



Redundancy and Retraining Project – Pilot Evaluation

Deadline for Tender Submissions:

16:00 19 November 2021



Contents

1. About us.....	4
2. Background to this Invitation to Tender (ITT).....	6
3. Contract Overview.....	9
3.1 Scope of the contract.....	9
3.2 Aims and objectives.....	9
3.3 Outcomes/Deliverables.....	13
3.4 Contract term.....	13
3.5 Budget.....	14
4. Invitation to Tender evaluation criteria.....	15
4.1 Scoring.....	15
5. Bid return and Tender evaluation process.....	17
5.1 Enquiries and communication.....	17
5.2 Amendments to the Invitation to Tender.....	17
5.3 Procedure for the submission of bids.....	18
5.4 Content of bids.....	18
5.5 Evaluation of bids.....	19
6. Important notices for bidders.....	20
6.1 Confidentiality.....	20
6.2 Accuracy of information and liability of Ageing Better and its advisers.....	20
6.3 Anti-collusion.....	21
6.4 Non-canvassing.....	21
6.5 Copyright.....	22
6.6 Tax Liability.....	22
6.7 Modern Slavery Act 2015.....	22
6.8 Confidentiality.....	22
6.9 Ageing Better’s right to reject bids.....	22
6.10 Time.....	23
6.11 Bid costs and loss of profits.....	23
7. Timetable.....	24
Appendix 1: Conditions of Contract.....	25
Appendix 2 – Pricing Document.....	26
Pricing Preambles.....	26

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Schedule of Rates	27
Appendix 3 – Written Return	28
Section 0 – General Information	29
Section 1: Approach to scoping (stage one)	31
Section 2: Ways of working	32
Section 3: Producing relevant and accessible findings	33
Section 4: Experience of working on employment and training related projects	34
Section 5: Risk management proposals.....	35
Appendix 4 – Form of Tender.....	36
Appendix 5 – Anti-Collusion Certificate	38
Appendix 6 – Non-Canvassing Certificate	40
Appendix 7 – Supply Chain of Conduct.....	41
Appendix 8 – Identified opportunities	44

1. About us

The UK's population is undergoing a massive age shift. In less than 20 years, one in four people will be over 65.

The fact that many of us are living longer is a great achievement. But unless radical action is taken by government, business and others in society, millions of us risk missing out on enjoying those extra years.

At the Centre for Ageing Better we want everyone to enjoy later life. We create change in policy and practice informed by evidence and work with partners across England to improve employment, housing, health and communities.

We are a charitable foundation, funded by The National Lottery Community Fund, and part of the government's What Works Network.

We have four priority goals:

Work

More people are working later in life. But employment rates drop after the age of 55 – and over half of people have stopped working before state pension age.

Supporting people to be in good quality, fulfilling work, for as long as possible, is important for their financial security in later life.

The Centre for Ageing Better is calling on employers to become more age-friendly. This means offering flexible working, fair recruitment and training and progression at every age and actively recognising the positive contribution older workers make. Ageing Better is also working with partners to find ways of helping more people approaching later life to get back into work.

Housing

Most people want to live in their own home for as long as possible. But most housing in the UK does not meet accessibility standards. And millions of homes are not deemed decent – in other words, not safe or warm.

Safe, accessible housing can maintain or improve health, wellbeing and social connections as we age.

The Centre for Ageing Better is campaigning with partners for all new homes to be built to higher accessibility standards and for current housing to be radically overhauled. Ageing Better is also working with planners, designers and developers to provide diverse housing options for people approaching later life.

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Health

Too many of us spend later life in poor health and disability despite our longer lives. And people from the poorest areas are spending up to 20 years with disabling health conditions.

Good health allows us to remain independent, work and be involved in our communities.

The Centre for Ageing Better is working with national and local partners to prioritise prevention and early intervention. Ageing Better is also working to ensure people's living and work environments enable them to live a full life even if their health has declined or they have developed a disability.

Communities

The design of the places we live in can enable us to get out and about and meet people as we grow older. But many people face barriers that stop them doing the things they enjoy and that matter to them.

As people approach later life, it's important they live in communities that make it easier to stay connected to other people.

The Centre for Ageing Better is working with local government, businesses and voluntary sector partners to improve transport and community spaces. Ageing Better is also working to increase opportunities for people to be active and involved in their communities regardless of age, ability or circumstances.

**Let's take action today for all our tomorrows.
Let's make ageing better.**

2. Background to this Invitation to Tender (ITT)

NOTE:

- This Invitation to Tender (“ITT”) is available to download on the Ageing Better website and is open to any **bidder** submitting a proposal for the Contract (hereinafter referred to as the “**Contract**”) before the stated deadline.
- Although this ITT is not subject to the [Public Contracts Regulations 2015](#), Bidders are reminded that Ageing Better will conduct the process in accordance with key principles of transparency, non-discrimination and equal treatment.
- Any clarification questions should be sent to responses@ageing-better.org.uk by 22 October 2021.
- Bidders should also notify us of their intention to bid by 5 November 2021.

Context to this work

Organisational context

To enable people to lead a good later life, the Centre for Ageing Better (Ageing Better) works to influence nationally and deliver locally – we do this through a range of partnerships with local and national organisations.

Ageing Better synthesises, develops and disseminates evidence on “what works” in relation to our four priority goal areas. With our partners, we conduct research and design and evaluate new solutions to challenges faced by those most at risk of missing out on a good later life. We then disseminate information about our learnings to relevant stakeholders to support their own practices.

The design of new solutions within our projects is led by Ageing Better’s Innovation and Change team, often alongside contracted service design partners. An example of this work is our [Greater Manchester Employment Support for Over 50s project](#), where we are designing a new support service to over 50s job seekers who are long term unemployed. Once pilot concept is finalised, the Evidence team will manage the evaluation of the pilot including this contract.

Tackling worklessness in England

The Redundancy and Retraining in the West Midlands project (the project) sits under our ‘Fulfilling Work’ priority goal, more specifically, the *Worklessness Programme*. The project will help us to achieve our programme objective: one million more people aged 50 to State pension age (SPA) in fulfilling work by 2022 by working to improve employment and retraining support for 50-66 year olds who have been made redundant.

The current employment support landscape does not work well enough for people aged 50 to SPA in England. People in this age cohort are significantly less likely to return to work after 3 months unemployment compared to other age groups. Appropriate support and intervention to help those aged 50 to SPA back into work or to retrain after redundancy is key for financial security and to enable them to live a good later life.

