



# **Inclusive Products in the Home: Understanding Mainstream Retail Markets**

**Deadline for Tender Submissions:**

***5pm 4 September 2019***



The Centre for Ageing Better received £50 million from the National Community Lottery 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.

## Contents

<b>1. About us</b>	<b>3</b>
1.1 Our approach to innovation and adoption	4
<b>2. Background to this Invitation to Tender (ITT)</b>	<b>5</b>
<b>3. Contract Overview</b>	<b>7</b>
3.1 Contract scope	7
3.2 Aims of the project	8
3.3 Methodology	10
3.4 Outcomes / Deliverables	11
3.5 Contract Terms	11
3.6 Budget	11
<b>4. Invitation to Tender Evaluation Criteria</b>	<b>12</b>
4.1 Scoring	12
<b>5. Bid Return and Tender Evaluation Process</b>	<b>14</b>
5.1 Enquiries and communication	14
5.2 Amendments to the Invitation to Tender	14
5.3 Procedure for the submission of bids	15
5.4 Content of bids	15
5.5 Evaluation of bids	16
<b>6. Important Notices for Bidders</b>	<b>17</b>
6.1 Confidentiality	17
6.2 Accuracy of information and liability of Ageing Better and its advisers	17
6.3 Anti-collusion	18
6.4 Non-canvassing	18
6.5 Copyright	19
6.6 Confidentiality	19
6.7 Ageing Better's right to reject bids	19
6.8 Time	20
6.9 Bid costs and loss of profits	20
<b>7. Timetable</b>	<b>21</b>
<b>Appendices:</b>	
Appendix 1- Conditions of contract	22
Appendix 2 – Pricing document	23
Appendix 3 – Written return	25
Appendix 4 – Form of tender	32
Appendix 5- Anti-collusion certificate	34
Appendix 6- Non-canvassing certificate	36

## 1. About the Centre for Ageing Better

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 believe that more people living longer represents a huge opportunity for society. But changes are needed so more people enjoy good health, are financially secure, are socially connected and have a purpose in later life. We bring about change by:

- **Working with others** to bring together the evidence on a topic, evaluate current practice and develop and test new approaches.
- **Influencing national and local decision makers** by communicating the changes that are needed to the system in order to improve later life.
- **Sharing knowledge on the evidence** for what works to improve later life and ensuring it is understood and widely applied.

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, [The State of Ageing in 2019: Adding life to our years](#)). 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**

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 the community.

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

## **1.1. About our approach to innovation and adoption**

We work with others to stimulate and test promising new ideas. Where we have the evidence of what really makes a difference, we support others to adopt and sustain the most effective ways of working.

We do this by:

- Listening to people's experiences and working with them to design new approaches.
- Looking at evidence and practice to identify promising examples.
- Bringing fresh perspectives to bear on tough challenges.
- Developing and testing new ideas with the potential to improve people's lives.
- Supporting others to adopt proven approaches and implement them at scale in order to reach as many people as possible.
- Bringing together organisations to learn from each other and share good practice.

## 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](mailto:responses@ageing-better.org.uk) by 5pm 7 August 2019.
- Bidders should also notify us of their intention to bid by 5pm 21 August 2019.

This background section gives more detail about the programme of work that led Ageing Better to fund this research, and briefly introduces the project we are commissioning through this ITT.

### Why this subject is important to improving later life

When we talk about an ageing population, all too often a bleak picture is painted about ill-health, care homes and loneliness. Despite common rhetoric, we spend most of our later lives living independently and in our own homes; and indeed, we know that the **majority of older people want to live independently in their current home for as long as possible**<sup>1</sup>.

However, we also know that most people over 65 live in mainstream housing<sup>2</sup> and current **UK housing stock is not suitable, adaptable or accessible for people in later life**<sup>3</sup>.

Of those aged 65 and above, 16% experience difficulty with at least one ‘activity of daily living’ (e.g. eating, bathing). This rises to half of those aged 85, with more than 1 in 3 people in their late 80s having difficulty undertaking five or more activities of daily living unaided<sup>4</sup>. Nearly half of over 65s (45%) personally worry about themselves ‘struggling’ with everyday activities like cooking, bathing or eating in the future<sup>5</sup>.

