



**Invitation to Tender for an  
Evaluation of Ageing Better's Flexible Working for Older  
Workers project**

**Deadline for Tender Submissions:**

**15 March 2019**



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

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## 1. About the Centre for Ageing Better

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

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

We have four priority goals:

### **Fulfilling work**

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

### **Safe and accessible homes**

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

### **Healthy ageing**

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

### **Connected communities**

Communities where people know and help each other make it easier to build relationships and stay active. By 2030, we want to see an increase in the proportion of people aged 50 and over who report they feel they strongly belong to their neighbourhood. We'll help create the physical environment

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necessary to build connections, remove barriers to participation and support more local areas to become age-friendly so that everyone feels part of a community.

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

## 2. Information about this Invitation to Tender

- This Invitation to Tender (“ITT”) is available to download on the Ageing Better website and is open to any **bidder** submitting a proposal for the Contract (hereinafter referred to as the “**Contract**”) before the stated deadline.
- Although this ITT is not subject to the [Public Contracts Regulations 2015](#), Bidders are reminded that Ageing Better will conduct the process in accordance with the key EU principles of transparency, non-discrimination and equal treatment.
- Any clarification questions should be sent to [responses@ageing-better.org.uk](mailto:responses@ageing-better.org.uk) by 20 February 5pm
- 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.

### *Age friendly employment and flexible working*

We know that for those who can work longer, good quality work provides not only an income, but can also offer a source of valued social interaction, and meaning and purpose. We also know that while some employers do recognise the importance of retaining an older workforce, many do not.

Our research suggests that access to good quality flexible working arrangements is a key component of an [age friendly workplace](#)<sup>1</sup>. But older workers (which we loosely define as those over 50 in this context) are not always able to access flexible working and experience all the benefits that it can bring and there are no clearly evidenced examples of how employers can implement truly flexible working practices.

### *Ageing Better’s flexible working for older workers project*

As a first step towards addressing these issues, we are working with the [Timewise Foundation](#) to help 2 larger employers to increase the availability and take up, by older workers, of more flexible working arrangements. We will use this experience and insights from engaging a further 4-6 employers to develop evidence informed guidelines to implementing flexible working.

It is early stages in the project, but organisations expressing an interest in participating in the project include Whitbread, Guys and St Thomas NHS Trust, Leeds City Council, L&G, KPMG and Sodexo.

**A summary of the project is attached with this specification, however to summarise:**

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<sup>1</sup> Centre for Ageing Better (2018). Age Friendly Employers Retrieved from <https://www.ageing-better.org.uk/our-work/age-friendly-employers>

Timewise will broadly follow an ‘action research’ approach to the delivery of the project. Following an initial insights phase with 6-8 employers, they will work in depth with two employers to agree objectives, understand the situation and build an evidence informed approach to overcoming challenges to implementing and accessing flexible working arrangements in these settings. Timewise will make pragmatic use of a variety of research techniques (focus groups, interviews, and surveys) to collect and analyse data from a variety of stakeholders which will inform the kinds of activities needed to overcome workplace challenges associated with encouraging, introducing, expanding and increasing take up of more flexible working arrangements. The timetable and activities are as follows:

- **Insights** (October 2018 – February 2019): Understanding perceptions of the potential benefits of flexible working for older workers, as well as the opportunities and challenges for increasing its availability and take up amongst 6-8 employers.
- **Diagnostics** (April – June 2019): Working in 2 of these employers to understand the challenges and opportunities for deploying flexible working amongst older workers in different areas of the business.
- **Pilot** (May 2019 – January 2020): Working with 2 of these employers to facilitate job redesign for 40 staff (20 in each employer) and creating wider interest and engagement with the issue of flexibility for older workers across each organisation.

In the summer of 2020, following completion of the pilot and the main phase evaluation two sets of reports will be produced

- Timewise will deliver to Ageing Better a project report, which will set out what has been undertaken, along with the principles and guidelines for employers and case studies. This report will be developed based on Timewise’s experiences and data collected as part of the initial stages of action research in the pilot sites, the wider ‘insights’ work undertaken with the larger group of employers and building on findings from the evaluation.
- The evaluators will deliver a final report providing an evidence-based analysis of the journey to and outcomes of the work to support employers to implement enhanced flexible working arrangements.

