
Disabled Students Allowance

Quote Selection

OWNER:	DSA Department
AUTHOR:	██████████
DATE DRAFTED:	22/09/2011
DATE APPROVED:	22/09/2011
VERSION:	3.0
STATUS: (Delete one of the options)	Live (Updated 15/02/2013 █████)

TABLE OF CONTENTS

1	DOCUMENT OVERVIEW	3
2	INSTRUCTION.....	3
2.1	PROCESS.....	3
2.1.1	Student choice	3
2.1.2	Assessor recommendations for Specific Suppliers.....	3
2.1.3	Items neglected from quotes / Not like for like	4
2.1.4	Specialist equipment e.g. ergonomic, hearing impaired	4
2.1.5	Cost	4
2.1.6	AT Training Quotes	4
2.1.7	HEI stipulation for NMH	4
2.1.8	If quotes are equal in cost, which supplier is chosen?.....	4
2.1.9	Choose quotes on Net Cost	4
2.2	EXAMPLES – CHOOSING MOST COST EFFECTIVE NET COST.....	5
2.3	PROCESS MAP – QUOTE SELECTION	7
3	7	

1 Document Overview

This document gives instruction on how to select any quote (including equipment, AT training and any NMH support) when reviewing a Needs Assessment Report.

2 Instruction

This process is to provide information on how business is awarded as we are often questioned about this area by suppliers and other third parties. This can also be used as a guide by DSA Officers if they are unsure which quote to use.

An incorrect view amongst some in the sector is that quotes are simply chosen based on cost alone, however this is untrue and the following items are taken into account when DSA Officers are selecting the quote.

Our correct standard practice is to have 3 Equipment Quotes and 2 Non Medical Helper Quotes.

2.1 Process

2.1.1 Student choice

No matter which quote we choose, ultimately the student has the final say and they can opt to use a supplier of their own choice. SFE will honour this but as we do have a duty to protect the public purse we would look to fund up to the price of the chosen quote from the NAR (for equipment). For AT Training and NMH, should the difference in cost be marginal we would look to pay this at our discretion – see DSA Bulletin Board for current marginal allowance.

Should the student decide to use their own supplier for equipment (e.g. a high street retailer) they would need to pay for this upfront and apply for a reimbursement from us. In this instance we would only fund up to the individual amount for each item from the quote we would have agreed.

In all instances where a student wishes to change the supplier from that agreed on the DSA2 letter they should inform us before hand. If they do so you should refer to 'DSA Process – Changing Supplier'.

If they have not informed us and the invoice/claim is received from a different supplier you should refer to 'DSA Process – Incorrect Supplier'

2.1.2 Assessor recommendations for Specific Suppliers

SFE expect recommendations to be linked to meet the specific needs of the student but do accept that it may be appropriate in some circumstances to recommend specific suppliers over others. Any justification for this should be considered on a case by case basis but please be aware that all suppliers should be able to offer the same support and service. There may also be cases where the student makes a specific request to use a specified supplier. All recommendations are considered on a case by case basis.

Should there be one quote for equipment for VI students, unless the items/ training that are being requested have been identified that no other supplier can provide, then we should still look to receive the full amount of quotes.

2.1.3 Items neglected from quotes / Not like for like

If items are neglected from quotes which means they are not like for like, you should request revised quotes from the Needs Assessor.

2.1.4 Specialist equipment e.g. ergonomic, hearing impaired

For recommendations for specialist equipment we only require 1 quote and therefore we would agree to the quote in the NAR.

2.1.5 Cost

Should all quotes be like for like (no missing items, same specification) and there are no specific recommendations then we would look at the most cost effective quote as there should be no difference in the service provided from each of the suppliers. To determine the most cost effective the NET cost would be used. We would use the NET costs when comparing NMH and AT training quotes also.

2.1.6 AT Training Quotes

AT training should be considered a separate item and the quotes should be reviewed without taking into account the chosen equipment supplier. If there is no reference to student choice or specific assessor recommendations in the NAR, then the most cost effective NET quote should be selected no matter who the equipment provider will be. When selecting this supplier please note there are currently two suppliers who would not provide training on another supplier's equipment. Please refer to the HEI Assessment Centre Contact List for this information.