Given that **homes headed by someone aged 85 and over are the fastest growing household** (by 2025 there are projected to be 1.5 million households headed by someone aged 85 or over – an increase of 54% from 2015)<sup>6</sup>, and more than 80% of the homes we need by 2050 are already built<sup>7</sup>,

---

<sup>1</sup> Source: Adams, S. Hodges, M. (2018), [‘Adapting for Ageing’](#).

<sup>2</sup> Source: Boardman et al (2005), Chapter 5, in [‘40% House’](#). Environmental Change Institute, University of Oxford, UK.

<sup>3</sup> Source: Department for Communities and Local Government (2016), [‘English housing survey 2014 to 2015: adaptations and accessibility of homes report’](#).

<sup>4</sup> Source: Adams, S. Hodges, M. (2018), [‘Adapting for Ageing’](#).

<sup>5</sup> Source: YouGov Survey (2019), Commissioned by [Centre for Ageing Better](#).

<sup>6</sup> Source: Ageing Better calculations based on: [‘Department for Communities and Local Government \(2016\), ‘2014-based Household Projections: England, 2014-2039’](#).

<sup>7</sup> Source: Boardman et al (2005), Chapter 5, in [‘40% House’](#). Environmental Change Institute, University of Oxford, UK.

## Centre for Ageing Better

**the products, fixtures and fittings we have in our homes will be key to enabling us to live independently for longer.**

The Centre for Ageing Better wants to help people to stay independent for longer in their own homes. Our [research](#) has highlighted the **positive and life-changing impact home aids and adaptations** - particularly minor adaptations such as handrails and lighting improvements - **can have on independent living**. As well as reducing the risk of falls, and increasing mobility, adaptations also help people to feel more independent, more in control, and in some cases, enable them to increase their social participation.

However, the evidence suggests that the clinical appearance of adaptations and their negative associations with vulnerability and a loss of independence **often put people off installing adaptations until they reach a point of crisis**; instead they adopt inappropriate coping strategies rather than adapt their home<sup>8</sup>.

Given that assistive products are a triggered need, rather than a planned one, with 55 per cent of people over 50 not expecting to need to adapt their home<sup>9</sup>, **how do we support the preventative agenda and enable people who have not yet reached their ‘crisis point’ to live well in their own homes for longer?**

We believe that the **retail market offers an important opportunity to shift the norm** in terms of making **everyday products that are well designed, easy-to-use, and created with clear consideration of the needs of the majority of the population**, such as easy grip potato peelers and lever taps, **more common, accessible and desirable in homes**.

We know that **older adults do not want to be stigmatised or singled out** as in need of ‘assistive’ products or ‘equipment’. As such, **brands and businesses need to ensure equal access for people of all ages** - a sentiment echoed by consumers - with 83% agreeing that age neutral and inclusive brands feel the most modern and relevant<sup>10</sup>.

Despite the fact that over-50s outspend their younger counterparts in many areas, **older people are largely absent in advertising and the media**, and those that are depicted tend to be shown in a less than flattering light, with four in five of those working in advertising, media and PR agreeing that the **advertising industry comes across as ageist**<sup>11</sup>.

We need to find better ways to provide people with what they need to live well. Thinking about major fixtures like kitchens and bathrooms as well as smaller fittings and products within these rooms, improving the visibility and availability of **multi-generational, inclusive products** could have significant impact. They have the potential to **make daily living easier for everyone**, enabling people to live well in their own homes for longer and prevent or delay people from reaching a ‘crisis point’.

---

<sup>8</sup> Source: Docking, R. (2018), [‘Homes that Help: A personal and professional perspective on home adaptations’](#).

<sup>9</sup> Source: BMG Research (2017), [‘Housing Insight: Older people preparing their homes for staying put.’](#)

<sup>10</sup> Source: The Age of No Retirement (2018), [‘Age Does Not Define Us.’](#)

<sup>11</sup> Source: Kemp, N. (2016) ‘Why ageism is a land’s next frontier’. Campaignlive.

Additionally, there is a wider business case for retailers to be able to tap into a previously untapped market. **At £320 billion a year, the over-50s account for around 47% of all consumer spending** and are the top spenders in a number of categories, including household goods<sup>12</sup>. With **82% of those over 55 saying that their favourite retail brand no longer understands them** or what they need, and 95% stating that they would consider cheating on their favourite retailer with a competitor, it is clear that **a step change is needed**.