Ageing Better intends to publish both reports and related outputs which we will produce and share with stakeholders. Both Timewise and the evaluators will be invited to participate in dissemination, media and other activities.

The evaluation will also look at longer term experiences and impacts in the pilot sites and report back in March 2021.

### **3. Contract Requirements**

#### *Aims and Objectives*

Ageing Better wishes to commission an evaluation of our ‘flexible working for older workers’ pilot.

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The evaluation will run alongside the pilot phase and beyond. The evaluation should generate high quality evidence about whether and how strategies can be deployed to enable flexible working, the experiences and outcomes of these changes for older workers, line managers, teams and organisations, and the process of change – both what had to change in terms of systems and behaviours across the organisations, and how this change was implemented / supported.

Within the broad framing of these questions there are two central hypotheses that we would like to test through the pilot and its evaluation. The first is that enhanced flexible working arrangements can be beneficial to individuals, line managers, teams and organisations. The second is that employers and staff can be actively supported / guided to create opportunities for flexible working.

We recognise that this is ‘proof of concept’ - it is a very small-scale pilot within two large organisations that are already recognising the importance of adapting their practice in order to retain and attract older workers. The project itself will provide high level guidelines and materials that we anticipate will be applicable to other settings and we anticipate that the evaluation will provide evidence of the relationship between activities and context which may help us when we come to exploring the likely transferability to other contexts.

### *Key research questions*

We anticipate the three research questions and sub-questions below will be used to guide the evaluation both during the pilot as part of follow up fieldwork. The evaluator will work with Ageing Better and Timewise and the Advisory Group to refine and prioritise amongst the sub-questions:

1. *What do new flexible working practices look like in the pilot sites, what outcomes and impacts have they had for whom<sup>2</sup>?*

#### *Proposed secondary questions*

- a) Are individuals now working ‘flexibly’ – who is working flexibly? What are these flexibilities? What flexibilities have not been possible?
- b) Who amongst the target populations is not working flexibly and why (amongst the ‘case study’ workers and more widely across the organisation)? How have workers’ and other stakeholders’ understanding of what ‘flexible working’ means changed?
- c) How have individuals, line managers and wider teams experienced these changes? How do stakeholders describe the benefits and disbenefits, intended and unintended changes / outcomes and impacts?
- d) What are the intended ‘measurable’ outcomes of flexible working for individuals, line managers and wider teams? We would like the evaluators to clarify the range of immediate / intermediate / longer term outcomes and where feasible, establish

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<sup>2</sup> The frame of reference here is both a) those involved or connected with workers in each site now working flexibly as a result of the intensive work to support 20 workers in each site to agree new ‘flexible roles’ and b) the wider work to scale flexible working across the organisation building on this / through internal champions, comms and use of guidelines

arrangements to track changes over time building on Timewise research measures, as well as situating these in broader trends / comparative analyses where appropriate and feasible).

- e) What are senior managers' perspectives on the benefits and disbenefits of flexible working and have these changed as a result of being involved? How do they perceive flexible working to have affected other business-related processes or outcomes?
  - f) What are the organisational outcomes? For example, can any qualitative evidence be generated that informs us about impacts of flexible working on staff retention and staff satisfaction? Can any quantitative changes in retention and satisfaction be measured and to what extent can they be attributed to the availability or take up of flexible working?
  - g) How sustainable are the changes and benefits of these changes?
2. *What sort of organisational changes were required in the pilot sites to enable new flexible working arrangements to become a reality?*

*Proposed secondary questions*

- a) What was the context in which flexible working was being introduced? For example, what were the main starting points in terms of business interest, existing strengths and dispositions, obstacles to change, and opportunities?
  - b) What sorts of changes to behaviours, systems, policies, processes and ways of working were needed? Who has been affected and how?
  - c) How far-reaching were these changes (do they represent, for example, a small tweak in ways of thinking and behaving or a major reorientation of systems and practice)?
  - d) How have stakeholders experienced these changes?
3. *What specific strategies and activities were necessary in the pilot sites to achieve the above changes?*

*Proposed secondary questions*

- a) What were the activities and inputs of different stakeholders involved in bringing about desired changes, how important do different activities and inputs appear to be?
- b) How have these changes been achieved?
- c) What resistance or challenges were experienced on the road to change and how were these overcome? Which strategies and efforts worked best, and what was less successful? How and in which ways?
- d) How have these stakeholders experienced these activities?



