



**Invitation to Tender for
Mid-life support – Employer and Service Provider Scoping**

Deadline for Submissions:

5pm 4th March 2020



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.

Project Brief

Introduction

At the Centre for Ageing Better, we believe that employers have an important role in providing support to employees from mid-life onwards to help them plan for their later lives which will include retirement, life post-retirement or staying in work for longer if they want to. We know that transitions in later life such as retiring from paid work, changing career, becoming a carer or developing a long-term health condition can have a major impact on people's lives and their wellbeing and that there is a lack of preparation for transitions such as these.

Recognising the lack of support for people as they get older, the Calouste Gulbenkian Foundation (CGF) funded several courses which aimed to build resilience and emotional wellbeing to help people feel ready and positive about later life and better able to navigate life transitions. These courses employed well-known therapeutic approaches such as cognitive behavioural therapy and mindfulness and examined issues around ageism, resilience and transitions.

CGF and the Centre for Ageing Better partnered on the evaluation of two of these courses *Working Longer and Living Life to the Full*, a two-day course run by Cheshire and Wirral Partnership NHS Foundation Trust (CWP) and *Changing Gears*, a three-day course run by Age & Opportunity in Dublin, Ireland.

The evaluation showed that for up to six months following the courses, participants had improved levels of wellbeing, self-kindness, self-judgement and acceptance of change. In addition, participants became clearer about their goals for their career, health, finances and relationships and had taken some action as a result. This suggests that psychological and emotional support can also give people the tools to plan and prepare for other areas of life. Further details on the impact of the courses can be found in the full evaluation.

We know that some employers are already providing some mid-life support to their employees. In 'Thinking Ahead' (Gloster et al., 2018) we looked at what 25 large employers were doing to support their employees in their mid-life through to retirement. Finances and health and wellbeing were the most common areas of focus. There tended to be much less support for careers and working life and just a few examples of holistic support, encompassing all three areas (finances; health and wellbeing; career and working life). None were providing the emotional and psychological support that we believe is an integral part of mid-life support.

We would now like to assess employer demand for courses like that offered by Cheshire and Wirral and Changing Gears that support employees to look at the psychological and emotional aspects of later life transitions and to understand more about potential routes for providing this. That is, we would like to understand whether there are opportunities for this type of course to become a more standard offer amongst employers.

Scope of Project

Centre for Ageing Better are looking to commission market research to assess the demand for this type of course from employers and possible routes of delivery. We want to

understand if there is demand for this type of model amongst other employers or whether the model would need to be changed or adapted. In order to develop an attractive and feasible offer to employers, we would like to understand employers' preferences for content, shape, and delivery mechanisms. We would like to conduct a focused piece of market research with employers to understand:

1. Is there demand amongst employers to offer this type of course to their employees? Some employers do provide some mid-life support to their employees but not the psychological and emotional support we are proposing here. Is there interest among employers in extending their offer to include psychological and emotional support?
2. Where there is demand, we would like to understand (list is not exhaustive):
 - Which of the outcomes that the course achieves are the most important for employers and why?
 - What length of course / offer would they be willing and able to deliver? What would be the preferred mode of delivery?
 - Would employers pay, and if so how much?
 - What other requirements would they have?
 - How employers envision incorporating the course into their existing offer or whether they see it as a supplementary and separate offer?
3. Where there is not demand we would like to understand why.

We would also like to conduct focused research with providers of employee support to better understand the existing market and possible routes to delivering these courses at scale.

4. Who would potentially deliver this model? We are interested to find out what deliverers would need in order to deliver this type of course with employers and what their requirements would be. Questions we would like to answer include:
 - Which providers already deliver pre-retirement courses and coaching? (these can be more generic pre-retirement courses, not psychosocial ones specifically though we would also like to ascertain if any similar courses have recently come on the market).
 - How are these courses delivered?
 - Would current providers of employee support be interested in adding this to their offer?
 - What would be needed for them to deliver these courses?
 - What would they charge for delivery?

Outcomes and Objectives

Understanding of the parameters (length, cost, mode of delivery, audience) within which a scalable version would have to fit

- Understanding of how to market / communicate the model
- Understanding potential routes for delivery of the support

Employer size:

- We would be interested to primarily have research focus on large employers of over 250 employees.

Timescale

- Project is to run 1 April, 2020 to 31 August, 2020

Budget

The budget available for this project and expenses is £16,667 excl. VAT.

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

Key Requirements

Deliverables:

- Scan of the current market of who is delivering pre-retirement courses and midlife reviews / MOTs to understand delivery mechanisms.
- Scan of the current market to scope if there are providers delivering courses that address the psychological and emotional aspects of later life.
- Provider interviews:
 - We would expect bidders to speak to 5 companies or individuals delivering training for employees (bidders to source companies and contacts).
 - We would additionally ask the bidder to speak to one company we have identified who use an alternative platform for delivery of training.
- Employer interviews:
 - We would expect potential bidders to indicate the number of employers they can interview as part of their bid.
- A report including findings with employers and potential deliverers, including case studies and recommendations with regards to delivery including models and mechanisms

Insurances

The Contractor shall take out and maintain in full force and effect with a reputable insurance company the following minimum insurances for the duration of the Contract:

- Public Liability insurance – £10 million
- Employer's Liability insurance – £5 million
- Professional Indemnity insurance – £2 million

- **Evaluation Methodology**

Bids will be evaluated on a quality/cost ratio of 90%/10%. The individual weightings for the 90% quality element are stated against each question in the Bid Proposal document.