2.1.7 HEI stipulation for NMH

Many HEIs are in a position where they do not allow external companies onto their premises or they have a contract in place with a specific NMH supplier. In these instances we will allow 1 quote and agree to this (from 1st April 2013, this no longer includes AT training, we should always have two quotes for AT Training) Please refer to the HEI Assessment Centre Contact List for this information. If there is no provider available locally or if there is a disability related reason to use certain provider, we will accept one quote.

2.1.8 If quotes are equal in cost, which supplier is chosen?

In the unlikely event that we ever receive like for like quotes which are all equal in cost (Net and Gross), we would select a quote at random from the NAR, if there is no other deciding factor.

Where quotes are equal and the Needs Assessor has indicated a preference for one of the suppliers we would accept their recommendation.

2.1.9 Choose quotes on Net Cost

We would look at the Net cost and make a decision based on this figure.

Although the quotes are selected based on Net Cost the full Gross Cost should be entered onto the DSA2 letter, NLP Screen and Student Database to ensure we know what to expect on the invoices.

By removing VAT as a variable when comparing quotes, we feel this will satisfy our interest of ensuring a level playing field amongst all suppliers that submit quotations. Currently, there appears to be some inconsistency of VAT application amongst suppliers which is a matter that will need to be addressed by HMRC. However we would still expect to see quotes containing any appropriate VAT where applicable, as we need to factor this in as a spend to a student's DSA allowance.

2.2 Examples – Choosing most cost effective Net Cost

Usually all quotes will be in the same format so will be easy to choose between:

	Ex. VAT	Inc. VAT	Decision
Supplier 1	£160	£192	Net Chosen Quote – Supplier 1
Supplier 2	£180	£216	DSA2 letter/NLP/Invoice Database £192 Invoice Expected at £192
Supplier 1	£150	£150	Net Chosen Quote – Supplier 2
Supplier 2	£145	£145	DSA2 letter/NLP/Invoice Database £145 Invoice Expected at £145
Supplier 1	£50+vat	Not Stated	Net Chosen Quote – Supplier 1
Supplier 2	£55+vat	Not Stated	DSA2 letter/NLP/Invoice Database £60 Invoice Expected at £60
Supplier 1	£120inc vat	Not Stated	Net Chosen Quote – Supplier 1
Supplier 2	£130inc vat	Not Stated	DSA2 letter/NLP/Invoice Database £120 Invoice Expected at £120
Supplier 1	£1240	£1488	Net Chosen Quote – Supplier 3
Supplier 2	£1290	£1548	DSA2 letter/NLP/Invoice Database £1452
Supplier 3	£1210	£1452	Invoice Expected at £1452

However there may be occasions where the quotes are not in the same format:

	Ex. VAT	Inc. VAT	Decision
Supplier 1	£80+vat	Not Stated	Net Chosen Quote – Supplier 1
Supplier 2	£85	Not Stated	DSA2 letter/NLP/Invoice Database £96 Invoice Expected at £96
Supplier 1	£40	£48	Net Chosen Quote – Supplier 2
Supplier 2	£35	Not Stated	DSA2 letter/NLP/Invoice Database £35 Invoice Expected at £35

Reason: Where it is not stated that VAT will be added/has been added we will assume the costs are Net in order to compare the quote.

You may also see occasions where a quote has a condition stated:

	Ex. VAT	Inc. VAT
Supplier 1	£160	£160- Please note when not providing equipment vat will be charged
Supplier 2	£170	£170
Supplier 3	£195	£195- Please note when not providing equipment vat will be charged

Net Chosen Quote – Supplier 1

DSA2 letter/NLP/Invoice Database £160 if supplying equipment or £192 if not supplying equipment.
Invoice Expected at £160 if supplying equipment or £192 if not supplying equipment.

