
Invitation to Quote

For

**Southend-on-Sea Borough Council
Older People Housing Needs
Assessment 2021
(Schedule 1)**

1. General Requirements

Southend-on-Sea Borough Council is looking to commission a study that will outline the current and future need for different types of general needs housing, specialist housing and health and social care support for older people in the borough. Older people are defined as those of general retirement age and over, largely consisting of two cohorts of those aged 65 and over those aged 85 and over. The assessment will provide a statistically relevant and robust evidence base reviewing current housing and social care provision and indicate the future requirements of older people.

An important element of the assessment will be to seek the views of older people to gain a better understanding of the housing aspirations of older people and to use this information to better quantify future need. The study will review what we already know about older people's housing preferences and will map existing specialist housing across the borough.

Quotations are invited for the supply of an older people housing needs assessment for Southend-on-Sea Borough Council (the Council), including qualitative and quantitative analysis. The Council are proposing to launch the housing needs assessment in November 2021. Detailed requirements are defined in section 7.

2. Background

The Council commissioned a Sheltered Housing Review in 2016. The review covered 475 (Part 1) and 998 (Part 2) schemes and bungalows. The latter includes accommodation not designated for older people. The review did not include extra care schemes. The review looked at the bricks and mortar, service delivery and the context for sheltered housing in the borough.

Whilst the review offered findings and recommendations on next steps, it is agreed that a renewed approach to older people housing is needed, with a broader approach to general needs and specialist housing, health and social care and including the aspirations of borough residents.

The proposed older people housing needs assessment is to take place in the context of the Council's Southend 2050 Ambition (**Appendix 1**), which presents a shared vision of Southend. It must take into account and align to the South Essex Housing Needs Assessment (SEHNA) (**Appendix 2**).

Southend-on-Sea Borough Council is working with residents to co-produce three 5-year Adult Social Care strategies, comprising of the Living Well Strategy (**Appendix 3**), Caring Well Strategy (**Appendix 4**) and Ageing Well Strategy (**Appendix 5**).

The aim is to build on the ongoing work of the Southend 2050 programme, the Housing, Homelessness and Rough Sleeping Strategy 2018-2028 (**Appendix 6**) and Adult Social Care strategies and provide insight of how the ongoing pressures of the Coronavirus (COVID-19) pandemic have affected older people's experiences, perceptions, and aspirations.

The assessment will form an important part of a technical evidence base supporting the preparation of development plan documents for service areas including Adult Social Care, Growth and Housing, Planning and Public Health services. It will therefore need to provide a robust and defensible basis for determining future housing needs of older people which accords to the relevant sections of national policy and guidance and which the client group can rely upon for the purposes of strategic and local plan-making, including at Examination in Public.

The Supplier will be expected to work collaboratively with the Housing Directorate, other applicable Council service areas, registered providers and/or strategic partners, stakeholders

identified for qualitative analysis and the chosen SEHNA Supplier to plan and produce all aspects of Southend-on-Sea Borough Council's older people housing needs assessment.

The Supplier will need to have a strong track record in offering strategic guidance on the process, best practice recommendations and collaborative facilitation of high-quality housing needs assessments that clearly define the housing need, aspirations and future demand of older people housing in the borough.

3. Objective and Output

The primary objective is to outline the current and future need for different types of general needs housing, specialist housing and related support for older people in the borough up to 2040. The assessment will need to provide statistically relevant data and a robust evidence base reviewing the current provision and indicate the future accommodation requirements for older people.

Proposals must include details of what data will be required to support each output, how this data will be sourced and how any perceived data shortfalls will be addressed. Southend-on-Sea Borough Council will make available to the Supplier any relevant documents from existing evidence bases.

Outputs required from the Supplier include:

1. Design older people housing needs assessment based on project specification.
2. Delivery of older people housing needs assessment.
3. Reporting and recommendations, to include:
 - Analysis by area at 'localities' level as outlined in section 5.
 - Housing and economic needs assessments.
 - Housing needs of different groups.
 - Housing for older and disabled people.
 - Headline key findings summary.
 - A written report on findings, with recommendations on priorities for action across service areas going forward and how these could be delivered, including priority tenures and funding streams.
 - Cross-tabulated data tables that are accessible through a portal/dashboard with the ability to review findings down to the granular ward level if needed.
 - Alignment with national, regional and county (SEHNA) data to ensure consistent data and analytics.

