



Evaluation of psychosocial support for the retirement transition

Deadline for Tender Submissions:

5pm Tuesday 10 October



The Centre for Ageing Better received £50 million from the Big 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.

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1. About us

We are the **Centre for Ageing Better**, an independent charitable foundation. We want 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 for people in later life today and for future generations. Practical solutions, research about what works best, and people's own insight are all sources that we draw on to help make this change. We share this information and support others to act on it. We also try out new approaches to improving later lives.

We are funded by an endowment from the [Big Lottery Fund](#). We are part of the network of [What Works](#) organisations that promote the better use of evidence.

1.1 Our work

We work on a range of topics that matter to people as they enter later life and that evidence shows are important:

- [Being in fulfilling work](#)
- [Living in a suitable home and neighbourhood](#)
- [Managing major life changes](#)
- [Contributing to communities](#)
- [Keeping physically active](#)
- [Taking a local approach to ageing](#)
- [Getting the most out of digital](#)

We have used the results of a major study we undertook with people in later life – [Later Life in 2015](#) – alongside existing research and the views of other organisations working in the field, to identify areas that are key to achieving our vision. We want more people in future to say:

I feel prepared for later life

- I feel confident managing major life changes
- I have made plans for my later life
- I have the skills I need for later life

I am active and connected

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- I am in fulfilling work and/or I am making a contribution to my community
- I have regular social contact with other people and some close relationships
- I keep physically and mentally healthy and active

I feel in control

- I live in a suitable home and neighbourhood
- I have care, support and services that help me live my life

I live in an age-friendly community

We also want more people to live in an age friendly community – [Greater Manchester](#) is the first of our partners taking a local approach to ageing better.

We bring about change by:

- Commissioning 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 best evidence and ways of implementing it, including bringing people together to learn from each other.

1.2 Innovation and adoption

We try out new approaches to improving later lives. Where we find evidence that promising solutions really make a difference, we support others to adopt and sustain these ways of working. We do this by:

- Listening to people's experiences and using these to inform the design of new approaches
- 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 by Monday 2nd October (noon).
- Bidders should also notify us of their intention to bid in order to receive further background information, as detailed within this ITT.

1. Introduction

Retirement from paid work is a major change that can affect people’s relationships, their wellbeing and the meaning they derive from their lives. We know that some people flourish and others find it difficult, sometimes more so than they expected.

Current support for the retirement transition is generally focused on the practical and financial aspects of retirement and fails to consider the impact of retirement on our social, psychological, and emotional wellbeing. There are a small number of courses offering a broader approach (encompassing psychological and emotional wellbeing), but they are the exception rather than the norm. We would like to improve the evidence base for these courses.

This Invitation to Tender concerns several projects that provide group-based psychosocial support to people approaching the transition into retirement. There are differences between projects, in aims, content and delivery style, and target groups for participation, but they have in common an aim to facilitate a better ‘transition into’ later life and retirement, resulting in improvements in wellbeing that are maintained in the long-term, and providing resources to manage future life changes. Many of these projects target people who are 50+, meaning that they are in some cases, some way off their retirement date, but the projects aim to help them start thinking and talking about their future and considering when & how they might want to retire.

We are interested in understanding more about the outcomes for participants, as well as the outcomes for employers, as a result of their employees participating.

A first phase of these projects was delivered in 2016-17 and its evaluation will be published at the end of September. This evaluation aimed to identify the types of outcomes which participants may experience as a result of participation in the projects, and to explore the

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characteristics of projects which appeared to be important in contributing to these outcomes. Contractors may obtain an embargoed copy of this by registering their interest in submitting a tender (responses@ageing-better.org.uk).

The projects are about to commence their second phase of delivery, having made some adaptations to their offer, after reflecting on learning from the first phase. This is an Invitation to Tender to evaluate the second phase of these projects. The evaluation requirements are divided into three parts:

- Part A: An in-depth evaluation of a project delivered in the Cheshire and Wirral NHS Foundation Trust: *Later Life Transitions – Working Longer and Living Life to the Full* (to provide one interim and one final report of no more than 30 pages each)
- Part B: Five lighter-touch evaluations of other projects, listed below (to provide five short reports of no more than 15 pages each)

There will be a challenge in the project in balancing resources across Part A and Part B. **Our priority is delivering a robust evaluation for Part A**; however, we would still like to evaluate the five projects in part B in a useful way. The beginning of the project will be a particularly resource-intensive period. We are open to hearing from potential contractors what is possible and realistic given the time constraints.

