Creating your Partnership for Care and Support Bidding

- Bidders are able to set up a new partnership in order to create offers of a new offer type, *Care and Support*. The existing partnership for 2011-15 for providers already using IMS can be used to bid for Care and Support.
- In order to create a bid for submission providers need to click on the 'Offer' button



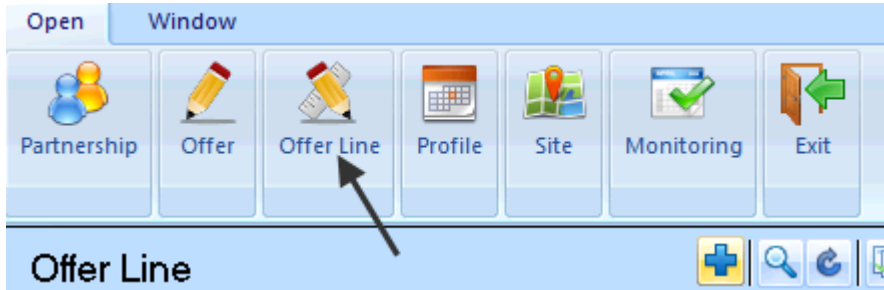
- Click on the 'Plus' icon to create a new record.
- Pick your partnership name from the dropdown.
- This activates the Agreement box and existing providers should choose their 2011/15 agreement name.
- From the Offer Type dropdown list providers must choose the Care and Support option for this bidding round, as shown below. Other options are available for selection but it is essential that bidders select the Care and Support route.



- Complete the remaining elements of the Offer screen as has been done for the AHP and click Save

2. Creating Offer Lines and Profiles within your Offer

- Click on the Offer Line icon from the top menu bar and then choose the 'Plus' icon once again to begin to create the first Offer Line.



- One Offer Line should be submitted for each individual scheme to be bid for.
- The first active tab is **Geography**, enter the GLA Operating Area and Local Authority code for this particular scheme.
- Pressing the Save button in the bottom left-hand corner of the screen saves that data, as well as activating the next two tabs, **Products** and **Site**.

Offer Line - [] - [SAVED]

Partnership: Group Ltd 2011/15 - Outside London
 Agreement: Group Ltd 2011/15
 Offer name: Care and Support Bid Submission 2012
 Offer line name: Bredgar, Kent Scheme

Offer line ID: 1796
 Status: New
 Data status: Invalid


Geography | **Products** | Site | Scheme and Client Groups | Provider Contributions

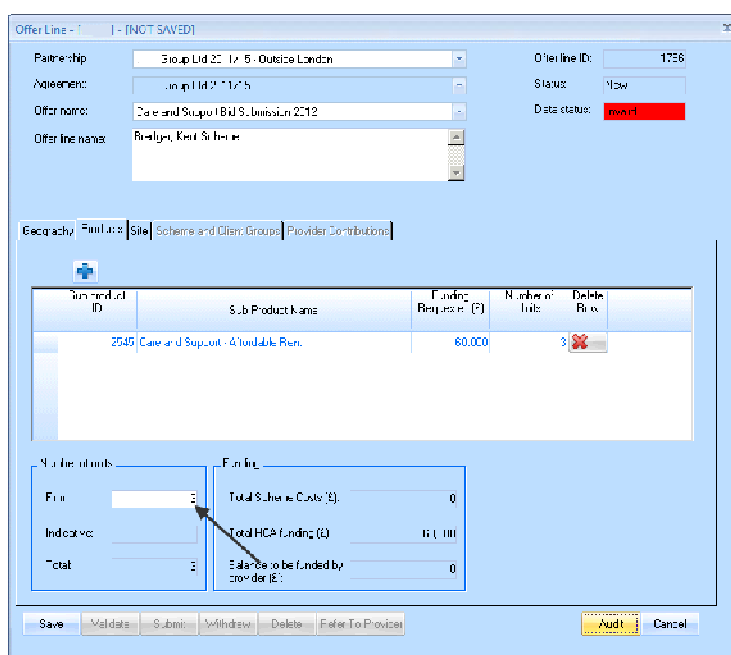
Sub product ID	Sub Product Name	Funding Requested (£)	Number of Units	Delete Row

Number of units: Firm: Indicative: 0 Total: 0

Funding: Total Scheme Costs (£): 0 Total HCA funding (£): Balance to be funded by provider (£): 0