### *Scope and focus of the Evaluation*

We expect the evaluators to commence in March 2019 and the contract will be completed in March 2021.

This project will be investing considerable resource to bring about relatively small tangible changes (e.g. 20 workers in each pilot employer working flexibly and greater organisational engagement and interest in flexible working). We are not interested in ‘evaluating’ Timewise or their methods of working to bring about this change, but using this activity as an opportunity to generate evidence and learning linked to the three key research questions around the experiences and outcomes of flexible working, the journey of change and the nature of the effort required in different contexts.

The focus of the evaluation is on the two pilot sites but there may be some limited opportunity to re-engage with employers involved in the advisory group who are involved in the insights work to provide a source of information about wider applicability of the findings. However we have not costed for detailed fieldwork outside of the pilot sites.

### *Evaluation Approach*

We anticipate that the successful contractor will work with Ageing Better and Timewise to develop their evaluation approach, building their research activities around the research and implementation activities and phases of work that Timewise will be delivering.

We expect bidders to set out their outline approach to addressing the three key (and sub-questions), including possible research methods and techniques and activities that could be deployed in an evaluation like this.

We are keen to use a [theory based approach to evaluation](#). We see key benefits from this as providing a strong framework underpinning both the project and the evaluation. The theory based approach will help to clarify a shared understanding of the challenges faced in pilot sites and clarify assumptions about how activities are expected to overcome challenges to achieve desired outcomes. This can be used in an ongoing and iterative way to inform both fieldwork and analysis during the course of the evaluation, and be updated and refined as the project (and associated evidence base) develops. The theory based approach is likely to offer considerable value to Timewise also by initially clarifying and helping to make choices and assumptions explicit, and as the evaluation progresses the ‘evidencing’ and refinement of these theories.

The evaluator is expected to contribute through this work to the project, our thinking and the evaluation by developing and regularly refining a ‘theory of change’ and ‘theory/theories of scale’ – working closely with Ageing Better and Timewise.

When we talk about *theory of change* we are referring to the strategy and underlying mechanisms for establishing the enabling conditions within the organisation to promote and support flexible working as well as the mechanisms for achieving take up of flexible working by 20 workers in each of

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the pilot employers along with the outcomes of this for individuals, teams, and the organisation. When we talk about *theory of scale* we are referring to the wider work to scale flexible working across the pilot organisation building on the achievements with 20 workers. Again we are interested in understanding how the strategy and underlying mechanisms operate and they these help to achieve wider take up, as well as the experiences and outcomes for individuals, teams and the organisation(s). We do not know at this stage which organisations or which workers will be selected for the pilot but the selection and decision making here will be key to understanding change and the contextual factors and assumptions underpinning such change.

These theories should articulate the activities that would help in overcoming obstacles to securing / enhancing / expanding flexible working for older workers in order to achieve personal, team and organisational outcomes. The process of developing and refining them, together with Ageing Better and Timewise them will involve clarifying target groups, contextual analysis, clarifying obstacles to be overcome for different types of workers and understanding Timewise's evolving ideas for activities that might help as well as anticipated consequences of flexible working for different stakeholders.

Whilst we anticipate the evaluators playing a key role in developing and refining the theory of change which in itself offers the opportunity to offer challenge, expose assumptions and bring new perspectives the evaluation is broadly speaking 'summative' in nature, rather than formative. Timewise themselves are using an action research approach and so will have their own built-in 'formative' processes.

### *Considerations to bear in mind*

**1. Working with an emergent project / emergent activities:** The Timewise approach to change, as outlined in the brief is broadly an 'action research' approach – at this early stage it is unclear what the range of outcomes might be, what working practices exist which may represent opportunities or constraints, nor what activities might be needed. The approach to change is likely to develop over time and in response to insights in the specific employers. The timescales for delivery of the project are also not predictable.

Correspondingly we anticipate a need for ongoing development and adaptation of the evaluation approach and activities, and allowing for avenues of enquiry to evolve accordingly. The evaluation activities must fit into and around the planned action research, and must be delivered in a way that supports the successful delivery of the project. Bidders should consider the costs of an evolved and flexible approach in responding to the invitation to tender.