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The pandemic has been particularly hard on this demographic, there are 4.7 million furloughed employments (February 2021) with 27.9% (1.3 million) of these being jobs held by people 50 years and over.

Those aged 50 years and over had the highest overall increase in redundancy rate over the year to February 2021, rising from 4.3 to 9.7 per thousand, up 5.4 per thousand on the year. This was the highest redundancy rate across age groups in the latest quarter.

Nationally, approximately 20% of all redundancies for over 50s were in the manufacturing and automotive sector.

In the West Midlands people aged 50-64 are the hardest hit in employment terms; for that age bracket the employment rate has dropped 3% points compared to 0.5% points for 18-24 year olds since March 2020 (the start of the pandemic). In contrast to the national picture where the employment rate has dropped 1.4% amongst 50-64s and 2.5% amongst 18-24.

The Redundancy and Retraining in the West Midlands Project

Ageing Better, supported by Barclays, are working in the West Midlands. We want to support individuals aged 50-SPA who have been recently (i.e. within 6 months) made redundant from the manufacturing or automotive industries (large-scale employers and SMEs) to find sustained employment through skills retraining or employment support. We plan to achieve this by either designing a new, or adapting an existing, redundancy and retraining support service using a co-design process.

The aim of the project is to learn “what works” in designing new solutions for individuals aged 50 to SPA who have been made redundant. Ageing Better does not directly deliver services and therefore will share information about what works with local organisations for them to adopt. Additionally, we will share learning with national commissioners and service providers- our ambition is that the service designed through the Project will be scalable across other regions and/or industries.

Delivering the project to date (Phase 1: Research) - Completed

We commissioned a design agency, Shift, to run the first stage of the design journey between January and May 2021. They researched the current redundancy support landscape (locally and nationally), completed user research and service mapping. Out of this work came six opportunity areas, and seven proposed ideas, for interventions to be taken through to prototyping including “designing for self-serve” and “designing to fill market gaps” (see Appendix 8 for further detail). Through this Phase, we engaged with 9 people with lived experience and over 25 stakeholder organisations.

Current stage of the project (Phase 2: Prototyping)

- a. **Testing the assumptions (Ageing Better):** Over the summer, Ageing Better worked through the feasibility of the opportunity areas identified in Phase 1. We did desk-based research and spoke to stakeholders to test the assumptions involved in these opportunity areas and ascertain stakeholder interest in taking part in prototyping solutions.
- b. **Prototyping (design agency):** Between September 2021 and January 2022, our commissioned design agency will support us to refine the opportunities and prototype solutions.

Invitation to Tender for Redundancy and Retraining Project - Pilot Evaluation

Phase 3: Piloting and evaluation

Following the prototyping stage, Ageing Better will work with relevant local partners to commission either a service improvement or new service, with this piece of work to run until October 2022.

An evaluator will be commissioned for this phase to evaluate the impact of the selected piloting model and to document what in our pilot is working, for whom and why (this tender). Further details are below.

Relevant stakeholders

West Midlands Combined Authority: This project works in partnership with West Midlands Combined Authority. We anticipate that West Midlands Combined Authority may be involved in commissioning the pilot of this project.

Barclays: This project is funded by Barclays Lifeskills as part of their charity partnerships to help tackle key issues facing the UK labour market.

Design agency: We are working with Shift to prototype and design the final pilot intervention. The evaluators will have access to the team – and their materials – to help them understand the intervention. Depending on the final pilot, we have an option to extend the contract for the designers into the pilot phase, to support the implementation.

Ageing Better project team: Our internal project team is led by a Project Manager dedicated to the project. We also have representatives from:

- Worklessness team: The team of sector experts on worklessness and unemployment support, including the Senior Programme Manager for the Employment Support Programme.
- The Innovation and Change team: The team responsible for designing the project and liaising with service designers on their outputs.
- Evidence team: The team responsible for commissioning evaluators for the pilot.
- Communications team: The team responsible for communications and branding.

3. Contract Overview

3.1 Scope of the contract

We are looking for an evaluation partner to evaluate the pilot – Phase 3 of the project. This is essentially a ‘proof of concept’.

We do not, at the time of commissioning this evaluation, know precisely what the pilot intervention will consist of. We know that it will broadly take the shape of one of the opportunities identified during Phase 1 of the project (see Appendix 8).

We are seeking to bring the evaluators in at the end of the prototyping phase (Phase 2), at the start of January 2022. Not to collect any data, or offer analysis – but to observe the final decision-making element of the pilot, to deepen their understanding of the project.

They will then have c. 3 months to work with the Ageing Better team to scope the evaluation, and develop an evaluation framework. We anticipate that the pilot itself will run from April to October 2022. We anticipate that the evaluation will continue c. 12 months after the pilot completes, to assess whether any outcomes are sustained.

3.2 Aims and objectives

Aims and research questions

As a result of this evaluation, we want more commissioners and service providers to adopt practices that will support people age 50+ to find sustained employment (or move closer to it) through skills retraining or employment support.

The aims of this evaluation are therefore:

- To outline how far our pilot – or elements of our pilot – were successful in supporting participants age 50+ to find sustained employment (or move closer to it) through skills retraining or employment support.
- To give commissioners and providers of relevant services the tools and information they need to implement those successful elements – either by implementing our intervention wholesale, or elements of it.
- To generate wider learning on the needs of people age 50+ who were recently made redundant, effective strategies for supporting them, and build the case for age-specific interventions.

The overarching questions we would like this evaluation to answer are therefore:

- What elements of the intervention were successful – or showed promise – in supporting participants age 50+ to find sustained employment (or move closer to it) through skills retraining or employment support?
- For whom was that success (not) achieved, and why (not)?

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- What should be considered by commissioners and providers wanting to implement this intervention – or elements of it – in the future? What are the key conditions for success?

We are therefore interested in both process and outcomes: we want to know what difference this pilot is making, but also what constitutes effective implementation.

If possible, we would like the evaluation to offer some insight into how specific the findings are to this geography, and to these industries – and how far they might be applicable elsewhere.