We have recently produced a high-level map ([please contact us for a copy if you are interested in bidding: \[responses@ageing-better.org.uk\]\(mailto:responses@ageing-better.org.uk\)](#)) which provides an amalgamation of the strategies, mechanisms and outcomes covered by these projects. Each project uses some, or all, of these elements in delivery. We hope this is a helpful tool in understanding the projects, and beginning work on the evaluation – however, it is a starting point, and contractors are likely to need to amend this according to their approach, review of the phase 1 evaluation and following more detailed discussions with project leads. **We also have early draft individual maps for projects**, which will be shared with the successful contractor. The projects are described individually below.

The outputs against Part A (Cheshire and Wirral NHS project), and for each project evaluated in Part B, should be able to be used as standalone pieces.

We are interested in how we can take a theory-based approach to the evaluation of all the projects. Please see more details further below in the 'Approach' section. However, we think it is possible that the theory-based approach in Part A) may be strengthened by the data collection and analysis of the other projects in Part B), by supporting or countering theories of causality.

This evaluation is commissioned by a partnership between the Centre for Ageing Better and the Calouste Gulbenkian Foundation (UK Branch). The projects themselves are funded by

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the Calouste Gulbenkian Foundation's Transitions in Later Life Programme (TILL). More details on that programme can be found [here](#).

The maximum budget for this evaluation is £100,000 excluding VAT. More details on the specification follow in the next section.

The word limit for tenders is 4,000 words.

The following documents can be shared with contractors who express interest in tendering for this project, but are not for wider sharing:

- High level map (as detailed in this background section)
- Final report (2016-7) and Proposal for 2017-8 for the Cheshire and Wirral NHS Foundation Trust Project
- More detail on course dates and delivery (for the purposes of considering implementation of data collection)
- Embargoed copy of the final report from the phase 1 evaluation report (to be published end September 2017)
- The data collection tools used in phase 1 evaluation

3. Specification of Requirements

A. Aims of this evaluation

To understand how people and organisations can benefit from group-based psychosocial preparation for retirement, document the key components of a course, and identify lessons from delivery.

B. Evaluation Questions

Part A: Evaluation of the Cheshire and Wirral NHS Foundation Trust Project (*Later Life Transitions – Working Longer and Living Life to the Full*).

- 1) What contribution does this project make to participants preparing for and/or managing the retirement transition better, and how does it do this?
 - a. What outcomes, if any, do participants experience from participation in the course in relation to
 - i. Wellbeing
 - ii. Resources to manage the retirement transition – now or in the future
 - iii. Behaviour change
 - b. What outcomes are there for the employer from staff participating in the courses? (e.g. engagement in work; performance; attendance or working longer)
 - c. How has project contributed to these outcomes for individuals and employers?
 - d. What is the contribution of external factors?
 - e. Are there any unintended outcomes (i.e. negative, or not expected by the service provider), and if so, why did they come about?
 - f. Do outcomes and causal explanations vary for different groups of people, and if so, how?
- 2) What are the core components of this course that are essential to create successful outcomes, and which current components seem not to be important?
- 3) What practice, resources or processes in the organisation are important in ensuring successful implementation and efficacy of this project.
- 4) What is the cost to organisations, in terms of staff time and other resources?
- 5) What has been challenging in implementation for the project, participants, or organisation, and what, if any, learning can be shared with other similar projects?

Part B: EQs to be used in evaluating each of the other projects:

- 1) What outcomes do participants experience from the course in relation to:
 - a. Wellbeing
 - b. Resources to manage the retirement transition – now or in the future
 - c. Behaviour change
 - d. Work: e.g. engagement, performance, attendance or working longer? (where appropriate)
- 2) Are there any unintended outcomes (i.e. negative, or not expected by service providers), and if so, why did they come about?
- 3) Do outcomes vary for different groups of people and if so, how?
- 4) What are the most important components in bringing about the above outcomes?
- 5) What has been challenging in implementation for the project, participants, or organisation?
- 6) What, if any, learning can be shared with other similar projects?