**2. Making use of existing data:** Timewise will be undertaking a range of 'diagnostic' information gathering activities (surveys, focus groups, interviews) in the early months of the pilot, and / or change focused activities (workshops / training / job redesign) during the latter stages. All of these are outlined in the accompanying project brief. There may as a result be limited opportunity for evaluators to undertake additional research during at least the early part of the pilot as it is

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important that we do not ask too much of participants (or directly duplicate activities). The contractor will therefore need to work closely with Timewise to ensure that both project and evaluative aims are met, without incurring participant fatigue due to requests for data collection and good use of Timewise's research outputs should be made where possible.

Timewise will use a range of data collection / research techniques during the diagnostic phase. Quantitative data will be limited, and its nature, extent and quality may vary in each site. Qualitative data from focus groups and interviews is unlikely to be captured in raw form. Ageing Better and the appointed evaluators may have the opportunity to feed into the design of tools, data collection, storage and analysis but the challenge will be to do so in a way that does not disrupt the pragmatic approach that Timewise are planning, which is likely to work well in this innovation environment which relies on good will, enthusiasm, and recognition of time limitations. Evaluators will be able to re-use (as well as revise) these tools at the end of pilot and post pilot phase.

**3. Employer buy in:** We will be seeking to secure a commitment from the two pilot sites to the innovation process (including some financial contribution to costs). A memorandum of agreement will be established between Timewise and pilot sites and we have agreed that this will include a line about evaluation.

However we have not yet entered into discussions with employers about the importance of participation in the evaluation – the Advisory Group and Steering Groups for the project (see section below) will provide opportunities to discuss the evaluation and to seek buy in and agreement to each phase of evaluation. prior work with stakeholders will be needed to ensure proposals are feasible and deliverable, but that any trade offs in terms of quality are made explicit.

Ageing Better and Timewise will support this process this via early discussions with employers and discussions and discussions at the initial advisory group in February 2019. We would expect discussions and a feasible, agreed plan for the main phase evaluation to be produced by June 2019 as well as an outline of the follow up phase.

We hope the offer of bespoke summary evaluation reports (see deliverables section) for each of the two pilot sites about the effectiveness and outcomes of efforts in each site will be valued by senior managers in these sites as well as wider interest in the evaluation across the advisory group.

**4. Agreement of specific research and evaluation plans:** We have outlined three phases of work. The plans for each phase should be discussed with the advisory group, and agreed locally with the Steering Groups in each pilot site, which are managed by Timewise. Timewise should be involved in the planning of any research activities to ensure coordinated approach.

### *Evaluation phases*

Below we outline some of our initial thoughts and ideas for different evaluation phases (which broadly map onto the diagnostic / pilot and / post pilot phases of the project). These ideas are based on some scoping we've undertaken internally to look at what might be possible, and useful at

different points in the evaluation. These ideas are not intended to constrain or limit bidders but are hopefully useful.

#### **During the diagnostics phase: (April – June 2019)**

In this initial phase which maps onto the 'diagnostics' work to be undertaken by Timewise in pilot sites we anticipate that the following activities could be usefully undertaken. We have not articulated this level of detail for other phases as we anticipate that the evaluators will fully scope these phases.

- a) Become familiar with Timewise project proposal, activities and approach – through participating in meetings, and attending workshops and other activities in the pilot sites
- b) Develop theories of change and theories of scale - working in a participatory way with Ageing Better and Timewise. A key point to do this is likely to be as Timewise approach completion of the 'diagnostics' phase in May / June. Through this process and some of the activities below evaluators may clarify the project aims and mechanisms, contribute early design ideas to the project team; develop an evaluation framework.
- c) Become familiar with Timewise's tools and research activities and the data collected to date to
  - a. Clarify what has been covered in the initial stages of the project and the extent to which this data is likely to be useful for later stages of the evaluation
  - b. Offer any suggestions to Timewise and Ageing Better for any refinements to the content, data collection and analysis of the tools during the early stages of the work so that existing data collection can better contribute to the evaluation.
  - c. Clarify the value of using the data / tools in future phases of fieldwork for evaluative purposes<sup>3</sup>
- d) Develop a clear, costed and feasible plan for the pilot phase based on a more detailed understanding of the project. This should also set out the nature of any likely support and input needed from - and what has been agreed with employers, Timewise and Ageing Better.