### 3. Contract overview

#### 3.1 Contract Scope

This project explores the concept of **inclusive design in relation to the application of everyday products** rather than assistive technologies or adaptations.

Our initial scoping suggests that there are well established principles around what good inclusive design looks like in this context and that many inclusive products exist, from eye-level ovens and kitchen unit carousels to walk-in showers and lightweight kettles. Whilst a lack of ‘good design’ may be an issue for certain products, **we are not intending to address the issue of design and manufacturing** at this stage. Rather, our focus is on **uncovering the attitudes and understanding of retailers and consumers towards inclusive products that already exist**.

More specifically, we are looking to understand the business case for retailing inclusive products and will work with retailers to understand their inclusive offerings, the **challenges, costs and opportunities** associated with these, as well as the perspectives of their consumers. We also want to identify the key levers for change to stimulate the market for inclusively designed products in the home.

To keep this manageable, we are suggesting focussing on products / design within a particular room in the house, such as a **bathroom or kitchen**. The exact area of focus will be determined in conjunction with the successful bidder, as to some extent the direction taken will depend on the bidder’s existing relationships and expertise.

This project will then inform our next phase of work, further details of which are in section 3.2.

#### **Key definitions**

- **Minor adaptations** are the most common adaptations made to homes and cost under £1,000. They include: hand rails, grab rails, ramps, steps, lighting improvements, lever taps, heating controls, key safes and door / window / curtain opening / closing equipment and

---

<sup>12</sup> Source: Hall, S. Rennick, K. Williams, R. (2019), [‘The Perennials: The Future of Ageing.’](#)

monitoring equipment for specific conditions, such as dementia, to enable someone to remain at home.

- **Inclusive design** is defined by the British Standards Institute as the design of mainstream products and / or services that are accessible to, and usable by, as many people as reasonably possible ... without the need for special adaptation or specialised design.
- By **retailer**, we mean a for-profit entity that sells goods for home products, fixtures and fittings to consumers through various distribution channels.
- By **manufacturer**, we mean an entity that makes goods to a process involving raw materials, components or assemblies, usually on a large scale with different operations divided among different workers.

### 3.2 Aims of the project

**This tender is for phase one of a two phase project.** This project aims to **develop relationships with a range of high-street retailers to build an understanding of their attitudes and perspectives towards inclusive design.**

The project also seeks to **uncover the assumptions and potentially divergences** that exist between retailers and their consumers through conducting a parallel strand of research that explores the factors that impact upon **consumer demand and sentiment** towards inclusive products – such as labelling, in-store engagement and retail positioning.

While this project does not focus on design or manufacturing, we will **convene well-established players in the inclusive design** field to support with identifying and promoting good design, as well as possible solutions or approaches that can be taken to address any challenges identified.

This **project will then inform a second phase of work** that will look to build upon insight gained from retailers and consumers throughout the first phase. At the moment, we believe this second phase will consist of working with a few select retailers to **test their products with consumers** and develop and trial **effective retailing approaches** for the market, such as the impact of product choice and quality, in-store positioning and labelling, online and offline variations and level of staff knowledge and engagement, on purchasing. However, the scope of this second phase may shift depending on the outcomes of phase one, particularly in relation to the key challenges and levers of change identified.

This project therefore comprises of two phases, described as follows. **This ITT relates to phase one.**

#### **Phase 1: Problem definition – understanding retailer and consumer attitudes and needs (October 2019 – July 2019 - approximately)**

The successful bidder/s for this phase will support the Centre for Ageing Better to conduct research into retailer and consumer insight. Recognising that these two strands may require slightly different skill sets, relationships and expertise, bidders may choose to bid for one or both of these projects.

We would **welcome organisations to bid in consortia** and would be very interested to hear from

## Centre for Ageing Better

those that have experience working with one another in a similar context.

**If two discrete bidders are selected, we will require both organisations to attend a joint planning meeting** with Ageing Better to design and plan the research methodology (including the sequence of activities), as well as establish key milestones and guidelines to reconvene, share learnings and, if necessary, adapt the approach to the project. Whilst Ageing Better is happy to play an intermediary role between the two organisations, close collaboration across both workstreams will be essential.