C. Outputs required

We would like the following outputs:

Part A (NHS Cheshire and Wirral Partnership Foundation Trust project)

- Theory of Change for the course
- Evaluation Framework
- Agreed research tools and sampling framework
- An output or outputs showing (anonymised) data collected
- Interim Report
- Final Report of a maximum of 30 pages (contractors should allow for several iterations of this, until it is agreed to be suitable for publication)
- Documentation of the course and its most important components.
- A paper reflecting on learning about the appropriateness of outcome measures, and data collection methods for Part A (could also be informed by Part B). This will inform future evaluation, which could include quasi-experimental methods.

Part B (evaluation of the other five projects)

- Evaluation framework
- Agreed research tools and sampling framework
- A summary/spreadsheet/qualitative research package tool, with the data collected

- One Final Report for each project, of a maximum of 15 pages (contractors should allow for several iterations of this, until it is agreed to be suitable for publication)

D. How the evaluation will be used

How we use the evaluation outputs will depend on the findings, especially the findings around outcomes. However, we hope to do the following:

- 1) Help the Cheshire and Wirral NHS Foundation Trust to sustainably fund/embed their project, and influence other NHS and public-sector employers in their region to make similar provision for their employees.
- 2) Encourage other employers, funders and service providers to provide a pre-retirement offer that supports people in a more holistic way with their transition into retirement (rather than the current offers which tend to focus on financial capability):
 - a) Develop our understanding of, and communicate the business case to employers:
 - Demonstrate the benefits to individuals in participating in this pre-retirement course
 - Demonstrate the benefits for employers in supporting people to participate in this pre-retirement course
 - b) Have a 'good enough' course model which outlines the course components and what is necessary for fidelity; have guidance for organisations in terms of what processes and costs are involved in roll-out;
 - c) Help employers who wish to improve existing provision which is not focused on emotional wellbeing, by suggesting principals or components which may be helpful to augment an existing offer or even in the absence of a whole course (secondary priority).
- 3) Facilitate the Transitions in Later Life (TILL) projects (the evaluands) to improve their practice in terms of better outcomes and easier implementation.
- 4) Inform future evaluation in this topic area by suggesting what outcome measures, and data collection methods may be appropriate in terms of capturing the right outcomes in an appropriate way and over a longer time period.

E. Project descriptions

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A summary of the each of projects is outlined below. We will provide more details on number and dates of courses to contractors who express an interest in bidding (Please email responses@ageing-better.org.uk)

Most of the projects deliver similar course models with several groups of participants, some of whom are not approaching retirement. Other groups include mid-life groups thinking ahead to retirement; older prisoners; older people with chronic health conditions; and those moving into sheltered housing. This evaluation focusses only on the courses being delivered people who are approaching or transitioning into retirement (for the purposes of this evaluation we could define approaching as 50+), and the course descriptions below pertain to that target group. The courses vary in participation criteria and recruitment approach – some specify an age group for NHS Cheshire and Wirral this is 50+; some target people who self-identify as ‘approaching retirement’ or ‘approaching later life’.

Part A of Evaluation

NHS Cheshire and Wirral Partnership Foundation Trust

delivering to an estimated 117 participants, between October 2017 and April 2018, over nine courses. This may be extended with a further six courses between January and June 2018.

This project is a two-day course run over consecutive days, for employees of the Trust who are approaching retirement age. The course explores the factors that support mental and emotional resilience, and introduces techniques including positive thinking, visualisation, goal setting and mindfulness. Participants in 2016-7 developed action plans for preparing themselves for this next phase of life.

Course Aims and Design

Core aims of the workshop for Phase 2:

- To highlight the importance of emotional and mental resilience in later life
- To demonstrate how emotional and mental resilience affects an individual
- To look at the nature of the challenge of later life transitions
- To look at individual strengths and development needs (personality/skills/aspirations)
- Introduction to tools and techniques designed to help deal effectively with later life transitions – and the opportunity to practice them

Brief overview:

- To explore the meaning of emotional and mental resilience
- To describe and explore the different influences of change and transitions that may be experienced in later life

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- To explore the processes that helps to develop resilience and decision making in individuals
- To relay practical steps to be adopted in building resilience in working longer in whatever role / occupation that maybe
- To explore career and Later Life planning

Learning and teaching strategies

- Tutor presentation
- Discussion
- Group Exercises

Follow Up

- Individual coaching sessions 6 months post workshop, where required
- Access to psychological counselling/therapy/CBT where needed

Part B of Evaluation

These courses will deliver to around 40-80 participants each, across October 2017 to April 2018. More precise information will be available to contractors who express an interest in bidding for this work (please email responses@ageing-better.org.uk)

Age and Opportunity

The courses all provide a blend of theory and practical tools and skills, aimed at helping people to understand and develop resilience and equip them for future changes and challenges. The courses are delivered over six half-day sessions. This project will be delivering to employees of the Irish Health Service Executive who are approaching retirement.