#### **During the pilot and pilot reporting phase: July 2019 – July 2020**

The fieldwork during this phase should be focused on comprehensively exploring experiences and measuring initial outcomes of flexible working practices, as well as understanding the change journey.

Key activities during this phase are likely to include:

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<sup>3</sup> We have advised Timewise that it may be important to repeat surveys undertaken during the insights and diagnostic phases at a later stage as part of the evaluation and where possible with the same samples / populations.

- a) Attending meetings to observe and understand the activities that are being delivered, reflecting ideas and observations back into the further development of theories of change and scale.
- b) Analysis of quantitative and qualitative data collected by Timewise
- c) Undertaking qualitative fieldwork that can usefully be undertaken to address the key research questions
- d) Implement follow up surveys and other data collection to address the key questions
- e) Detailed planning and costing for phase 3 research
- f) Update the theories of change and scale with Timewise and Ageing Better in light of the evidence.
- g) Detailed planning and costing for the post pilot phase should also be undertaken during this phase.

### **Post pilot follow up phase: September 2020 – March 2021**

In this final wave of research fieldwork, we would like the evaluators to undertake a follow up phase of fieldwork in the pilot sites. The aim of this phase is to explore the sustainability and further development of flexibility outcomes reported following the pilot and the success of organisations' efforts to scale up flexible working initiated during the pilot.

Key to this phase is addressing the research questions and exploring the wide range of influences that may have influenced outcomes since the pilot completion.

The theories of change and scale should be updated with Timewise and Ageing Better in light of the evidence.

### *Other considerations*

**Collaboration:** Ageing Better expects to work in a highly collaborative way with our contractors. Our internal evidence team is keen to actively support decision making and the direction of the evaluation to overcome likely issues and achieve the best outcomes. Timewise have set aside a clear allocation of time support the evaluation and time to absorb emerging findings. Contractors should not expect a 'distant' relationship from either Timewise or Ageing Better.

**Standards:** We are looking for research and evaluation to be delivered according to Social Research Association and United Kingdom Evaluation Society standards and with careful consideration of methodological, ethical and data protection issues.

**Advisory group:** An Advisory group for the project will be established by Ageing Better and will meet approximately three times a year. All employers involved in the project will be invited to participate in the Advisory group including those involved in the wider insights work, representatives from relevant government departments, Timewise and the evaluators. The evaluators will be invited to

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provide reports on progress and findings from the evaluation. They will be free to offer suggestions about project activities and delivery (especially where changes to project design or delivery may result in a greater ability to address the strategic questions or otherwise enhance the quality of evaluation) and ideas for how to enhance uptake and adoption amongst other employers.

**Steering groups:** A steering group will be established in each of the pilot sites. This group of senior operational and HR leaders will meet no less than three times: after the Flexibility Audit; at the end of the diagnostic process in pilot sites (April - June 2019) when Timewise will present the recommendations for action and agree next steps, including areas for the pilot to be carried out; once during the pilot, and again on completion of the pilot (December 2020). The evaluator will be invited to join these meetings – where it will be possible to present evaluation plans and activities.

### *Deliverables*

The main deliverables from the evaluation are expected listed below. Most are for internal use, except where stated:

*During the diagnostics phase: April – June 2019*

A) *May / June 2019: initial theories of change and theories of scale* - based on workshops with Timewise and Ageing Better following the 'diagnosis phase'.

C) *June 2019: An agreed evaluation plan* following a period of familiarisation with the project, and discussions about questions and methods and data. It should set out clear plans for the research pilot phase, including priority questions to be addressed, methods and a project plan. This will need to be agreed with the pilot sites (Steering Groups) and shared with the Advisory Group, Timewise and Ageing Better

*During the pilot and pilot reporting phase: July 2019 – July 2020*

D) *November 2019: A brief 'end of pilot' interim report* setting out preliminary findings from the pilot phase including a summary of findings, updated theories of change and scale, analyses and findings relating to research questions 1-3, along with any technical methodological and analytical issues and considerations – suitable for sharing with Ageing Better, Timewise and the Advisory Group.

