



Understanding the experiences of those approaching later life

Deadline for Tender Submissions:

5pm, 16 August 2019



The Centre for Ageing Better received £50 million from the National Lottery Community Fund in January 2015 in the form of an endowment to enable it to identify what works in the ageing sector by bridging the gap between research, evidence and practice.

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1. About us

The Centre for Ageing Better is a charity, funded by an endowment from The National Lottery Community Fund, working to create a society where everyone enjoys a good later life. We want more people to be in fulfilling work, in good health, living in safe, accessible homes and connected communities. By focusing on those approaching later life and at risk of missing out, we will create lasting change in society. We are bold and innovative in our approach to improving later lives. We work in partnership with a diverse range of organisations. As a part of the What Works network, we are grounded in evidence.

Working in partnership with national and local government, private, public and voluntary sector, we will seek to influence national policy and deliver long lasting changes locally. We work on a range of topics that matter to people as they enter later life (see for example our research published in partnership with Ipsos MORI, [Later Life in 2015](#)). We have four priority goals:

Fulfilling work

Around 1 million people between 50 and 64 are involuntarily out of work. We know being in good quality work is important to helping people remain financially secure, but employers are not doing enough to create age-friendly workplaces. Our goal is 1 million more people aged 50-69 in fulfilling work by 2022. We will help make employers more age-friendly, promote health at work, and find new ways to support people who want to get back into work.

Safe and accessible homes

Our housing stock is among the oldest in Europe with some of the highest associated health and care costs. Most people want to remain in their own home, but current housing stock is not suitable for us as we get older. Our goal is that by 2030 there will be 1 million fewer homes defined as hazardous and half of all new homes will meet accessibility standards. We'll work to make sure new homes are future proofed and that there is a diversity of suitable homes, that current homes are adapted, and better information is available for people approaching later life.

Healthy ageing

Our health is fundamental to our quality of life. We want more people to reach later life in good health: free of preventable disability and better able to manage long-term conditions. This helps us stay in work, stay independent in our own homes and be active in our communities. Our goal is for people to have five more years free of preventable disability, and to reduce the gap between the richest and poorest people in disability-free life expectancy by 2035. We will bring together a wide range of organisations who together can ensure more of us age well, support local areas to take an integrated approach to healthy ageing, and identify and test interventions to influence behaviour change.

Connected communities

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Communities where people know and help each other make it easier to build relationships and stay active. By 2030, we want to see an increase in the proportion of people aged 50 and over who report they feel they strongly belong to their neighbourhood. We'll help create the physical environment necessary to build connections, remove barriers to participation and support more local areas to become age-friendly so that everyone feels part of a community.

Millions of us risk missing out on a good later life. We must act now to secure a better future for everyone.

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 the key EU principles of transparency, non-discrimination and equal treatment.
- Any clarification questions should be sent to responses@ageing-better.org.uk by 5pm, 5 July 2019.

2.1 Background

The Centre for Ageing Better was created in 2015 to bring about lasting change that makes a difference to people’s experience of later life, now and in the future. Since then, we have conducted various pieces of research and worked with a range of sector experts to define a path that will make this vision a reality. Our most recent strategy - [Transforming Later Lives – Strategy 2018](#) – outlines the outcome of this work, detailing our vision, target population group and priorities (see ‘Our strategy’ below for a summary).

Our strategy in summary

- *Our vision:* a society where everyone enjoys their later life. We define this as being dependent on having financial security, good health, social connections, and meaning and purpose.
- *Target group:* we are taking a preventative approach and are therefore focusing on those who are approaching later life. We classify this loosely as people in their 50s and 60s. Within this group we are particularly interested in those who are at risk of missing out on a good later life.
- *Areas of life:* in order to achieve our vision and the various dependencies, we have organised our work around four areas of life – fulfilling work, healthy ageing, connected communities and safe and accessible housing. We refer to these as our four priority goal areas.