Stages

We anticipate this evaluation will have four stages:

Stage 1: Scoping and developing the framework (January-March 2022)

During this stage, the evaluator will familiarise themselves with the project, and work with Ageing Better to:

- Develop a prototype Theory of Change for the pilot intervention - identifying relevant outcomes for different participants, and potential causal pathways. We expect this to build on the initial ToC work by the project team and link to the overarching Employment Support programme ToC
- Identify process and outcome measures appropriate to the final intervention
- Refine the evaluation research questions
- Develop and agree an evaluation framework, and project plan
- Work with Ageing Better and the service delivery partner to define the key MI to be collected through service delivery.

Ideally, the evaluator would work collaboratively not just with us, but with the key audiences for the evaluation, to co-create and prioritise the research questions.

Stage 2: Pilot delivery (April – November 2022)

While the pilot is underway, we expect the evaluators will:

- Undertake fieldwork using the agreed research methods
- Provide regular feedback to partners to improve delivery as the pilot intervention evolves
- Adapt the evaluation framework if necessary

Stage 3: Interim findings (November- December 2022)

At the end of the pilot, we would like the evaluators to:

- Provide a public facing end of pilot report at 6 months outlining factors that drive effective delivery and positive outcomes, and what can be done to reduce identified barriers to positive impact.
- Refine/revise the prototype ToC in line with the evidence collected in phase 2

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Stage 4: Follow up and final report (October-December 2023)

We would like the evaluators to follow up with contacts around 12 months following the completion of the pilot, to investigate how sustained any of the outcomes from the pilot were.

These should then be reported through a final evaluation report, and a final update to the ToC.

Alongside these outputs, we would also like the evaluators to produce a 'practitioner toolkit'. We imagine this will contain:

- A summary of the intervention(s) and its observed impact
- A list of key takeaways on implementation, for anyone who may want to implement the intervention(s) themselves
- A list of key takeaways for organisations who deliver similar services and employers, who may be able to use our insights to improve their offer

Ageing Better expects this practitioner-focussed output to be accessible and clear, containing actionable insights for practitioners. Ageing Better staff will support the evaluators in this by:

- Brokering conversations with relevant audiences to test the material
- Support with language and drafting
- Managing the design of the final product (which will be funded separately from this contract).

Evaluation approach and methods

Given the small number of anticipated participants (c.150), the short length of the pilot, and the limited context in which it is being delivered (in one part of the country, with workers from just two sectors), we anticipate that a **theory-based** evaluation approach will be most appropriate.

We would not rule out a quasi-experimental approach, if an appropriate comparison group could be identified. But, given the emergent and small-scale nature of this proof-of-concept pilot, this is not crucial.

As described above, we expect this evaluation to look at process as well as outcomes: generating findings which will allow commissioners and support/training providers to effectively implement the intervention (or elements of it) themselves.

The precise information to be captured will depend on the form the pilot takes, but we imagine that it will include: factors affecting take-up; satisfaction with delivery and content; reasons for drop out; unmet need; perceived impact (soft – e.g. confidence) and hard data (e.g. applications for jobs, success rate). We want to look at the perspective of all stakeholders – such as delivery partners – as well as participants.

It is difficult at this stage to identify the most appropriate research methods. We anticipate that surveying participants will be key, as will gathering qualitative data from them to understand their experience of the intervention. We also expect that engagement with the

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professionals surrounding the pilot intervention will be important – not just staff delivering the pilot, but people involved in the system surrounding it. It may be useful to capture observations of practice, if possible.

Please Note: Whilst at the time of publication of this ITT, we are unable to provide further detail on the solution to be piloted, at such time bidders are invited to interview we will provide a shortlist of prototyping solutions and this will form part of the interview process.

Ways of working

Partnership. Centre for Ageing Better is not a service delivery organisation so the pilot will be delivered by an external delivery organisation (to be identified through the design and development process. The evaluators will need to be comfortable working in projects with multiple partners.

Collaboration. Our design and prototyping contract currently covers Phase 2 – but with an option to extend into Phase 3. Depending on the outcome of Phase 2, we may extend the contract of the design partners for the start of the pilot phase, to support implementation. Any involvement from the designers in Phase 3 would form part of the object of study for the evaluation.

However, if both teams are seeking to engage with participants at the same time, it may prove beneficial for the evaluators and designers to work together, to avoid over-burdening participants with requests from multiple partners. The evaluators should be ready to have these discussions in an open way – as will the designers.

'One team'. The Ageing Better team will offer support by providing expertise on worklessness in mid-to-later life, establishing relationships with relevant stakeholders and moving the project forward as a whole. We expect to work as 'one team' with all our partners – communicating regularly about project progress, and sharing common communication channels. In return, we will actively support the delivery of the evaluation – for example, helping to recruiting participants, and shaping outputs, for example, this may equate to c.4 days a month from the project manager and c. 2 days a month from the evidence officer.

Ongoing sharing and engagement, and focus on impact. Ageing Better is not waiting until the final evaluation report is complete to share the learning from this project. Already, we have established a network of stakeholders in the West Midlands – for example in the Combined Authority itself, other local authorities, and Jobcentre Plus – to share the findings from Phase 1. This network will expand once we have chosen the pilot intervention.

Ageing Better works actively to ensure that the learning from our projects is useful – and used – by our target audiences. The evaluators will be expected to join us in this endeavour – sharing findings with this network as they emerge, putting the concerns and interests of the intended recipients at the centre of the research, and presenting the outputs (particularly the 'toolkit') in a way that is designed to be accessible to commissioners and practitioners.

Communications. We aim to put the voices and experiences of individuals at the heart of all of our evidence gathering and communications work. These stories help us to illustrate the opportunities longer life can bring, but also the challenges that many people face across

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different aspects of life and society. Ultimately it is these stories, in combination with evidence and data, that enable us to influence opinion, policy and practice, and create the change that's needed.

As such, we will require you to work with us to identify and help us capture people's experiences of redundancy and retraining that can be used across our communications work and make the case for change. As a basic requirement we want to record these stories either in writing or on film. The interviews might be used in full or quotes and clips used across our website, social media, and across other platforms and channels such as newsletters and presentations. We require within the selection you provide us to have at least two or three people who'd be willing to do some media work.