E) *Summer 2020: An 'end of pilot' report* with an executive summary. The report should provide clear findings and conclusions on research questions 1-3, along with any technical methodological accounts or considerations. The report should be drafted to be accessible, practical, and useful. It should set out any implications or suggested changes for Timewise materials, guidelines or tools. This final project report comes in the 'summer' of 2020 at least six months after the pilot finishes to allow outcomes and impacts to have materialised and been felt and to provide time for proper data collection, analysis and reporting.

F) *July 2020: Individual summary reports for each pilot employer* providing a summary of findings drawn from the evidence collected against the three research questions and drawing useful and well evidenced conclusions about the pilot

G) *August 2019: A feasible and costed plan for the post pilot phase.*

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*Post pilot follow up phase: September 2020 – March 2021*

*H) March 2021:* A final follow up report with an executive summary updating the findings of the July 2020 and of a publishable standard.

#### *Contract Term and budget*

The contract is expected to commence in March 2019 and will continue through to March 2021.

We have allocated an overall budget for the project of £70K (incl. VAT) for this evaluation. We are aware that the costs of this work may actually be less – as a result of the constraints and opportunities that arise – most of which are unknowable at this stage. We reserve the right to vary the contract in either direction.

As requested below under criteria 3, bidders should set out their broad approach and activities for the overall project and an initial costed plan for phase 1. Following phase 1, costed plans for each subsequent phase of the work will need to be agreed - as more is known about the constraints and opportunities that will shape what is possible.

The following is an indication of the approximate allocation of resources to different phases of work:

- Phase 1: 20%
- phase 2: 50%
- phase 3: 30%

#### *Working with Ageing Better and Timewise*

The successful bidder will be expected to attend a number of face to face meetings and some phone based meetings. Meetings are likely to include:

- Regular catch ups with the evidence team at Ageing Better
- Monthly meetings of Ageing Better, Timewise and evaluators
- Project Advisory Group meetings (x3).
- Pilot site steering Groups (x3)

We expect the contractor to provide update reports and to present findings from time to time. The nature and frequency of these meetings will depend on the issues and requirements and we will endeavour to as flexible as possible.

Bidders should set out their approach to performance management and quality assurance. Reports should be quality assured internally by the team prior to submission to Ageing Better.

Timewise have suggested ways they will support the evaluation including:

- Meeting with the evaluator to bring them up to speed and keeping them updated on a regular basis
- Engaging with evaluators during theories of change workshops and considering ideas and

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observations from the evaluators as the project progresses

- Sharing tools and materials to be used in the project so that evaluators can suggest tweaks to improve coverage of topics, issues and scope
- Working together to identify points where our project activities can provide useful data/insights for the evaluator
- Gaining employer buy-in to the evaluation process, and related activities, throughout the course of the project
- Ensuring our joint activities dovetail to provide minimum disruption for the employers, and still allow both parties to deliver through good communication and project planning
- Contributing to the evaluator's data collection, through interviews and other forms of feedback



#### 4. Invitation to Tender Assessment Criteria

Bids for the Contract for shall be assessed on the basis of the criteria set out below. Ageing Better has allocated a maximum weighting for each criteria as follows:

Criteria	Weighting
1. Previous examples of successfully doing research and / or evaluation with staff in business and public sector employment settings is essential. We would also value teams with knowledge of and research experience in  (a) organisational change  (b) flexible working  (c) older workers	25%
2. A clear understanding of and good strategies for overcoming the challenges that may be faced in delivering an evaluation like this, in the context of an evolving innovation project. Including ethical issues and the 'soft skills' of evaluation.	20%
3. An initial outline approach to the evaluation that demonstrates a) expertise in design of social research and use of research techniques b) understanding of theory based evaluation c) a good understanding of the brief and d) likelihood of being able to address the key research questions <sup>4</sup> and a detailed and costed plan for phase 1	25%
4. Suitability of the team, assigned roles and responsibilities and approach to performance and risk management	20%
5. How you will seek to offer value for money throughout the project.	10%
<b>Total</b>	<b>100%</b>

#### Scoring

Criteria 1 to 5 shall be scored on a scale of 0 to 10 by reference to the following scoring guide:

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<sup>4</sup> We will use this as part of the assessment criteria but would fully expect the approach and methods to evolve / be refined as more is learned about the project in the first phase of the work.

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.