Ownership of all data collected will remain with the Council.

There may be a requirement for the Supplier to present the overall findings to the Council's Corporate Management Team.

4. Timeline

The outline timeline for an older people housing needs assessment is set out below, although subject to refinement depending on the methodology used.

Activity	Indicative Milestone	Duration (our ref)
Issue tender documents	6 September 2021	2 weeks later
Tender submission	20 September 2021	2 weeks later
Tender analysis completed	4 October 2021	2 weeks later
Award contract	11 October 2021	1 week later

Inception meeting	18 October 2021	1 week later
Finalisation of questions and methodology	25 October 2021	2 weeks later
Housing needs assessment begins	8 November 2021	2 months later
Housing needs assessment ends	10 January 2022	2 weeks later
Headline key findings summary	24 January 2022	1 month later
Full reporting	21 February 2022	
CMT presentation meeting (TBC)	TBC	

5. Methodology

There is no mandatory methodology for undertaking housing needs assessments specified in national policy. Proposals to this brief must therefore, set out a robust and specific methodology that will deliver the objective and outcome, specification and in accordance and compliance with the [National Planning Policy Framework \(NPPF\)](#), [Planning Practice Guidance \(PPG\)](#), [Strategic Housing for Older People \(SHOP\) Analysis Tool](#) and Government guidance [Housing Needs of Different Groups](#), [Housing for Older and Disabled People](#) and [Housing: Optional Technical Standards](#).

All of which to identify the minimum number of homes expected to be planned for in a way that addresses projected household and ageing population growth, including an adjustment to take account of affordability for older people.

All assessment respondents must be over 18, meet specification requirements and be a resident in the local authority area. The sample must be demographically representative of the range of Southend residents and the four localities of Southend as set out below and take account of the range of housing tenures and options.

- West (Eastwood Park, Belfairs, West Leigh, Leigh wards).
- West Central (St Laurence, Blenheim Park, Prittlewell, Westborough, Chalkwell, Milton wards).
- East Central (St Luke's, Victoria, Kursaal wards).
- East (Southchurch, Thorpe, West Shoebury and Shoeburyness wards).

While we request standard methodology in line with the NPPF, PPG, SHOP Analysis Tool and Government guidance as noted, we are looking for recommendations and a clear cost analysis from the Supplier on the most appropriate methodology given the proposed timeline and requirements.

The exact methodology to be followed will be agreed between the successful Supplier and Southend-on-Sea Borough Council at an inception meeting and will be further refined during the lifetime of the contract.

6. Questions

The older people housing needs assessment will need to include quantitative and qualitative data analysis to determine current and future housing type, tenure, health and social care support and any other issues or emerging trends.

Any part of the assessment, where provided in written format, must have a user-friendly design, with a minimum font size of 12 point and be available, upon request, in alternative format text, languages or via a telephone helpline for those with additional accessibility needs.

The Council's proposed questions for inclusion in the older people housing needs assessment are specified below. These will be subject to further discussion and refinement with the

selected Supplier in line with the proposed timeline and accompanied by contextual commentary, where necessary.

Proposed questions:

1. What is your current housing tenure? Does this meet your current housing need?
2. What are your care and support needs and are these currently being met? If so, by whom?
3. What is most important to you when thinking about how and where you live as you get older?
4. Thinking about your health and housing in the future, what is most important so that you can live a good quality life in Southend-on-Sea?

Questions are to be agreed between the Council and the Supplier and finalised in writing no later than as set out in the timeline (section 4).

