



## Age-friendly and Inclusive Volunteering Grant Programme: Learning and evaluation

Deadline for Tender Submissions:

*5pm 11 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.

## Contents

1. About us .....	3
2. Background to this Invitation to Tender (ITT) .....	5
3. Contract overview .....	8
4. Invitation to Tender evaluation criteria .....	13
5. Bid return and Tender evaluation process .....	15
Appendix 1: Conditions of Contract .....	23
Appendix 2: Pricing Document .....	24
Appendix 3: Written Return .....	26
Appendix 4: Form of Tender .....	32
Appendix 5: Anti-Collusion Certificate .....	34
Appendix 6: Non-Canvassing Certificate .....	36
Appendix 7: Sample projects .....	37

## 1. About us

The Centre for Ageing Better is a charity, funded by an endowment from The National Lottery Community Fund, working to create a society where everyone enjoys a good later life. We 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 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. Background to this Invitation to Tender (ITT)

### NOTE:

- This Invitation to Tender (“ITT”) is available to download on the Ageing Better website and is open to any bidder submitting a proposal for the Contract (hereinafter referred to as the “Contract”) before the stated deadline.
- Although this ITT is not subject to the [Public Contracts Regulations 2015](#), Bidders are reminded that Ageing Better will conduct the process in accordance with the key EU principles of transparency, non-discrimination and equal treatment.
- Any clarification questions should be sent to [responses@ageing-better.org.uk](mailto:responses@ageing-better.org.uk) by 15 February 2019.
- Bidders should also notify us of their intention to bid by 20 February 2019.

This ITT is for the learning and evaluation strand of the Age-friendly and Inclusive Volunteering Grant Programme. In this context we mean learning and evaluation of the grant-funded projects, rather than the overall grant programme. This background section gives more detail about the review that preceded the grant programme and the grant programme itself before briefly introducing the project we are commissioning through this ITT.

### The review

The Centre for Ageing Better, in partnership with the Department for Digital, Media, Culture and Sport (DCMS) recently undertook a review into community contributions in later life.

The review report - [Age-friendly and Inclusive Volunteering: Review of community contributions in later life](#) – was published in October 2018. The review found that many older people who would benefit most from contributing to their communities encounter practical, structural and emotional barriers which prevent them from taking part, or from remaining involved as life changes. It called on voluntary organisations to do more to tackle these barriers and set out six key principles for achieving this. These principles are summarised in the diagram on the following page.

## Age-friendly, inclusive volunteering is:



## The fund

Following the review, the [Age-friendly and Inclusive Volunteering Fund](#) has been set up to put these principles into practice. We are grant-funding five projects to develop and document models of good practice in supporting older people's voluntary and community activity. The successful bidder for this ITT will support learning and evaluation activities for these projects.

The priorities of the fund are:

- Sustaining lifelong contributions and helping people remain involved throughout major life changes such as bereavement, caring or developing a health condition;
- Helping people connect to and take part in voluntary activities and opportunities that suit their life circumstances, including informal and self-organised contributions;
- Providing practical support to include older people who currently face barriers to volunteering (for example due to health, language, cultural or social factors).

The scale and activities of each project are different, but each will receive around £50,000 to

## **Centre for Ageing Better**

run over a one-year period. We are unable to share the exact details of the projects until grant agreements are finalised (mid-March) but have included some sample projects in appendix 7 to give an indication of the kinds of projects that will be funded.

### **This ITT**

The project we are commissioning through this ITT will focus on supporting the grant-funded projects with learning and evaluation. Further details are in the following chapter, but this will broadly entail supporting the grant-funded projects to refine, articulate, and share their age-friendly and inclusive models whilst also conducting a light-touch evaluation of the grant-funded projects themselves.

### **Please note:**

Throughout the rest of this ITT “project” and “project team” refers to the project we are commissioning through this ITT and the successful bidder respectively. The term “grant-funded project” will be used to reference the models being delivered by the grantees.

“Principles” refers to the principles of age-friendly and inclusive volunteering as set out in the review. “Priorities” refers to the three priorities of the grant fund.

### 3. Contract overview

#### Aims

The aims of this project are as follows:

- To support each grant-funded project to refine, articulate and share their delivery models
- To build capacity within grant-funded projects to create or improve upon existing monitoring and evaluation frameworks
- To provide emerging evidence of individual and organisational impact through light touch evaluation

Bidders should note that grant-funded projects will have budgeted up to 8 days each to engage with the learning and evaluation process as set out in this ITT. Any direct engagement with the grant-funded projects will therefore need to fit within these parameters.