	Ex. VAT	Inc. VAT
Supplier 1	£160	£160- Please note when not providing equip vat will be charged
Supplier 2	£160	£160

Net Chosen Quote – Supplier 2**DSA2 letter/NLP/Invoice Database £160.****Invoice Expected at £160 as they have quoted and not stated VAT will be charged. Suppliers are asked to quote as if not awarding equipment.**

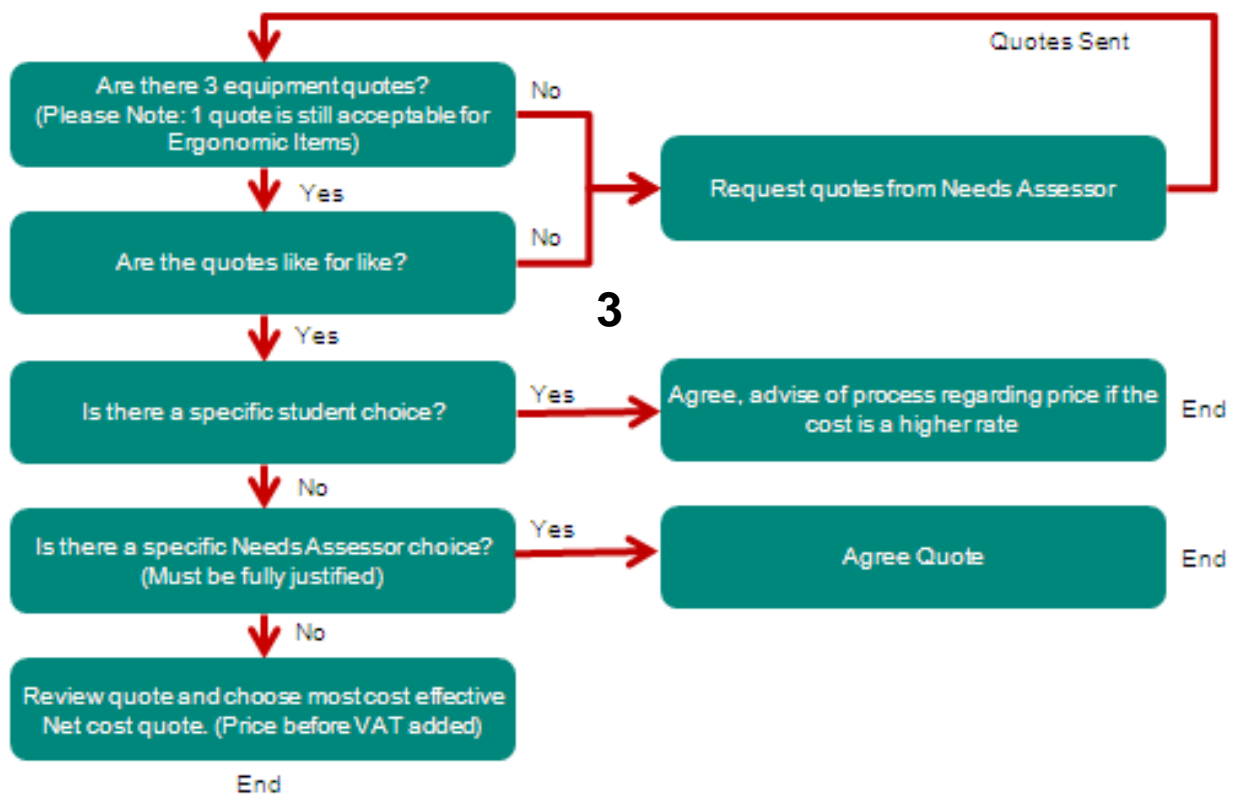
Supplier 1	£150	
Supplier 2	Free	– Will only provide training on their own equipment
Supplier 3	£195	

Here you would select Supplier 2 if this company were also the cheapest Equipment Supplier. If they were not the cheapest Equipment Supplier you would select Supplier 1. (Do not combine totals to look for cheaper options – Equipment and Training should be reviewed separate)

2.3 Process Map – Quote Selection

Please see the next page for the process map for quote selection (for equipment and NMH).

DSA Process Map – Quote Selection (Equipment)



DSA Process Map – Quote Selection (NMH/AT)