7. Service and Scope

The general requirement for the selected Supplier will be to undertake all project management activities associated with the older people housing needs assessment. Specific requirements include:

Data

- Analysis of older people general needs, age-restricted, specialist, sheltered and extra care housing/care/nursing homes and park homes in the borough to 2040.
- Analysis of the housing need for people with disabilities to 2040 should be distinguished from the need for housing for older people to avoid double counting.
- Analysis of older adults with learning disabilities and older adults with dementia.
- A breakdown of older people in 5-year increments from 65-70, 70-75, 75-80, 80-85 and 85 and above.
- Views of those that will be 'older' within the next 10-15 years and carers of older people.
- Analysis of existing stock and a breakdown of tenure and type (including mixed tenure) to include general market housing, age-restricted general market housing, sheltered housing, extra care housing/care/nursing homes and park homes and affordable housing, including social rent, discounted market rent and shared ownership products as set out in [Annex 2 of the NPPF](#).
- Evidenced guidance on the general age when the requirement for different types of housing become most relevant, including analysis of older people's income and affordability to determine current and future need.
- Satisfaction with current housing and, where applicable, health and social care services.
- How lived experiences, including during the Coronavirus (COVID-19) pandemic, have affected priorities and aspirations for housing.
- Provide analysis and coding of qualitative data, including raw data for all responses.
- Undertake analysis and provide a cross tabulation report by weighted schedule variables, including demographic information and the four localities as outlined.
- Provide top-line results for the local authority area and disaggregated results at localities level, including base figures in Microsoft Excel format.
- Outcomes should be provided in Microsoft Word format (final versions in Word and as PDFs) with any embedded tables containing data provided separately in Microsoft Excel format.
- The assessment should be as visual and user friendly as possible, making best use of mapping, imagery and graphics whilst also being compatible for GIS.

- Ensure that the assessment is conducted in line with the Market Research Society Code of Conduct, and in line with requirements of the Data Protection Act and General Data Protection Regulations and any other relevant legislative requirements.

Service

- Provide advice and recommendations of the most suitable assessment methodologies given the specification requirements, cost and timeline.
- Provide innovative ideas for implementing the assessment in line with local circumstances, the Southend 2050 programme, the Housing, Homelessness and Rough Sleeping Strategy, the three Adult Social Care strategies and the impacts of the Coronavirus (COVID-19) pandemic.
- Provide a detailed summary of which residents' and older people will be involved in fieldwork, including the methodology (or mixed methodologies) to be used.
- Demonstrate methods to recruit and obtain qualitative data and insights, considering the impacts of the Coronavirus (COVID-19) pandemic and evolving participant engagement techniques.
- Demonstrate steps that will be taken to enhance engagement, including ways to increase responses from potentially under-represented groups.
- Provide advice and support to participants during the assessment period, for example, providing frequently asked questions.
- Capture 'opt-in' information of participants for potential further consultation and engagement activity. Supplier guidance on the most appropriate method of obtaining this information and maintaining anonymity is sought.
- Provide bi-monthly updates to outline the number of participants engaged, cumulative responses and details of any emerging issues.
- Outline timescales for each stage of the process, including a cut-off date for assessment responses (if applicable).

8. Contract Management

The successful bidder must designate a senior manager as the Contract Manager to oversee the running of this Contract. They will undertake a minimum of bi-monthly update meetings to start with but could be scaled back as agreed.

The successful bidder is required to proactively partake in review meetings/conference calls with the Council. These will form part of the bi-monthly review meetings as required. The purpose of these review meetings/conference calls is to ensure compliance to the contract and to discuss any issues regarding the Contract.

Responsibilities of the successful bidder's Contract Manager will include but will not be limited to:

- Ensuring that all work is carried out in accordance with the requirements of the Contract, including progress against the agreed timeline of activity and working collaboratively to unblock any obstacles which may arise.
- Discuss financial aspects relating to the Contract.
- Monitoring and reporting to the Council on the provisioning of the contract when required by the Council.
- The successful bidder must at all times, consult fully with the Council and keep the Council fully informed of all issues immediately in writing, via email is sufficient, which could have a negative effect on the running of the contract.

- As and when requested by the Council, the successful bidder shall liaise with and provide all such information as the Council may reasonably require and which is in the successful bidder's possession and control.

The point of contact for the Council is **Jodi Thompson**, Project and Policy Officer.

The Council's Contract Manager reserves the reasonable right to convene a meeting with the successful bidder's designated Contract Manager at any time.

The Council reserves the right to change its own Contract Manager without notice to the successful bidder.

The successful bidder will ensure that it resolves all queries raised by the Council's Contract Manager within 48 hours.

The relationship between the successful bidder and the Council must be established as a working partnership with close liaison and discussion being a regular feature of the Contract.