#### Methodology

Each project aim is inter-related and likely to need different but complementary methods. We are open to bidders suggesting their own approach but would expect the work to address the following:

##### **Refining, articulating and sharing the models**

Grant-funded project ideas have already been developed, building upon grantees' existing work. We want the project team to support grantees in the process of refining, articulating, and sharing their models and learning. For this element of the work we see the role of the project team as being a 'critical friend', providing the opportunity and tools for the grant-funded projects to reflect upon, refine and articulate their own models.

Bidders should therefore outline how they would support each grant-funded project to:

- Continuously refine their model by documenting and understanding its successes and failures with respect to delivery, ensuring it meets at least one fund priority and puts the review principles into practice
- Describe and articulate their model in a clear and compelling way (i.e. at least one output from the will need to answer the question: 'what is the model?' This output



will be produced by the project team, but be based on input from the grant-funded projects)

- Share the model and learning in ways that engage stakeholders and encourage adoption of the key principles of age-friendly and inclusive volunteering (i.e. at least one output answering the question ‘how would I use this model/learning from this model in my own work?’ This output will be produced by the grant-funded project, with support from the project team)

### **Building monitoring and evaluation capacity**

Each grant-funded project builds upon an already existing model or service and therefore most will have some form of monitoring and/or evaluation in place. This is likely to vary between projects and is unlikely to have any specific relevance to the priorities of the fund or the principles of age-friendly and inclusive volunteering. Therefore, bidders should outline how they will work with grant-funded projects to:

- Build understanding of current monitoring approach, including what is monitored, how, when, by whom, and for what purpose
- Co-produce a refined monitoring framework with additional indicators that are of relevance to the principles of age-friendly and inclusive volunteering
- Discuss with projects challenges around implementing this framework and ways to overcome these challenges
- Build understanding of current evaluation approach (if any)
- Develop ways for grantees to capture and evidence impact
- Develop before and after measures that can be incorporated into a monitoring framework
- Develop logic models or theories of change

The latter two bullet points will be useful to grant-funded projects in and of themselves, but if additional funding is made available after the initial grant period they will provide a solid foundation for further evaluation work.

### **Evaluation of the grant-funded projects**

We are interested in beginning to understand the individual and organisational impacts that these models have. We understand that it can be difficult to evidence such things within such a short time-scale and within the budget proposed. Therefore, we anticipate bidders will propose a light touch, proportionate approach to evaluating the grant-funded projects.

Below are the common research questions we would expect to be answered by the end of this project across all grant-funded projects. However, we are open to developing and

refining the research questions with grantees and the project team. We are also happy for both qualitative and quantitative research methods to be used to answer these questions and expect bidders to clearly outline what combination of methods they might use to answer which questions.

Our research questions are:

1. To what extent are the grant-funded projects 'age-friendly and inclusive'?
  - a. Have the grant-funded projects met the fund priorities as set out on page 6<sup>1</sup>?
  - b. How effective are the grant-funded projects in terms of increasing the number and variety of older people volunteering, sustaining engagement with volunteering and improving the quality of volunteering?
2. Are any of the review principles being implemented by the grant-funded projects and, if so, are any of them more or less effective in terms of 1b?
3. To what extent will the new approach be sustainable beyond the lifetime of this grant?
  - a. Have the principles of age-friendly and inclusive volunteering been embedded in the host organisation?
4. What effects have the grant-funded projects had on staff and volunteers?
5. What could change to improve the level of age-friendliness and inclusivity of volunteering opportunities within the model?

## Additional considerations

The Centre for Ageing Better will provide additional support to the grant-funded projects. This support sits outside of this ITT, and includes:

- A monthly meeting (delivered virtually) to discuss grant-funded project delivery matters, challenges and successes and/or discuss a specific topic of interest. We do not expect the project team to participate in this meeting.
- Four action learning sets for grantees to discuss issues they are facing, explore solutions, and learn from each other. We will be commissioning this separately to this ITT.
- Four to six day-long workshops (location TBC). These will be chaired and facilitated by Ageing Better staff or outside facilitators and enable projects to develop their capacity and learning on areas key to their delivery. The first workshop will take place over two days, with one day introducing the programme and day two covering 'co-production' (which is being commissioned separately to this ITT). We would

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<sup>1</sup> Each grant-funded project will not necessarily be working on all three priorities set out on page 6, with some only focusing on one or two of them

expect the successful bidders to attend day one of the first workshop in April 2019 so that they can meet the grantees, and a final wrap-up workshop in March 2020.