3.3 Outcomes/Deliverables

Deliverables

1. An evaluation framework: setting out clearly the key research questions, and plans for answering them. Co-created with Ageing Better and key audiences.
2. A theory of change: developed alongside partners at Ageing Better, WMCA, and other relevant stakeholders (depending on pilot intervention).
 - To be developed and validated over the course of the evaluation (with revisions to be delivered alongside the interim and final reports).
3. Regular presentations at steering group meetings, and 2-3 stakeholder workshops.
4. Broker relationships with research participants to facilitate the creation of comms materials by Ageing Better, e.g. case studies
5. An end of pilot evaluation report – outlining preliminary findings – immediately following the end of the pilot (c. December 2022)
6. A final evaluation report – including materials designed for target audiences – following the end of the pilot (c. December 2023)
7. A practitioner's toolkit (see description above) (c. December 2023)

3.4 Contract term

January 2022 to December 2023.

Stage 1: Scoping and developing the framework (January-March 2022)

Stage 2: Pilot delivery (April – November 2022)

Stage 3: Interim findings (November- December 2022)

Stage 4: Follow up and final report (October-December 2023)

3.5 Budget

We are inviting bids costed between £65,000 and £80,000 exclusive of VAT. Bidders should note that £80,000 excl. VAT is the maximum available for this work. Extra capacity in the form of Ageing Better staff time will also be available to the evaluators – particularly in the area of recruiting, liaising with and managing stakeholders and research participants. This is likely to be c.4 days a month from the Project Manager and c.2 days a month evidence support.

We anticipate three payment milestones, on receipt of the deliverables at the end of stages 1, 3 and 4.

We would ideally like to see the budget broken down in to 3 parts:

- A. The initial Scoping stage (Stage 1)
- B. The pilot and end of pilot outputs (Stages 2 and 3)
- C. The final phase (12 months after the pilot end) including outputs (Stage 4)

Costs in the Pricing Document should be presented exclusive of VAT. Bidders should state whether or not they will apply VAT to the total Contract value. Ageing Better intends to award a Contract for services, on the basis of this Specification and Invitation to Tender. As such, it is our understanding that VAT is applicable, regardless of the successful Bidder's VAT status. Ageing Better recommends that Bidders should seek independent advice if they do not intend to apply VAT. Ageing Better will not make any additional provision to the agreed Contract value in order to cover VAT liabilities, if these costs are not included in the original Pricing Document.

4. Invitation to Tender evaluation criteria

Bids for the Contract shall be evaluated on whether it's the most economically advantageous tender (MEAT), as well as the criteria set out below.

Criteria	Sub Criteria	Weighting
Price (30%)	1. Pricing	20%
	2. Value for money	10%
Quality (70%)	3. Approach to scoping	20%
	4. Ways of working	15%
	5. Producing relevant and accessible findings	10%
	6. Sector Experience	10%
	7. Risk management proposals	15%
	Total	

4.1 Scoring

Scoring

Criteria 1 to 5 shall be scored on a scale of 0 to 5 by reference to the following scoring guide:

Score	Description
5	Exceptional. Demonstrates strengths, no errors, weaknesses or omissions and exceeds expectations in some or all respects.
4	Good. The standard of response fully meets expectations.
3	Satisfactory. The response is acceptable but with some minor reservations.
2	Poor. The response is deficient in certain areas where the details of relevant response require the reviewer to make certain assumptions.
1	Very Poor. The response is deficient in the majority of areas where the details of relevant response require the reviewer to make frequent assumptions.

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0	Rejected. Response is unacceptable or non-existent, or there is a failure to properly address any issue.
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Criterion 1 is weighted at 30%. The Bidder that submits the Lowest Bid Total shall receive the maximum score of 30%. All other Bidders' Bid Totals shall be evaluated using the following formula:

Lowest Bid Total

_____ X 30

Other Bidder's Bid Total

If a Bidder is successful in its bid for the Contract, then the Pricing Document is submitted as part of its bid will be referenced in the Contract it enters into with Ageing Better and will be used in calculating the amount payable to the successful Bidder under the Contract.

5. Bid return and Tender evaluation process

5.1 Enquiries and communication

During the Invitation to Tender stage Bidders may submit questions and requests for Clarification or further information. Bidders should note the following procedure for obtaining further information or Clarification on matters arising during the Invitation to Tender stage:

- Bidders shall address their questions and requests for Clarification or further information via e-mail to: **responses@ageing-better.org.uk**;
- On receipt of a request for Clarification or further information, Ageing Better may, at its sole discretion, endeavour to respond to the Bidder and provide such Bidder with any additional information to which Ageing Better has access, but Ageing Better shall not be obliged to comply with any such request and does not accept any liability or responsibility for failure to provide any such information (and absence of a response from Ageing Better shall not entitle a Bidder to make any particular assumptions about the matters sought to be clarified);
- Except as stated below, all questions and requests for Clarification or further information and the corresponding responses, will be circulated by Ageing Better to all Bidders;
- When submitting a question or request for Clarification or further information, Bidders should indicate whether or not they believe the question or request for Clarification or further information is commercially confidential to them and should not therefore be shared with other Bidders. Any such question or request for Clarification or further information should be marked 'Confidential – not to be circulated to other Bidders';
- If Ageing Better considers that, in the interests of open and fair competition, it is unable to respond to the question or request for Clarification or further information on a confidential basis, it will inform the Bidder who has submitted it. The Bidder must as soon as practicable thereafter request that either the query be withdrawn or treated as not confidential;
- All questions or requests for Clarification or further information must be submitted by **16:00 22 October 2021** at the latest. Requests/questions received after this time will not be responded to by Ageing Better.

5.2 Amendments to the Invitation to Tender

Ageing Better reserves the right to issue amendments or modifications to this Invitation to Tender during the Invitation to Tender stage. These will be issued to all Bidders simultaneously and bids will be assumed to take account of any such modifications and amendments.

5.3 Procedure for the submission of bids

Bidders shall submit one electronic copy Invitation to Tender by no later than **16:00 19 November 2021** via e-mail to: **responses@ageing-better.org.uk**

The Invitation to Tender return shall state the following title:

Redundancy & Retraining Project - Evaluation

We will acknowledge receipt of all bids.

Please provide your response to this Invitation to Tender by completing the required documents. Please do not provide separate or different types or formats of documents unless specifically requested to do so.

Please note that any stated limits on length of responses set out in the Invitation to Tender must be strictly adhered to. Any question response exceeding the stated limit will be disregarded beyond that limit. Unless specifically requested to do so, please do not include or upload any standard marketing or promotional material within your answer as this will be disregarded.