9. Contract Length and Budget

This contract will be in place from 11 October 2021 to 11 April 2022.

The value of this contract will be capped at £25,000. Bids above £25,000 will not be accepted.

10. Enquiries and Quotation Submissions

Bidders should note that all clarification questions must be made in writing (via email). The Council, at their discretion, reserves the right to circulate any response to all suppliers. All clarification questions must be clearly marked CLARIFICATION with the question and Supplier details clearly set out. Any clarification questions from the Supplier to the Council should be sent to jodithompson@southend.gov.uk

To allow information to be circulated in time, the deadline for receiving clarification questions is **14:00 on 13 September 2021**.

The quotation return date is **14:00 on 20 September 2021**.

Quotations should be submitted to jodithompson@southend.gov.uk (you are recommended to request confirmation of receipt). Please use the title 'older people housing needs assessment quotation' when submitting your response.

To receive clarifications, Bidders should register their interest to the email address above: confirming the individual and the email address the clarifications are to be forwarded to.

11. Evaluation of Quotations

All quotations will be subjected to a thorough evaluation. The Council will examine quotations for completeness and may seek clarification where necessary. A quotation determined to be incomplete or not substantially fulfilling the conditions in this document will be rejected.

- Technical (Quality) evaluations will be conducted, based on the information submitted in Schedule 2, in writing, as part of this quotation submission.
- Commercial (Price) evaluations will be conducted, based on the information submitted in Schedule 3, in writing, as part of this quotation submission.

12. Evaluation Criteria

The Council does not bind itself to accept the lowest priced quotation, or any quotation for this service. The Council will have no obligation to Suppliers arising from this quotation unless and until it enters into a formal contract with the successful Supplier for the provision of the goods and/or services that are subject to this Quotation document. Any contract awarded will be to the Supplier whose proposal is determined to be the most economically advantageous.

The evaluation criteria are:

Table 1

Criteria	Evaluation Method	Percentage Score
Price	Commercial Questionnaire (price submission)	30%
Quality	Quality assessment of the responses to the questions within the Technical Questionnaire	70%

30% price allocation: To be detailed within this written quotation submission, by the Supplier. It is the requirement of the Council to maximise the budget available for this project. The Quotation is accepted on a "Fixed Price" basis and the Supplier will not be entitled to claim any additional payments or expenses including but not limited to any increase in the price of the service and/or cost of, or incidental to, the employment of labour. The prices included in the Quotation shall be the maximum payable by the Council for the duration of the contract.

Pricing Evaluation (30%) – using the Prices submitted by Suppliers a percentage will be allocated to the total cost as follows:

- Score = (Lowest Price Quotation/Your Price) * 30%
- The Table below gives an example of how the methodology works when applied to contract prices. The prices used here are examples of the pricing methodology and do not reflect any expectation of this contract in relation to any aspect of the pricing.

See example below:

$$\frac{\text{Lowest Price Bid (£15,000)}}{\text{Next Tenderer's Bid (£22,000)}} \times 30 = 20.45$$

Price score example – assuming for demonstration purposes only 3 companies were bidding

	Company 1	Company 2	Company 3
Tenderers price bid	£15,000	£22,000	£25,000
Total Price Score out of a possible score of 30	30.00	20.45	18.00

70% quality allocation: To be detailed within this written quotation submission, by the Supplier, in Section A (Technical Questionnaire).

Evaluation of Responses will be carried out on an individual question basis. Grade labels and definitions are as follows:

Scoring Matrix		Score
Unacceptable /not answered	Question not answered and/or response to the question significantly deficient and/or raises fundamental concerns regarding the organisation's ability to successfully deliver the	0