We have published previous reports that examined the lives and experiences of people approaching and in later life (see Appendix 1 for further details). We expect that this work will build on, rather than duplicate, these previous reports.

2.2 Understanding lived experiences

The piece of work being tendered here is another important step in our organisational development. It is the first time we are tendering for a large, mixed methods piece of research that will explore in detail the experiences of those approaching later life. It is intended to provide us with an in-depth understanding of people's lived experiences, looking across our priority goal areas and the relationship between them (see section 3.1). The results of this research will shape our work programmes going forward, provide us with invaluable insights that will strengthen our dissemination and influencing activities, and support others who are also interested in this exploring this life stage.

Defining 'at risk'

As described, we are focused on those who are at risk of missing out on a good later life. We conceptualise as an overall outcome and various contributory or risk factors (see list below and Figure 1).

Vision: a good later life

- Example indicators: satisfaction, wellbeing

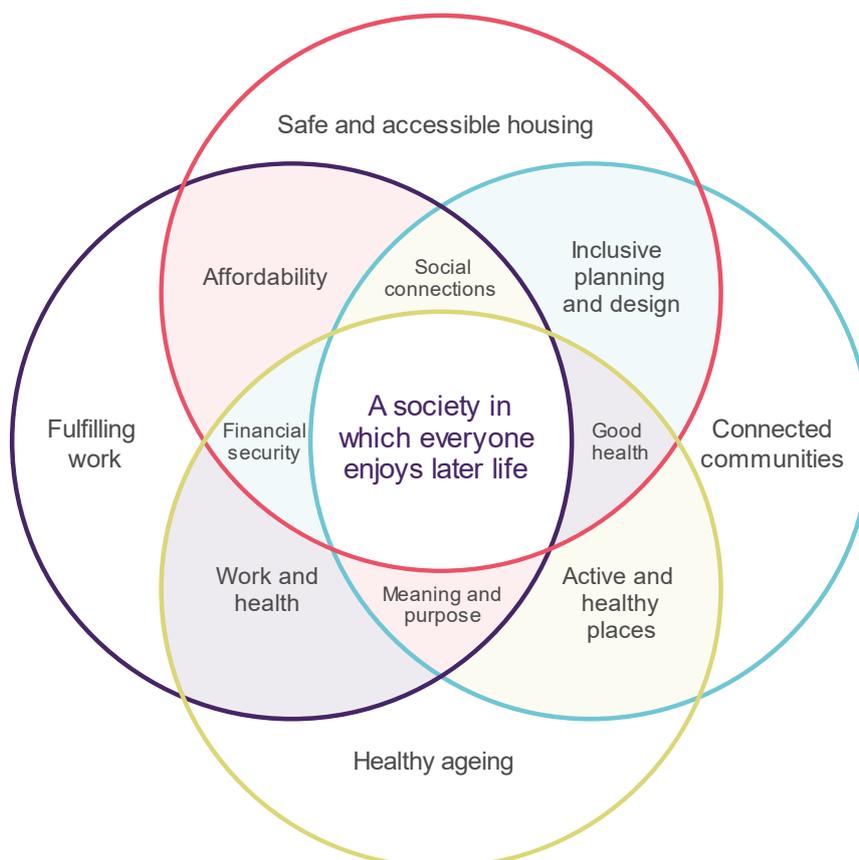
Contributory / risk factors

- Financial security – enough income for daily life with savings for future plans or emergencies
 - Example indicators: measures of poverty and income, ability to plan and save for the future, unemployment, insecure work, low-skilled work, health conditions that limit ability to work, housing status
- Good health – the best possible physical and mental health and able to live independently for as long as possible
 - Example indicators: risk factors to poorer health in later life (smoking, obesity, lack of physical activity etc), long-term conditions, disability-life expectancy, condition and accessibility of home
- Social connections – close, personal relationships and everyday contacts that provide practical and emotional support
 - Example indicators: accessibility of local environment, satisfaction with neighbourhood, relationship status, proximity of family and friends
- Meaning and purpose – feeling valued and respected