Supporting information (appendices, attachments etc.) should be presented in the same order as, and should be referenced to, the relevant question.

Late submissions will not be accepted.

Bidders are strongly recommended not to leave their Invitation to Tender submission to the last minute. Ageing Better will not be held liable for failures to submit an Invitation to Tender on time due to technical issues reported less than 24 hours before the submission deadline.

5.4 Content of bids

All bids must consist of the following items/documents:

- Confirmation of acceptance of the Conditions of Purchase as set out at Appendix 1;
- A completed Pricing Document as set out at Appendix 2;
- A completed Written Return, specifying how the Bidder will carry out the Services to be provided under the Contract, as set out at Appendix 3
- A copy of the Form of Tender as set out as Appendix 4 signed by the authorised signatory submitting the bid on behalf of the Bidder;
- A completed Anti-Collusion Certificate as set out at Appendix 5, signed by the authorised signatory submitting the bid on behalf of the Bidder;
- A completed Non-Canvassing Certificate as set out as Appendix 6, signed by the authorised signatory submitting the bid on behalf of the Bidder.
- A signed Supply Chain of Conduct as set out at Appendix 7, signed by the authorised signatory submitting the bid on behalf of the Bidder.

5.5 Evaluation of bids

- Bids will be checked initially for compliance with this Invitation to Tender and for completeness. Bids that are not substantially complete and/or compliant with this Invitation to Tender may be rejected;
- During the evaluation period, Ageing Better reserve the right to call for further information/clarifications from Bidders to assist it in its consideration of their bids. Note that Ageing Better reserve the right to adjust the scoring of a Bidder's bid if information is established during clarifications that fundamentally changes any tendered proposal.
- Ageing Better reserve the option to invite Bidders to attend an interview at Ageing Better's offices to further explain their bid proposals. The provisional dates for these interviews are shown in Section 7 (Timetable) of this Invitation to Tender. The dates, times and venues of the interviews (if held) will be confirmed with Bidders under separate cover;
- The purpose of the Bidder interview is to allow Ageing Better to achieve a more rounded appreciation of Bidders' proposals. Note that Ageing Better reserve the right to adjust the scoring of a Bidder's bid if information is established during the interview that fundamentally changes any tendered proposal.

6. Important notices for bidders

6.1 Confidentiality

Subject to the exceptions referred to below, the information in this Invitation to Tender is made available by Ageing Better on condition that Bidders shall:

- at all times treat such information as confidential;
- not disclose, copy, reproduce, distribute or pass the information to any other third person or allow any of these things to happen; and
- not use the information for any purpose other than for the purpose of making (or deciding whether to make) a bid for the Contract.

Notwithstanding the conditions referred to above, Bidders may disclose, distribute or pass information to another person if:

- it is done for the sole purpose of enabling a bid to be made and the person receiving the information undertakes in writing to keep the information confidential on the same terms as set out in this Invitation to Tender; or
- Ageing Better gives its prior written consent in relation to such disclosure, distribution or passing of information.

Ageing Better may disclose any information relating to the bids to its directors, officers, employees, agents or advisers. Ageing Better also reserve the right to disseminate information that is materially relevant to the Contract to all Bidders, even if the information has only been requested by one Bidder. Ageing Better will act reasonably as regards the protection of commercially sensitive information relating to the Bidder.

6.2 Accuracy of information and liability of Ageing Better and its advisers

The information contained in this Invitation to Tender has been prepared by Ageing Better in good faith but does not purport to be comprehensive or to have been independently verified. Ageing Better does not accept any liability or responsibility for the adequacy, accuracy or completeness of, or makes any representation or warranty (express or implied) with respect to the information contained in the Invitation to Tender or with respect to any written or oral information made or to be made available to any Bidder or its professional advisors and any liability therefore is hereby expressly disclaimed.

Bidders considering entering into a contractual relationship with Ageing Better should make their own enquiries and investigations of Ageing Better's requirements. The subject matter of this Invitation to Tender shall only have contractual effect when it is contained in the express terms of an executed agreement.

Centre for Ageing Better

Nothing in this Invitation to Tender is, or should be, relied upon as a promise or representation as to the future and Ageing Better does not undertake to provide Bidders with access to any additional information or to update the information in this Invitation to Tender or to correct any inaccuracies that may become apparent. Ageing Better reserve the right, without prior notice, to change the procedures outlined in this Invitation to Tender or to terminate discussions and the delivery of information at any time before entering into the Contract.

6.3 Anti-collusion

Any Bidder who, in connection with the competition for the selection of Bidders for the Contract:

- Fixes or adjusts its bid by or in accordance with any agreement or arrangement with any other Bidder;
- Enters into any agreement or arrangement with any other Bidder to refrain from making a bid or to alter, in any way, the content of any bid to be submitted;
- Causes or induces any person to enter into any such agreement as referred to above or to inform any other Bidder of the content of any other bid for the Contract;
- Offers or agrees to pay or give or does pay or give any sum of money, inducement or valuable consideration directly or indirectly to any persons for doing or having done or causing or having caused to be done any act or omission in relation to any other bid or proposed bid for the Contract; or
- Communicates to any person (outside its consortium, its professional and financial advisers other than Ageing Better or any person duly appointed by Ageing Better) the content of its proposed bid, will be disqualified (without prejudice to any other civil remedies available to Ageing Better and without prejudice to any criminal liability that such conduct by a Bidder may attract) from further participation in the competition for the Contract. Bidders are required to return with their bid the Anti-Collusion Certificate set out at Appendix 5.

6.4 Non-canvassing

Any Bidder who, in connection with its bid for the Contract:

- offers an inducement, fee or award to any representative of Ageing Better or any person acting as an adviser to Ageing Better in connection with the selection of Bidders for the Contract; or
- does anything which would constitute a breach of the Bribery Act 2010, will be disqualified (without prejudice to any other civil remedies available to Ageing Better and without prejudice to any criminal liability that such conduct by a Bidder may attract) from further participation in the competition for the Contract. Bidders are required to return with their bid the Non-Canvassing Certificate set out at Appendix 6.

6.5 Copyright

The copyright in this Invitation to Tender is vested in Ageing Better and may not be reproduced, copied or stored in any medium without the prior written consent of Ageing Better. This Invitation to Tender and any document issued to Bidders supplemental to it shall remain the property of Ageing Better and shall be returned upon demand.