	Contract. Answer does not provide satisfactory evidence as to the organisation's capability to deliver the contract successfully.	
Poor	A response that is inadequate or only partially addresses the question. Response provides only limited evidence as to the organisation's capabilities to deliver the contract successfully. Raises a large number of concerns and/or includes a large number of informational deficiencies. Does not raise any fundamental concerns regarding the organisation's ability.	1
Acceptable	An acceptable response submitted in terms of the level of detail, accuracy and relevance. Answer provides an average level of evidence as to the organisation's capability. The response raises some concerns and/or includes a significant number of informational deficiencies. Does not raise any fundamental concerns regarding the organisation's ability.	2
Good	A good response in terms of the level of detail, accuracy and relevance. The information provides good evidence of the ability of the organisation to deliver the Contract successfully; but does raise minor concerns and/or includes deficiencies around some of the information provided in the response. Does not raise any fundamental concerns regarding the organisation's ability.	3
Very good	A very good response in terms of the level of detail, accuracy and relevance. The information submitted provides significant evidence of the ability of the organisation to deliver the Contract successfully. However, the response lacks a level of detail needed for full marks. The response raises no fundamental concerns regarding the organisation's ability.	4
Excellent	An excellent response in terms of the level of detail, accuracy and relevance. The level of information provided is comprehensive and strongly evidences an assurance as to the organisation's capability to deliver the contract successfully. The response raises no concerns and has no information deficiencies.	5

Tenderers scores will be calculated by dividing the tenderers actual score by the maximum obtainable total weighted score and then multiplying this by the 70% weighting allocated for quality. See formula and example below:

$$\frac{\text{Tenderer's total score (3)}}{\text{Maximum obtainable score (5)}} \times 70 = 42.00$$

Quality Score Example - Assuming for demonstration purposes only 3 Tenderers were bidding.

	Company 1	Company 2	Company 3
Score out of 5	5	2	3
Total Quality Weighted Score out of a possible score of 70	70.00	28.00	42.00

Technical Questionnaire 70% (Schedule 2)

Please note that page limits are on the basis of font Arial 11 and include charts, diagrams, tables etc. Additional appendices are not permitted.

1. Demonstrable understanding of the brief and subject area

Please confirm the approach that your organisation will employ to the Council to deliver this contract.

Your response should include but not be limited to:

- Demonstrating an understanding of the project brief and subject area. You should include a statement of methodology within this response.
- Ability to complete work within the given timeline, including proposed timeline of activities and evidence of how skills learnt from delivering similar services will assist you to deliver this project.
- Technical merit, including details (CV's) of staff that would be involved in the project.
- How your organisation will safeguard the Council's data whilst ensuring compliance with the Market Research Society Code of Conduct, the Data Protection Act, General Data Protection Regulations and any other relevant legislative requirements.

The page limit in response to question 1 is 6 sides of A4 and should be in a minimum of 11pt Arial (or equivalent) and use standard margins (not including staff CVs).

(Weighting = 70%)

13. Commercial Questionnaire 30% (Schedule 3)

Costs should be broken down with a full description of each component and its associated time and costs to cover preparation, implementation, analysis and reporting.

Component description	Cost (£)
Project set up, including inception meeting and advice on assessment questions.	
Conducting housing needs assessment, including fieldwork (quantitative), processing data, data tables and analysis.	
Conducting housing needs assessment, including fieldwork (qualitative), processing data, data tables and analysis.	
Reporting and recommendations, including presentation of findings.	
Any other associated components or costs not noted above – please specify.	
Total cost:	£

The Council is not bound to accept the lowest priced or any quote and shall not be bound to accept the supplier as sole supplier. Prices quoted shall remain firm for the duration of the contract. Value Added Tax (VAT) should be shown separately, and the VAT registration number given.

14. Appendices

Appendix 1 – Southend 2050 available at <https://www.southend.gov.uk/southend2050>



Southend_2050_Amb
ition.pdf

Appendix 2 – South Essex Housing Needs Assessment brief, further information is available at <https://www.housingessex.org/topic/evidence-base/>



SHMA Brief (draft) 22
June 2021.pdf

Appendix 3 – Adult Social Care Living Well Strategy, available at <https://yoursay.southend.gov.uk/have-your-say-asc-strategies-2021>



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Appendix 4 – Adult Social Care Caring Well Strategy available at <https://yoursay.southend.gov.uk/have-your-say-asc-strategies-2021>



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Care_Caring_Well_Str

Appendix 5 – Adult Social Care Ageing Well Strategy available at <https://yoursay.southend.gov.uk/have-your-say-asc-strategies-2021>



Adult Social
Care_Ageing_Well_Str

Appendix 6 – Housing, Homelessness and Rough Sleeping Strategy 2018-2028 available at <https://www.southend.gov.uk/housing-1/housing-policies-strategies>



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Homelessness and Ro