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- Example indicators: satisfaction with life, ability to do things that people feel are worthwhile, physiological outlook, ability to undertake fulfilling paid and/or unpaid work, physiological outlook, opportunities for life-long learning

Figure 1: Our strategy and the interconnected priorities



We are seeking proposals that outline how bidders will create a compelling, coherent narrative that brings together this diverse range of topics and data (as per the research questions in Section 3.1). This includes an exploration of how the experiences cluster in different population groups (e.g. across ethnicity, gender, age, deprivation, etc) *and* the relationship between the risk factors themselves (e.g. whether having meaning and purpose is related to health outcomes across the life stage as a whole).

Note that the list of 'example indicators' above are not exhaustive and will be agreed collaboratively with the successful bidder. Bidders can also suggest other categorisations of contributory / risk factors as long as it reflects our strategy.

Measuring lived experiences

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There are different ways in which to explore lived experiences and we are open to suggestions from bidders. An example is the framework created by the Equality and Human Rights Commission (EHRC) to measure inequality in society ([EHRC, 2017](#)). This framework differentiates between three types of measurement: outcome, process and autonomy. The result is a set of data that describes people's outcomes *and* the differences in opportunity (the circumstantial or structural challenges that some people face).

Type of measurement	Definition	Example
Outcomes	What people have been able to achieve, e.g. being healthy, having a safe and accessible home	The percentage of people living in non-decent homes
Process	Their treatment by others, e.g. discriminatory actions, access to support	The percentage of people who receive the Disabled Facilities Grant
Autonomy	The amount of choice and control they have over decisions about their lives and circumstances	The percentage of people who would like to move home but are unable to for financial reasons

Bidders may also find it helpful to review our [Ageing Better Measures Framework](#). The Framework is a compendium of 63 measures, survey scales and their associated data sources looking at outcomes at the individual level related to ageing and later life.

Note that the use of these frameworks is not a requirement of the ITT. We have included this information here to demonstrate that we are interested in people's outcomes and documenting some of the causes behind the inequalities in outcomes. As described in Section 3.2, some of this can be described using existing literature and the combination of quantitative and qualitative methodologies.

3. Contract overview

3.1 Aims

We want to further understand the lived experiences of people approaching later life (people aged 50-69), *with a particular interest in those who are at risk of missing out on a good later life*. This will include the provision of overall trend and data analysis, alongside first-hand descriptions of people's lives and everyday experiences. Our core focus is to understand the current picture of this life stage but we are also interested in how this compares to previous generations and what it means for the future. Our research questions are as follows:

1. Who are this group?
 - a. An overview of their demographic characteristics plus other characteristics such as wealth/income/deprivation, geographic location and, relationship, household and carer status (and the intersections between these characteristics).
2. Within this group, who are at risk of missing out on a good later life and why?
 - a. An overview of their status as per our 'vision' and 'contributory factors' described in Section 2.2, noting the range in experience as per the characteristics outlined above.
 - b. What is the relationship between these contributory factors and how do they cluster?
 - c. Can we understand why people are missing out now and/or at risk of missing out on a good later life? For example, as a result of structural barriers or discrimination.
3. What commonly happens to people during these 20 years? Are there life events that are more likely to happen during this age group and do these contribute to the risk of missing out? Who do these events most commonly happen to (e.g. are some people more likely than others to get a long-term health condition)?
4. Broadly, how are the experiences of today's 50-69 year old's different to the previous generation and what implications does this have for their later life *and* future society?
5. What are the lived experiences of those who are at risk of missing out on a good later life?

- a. How do people describe their current or recent experiences (including any particular transitions or life events that have occurred during the 19 year period)?
- b. How do they understand the impact of their current situation, choices or behaviour on their future later life?
- c. What are their aspirations and expectations for the future?
- d. What are the perceived barriers and enablers to future-orientated action?