6.6 Tax Liability

Ageing Better and its subsidiaries, conducts their activities with integrity, transparency and fairness. Ageing Better are committed to the prevention of the facilitation of tax evasion as they recognise the importance of fostering a positive culture of tax compliance and maintaining the confidence of students, staff, partner organisations, other customers and the tax authorities.

Ageing Better and its subsidiaries do not and will not work with others who do not share their commitment to preventing the facilitation of tax evasion.

6.7 Modern Slavery Act 2015

The Bidder recognises that Ageing Better has a legal and moral commitment to ensuring that Ageing Better, through its staff, associates, agents, service providers and suppliers, conducts its business in accordance with the highest standards of ethical behaviours, transparency and probity. The Bidder shall, upon the request of Ageing Better, provide evidence of the steps the Bidder is taking to ensure that slavery and human trafficking is not taking place in any part of the Bidder's own business or supply chain in accordance with the provisions of the Modern Slavery Act 2015.

6.8 Confidentiality

Bidders shall not undertake (or permit to be undertaken) at any time, whether at this stage or after conclusion of the Contract, any publicity activity with any section of the media in relation to the Contract other than with the prior written consent of Ageing Better (in relation to the form and content of the proposed publicity).

6.9 Ageing Better's right to reject bids

Notwithstanding anything else stated in this Invitation to Tender, the issue of this Invitation to

Centre for Ageing Better

Tender in no way commits Ageing Better to enter into the Contract or any other agreement whatsoever. Ageing Better is not bound to accept any bid and reserve the right to accept any bid either in whole or in part.

Ageing Better reserve the right to reject any or all of the responses received and discontinue the bidding process and/or reject any incomplete or incorrectly completed responses.

Bids will be checked initially for compliance with the requirements of this Invitation to Tender and for completeness. Clarification may be sought from Bidders in order to determine if a bid is complete and compliant. Bids that are not substantially complete and/or compliant with the requirements of this Invitation to Tender may be rejected.

6.10 Time

Ageing Better reserve the right, in its absolute discretion to amend the timetable or extend any time period in this Invitation to Tender.

6.11 Bid costs and loss of profits

Bidders shall bear their own costs and in no circumstances whatsoever shall Ageing Better become liable for any bidding costs, nor shall Ageing Better be liable for any loss of profits, loss of Contracts or other costs or losses suffered or incurred by a Bidder as a result of that Bidder not being awarded one or more Contracts pursuant to this procurement process. Ageing Better shall similarly not be liable in the event that the procurement process is cancelled, whatever the reason.

7. Timetable

The indicative timetable for the procurement process is as set out below:

Stage	Date
Invitation to Tender issued to Bidders	4 October 21
Deadline for clarification questions	16:00 22 October 21
Deadline for notifying intention to bid	16:00 5 November 21
Deadline for bid submission	16:00 19 November 21
Bidder Interview	w/c 6 December 21
Notification of result	15 December 21
Appointment of successful Bidder	17 December 21
Contract commencement	w/c 17 January 22

Ageing Better reserves the right to amend the above timetable.

Appendix 1: Conditions of Contract

Appendix 2 – Pricing Document

Pricing Preambles

1. The Pricing Document contains the Bidder's rates (excluding VAT).
2. The descriptions in the Pricing Document shall not be regarded as an exhaustive statement of everything included in the Contract; refer to the Specification for the full Contract requirements. The rates in the Pricing Document shall include for all work shown or described in the Contract as a whole and for all work not described but apparent as being necessary for the provision of the Services.
3. The rates in the Pricing Document shall include for the whole of the Bidder's obligations under the Contract whether expressly stated or reasonably implied. No additional request for payment will be permitted unless authorised in writing by Ageing Better.
4. All rates quoted are to be fixed until March 2024. Rates from March 2024 onwards shall be subject to review between the parties, and any proposed increase shall be agreed in writing by Ageing Better. Any rate of increase shall be limited to a maximum of the prevailing CPI rate at the time of the review, published by the Office for National Statistics.
5. Where quantities are stated in the Pricing Document the Bidder should note that they may vary and there is no guarantee of quantity. The rates quoted in the Pricing Document shall apply regardless of the actual quantity of Services subsequently ordered.
6. The rates shall be sufficient to provide the Services as outlined in the Specification in isolation from any other requirement and in any quantity.
7. No quantity or continuity of work is guaranteed to the Bidder and this should be taken into account when completing the Pricing Document. Unless expressly stated to the contrary, any quantities given in the Pricing Document are indicative only.
8. Payment shall be made in accordance with the Pricing Document and the procedures described in the Conditions of Contract attached at Appendix 1.
9. The Bidder shall include all mileage, subsistence and expenses costs within the submitted rates.
10. The Bidder shall include all costs for the production of any documentation and the attendance of any meetings required by Ageing Better under the Contract within the submitted rates.

Schedule of Rates

Please provide your budget breakdown in 3 parts, those parts consist of:

Part A: Stage 1: Scoping and developing the framework (January-March 2022)

Part B: Stage 2: Pilot delivery (April – November 2022) and Stage 3: Interim findings (November- December 2022)

Part C: Stage 4: Follow up and final report (October-December 2023)

It is understood that, due to the current uncertainty around the form the pilot will take, proposals and costings beyond stage 1 of the pilot will be indicative at this stage. Bidders should note however that £80,000 excl. VAT is the maximum budget available for this work.

Please base your indicative budget on the following assumptions: the intervention is delivered to 150 people; there will be two 'cohorts' of service users going through the intervention during the six-month pilot; there will be a single provider, and single intervention. Please state other assumptions you have made in your budget, if needed.

Team member	Role	No. of days	Price per day (excl. VAT)	Total days
Total (excl. VAT)				£

The above rates shall include for all work shown or described in the Contract as a whole and for all work not described but apparent as being necessary for the provision of the Services.

Appendix 3 – Written Return

The Written Return is separated into a number of Sections and questions to provide Bidders with clarity on the overall requirements of Ageing Better in relation to the quality measures used to evaluate all bids.

Each Section is linked to the Evaluation Criteria detailed in Section 4 of this ITT document. The Section weightings are shown in each Section heading

Each element of each question shall be scored on a scale of 0 to 5 by reference to the scoring guide detailed in Section 4 of this ITT document:

Bidders shall note that there is a 3000 word limit for the entire written return (Excluding section 0). Words that are used in diagrams are included in the word limit but it doesn't apply to Bibliographies, reference lists or CVs.