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The course uses story-telling to explore different experiences of later life and to help participants explore how they want their own later lives to be. This is combined with mindfulness, reflective practices, and goal setting. This project is delivered over three sessions—two half days and one full day.

Manchester MIND

This project is delivered as a six-session (once a week) intervention to people in later life. It focuses on building resilience and developing life skills, along with peer support. Positive psychology, cognitive behavioural therapy (CBT), mindfulness and relaxation/meditation are key components of the course, combined with planning and goal setting for the future.

Workers Educational Association (WEA)

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This course uses reflective writing, mindfulness and mind-mapping alongside relaxation and movement techniques. It will be delivered over the equivalent of three full days with different partner organisations – employers and voluntary organisations - across the Scottish Highlands.

Beth Johnson Foundation, in partnership with Ageing Without Children

This course focusses on equipping participants to prepare and plan for later life and provided tools and techniques to accept and adjust to future changes and challenges. This project works with people aged 50+ (pre- and post-retirement) through local employers and recruited through local voluntary sector organisations.

F. Evaluation Approach

Part A: Evaluation of the NHS Cheshire and Wirral Foundation Trust Project

We would like a theory-based evaluation of this project because we are still at the stage of clarifying what outcomes are achieved and how they are achieved. Given our overall aims and the nature of this project, we would like contractors to suggest their specific approach, however we would expect it to include:

- a) Drafting a theory of change for the project (we have a draft map, which could be refined/built upon or used as a starting point)
- b) Working with us, and the project lead and a couple of stakeholders in the organisation (to be identified by the project lead), to ensure that we will investigate outcomes of interest to the organisation (e.g. those that would support a business case to continue the courses).
- c) Developing an evaluation framework and approach to data collection and analysis based on this
- d) Data collection
- e) Analysis and Reporting
- f) Providing documentation of the course and highlighting those components which are most important
- g) Providing feedback to us (during or after the evaluation) to inform future evaluation.

At this stage, we would expect contractors to outline their proposed data collection, as well as a process for developing an evaluation framework and finalising the data to be collected over the evaluation. **It will be very important in the tender to explain what the initial scoping activity to develop an evaluation framework would look like, and also whether later iterations to the framework are also likely.**

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The evaluation should be costed based on the initial process for developing the initial evaluation framework and the data collection and analysis proposed as most helpful for the evaluation questions (as delivering the outputs listed in section C). The tenders will be scored and the contract awarded on that basis (according to the tender evaluation criteria detailed in this ITT). After the contract commences and further scoping takes place to develop an initial evaluation framework, this may necessitate changes to the data collection and analysis, and therefore to the costs. Subject to agreement on both sides, we will arrange a contract amendment at that point. However, whilst the metrics and specific data to be collected is likely to be identified in scoping, we would still expect that some of the data collection methods can be identified from the start.

We expect the evaluator to work with the NHS Cheshire and Wirral Foundation Trust (contacts identified by project leads), and us, early on in the contract to confirm with them what precise data what will be most useful to collect and whether to select an existing validated tool, or develop another tool. However, we have outlined in the research questions some areas that we know will be of interest.

Whilst we want a rigorous approach, there are real-world constraints, particularly in terms of timescales. As such, it will be important that this evaluation balances rigour with practical application, and we will be looking for the tender to demonstrate this.

Theory-based evaluation means that we are also interested in how other theories and evidence can help build or support hypotheses within the theory of change. However, this will need to take place alongside data collection, and we would like to understand from contractors what is possible given these considerations as well as time constraints.

Something of interest to us, and included in the evaluation questions, is whether and how outcomes vary across participants, and we would like the investigation to pay attention to ensuring that neutral and negative experiences are captured as well as positive ones.

We expect the primary research to include data collection within the organisation as well as with individuals & project leads.

We suggest that data from the five projects being evaluated in Part B is also used – where appropriate – to test theory developed for the evaluation of this project, for example, where similar mechanisms are used in other projects. However, contractors should suggest how they would build this into their approach, what is likely to be possible given the time constraints, and under what situations it would be appropriate or not appropriate to do this.

We would like the evaluator to consider how they will document the course for future replication or testing, and how this is best done given the type of course that it is.