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. Arrangements for bidding and returning your bid**

### **Enquiries and communication**

During the Invitation to Tender stage Bidders may submit questions and requests for Clarification or further information. All questions or requests for clarification or further information must be submitted by **20 February 5 pm** at the latest. Requests/questions received after this time may not be responded to by Ageing Better.

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](mailto:responses@ageing-better.org.uk)
- On receipt of a request for Clarification or further information, Ageing Better may, at its sole discretion, endeavour to respond to the Bidder and provide such Bidder with any additional information to which Ageing Better has access, but Ageing Better shall not be obliged to comply with any such request and does not accept any liability or responsibility for failure to provide any such information (and absence of a response from Ageing Better shall not entitle a Bidder to make any particular assumptions about the matters sought to be clarified);
- Except as stated below, all questions and requests for Clarification or further information and the corresponding responses, will be circulated by Ageing Better to all Bidders;
- When submitting a question or request for Clarification or further information, Bidders should indicate whether or not they believe the question or request for Clarification or further information is commercially confidential to them and should not therefore be shared with other Bidders. Any such question or request for Clarification or further information should be marked 'Confidential – not to be circulated to other Bidders';
- If Ageing Better considers that, in the interests of open and fair competition, it is unable to respond to the question or request for Clarification or further information on a confidential basis, it will inform the Bidder who has submitted it. The Bidder must as soon as practicable thereafter request that either the query be withdrawn or treated as not confidential;

### **Amendments to the Invitation to Tender**

Ageing Better reserve 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.

**Invitation to Tender for an Evaluation of Ageing Better's Flexible Working for Older Workers project**

### **Procedure for the submission of bids**

Bidders shall submit one electronic copy Invitation to Tender by no later than **15 March 5pm** via e-mail to: [responses@ageing-better.org.uk](mailto:responses@ageing-better.org.uk)

The Invitation to Tender return shall state the following title:

**‘Evaluation of Ageing Better’s Flexible Working for Older Workers project’**

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.

We will acknowledge receipt of all bids.

### **Responding to this invitation to tender**

Please provide your response to this Invitation to Tender by completing the required documents below.

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.

Supporting information (CVs, appendices, may be submitted but please reference the question they related to. 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.

All bids must consist of the following items/documents:

- Confirmation of acceptance of the Conditions of Purchase as set out at Appendix 1;
- Confirmation of acceptance of the Specification as set out at Appendix 2;
- A completed Pricing Document as set out at Appendix 3;
- A completed Written Return, specifying how the Bidder will carry out the Services to be provided under the Contract, 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.

**Invitation to Tender for an Evaluation of Ageing Better’s Flexible Working for Older Workers project**

**Assessment of bids**

- Bids will be checked initially for compliance with this Invitation to Tender and for completeness. Bids that are not substantially complete and/or compliant with this Invitation to Tender may be rejected;
- During the evaluation period, Ageing Better reserve the right to call for further information/clarifications from Bidders to assist it in its consideration of their bids. Note that Ageing Better reserve the right to adjust the scoring of a Bidder's bid if information is established during clarifications that fundamentally changes any tendered proposal.
- Ageing Better reserve the option to invite Bidders to attend an interview at Ageing Better's offices to further explain their bid proposals. The provisional dates for these interviews are shown in Section 9 (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**

### **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.

### **Accuracy of information and liability of Ageing Better and its advisers**

The information contained in this Invitation to Tender has been prepared by Ageing Better in good faith but does not purport to be comprehensive or to have been independently verified. Ageing Better does not accept any liability or responsibility for the adequacy, accuracy or completeness of, or makes any representation or warranty (express or implied) with respect to the information contained in the Invitation to Tender or with respect to any written or oral information made or to be made available to any Bidder or its professional advisors and any liability therefore is hereby expressly disclaimed.

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.

**Invitation to Tender for an Evaluation of Ageing Better's Flexible Working for Older Workers project**

Nothing in this Invitation to Tender is, or should be, relied upon as a promise or representation as to the future and Ageing Better does not undertake to provide Bidders with access to any additional information or to update the information in this Invitation to Tender or to correct any inaccuracies that may become apparent. Ageing Better reserve the right, without prior notice, to change the procedures outlined in this Invitation to Tender or to terminate discussions and the delivery of information at any time before entering into the Contract.

#### **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.

#### **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.

#### **Copyright**

**Invitation to Tender for an Evaluation of Ageing Better's Flexible Working for Older Workers project**

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.