Section 0 – General Information

1	Bidder name	Insert details
2	Registered address	Insert details
3	Name of person completing the Invitation to Tender	Insert details
4	Telephone number	Insert details
5	E-mail address	Insert details
6	Company status (e.g. Ltd, Plc, sole trader, Charity, Community Benefit Society, etc.)	Insert details
7	VAT registration number	Insert details
8	Company registration number and/or charity number	Insert details
9	Date of incorporation	Insert details
10	Please provide the organisation name, contact details and a brief description of 2 contracts of a similar nature which demonstrate the Bidder's experience in relation to Ageing Better's requirements. Any Contract award will be subject to a satisfactory reference being provided by one or both of the named companies.	
	Insert details	

NOTE TO BIDDERS

Upon identifying the successful Bidder, Ageing Better may seek further evidence to determine the Bidder's ability to perform the Contract prior to awarding the Contract. If the Bidder is unable to provide the further evidence required, Ageing Better reserves the right to withdraw the Bidder's successful Bidder status.

Section 1: Approach to scoping (stage one)	Weighting
	20%
<p>We would like bidders to set out how they would approach stage 1 of this project: scoping and developing the evaluation framework. We want to know:</p> <ul style="list-style-type: none">• What steps would you take?• What information would you gather?• What order would you make decisions in?• Who would you engage with?• How would you communicate with us and other partners?	
Bidder's Response	

Section 2: Ways of working	Weighting
	15%
<p>We would like bidders to outline how they would manage the uncertainties inherent in this project.</p> <ul style="list-style-type: none">• How would you respond to a change in the pilot during the delivery? How would you work with us to weigh up the consequences of doing so?• What experience do you have of evaluating innovative and emergent interventions?• What experience do you have of working flexibly and collaboratively with commissioners?	
Bidder's Response	

Section 3: Producing relevant and accessible findings	Weighting
	10%
<p>We want to know:</p> <ul style="list-style-type: none">• How would you go about ensuring that the findings and materials are relevant and accessible to intended audiences?• What examples can you give of practitioner-focussed outputs you have previously produced?	
Bidder's Response	

Section 4: Experience of working on employment and training related projects	Weighting
	10%
<p>Please give 2-3 relevant examples of employment and training-related evaluations that this team have delivered before. We would particularly welcome examples of when this team have worked with people in the target age group for this pilot (50-SPA).</p>	
Bidder's Response	

Section 5: Risk management proposals	Weighting
	15%
<p>Acknowledging this project has important unknowns, we are asking bidders to outline how they propose to manage the risk inherent in such a project. In particular, we are looking for bidders to:</p> <ul style="list-style-type: none">• Identify the specific project management needs of this type of project• Demonstrate the organisational capacity, systems and processes for managing projects similar to this• Evidence their ability to work flexibly and collaboratively with project partners• Identify the specific risks of a project of this nature, and avenues for mitigating these risks	
Bidder's Response	

Appendix 4 – Form of Tender

To: Centre for Ageing Better

Re: Redundancy and Retraining Project – Pilot Evaluation (the “Contract”)

Dear Sirs

1. Having examined the Invitation to Tender and having satisfied ourselves as to all other matters relevant thereto, we confirm our tender for the Contract.
2. We enclose our tender, and confirm that these comprise all of the documents required to be submitted in accordance with the matters set out in the Invitation to Tender. We acknowledge that we are bound by our proposals submitted pursuant to the Invitation to Tender.
3. We hereby unconditionally and irrevocably offer to provide the Services requested to be provided and performed under the Invitation to Tender in accordance with the Contract and at no greater rates or prices than the rates or prices stated in the Pricing Document.
4. We confirm that we are fully conversant with all the Invitation to Tender documentation and that this tender is submitted strictly in accordance with the Invitation to Tender.
5. We agree that this tender shall remain open to be accepted or not by Ageing Better and shall not be withdrawn for a period of twelve (12) months from the deadline for receipt of tenders as set out in the Invitation to Tender, or such longer period as may be agreed with Ageing Better.
6. We undertake to execute the Contract for the proper and complete fulfilment of the Services required or any part or parts thereof, as you may in your absolute discretion award to us.
7. We agree that we shall commence and undertake the Services required when instructed to do so pursuant to the terms of the Contract.
8. We certify that the details of this tender and the Invitation to Tender documentation have not been communicated to any other person or adjusted

Centre for Ageing Better

in accordance with any agreement or arrangement with any other person or organisation.

- 9. We acknowledge that Ageing Better is not bound to accept the lowest or any tender it may receive, and reserve the right at its absolute discretion to accept or not to accept any tender submitted.
- 10. We certify that we have full power and authority to enter into the Contract and to carry out the Services, and that this is a bona fide tender.
- 11. We confirm that in submitting our tender, we have satisfied ourselves as to the accuracy and completeness of the information we require in order to do so (including that contained in the Invitation to Tender).

Total Price for this Tender

£.....

in words

Signed for on behalf of the Bidder by a duly authorised signatory of the Bidder:

Signed: _____

Name: _____

Position/Status: _____

On behalf of:
(name of Bidder) _____

Date: _____

Appendix 5 – Anti-Collusion Certificate

To: **Centre for Ageing Better**

Re: **Redundancy and Retraining Project – Pilot Evaluation** (the “**Contract**”)

The essence of the public procurement process is that Ageing Better shall receive *bona fide* competitive tenders from all Bidders. In recognition of this principle we hereby certify that this is a *bona fide* bid, intended to be competitive, and that we have not fixed or adjusted the bid by or under or in accordance with any agreement or arrangement with any other Bidder (other than a member of our own consortium). We have not and insofar as we are aware neither have any of our employees, contractors, advisers, agents, officers or subcontractors:

1. Entered into any agreement with any other person with the aim of preventing bids being made or as to the fixing or adjusting of any bid or the conditions on which any bid is made; or
2. Informed any other person, other than the person calling for this bid, of the content of the bid, except where the disclosure was necessary for the preparation of the bid for insurance, for performance bonds and/or Contract guarantee bonds or for professional advice required for the preparation of the bid; or
3. Caused or induced any person to enter into such an agreement as is mentioned in paragraph (1) and (2) above; or
4. Committed any offence under the Bribery Act 2010; or
5. Offered or agreed to pay or give any sum of money, inducement or valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any other bid or proposed bid any act or omission; or
6. Canvassed any other persons referred to in paragraph (1) above in connection with the Contract; or
7. Contacted any officer of Ageing Better about any aspect of the Contract except in a manner permitted by the Invitation to Tender.