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In delivery of data collection, there will be a need to participate in the ethics and security processes within the organisation. This involves:

- Supplying the organisation with details of researchers who will be interviewing staff,
- Using appropriate (and agreed) consent forms, and
- Agreeing the participant information sheet (describing the research) with the organisation.

We would also expect contractors to indicate what ethical issues they think may arise in this project and how they propose to deal with them (this will be scored in bid reviewing process under 'challenges')

Part B: Evaluation of the other Projects

- We are open to suggestions on the best approach.
- In terms of resources, we suggest that around half of the total resource is spent on Part B, but are open to variations to this.
- Whilst there might be some consistency across the projects in terms of the metrics collected, and the qualitative research tools, it may also be sensible to tailor this to individual projects as far as needed – to capture any differences in outcomes they focus on, or to provide the relevant context to participants in asking questions. Previous evaluation has indicated that participants do not always identify specific elements of courses, such as mindfulness, some months on, and this would require some thought from the evaluator.
- The phase 1 evaluation indicated a set of common outcomes which we would like to base data collection in phase 2 around. As mentioned earlier an embargoed copy of the phase 1 evaluation is available to those who express interest in the contract.
- The phase 1 evaluation demonstrated the strength of qualitative evidence for supporting the evaluation of these projects, given their holistic qualities. Alongside some quantitative data collection, we think it may be helpful to have before and after interviews conducted with a sample from each project, and are interested in hearing in proposals what other forms of data collection you suggest as suitable.

G. Available background materials

The following is attached to this ITT:

- **Draft** map which provides an interpretation of all the strategies, mechanisms and outcomes which are used by the projects. This is an amalgamation of all projects. Most projects are likely to use a subset of these.

The following documents can be shared with contractors who express interest in tendering for this project, but are not for wider sharing:

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- More detail on course dates and delivery (for the purposes of considering implementation of data collection)
- The report from the phase 1 evaluation report
- The data collection tools used in phase 1 evaluation
- Final report from the Cheshire and Wirral NHS Foundation Project
- Proposal for this year for the Cheshire and Wirral NHS Foundation project

H. Further issues in relation to evaluation design

Use of behaviour change theory

We are interested in whether behaviour change theory provides a useful framework to help design data collection, and have included reference to this in our mapping.

Timing

The participants of these courses are not all on the brink of retirement; some of them will be over ten years away. We will be interested to work with contractors to identify how best to measure intermediate outcomes, as outlined in the research questions, whilst bearing in mind that we likely cannot follow most participants through retirement and examine their outcomes afterwards.

Collecting quantitative data

There was some feedback from the evaluators and project leads in the phase 1 evaluation concerning the appropriateness of the available validated tools (contractors are advised to request and read the report from phase 1). This feedback related to: burden on participants; precision of outcomes collected and their relevance to the projects; participants' responses to the questions; and suitability for research with people in this age group. We will discuss this feedback with the evaluator who is appointed.

Recruitment bias

Those who participate may be those who are more interested and may not be typical of the population. They may be more likely to be affected by the programme. At a minimum, we would like to understand whether this is the case.

I. Timeline for Project Delivery

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An outline timeline for delivery is outlined below. We expect contractors to suggest a more detailed timeline to match their suggested approach – especially in the early phase of scoping, and an outline for how data collection and analysis may work beyond the scoping phase. We acknowledge that the timeline for the whole project may change after further scoping.

It would be helpful to have an earlier interim presentation as well, to discuss emerging findings so far. This could also be more of a discursive or workshop based output to allow challenge and input. However, this should be timed to be helpful for the evaluation delivery and we will not press for this if it detracts from the data collection and analysis.

	Part A: NHS Cheshire and Wirral Foundation	Part B: Other Projects
17 th October – 15 th November	<ul style="list-style-type: none">- Review and revise project map / theory of change- Discussions NHS Cheshire & Wirral: identify most important outcomes to capture data on for influencing activity	<ul style="list-style-type: none">- Discussions with project leads- Review project maps and identify most important outcomes to capture data on across other projects
Mid November	Agree Evaluation Framework	Agree Evaluation Framework
April 2018	Planned courses finish (<i>however, these may be extended with additional courses – to be confirmed in Autumn 2017</i>)	Projects finish delivery
June 2018	Interim Report	Interim Reports
Early 2019	Final Report (including follow up data from participants)	Final Report (including follow up data from participants)

For the **procurement timetable**, please see **page 28**

J. Budget

The budget for this project is £100,000 excluding VAT.