### **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).

### **Ageing Better's right to reject bids**

Notwithstanding anything else stated in this Invitation to Tender, the issue of this Invitation to Tender in no way commits Ageing Better to enter into the Contract or any other agreement whatsoever. Ageing Better is not bound to accept any bid and reserve the right to accept any bid either in whole or in part.

Ageing Better reserve the right to reject any or all of the responses received and discontinue the bidding process and/or reject any incomplete or incorrectly completed responses.

Bids will be checked initially for compliance with the requirements of this Invitation to Tender and for completeness. Clarification may be sought from Bidders in order to determine if a bid is complete and compliant. Bids that are not substantially complete and/or compliant with the requirements of this Invitation to Tender may be rejected.

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 reserve the right to withdraw the Bidder's successful Bidder status.

### **Time**

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

### **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.

**Invitation to Tender for an Evaluation of Ageing Better's Flexible Working for Older Workers project**



## 7. Timetable

The indicative timetable for the procurement process is as set out below:

Stage	Date
Invitation to Tender issued to Bidders	6 February 2019
Deadline for clarification questions confirmation of intention to bid	20 February 2019
Deadline for bid submission	15 March 2019 5 pm
Bidder Interview	1 April 2019 TBC
Notification of Result	3 April 2019 TBC
Intended appointment / contract commencement	w/c 8 April 2019

Ageing Better reserve 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. All rates quoted are to be fixed until the completion of the contract.
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 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 costs.
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.
11. 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 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.

### **Schedule of Rates**

Insert an initial breakdown of the daily rates and roles for all team members indicating the number of days of this person's time expected to be allocated to the work


### **Appendix 3 – Written Return**

The Written Return is separated into a number of Sections and questions to provide Bidders with clarity on the overall requirements of Ageing Better in relation to the quality measures used to evaluate all bids.

Each Section is linked to the Evaluation Criteria detailed in Section 4 of this ITT document. The Section weightings are shown in each Section heading

Each element of each question shall be scored on a scale of 0 to 10 by reference to the scoring guide detailed in Section 4 of this ITT document:

## Section 0 – General Information

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

### Section 1 - Response to requirements

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

Criterion 1 (max 750 words)	Weighting
6. Previous examples of successfully doing research and / or evaluation with staff in business and public sector employment settings is essential. We would also value teams with knowledge of and research experience in (a) organisational change (b) flexible working (c) older workers	25%
Bidder's Response	

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Criterion 2 (max 750 words)	Weighting
A clear understanding of and good strategies for overcoming the challenges that may be faced in delivering an evaluation like this, in the context of an evolving innovation project. Including ethical issues and the ‘soft skills’ of evaluation.	20%
Bidder’s Response	



Criterion 3 (Max 1000 words)	Weighting
An initial outline approach to the evaluation that demonstrates a) expertise in design of social research and use of research techniques b) understanding of theory based evaluation c) a good understanding of the brief and d) likelihood of being able to address the key research questions <sup>5</sup> and a detailed and costed plan for phase 1	25%
Bidder's Response	

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<sup>5</sup> We will use this as part of the assessment criteria but would fully expect the approach and methods to evolve / be refined as more is learned about the project in the first phase of the work.

Criterion 4 (Max 750 words)	Weighting
Suitability of the team, assigned roles and responsibilities and approach to management of the project, performance, and risk	20%
<div>Bidder's Response</div>	

Criterion 5	Weighting
Daily rates for the team members, and how you will seek to offer value for money throughout the project.	10%
Bidder's Response	

#### **Appendix 4 – Form of Tender**

To: **Centre for Ageing Better**

Re: **the Evaluation of Ageing Better's flexible working for older workers project**

(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. We understand that a revised and recosted proposal will be required as part of the inception phase and that this cost will be within the amount detailed below.
7. We agree that we shall commence and undertake the Services required when instructed to do so pursuant to the terms of the Contract.

**Invitation to Tender for an Evaluation of Ageing Better's Flexible Working for Older Workers project**

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: **the Evaluation of Ageing Better’s flexible working for older workers project (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.

**Invitation to Tender for an Evaluation of Ageing Better’s Flexible Working for Older Workers project**

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: **the Evaluation of Ageing Better’s flexible working for older workers project (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: \_\_\_\_\_