The Bidder that submits the lowest Bid Total will receive the maximum score of 10%. All other Bidders' Bid Totals will be scored based on the following formula:

$$\frac{\text{Lowest Bid Total}}{\text{Bidder's Bid Total}} \times 10$$

- **Timescales**

The indicative timetable for the procurement is as follows:

Stage	Date
Issue ITT document	5 February, 2020
Deadline for clarifications	13 February, 2020
ITT return deadline	5pm, 4 March, 2020
Interview	Friday 13 March, 2020
Notification of result	18 March, 2020
Inception meeting	23 March, 2020
Project start	1 April, 2020
Project end	31 August, 2020

Ageing Better reserves the right to amend these dates.

Supplier Questionnaire

1	Bidder name	Insert details
2	Registered address	Insert details
3	Name of person completing the Invitation to Tender	Insert details
4	Telephone number	Insert details
5	E-mail address	Insert details
6	Company status (e.g. Ltd, Plc, sole trader, Charity, Community Benefit Society, etc.)	Insert details
7	VAT registration number	Insert details
8	Company registration number and/or charity number	Insert details
9	Date of incorporation	Insert details
10	Please attach a latest copy of the Bidder's latest audited accounts	
	Accounts enclosed – Yes/No	
11	Please provide evidence of the following levels of insurance cover: <ul style="list-style-type: none"> • Employer's liability • Public liability 	

	<ul style="list-style-type: none"> • Professional indemnity
	Insurance evidence enclosed – Yes/No
12	Please provide details of any relevant industry accreditations held by the Bidder.
	Insert accreditation details
13	Please provide the organisation name, contact details and a brief description of 2 contracts of a similar nature which demonstrate the Bidder's experience in relation to Ageing Better's requirements. Any contract award will be subject to a satisfactory reference being provided by one or both of the named companies.
	Insert details

Bid Proposal

Reflecting the requirements set out in the Project Brief, please submit your responses to the following:

1. Experience and Skills (weighting 30%- maximum 1000 words)

We are looking for a bidder with a track record of research with employers, and strong research skills. Please outline your experience in relation to similar projects and highlight your knowledge and experience of the topic areas. Please also highlight involvement of specific staff. CVs can be included as appendices and do not count towards the word limit.

2. Approach and methodology (weighting 40% - maximum 1000 words)

Please outline your approach to the project against the outcomes and objectives as set out in the Project Brief, showing how you will approach each aspect of the work including:

- Any specific methods or techniques you plan to use;
- Your approach to sampling and recruiting employers and relevant training providers for the project

Please highlight any challenges you foresee and how these might be overcome.

3. Project management (weighting 20% - maximum 1000 words)

Please explain how the project will be managed to ensure a high quality outcome and outputs. Please also explain your approach to consent and GDPR.

4. Price (weighting 10%)

Please provide your proposed cost for delivery of the contract. This shall be broken down to show the cost of each individual milestone, the proposed number of days allocated to the contract, the day rates of each allocated staff member, and any applicable expenses. All costs are to be stated exclusive of VAT, and confirmation if VAT is applicable.

Please note that the maximum budget for this project and expenses is £16,667 excl. VAT

Total Price for this Tender (excl. VAT)

£

in words

Declaration

I/We, having read and understood the Invitation to Tender hereby offer to supply the Services in accordance with the Project Brief at the stated cost, and that this offer remains valid for a period of ninety (90) days.

Duly authorised to submit Tenders for and on behalf of the Company:

Name:

Signature:

Date:

Company:

Telephone:

E-mail:

Appendices for “Mid-life Support – Employer and Service Provider Scoping”

Appendix 1: Conditions of Contract

[Conditions of Contract](#)

Appendix 2 – 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 September 2020. Rates from September 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.

Schedule of Rates

Name	Number of days	Day rate	Total cost	

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 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 the ITT:

Bidders shall note that there is a 3000 word limit for each Written Return response.

Section 0 – General Information

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

NOTE TO BIDDERS

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

See next page for further tables to fill out as part of your written return

Section 1	Weighting
Skills and experience of team	30%
<p>We are looking for a team with a track record of research with older workers, particularly in the context of employment, and strong research skills.</p> <p>Please outline your experience in relation to similar projects and highlight your knowledge and experience of the topic areas. Please also highlight involvement of specific staff. CVs can be included as appendices and do not count towards the 3000 word limit.</p>	
Bidder's Response	

Section 2	Weighting
Approach	40%
<p>Please outline your approach to the project, showing how you will approach each aspect of the work including:</p> <ul style="list-style-type: none">• Any specific methods or techniques you plan to use;• Your approach to sampling and accessing employers <p>Please highlight any challenges you foresee and how these might be overcome.</p>	
Bidder's Response	

Section 3	Weighting
Project management	20%
<p>Please explain how the project will be managed to ensure a high quality outcome and outputs. Outline your approach the necessary processes and outputs and your approach to risk management.</p>	
Bidder's Response	

Section 4	Weighting
Cost	10%
<p>Cost will be scored via the formula detailed on page 10.</p> <p>Please include a table detailing the following:</p> <ul style="list-style-type: none"> • Number of days on each activity by each team member • Day rates • Total cost of the project (excl. VAT) 	
Bidder's Response	
Empty space for bidder's response	

Appendix 4 – Form of Tender

To: **Centre for Ageing Better**

Re: “Mid-life Support – Employer and Service Provider Scoping” (the “**Contract**”)

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.
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: “Mid-life Support – Employer and Service Provider Scoping” (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



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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: _____



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Appendix 6 – Non-Canvassing Certificate

To: **Centre for Ageing Better**

Re: “Mid-life Support – Employer and Service Provider Scoping” (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: _____



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