We expect this work will be used in the following ways:

- To support the development of further strategic and programme development work at Ageing Better, both the population groups we will focus on and specific topic areas.
- To support our dissemination and influencing activities through the provision of key statistics and individual stories that bring to life our priority goal areas and organisational vision.

3.2 Methodology

As per feedback to our pre-ITT consultation, this tender has been separated into two work packages, divided by methodology. We have left the specific methodology open to bidders to suggest and would like this to be clearly detailed in the proposal.

Work package 1: a quantitative perspective

- Responding to research questions 1-4, with particular attention to our areas of interest as outlined in Section 2.3 and the depth of information we want to gather as per Section 2.2.
- An analysis of publicly available data sets.
- Bidders should also consider privately held datasets, e.g. for consumer information.
- Bidders may also want to propose the collection of new data.
- Literature reviews may be used to supplement gaps in the data (and/or qualitative methodologies).
- Bidders should also demonstrate how those approaching later life will inform the research (e.g. in the design process or testing of the emerging findings).

Work package 2: a qualitative perspective

- Responding primarily to research questions 4 and 5 but with explanations of how the results could contribute to the other research questions where possible.
- Qualitative methodologies that provide compelling and in-depth narratives into the lived experience of people in this life stage.

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- Bidders should pay particular attention to our areas of interest as outlined in Sections 2.2 and 2.3, and those who are at risk of missing out on a good later life but who are often underrepresented in data analysis, e.g. BAME and LGBT groups (note that this should not include marginalised groups such as homeless people or those in prison). The data and narratives obtained in this work package should reflect our priority goal areas and respond to initial findings from work package 1 (depending on how the work is sequenced).
- Bidders should also demonstrate how those approaching later life will inform the research (e.g. in the design process or testing of the emerging findings).

Videos and other digital outputs

We want this work package to bring to life people's experiences and provide us with case studies that we can share more widely. As such, we have an additional £20,000 (excluding VAT) to spend on the creation of videos and other digital outputs. If bidders have a preferred supplier to create these outputs, please notify us in your proposal (although we reserve the right to contract with a different organisation).

It will be expected that both work packages, and particularly work package 2, will work closely with the supplier of these outputs and our digital communications team. The research team will not be expected to create these outputs themselves but will be expected, where appropriate and with full compliance to ethics requirements, to provide access to individuals and their stories.

3.3 Outputs

The successful bidder(s) will be expected to produce a single research report which outlines the findings from both work packages. The report should provide a clear and engaging narrative of the results. In addition to the full report, we would also like a summary version that is written in plain English. The data behind all graphs and tables in the final report should be provided to us in Excel format (for further dissemination activities). Note that all the outputs created may be used by Ageing Better to generate further dissemination materials (e.g. infographics, blogs, insight reports, etc).

We would also like the successful bidder(s) to hold one or more round tables to test out emerging findings and undertake some policy/solution-focused future scenario planning for later lives (and potentially generate ideas that Ageing Better will incorporate into our work plans). Our offices in central London can be used as a venue and we would expect to collaborate on the design of the workshop and invite lists.

3.4 Tendering for the work

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Our preference is to contract with a single organisation or pre-formed consortium that will deliver both work packages. Bidders forming consortiums will need to demonstrate that they have successfully worked together previously and that they can identify and mitigate any risks that may occur as a result of partnership working. However, bidders can submit a response to just one of the work packages and if possible, we will join you with another organisation who can deliver the other half.

Note that in whatever formation, we expect organisations to work as a single team, producing a single set of outputs. This includes, amongst other things:

- Producing a joint project plan with clear roles and responsibilities, and jointly agreed milestones.
- Demonstrating to Ageing Better how the organisations will collaborate, e.g. through joint team meetings and regular contact.
- Holding joint activities to discuss and test out emerging findings.
- Producing a single, final research report which summarises and brings together all elements of the research.