The two research areas for phase one are listed below.

### **1a) Market analysis**

The successful bidder for this research strand would have close, established relationships with high street retailers, and be able to quickly identify those that would be particularly interested in working on this project. They would then support Ageing Better to engage with these retailers (including identifying who we need to reach within the organisation) to build an understanding of the various challenges, barriers and opportunities around retailing inclusively designed products.

We would welcome the bidder's input and expertise in designing the research questions, however, we have listed potential areas of exploration below as a guide. We would be looking to the successful bidder to recognise the most suitable approach to asking these questions to get to the reality of the situation.

1. How do retailers perceive and understand 'inclusive design'? How does this translate to their product offering and procurement strategy?
2. If retailers are already selling inclusively designed products for the home, what products currently exist on the market and how are they performing? Is this possible to categorise and measure?
3. If retailers are not considering inclusive design in their retailing strategy, why is this the case? What considerations are they making? What barriers are they facing to retailing inclusively designed products?
4. What marketing / retailing strategies are retailers using for inclusively designed products, if any?
5. How do retailers perceive and understand the older adult / later life product market and consumer group? How does this translate to their product offering / retailing strategy? Is any particular consideration given to products that people can continue to use as they age?
6. Is there a business case for inclusive design products in the UK homes retail market? If not, why not and what can be done to create one? What are the key opportunities or levers of change that would need to be utilised?
7. Who are the leaders in this space and what differentiates them from other retailers?

### **1b) Consumer Insight**

The successful bidder for this strand of work would be experienced in utilising various insight gathering techniques to get to the truth of issues and address the fact that what people say in surveys may not be an accurate reflection of how they behave when the need arises.

## Centre for Ageing Better

They would need to work **flexibly** and **in consideration of the retailers** selected by the retail insight team to understand the relevant consumer groups to target, as well as methodologies necessary to unpick perspectives surrounding inclusive design and homebuying habits.

As above, we have indicated possible questions to explore below; however, we would be looking to the successful bidder to provide their expertise in shaping the final research questions, as well as pulling together, where relevant, the evidence that already exists on the subject matter.

1. What factors do consumers consider when selecting home products? What is the importance of factors such as longevity of products / fixtures / fittings in such considerations? Which factors help most in decision-making by consumers?
2. How often do consumers redesign their kitchen / bathroom? At what point do they start planning for a lifetime home, if at all?
3. Can consumers identify inclusively designed products? How do people describe these products, their purpose and value?
4. Are there any trigger points for considering these products? Which products are most important to consumers if / when thinking about longevity / the future?
5. What products / fixtures / fittings do consumers have in their home already that they believe are inclusively designed?
6. Would increased advice / awareness of the fact that certain products support independent later living (e.g. accreditation) make consumers more likely to purchase such products? If not, what other mechanisms might shift behaviour?
7. How do consumers perceive and understand the older adult / later life product market?

### **Phase 2: Developing and testing new approaches – retail pilots (TBC)**

As mentioned previously, the second phase of work would be informed by the outputs of the first phase. However, it would likely be interventionist and involve pilots with select retailers that we engaged with in Phase 1 to develop and test effective retailing strategies of inclusive products.

This second phase will be **commissioned separately** via open competition. **Bidders for Phase 1 will be welcome to bid for Phase 2** but will not receive any preferential treatment in this competition.

## **3.3 Methodology**

We are **open to bidder's suggestions and thoughts as to the best methodology** for answering our research questions, as well as the research questions themselves and possible consumer groups to target. We envisage that a mix of interviews and focus groups will be employed, although **we are open to more creative methods of engagement**, particularly for the consumer insight elements.

We would expect the successful bidders to treat the information gathered with a critical eye and exercise sound judgement as to the most appropriate methods of engagement to get to the truth of retailer and consumer perspectives.

**Market analysis** - We anticipate that the successful bidder will bring inputs and suggestions from

## Centre for Ageing Better

their own expertise and contacts in the retail market. It is expected that the bidder would have 'warm contacts' with mainstream, high street homes retailers in the UK in order to quick-start engagement and discussions with experts.