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

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not intend to apply VAT. Ageing Better will not make any additional provision to the agreed Contract value in order to cover VAT liabilities, if these costs are not included in the original Pricing Document.

4. Invitation to Tender evaluation criteria

Bids for the Contract 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 criterion as follows:

Criteria	Weighting
<p>1. Approach to the evaluation:</p> <ul style="list-style-type: none"> a. Designed to answer the research questions b. A suitable iterative approach to finalising the evaluation frameworks c. Consideration of how stakeholder views will be incorporated in developing the evaluation framework d. Clear explanation of how a theory-based approach will be applied, and any limitations e. Suitable outline proposal for data collection f. Approach to analysis 	40%
<p>2. Skills and experience of each individual team member</p> <p><i>We require an explanation of the skills and experience of each team member. As a whole, the team should have:</i></p> <ul style="list-style-type: none"> a. Experience in theory-based evaluation b. Strong social research skills (quantitative and qualitative): design, delivery, analysis and reporting c. Expertise in research or evaluation of psychosocial issues or projects d. Experience in researching sensitive topics e. Able to understand the strengths and weaknesses of different research methods and where to apply them in evaluation 	30%
<p>3. Understanding of challenges and risks and a suitable mitigation or approach to dealing with these</p>	20%
<p>4. Cost, excluding VAT</p>	10%
<p>Total</p>	<p>100%</p>

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

Criterion 4 (Cost, excluding VAT) is weighted at 10%. The Bidder that submits the Lowest Bid Total shall receive the maximum score of 10%. All other Bidders' Bid Totals shall be evaluated using the following formula:

Lowest Bid Total

_____ X 10

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 significant 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 **Monday 2nd October (noon)** 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

Centre for Ageing Better

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 **Tuesday 10 October (5pm)** via e-mail to: responses@ageing-better.org.uk

The Invitation to Tender return shall state the following title:
'Evaluation of TILL Phase 2

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:

Centre for Ageing Better

- Confirmation of acceptance of the Conditions of Purchase as set out at Appendix 1;
- Confirmation of acceptance of the Specification as set out at in this ITT;
- 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, 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 reserves 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 advisers 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 reserves 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 reserves 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 reserves 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	Tuesday 19 October
Deadline for clarification questions	Monday 2 October at noon
Deadline for bid submission	Tuesday 10 October at close of play
Bidder Interview (optional)	Monday 16 /Tuesday 17 October
Notification of result	w/c 16 October
Appointment of successful Bidder	w/c 23 October
Contract commencement	w/c 23 October

Ageing Better reserves the right to amend the above timetable.

Appendix 1: Conditions of Contract



Conditions of
Contract 0.2.docx

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. 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.
5. The rates shall be sufficient to provide the Services in the Specification in isolation from any other requirement and in any quantity.
6. 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.
7. Payment shall be made in accordance with the Pricing Document and the procedures described in the Conditions of Contract attached at Appendix 1.
8. The Bidder shall include all mileage, subsistence and expenses costs within the submitted rates.
9. 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

Suggested template:

	Staff Member 1 Days	Staff Member 2 Days	Etc. – add columns as required	Fixed costs	Totals across all staff members
Day rate	<i>£xx</i>				
Activity 1	<i>No of days</i>				<i>Activity 1 total cost</i>
Activity 2	<i>No of days</i>				<i>Activity 2 total cost</i>
Activity 3	<i>Etc.</i>				<i>Etc.</i>
Further Activities: add rows as required					
Total days per staff member					<i>Total days from all staff</i>
Total cost per staff member					<i>Total costs ex VAT</i>

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

Bidders may use their own template to submit their proposal for the work. Please also submit the General information template below.

Bidders are recommended to structure their bids by the evaluation criteria.

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 4,000-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.

Appendix 4 – Form of Tender

To: **Centre for Ageing Better**

Re: **Evaluation of psychosocial support for the retirement transition (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.

Centre for Ageing Better

- 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: **Evaluation of psychosocial support for the retirement transition (the “Contract”)**

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

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

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

In this certificate

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

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

Signed: _____

Name: _____

Position/Status: _____

On behalf of:
(name of Bidder) _____

Date: _____

Appendix 6 – Non-Canvassing Certificate

To: Centre for Ageing Better

Re: Evaluation of psychosocial support for the retirement transition (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: _____