Bidders are requested to clearly indicate which work package(s) they are responding to in their Notification of intention to bid and their final submission.

3.5 Contract Term

The contract will be for 18 months at the longest. However, we would appreciate bids that can be delivered in a shorter timeframe. In terms of the schedule of work, we anticipate emerging findings from work package 1 will feed into the design of work package 2.

3.6 Budget

Work package 1: We are looking for bids up to £80,000 (exclusive of VAT).

Work package 2: We are looking for bids of up to £100,000 (exclusive of VAT).

3.7 Ways of working

We are an active commissioner.

This means that:

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- We expect to be in regular contact as the project progresses and would welcome suggestions from bidders as to appropriate frequency and format.
- We expect to work with the successful bidder to manage the scope of the project and help them to make decisions about priorities – to ensure the project meets stakeholders needs whilst being deliverable within timescales and budget.

We also expect bidders to have clear processes for QA and project management in place. We also expect that bidders will meet any necessary research ethics and GDPR requirements.

4. Invitation to Tender evaluation criteria

Bids for the Contract for shall be evaluated on the basis of the criteria set out below to determine the most economically advantageous tender (MEAT). Ageing Better has allocated a maximum weighting for each criteria as follows:

Criteria	Weighting
1. Experience of the team	30%
2. Methodology	40%
3. Project management and quality assurance	20%
4. Value for money	10%
Total	100%

Bidders should submit no more than 4,000 words answering each of the above criteria. Bidders should also submit CVs for every project team member (these do not count towards the word limit).

4.1 Scoring

Criteria 1 to 4 shall be scored on a scale of 0 to 10 by reference to the following scoring guide:

Score	Description
9-10	Exceptional. Demonstrates strengths, no errors, weaknesses or omissions and exceeds expectations in some or all respects.
7-8	Good. The standard of response fully meets expectations.
5-6	Satisfactory. The response is acceptable but with some minor reservations.
3-4	Poor. The response is deficient in certain areas where the details of relevant response require the reviewer to make certain assumptions.
1-2	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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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 5pm, 5 July 2019 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 5pm, Friday 16 August via e-mail to: responses@ageing-better.org.uk

The Invitation to Tender return shall state the following title:
Understanding the experiences of those approaching later life

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 2
- A completed Pricing Document as set out at Appendix 3;
- A completed Written Return, specifying how the Bidder will carry out the Services to

be provided under the Contract, and CVs of each team member as set out at Appendix 4;

- A copy of the Form of Tender as set out as Appendix 5 signed by the authorised signatory submitting the bid on behalf of the Bidder;
- A completed Anti-Collusion Certificate as set out at Appendix 6, signed by the authorised signatory submitting the bid on behalf of the Bidder;
- A completed Non-Canvassing Certificate as set out as 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 reserves 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.

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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.

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 6.

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 7.

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 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).

6.7 Ageing Better's right to reject bids

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

6.8 Time

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

6.9 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	Monday 17 June
Deadline for clarification questions	Friday 5 July
Clarification questions published	Wednesday 10 July
Notification of intention to bid	Monday 29 July
Deadline for bid submission	Friday 16 August
Bidder interviews	Wednesday 4 September
Notification of result	Friday 6 September
Inception meeting	Wednesday 11 September

Ageing Better reserves the right to amend the above timetable.

Bidders are requested to clearly indicate which work package(s) they are responding to in their notification of intention to bid and their final submission.

Appendix 1: Related Ageing Better publications

In response to requests received in our pre-ITT consultation, we have indicated below a few Ageing Better publications that are of particular interest to this ITT. In addition to these population-focused reports, we have [numerous priority goal-specific publications](#) that bidders may want to review.