**Consumer insight** - The bidder would be expected to share their expertise of consumer research to collaborate with the retail insight team and engage with the selected retailers (and their consumers) to gather insight around the key questions. Mystery shopping, shop floor walking, behavioural insight testing, ethnography and survey questionnaires could be utilised, among other methods, to gather these insights.

**Collaboration** - It is expected that the successful bidder/s would be working closely alongside Ageing Better staff to engage with all key partners and stakeholders. If two separate bidders are chosen to conduct the retailer and consumer research, close collaboration will be required across organisations. As mentioned previously, we welcome bids from consortia / partners and will assess any bids received on their proven ability to collaborate and work effectively as partners.

### 3.4 Outcomes/Deliverables

The deliverables are as follows:

- Sharing of and facilitating connection with key retail industry contacts.
- Insight report(s) with findings from retailer and consumer research:
  - The report(s) will explore retailer and consumer perspectives towards inclusive design, with sections devoted to understanding what inclusive products are currently being offered by retailers, as well as whether there is a business case for retailing inclusive products (through an exploration of the associated barriers, costs, opportunities and key levers of change).
- Summary report with feasible actions for Phase 2 outlining proposed approaches to developing and testing effective retailing / marketing strategies for inclusive products.

### 3.5 Contract term

The contract for this project is for 9 months (approximately).

### 3.6 Budget

The budget for this project (excluding VAT) is:

- **Market analysis:** £50,000
- **Consumer insight:** £33,333

## 4. Invitation to Tender evaluation criteria

Bids for the Contract 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. Service delivery proposal: strong understanding of the inclusive design subject matter and value of the project, with a clear proposed delivery plan. Strong methodology and proven ability to collaborate with another organisation (if relevant) to deliver the project to a high standard.	30%
2. Contract mobilisation proposal: ability to operationalise the project to the specified time frames, with a clear plan of action, proposed staffing structure and engagement strategy with Ageing Better.	15%
3. Stakeholder engagement proposal: evidence of relevant expertise working with retailers/ the retail sector and/or consumers to creatively gather key market and consumer insight, with a clear proposed engagement strategy.	20%
4. Risk management proposals: proven ability to identify and evaluate risks associated with the proposal and provide strategies to mitigate or lessen these risks to ensure the project yields insightful results.	10%
5. Cost and value for money	25%
<b>Total</b>	<b>100%</b>

Bidders shall note that there is a 3000 word limit for each Written Return response if only bidding for one area of research. If bidding for both areas of research, there is a 5000 word limit for each Written Return response.

Bidders should also submit CVs for every project team member (these do not count towards the word limit).

### 4.1 Scoring

Criteria 1 to 5 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.
0	Rejected. Response is unacceptable or non-existent, or there is a failure to properly address any issue.

Criterion 5 is weighted at 25%. The Bidder that submits the Lowest Bid Total shall receive the maximum score of 25%. All other Bidders' Bid Totals shall be evaluated using the following formula:

Lowest Bid Total

$$\underline{\hspace{10em}} \times 25$$

Other Bidder's Bid Total

If a Bidder is successful in its bid for the Contract, then the Pricing Document it 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 **5pm 7 August** 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 4 September 2019** via e-mail to: [responses@ageing-better.org.uk](mailto:responses@ageing-better.org.uk).

The Invitation to Tender return shall state the following title:

**Inclusive Design in the Home: Understanding Mainstream Retail Markets**

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;

## Centre for Ageing Better

- 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.

### 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 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.

## **Centre for Ageing Better**

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 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 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	26 July 2019
Deadline for clarification questions	5pm 7 August 2019
Clarification questions published	14 August 2019
Notification of intention to bid	5pm 21 August 2019
Deadline for bid submission	5pm 4 September 2019
Bidder Interviews	24 September 2019
Notification of result	25 September 2019
Inception meeting	w/c 30 <sup>th</sup> September 2019
Contract commencement	w/c 7 <sup>th</sup> October

Ageing Better reserves the right to amend the above timetable.

## Appendix 1: Conditions of Contract

[Conditions of contract link.](#)

## Appendix 2 – Pricing Document

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 July 2020. Rates from July 2020 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 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.

## Centre for Ageing Better

### Schedule of Rates

Insert day rates by team member.