Save Validate Submit Withdraw Delete Refer To Provider Audit Cancel

- Click on the  icon in order to create a new sub product
- The first required information is the sub product dropdown where there are two choices; Care and Support - Affordable Rent or Care and Support – Affordable Home Ownership. Choose the appropriate option for the scheme as well as entering the number of units and funding requested.
- An offer line can contain both Affordable Rent and Affordable Home Ownership units, complete all of the details for the Affordable Rent units and then repeat the process for the Affordable Home Ownership units when necessary.
- Clicking the save button will then activate the three relevant tabs of Revenue Income, Unit Size and Mix and Delivery Profile. *[Payment Rate and Capital Contributions are not relevant to this bidding process so are 'greyed out'.]*
- Complete each of the white boxes in the **Revenue Income** tab with figures that have been estimated for the scheme. There are four boxes to complete for Affordable Rent schemes and one to complete for Affordable Home Ownership, depending on which was chosen.
- Add the number of units into each of the boxes as appropriate for the **Unit Size and Mix**, the same unit can occur in more than one box. Bidders must set the number of units for the 'Supported and Older People' category to equal the total number of units for that element.
- The final tab to complete is **Delivery Profile**; bidders should complete the timetable to show in which quarter the units will start and in which quarter they will complete. There are checks in place within IMS to ensure that the payments entered alongside the two milestones are as set by the payment controls (i.e. 50% split of the funding requested).
- Once the sub products have been entered for the scheme, add the total number of units into the Firm units box as indicated by the arrow in the diagram below.



Offer Line - 1 | - [NOT SAVED]


Partnership: Group Ltd 2015 - Outside London | Offerline ID: 1728

Assessment: Group Ltd 2015 | Status: New

Offer name: Care and Support Bid Submission 2012 | Date stamp: **expired**

Offer line name: Residential Care Services

Activity | Financials | Site | Scheme and Client Groups | Provider Contributions

Item and ID	Sub Product Name	Funding Request (£)	Number of Units	Delete Box
2545	Care and Support - Affordable Rent	60,000	9	

Number of units: Firm: | Total Scheme Costs (£): 0

Indicative: | Total HCA Funding (£): 60,000

Total: | Subs to be funded by provider (£): 0

Buttons: Save, Validate, Submit, Withdraw, Delete, Refer To Provider, Audit, Cancel

- Now that the Products tab has been completed providers should move onto the **Site** tab, which is unchanged from the AHP submission.
- The Site information is now complete, which has activated the next tab in the Offer Line screen, **Scheme and Client Groups**.
- A completed example of this screen is shown below. Bidding organisations are required to enter data appropriate to their scheme on areas such as the planning date and status as well as the total scheme costs. Once entered, press the Save button. Once again this activates another tab, **Provider Contributions**.

Offer Line - [] - [NOT SAVED]

Partnership: Group Ltd 2011/15 Outside London
 Agreement: Group Ltd 2011/15
 Offer name: Care and Support Bid Submission 2012
 Offer line name: Bredgar, Kent Scheme

Offer line ID: 1796
 Status: New
 Data status: Invalid

Geography | Products | Site | **Scheme and Client Groups** | Provider Contributions

Design Type: Specialist housing for disabled adults without care and/or support

Has revenue funding been agreed in this proposal? No

Delivery Route: New Build

Planning Status: Achieved

Planning Date: 19-Oct-2012

Scheme Costs (£)

Acquisition: 1
 Works Costs: 265,000
 On Costs: 45,000
 Total Scheme Costs: 310,001

Client Group	Number of Units	Number of Persons
Older people	0	0
People with learning difficulties	0	0
✓ People with physical or sensory disabilities	3	3
People with mental health problems	0	0
✓ Total:	3	3

Save Validate Submit Withdraw Delete Refer To Provider Audit Cancel

- Providers enter relevant amounts, along with a comment, against the fields listed under the **Provider Contributions** tab. This is totalled at the foot of this screen to be the total balance funded by the provider.
- There is a validation on this screen that ensures the total funding requested added to the balance to be funded by the provider must be equal to the total scheme costs listed on the Scheme and Client Groups tab.
- This completes the required information for an Offer Line. Providers should validate this Offer Line and repeat the process for each of the other schemes they are bidding for.
- Once all Offer Lines are validated providers should validate and submit their overall Offer.
- Once the bid has been submitted, and up until the deadline for bidding passes, providers are able to 'Undo Submit' their bid, make amendments and re-submit.