[Later Life in 2015](#)

- This was primary research that explored how older people define a ‘good life’, what the barriers and opportunities are and which of these are most important.
- The report used data from the English Longitudinal Survey for Ageing to undertake cluster analysis that segmented the people aged 50 and over on the basis of their responses to 30 wellbeing indicators. Six segments were created, and profiles formed based on their common characteristics. Various qualitative methodologies were used in the interpretation of these segments.
- This report was used to demonstrate the diversity of experience in later life. It also gave us valuable information about what older people themselves value in life; evidence that has informed our recent strategy work and the creation of our priority goal areas.

[A mid-life less ordinary \(2017\)](#)

- This report outlined the characteristics and incomes of low to middle income households aged 50 to state pension age (using data primarily from the Family Resources Survey). In order to understand the specific experiences of this age group, the report compared these characteristics to younger low to middle income households and provided insight into the challenges they face.
- The report concludes that while this cohort are often labelled as the wealthier, more successful generation of baby boomers, ‘there remains a group of working-age families aged 50 to State Pension age, with less than typical income, who work more, vote more, but with incomes at similar levels to a decade ago’.

[Inequalities in Later Life \(2017\)](#)

- This research was based on an evidence scoping of the nature of inequalities in later life. The purpose was to further understand the causes and symptoms of inequality. The research focused on six key areas of life and explored them through the lenses of the equality characteristics plus socioeconomic status, place of residence, and status as an informal carer.
- The report concluded that inequalities can be understood as the product of cumulative disadvantage overtime and the result of multiple other factors. It

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suggests that poverty and disadvantage are often a fundamental aspect of inequality in later life and that there are data gaps around the experiences of BME groups, the LGBT community, people with disabilities, people with informal caring responsibilities, and the oldest old.

Bidders may also be interested in our publication [Planning and preparing for later life](#) (2018) which sought to understand if and how people in mid-life plan for later life. The report outlines the enablers and barriers and, highlights the differences in people's propensity to plan.

More recently, we have published [The State of Ageing in 2019](#), a report that used publicly available data to give a snapshot of what life is like for people aged 65 and older today. It also forecast, at a high level, the potential future scenarios for people currently in their 50s and 60s, looking across four priority goal areas.

Appendix 2: Conditions of Contract



Conditions of
Contract 0.2.docx

Appendix 3: Pricing Document

Pricing Preambles

1. The Pricing Document contains the Bidder's rates.
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 2021. Rates from March 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 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 2.
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

Insert day rates by team member

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 4: 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 10 by reference to the scoring guide detailed in Section 4 of this ITT document:

Bidders shall note that there is a 4000-word limit for the total Written Return response. Bidders should also include CVs for all team members, but these do not count towards the word limit.

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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	<p>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.</p>	
	<p>Insert details</p>	

Section 2	Weighting
Methodology	40%
<p>Please outline your approach to the project, showing how you will approach each aspect of the work including any specific methods or techniques. Highlight any challenges you foresee and how these might be overcome.</p>	
<p>Bidder's Response</p>	

Section 3	Weighting
Project Management and Quality Assurance	20%
<p>Please set out team members roles in delivering the work, including days, rates and activities. Explain how the project will be managed. Outline your approach to QA of processes and outputs. If you are bidding as a consortium, please highlight how you will work together and mitigate risk.</p>	
<p>Bidder's Response</p>	

Section 4	Weighting
Value for money	10%
<p>Please outline how your bid demonstrates value for money. We are not looking to award higher points to the cheapest bid here – but to understand the ways in which value is being offered by bidders.</p>	
<p>Bidder's Response</p>	

Appendix 5: Form of Tender

To: Centre for Ageing Better

Re: Understanding the experiences of those approaching later life (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 in accordance with any agreement or arrangement with any other person or organisation.

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- 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 6: Anti-Collusion Certificate

To: Centre for Ageing Better

Re: Understanding the experiences of those approaching later life (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 7: Non-Canvassing Certificate

To: Centre for Ageing Better

Re: Understanding the experiences of those approaching later life (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: _____