We also undertake that we shall not procure the doing of any of the acts mentioned in paragraphs (1) to (7) above before the hour and date specified for the return of the bid nor (in the event of the bid being accepted) shall we do so while the resulting Contract continues in force between us (or our successors in title) and Ageing Better.

In this certificate

The word “person” includes any person, body or association, corporate or incorporate and “agreement” includes any arrangement whether formal or informal and whether legally binding or not.

Signed for on behalf of the Bidder by a duly authorised signatory of the Bidder:

Signed: _____

Name: _____

Position/Status: _____

On behalf of:
(name of Bidder) _____

Date: _____

Appendix 6 – Non-Canvassing Certificate

To: **Centre for Ageing Better**

Re: **Redundancy and Retraining Project – Pilot Evaluation (the “Contract”)**

Non-Canvassing Certificate

I/we hereby certify that I/we have not canvassed or solicited any officer or employee of Ageing Better in connection with the award of the Contract and that no person employed by me/us or acting on my/our behalf has done any such act.

I/we hereby further undertake that I/we will not in the future canvass or solicit any officer or employee of Ageing Better in connection with the award of the Contract and that no person employed by me/us or acting on my/our behalf will do any such act.

Signed for on behalf of the Bidder by a duly authorised signatory of the Bidder:

Signed: _____

Name: _____

Position/Status: _____

On behalf of:
(name of Bidder) _____

Date: _____

Appendix 7 – Supply Chain of Conduct

Ageing Better is committed to carrying out procurement activities in an environmentally, socially, ethically and economically responsible manner and to entering into agreements and contacts with suppliers that share and adhere to its vision

To demonstrate this commitment, Bidders are asked to acknowledge their compliance with the principles of the Supply Chain Code of Conduct for this Contract, below, with respect to their organisation and their supply chain:

With respect to Social Compliance Tenderers shall:

(i) Not use forced, involuntary or underage labour

- Employees should be free to choose their employment and leave that employment without hold by financial deposit of personal items
- Forced, bonded or involuntary prison labour shall not be used
- Support the effective abolition of child labour
- Comply with the national minimum age for employment, or minimum age 15, whichever is the higher unless a lower minimum age is permitted under International Labour Organisation (ILO) convention 138
- Where any child is found to be engaged in performing child labour, to provide support for that child to enable them to complete, as a minimum, their compulsory education (even if they shall cease to be involved in child labour) or an equivalent education level, as provided for under the UNI Covenant on Economic, Social and Cultural Rights. Such support by the Tenderer should recognise and not prove detrimental to the conditions of the child or those that their work supports

(ii) Provide suitable working conditions and terms

- At least statutory minimum wages (or if none, a realistic living wage) must be paid without discrimination to all employees and all non-statutory deductions must be with the consent of the employee.
- Working hours must be excessive (not over 48 hours per week, excluding overtime) and must allow for at least 1 day off for each 7 day period on average. Working beyond this should be non-regular and of employees own will
- A safe and hygienic working environment must be provided, including any catering or accommodation areas. Any hazardous working, as defined by ILO, should only be carried by persons age 18 years or over
- All equipment must be safe for use and processes must allow a safe working environment
- Policies and processes must be in place for recording and eliminating occurrence / reoccurrence of health and safety related incidents.

(iii) Treat employees fairly

- Allow employees the freedom of association to join (but not be forced to join), or be represented by, a trade union or similar organisation of their choice, and be free to leave organisations
- Not discriminate or unfairly treat any employee for any reason including education, social class/ caste, nationality, trade union membership or any of the 9 Protected Characteristics of the UK Equality Act 2010

- Provide a workplace free from discrimination, harassment or victimisation
- Treat all employees with respect and dignity, and not accept inequality as justifiable on a basis of culture
- Remunerate all employees equally at the same employment grade, regardless of any characteristics listed above, unless statutory conditions require otherwise.

With respect to Ethical Compliance & Economic Development Tenderers shall:

- As a minimum, comply with all laws and regulations of the countries they are working in, manufacturing in or trading with, as applicable
- Not be involved in any way with acts of corruption or bribery, or support acts of violence or terrorism or abuse of individual people or communities
- Not force unsustainable or unfair contract terms on their suppliers, or throughout their supply chain, nor allow unfair exploitation of a dominant market or customer position
- Support fair trade conditions for producers, where applicable
- As a minimum, comply with all financial regulations and taxations of the countries they are working in, manufacturing or trading with, as applicable
- Include community benefit delivery in the locality of where the contract is performed (including publishing and delivering levels of local training and employment opportunities)
- Appoint sub-contractors through an open and fair process, such as public advertising of such opportunities wherever possible
- Act at all times with respect and integrity, including open and transparent accounting
- Allow staff protection if reporting misconduct or raising concerns with respect to their own, or another organisation, and ensure all affected staff are treated in a fair and transparent manner

With respect to Environmental Compliance Bidders shall:

- As a minimum, comply with all local and national environmental laws, regulations and directives of the countries they are working in, manufacturing in or trading with , as applicable
- Actively avoid causing environmental damage and / or negative environmental impact through manufacture and supply of the goods or services and disposal of supply chain waste
- Have a business plan in place, and be acting on it, to minimise their environmental impact year on year and adopting or working towards internationally recognised environmental standard and/ or behaviours
- Encourage the development and use of environmentally friendly technologies
- Promote positive environmental impacts (such as reduced carbon emissions, better carbon management, waste management and water management, reduced pollution levels and technological improvements) through their activities wherever possible.

I confirm that I am authorised and have all requisite corporate authority to make this declaration on behalf of the entity referred to below

I hereby confirm that the entity referred to below adheres to this Supply Chain Code of Conduct and , if successful in this procurement exercise , shall ensure its supply chain adheres to the Code of Conduct also in order to enforce and promote sound social, ethical , environmental and economic practices

Entity	(Enter text here)
Name	(Enter text here)
Title	(Enter text here)
Position in Entity	(Enter text here)
Date	(Enter text here)

Appendix 8 – Identified opportunities