Name	Role	Daily Rate (£)	Days	Total

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 10 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 each Written Return response if only bidding for one area of research. If bidding for both areas of research, there is a 5000 word limit for each Written Return response.

Bidders should also submit CVs for every project team member (these do not count towards the word limit).

Section 0 – General Information

1	<b>Bidder name</b>	Insert details
2	<b>Registered address</b>	Insert details
3	<b>Name of person completing the Invitation to Tender</b>	Insert details
4	<b>Telephone number</b>	Insert details
5	<b>E-mail address</b>	Insert details
6	<b>Company status (e.g. Ltd, Plc, sole trader, Charity, Community Benefit Society, etc.)</b>	Insert details
7	<b>VAT registration number</b>	Insert details
8	<b>Company registration number and/or charity number</b>	Insert details
9	<b>Date of incorporation</b>	Insert details
10	<b>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.</b>	
	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	Weighting
Service Delivery Proposal	30%
<p>The following elements are seen as essential for the delivery of a successful Contract:</p> <ol style="list-style-type: none"> <li>1. A strong understanding of the inclusive design subject matter and the overall value of the project (including an expert perspective on how the research questions could best be framed to produce the most valuable insight)</li> <li>2. A clear proposed design and delivery model / methodology, which addresses if, and how, the bidder would collate evidence where it already exists to reduce the risk of duplication and shape the subsequent research questions</li> <li>3. Evidence of the expertise required to deliver either both aspects of research, or (if bidding for only one aspect) to collaborate effectively with another organisation to deliver the project to a high standard</li> </ol> <p>The Bidder shall demonstrate how their proposed solution addresses the requirement above. The Bidder's response shall take each requirement and explain the understanding of the requirement and the Bidder's proposed solution to addressing that requirement. Bidders shall provide evidence to support the response.</p>	
Bidder's Response	
This area is intentionally left blank for the bidder's response	

Section 2	Weighting
Contract Mobilisation	15%

The following element is seen as essential for the delivery of a successful Contract:

1. The ability to operationalise the project to the specified time frames, with a clear plan of action (including a clear proposed staffing structure and engagement strategy with Ageing Better)

The Bidder shall demonstrate how their proposed solution addresses the requirement above. The Bidder's response shall take each requirement and explain the understanding of the requirement and the Bidder's proposed solution to addressing that requirement. Bidders shall provide evidence to support the response.

**Bidder's Response**

<b>Section 3</b>	<b>Weighting</b>
<b>Stakeholder Engagement</b>	<b>20%</b>

The following element is seen as essential for the delivery of a successful Contract:

1. If bidding for the retail strand - the Bidder's existing relationships with retailers (please specify which

retailers and retail departments you would like to involve in the project), as well as an appropriate engagement strategy that critically assesses any information gathered to yield a deeper level of insight

2. If bidding for the consumer strand - the Bidder's approach to involving consumers to ensure that the project involves people with lived experiences of the issues and utilises creative methods of engagement to unpick perspectives and yield insightful analysis

The Bidder shall demonstrate how their proposed solution addresses the requirement above. The Bidder's response shall take each requirement and explain the understanding of the requirement and the Bidder's proposed solution to addressing that requirement. Bidders shall provide evidence to support the response.

**Bidder's Response**

**Section 4**

**Weighting**

**Risk Management**

**10%**

The following elements are seen as essential for the delivery of a successful Contract:

1. Identification of the main risks associated with the Contract
2. How the Bidder would mitigate each risk to ensure the project yields insightful results

The Bidder shall demonstrate how their proposed solution addresses the requirement above. The Bidder's response shall take each requirement and explain the understanding of the requirement and the Bidder's proposed solution to addressing that requirement. Bidders shall provide evidence to support the response.

**Bidder's Response**

## Appendix 4 – Form of Tender

To: **Centre for Ageing Better**

Re: **Inclusive Products in the Home: Understanding Mainstream Retail Markets (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

**Centre for Ageing Better**

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: **Inclusive Products in the Home: Understanding Mainstream Retail Markets (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.

**Centre for Ageing Better**

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: **Inclusive Products in the Home: Understanding Mainstream Retail Markets (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: \_\_\_\_\_