- Communication activities, including making films of the grant-funded projects. We do not expect the successful bidder to be part of this process.

## **Outputs**

We are looking for a range of outputs from this project, including both traditional research reports and other forms of media to fit with the aims and aspirations of each grant-funded project.

We would expect the following outputs as a minimum, with suggestions welcomed for additional outputs:

- A short research report outlining the methodology of the overall project and key findings
- A written output produced by the project team, based on input from grantees, articulating their model in a clear and compelling way (see page eight – ‘what is the model?’)
- Evidence of having supported each grantee in their thinking about how best to produce an output aimed at sharing the learning from the model that enables others to think about how they might use the findings in their own work, for example a tool-kit or ‘how-to’ guide (see page nine – ‘how would I use this model/learning from this model in my own work?’)
- An agreed-upon monitoring tool or framework for each grant-funded project
- A presentation to Ageing Better on the overall project

## **Contract Term**

The contract will commence in March 2019 and run until April 2020.

## **Budget**

We are looking for bids up to £78,300 (exclusive of VAT).

## **Ways of working**

**We are an active commissioner.**

This means that:

## **Centre for Ageing Better**

- We expect to be in regular contact as the project progress and would welcome suggestions from bidders as to appropriate frequency and format.
- We expect to work with the successful bidder to manage the scope of the project and help them to make decisions about priorities – to ensure the project meets stakeholders needs whilst being deliverable within timescales and budget.

We also expect bidders to have clear processes for QA and project management in place.

## **Consortiums**

We welcome bids from consortiums. Bidders forming consortiums will need to demonstrate that:

- They have successfully worked together previously.
- That they can identify and mitigate any risks that may occur as a result of partnership working

## 4. Invitation to Tender evaluation criteria

Bids for the Contract for shall be evaluated on the basis of the criteria set out below to determine the most economically advantageous tender (MEAT). Ageing Better has allocated a maximum weighting for each criteria as follows:

Criteria	Weighting
1. Experience of the team	30%
2. Methodology	40%
3. Project management and quality assurance	20%
4. Value for money	10%
Total	100%

Bidders should submit no more than 4,000 words answering each of the above criteria. Bidders should also submit CVs for every project team member (these do not count towards the word limit).

### 4.1 Scoring

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

Score	Description
9-10	Exceptional. Demonstrates strengths, no errors, weaknesses or omissions and exceeds expectations in some or all respects.
7-8	Good. The standard of response fully meets expectations.
5-6	Satisfactory. The response is acceptable but with some minor reservations.
3-4	Poor. The response is deficient in certain areas where the details of relevant response require the reviewer to make certain assumptions.

1-2	Very Poor. The response is deficient in the majority of areas where the details of relevant response require the reviewer to make frequent assumptions.
0	Rejected. Response is unacceptable or non-existent, or there is a failure to properly address any issue.

## 5. Bid return and Tender evaluation process

### 5.1 Enquiries and communication

During the Invitation to Tender stage Bidders may submit questions and requests for Clarification or further information. Bidders should note the following procedure for obtaining further information or Clarification on matters arising during the Invitation to Tender stage:

- Bidders shall address their questions and requests for Clarification or further information via e-mail to: [responses@ageing-better.org.uk](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;
- All questions or requests for Clarification or further information must be submitted by 15 February 2019 at the latest. Requests/questions received after this time will not be responded to by Ageing Better.

### 5.2 Amendments to the Invitation to Tender

Ageing Better reserves the right to issue amendments or modifications to this Invitation to Tender during the Invitation to Tender stage. These will be issued to all Bidders simultaneously and bids will be assumed to take account of any such modifications and amendments.

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

Bidders shall submit one electronic copy Invitation to Tender by no later than 5pm 11 March 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:  
Invitation to Tender for age-friendly and inclusive volunteering grant programme: Learning and evaluation

We will acknowledge receipt of all bids.

Please provide your response to this Invitation to Tender by completing the required documents. Please do not provide separate or different types or formats of documents unless specifically requested to do so.

Please note that any stated limits on length of responses set out in the Invitation to Tender must be strictly adhered to. Any question response exceeding the stated limit will be disregarded beyond that limit. Unless specifically requested to do so, please do not include or upload any standard marketing or promotional material within your answer as this will be disregarded.

Supporting information (appendices, attachments etc.) should be presented in the same order as, and should be referenced to, the relevant question.

Late submissions will not be accepted.

Bidders are strongly recommended not to leave their Invitation to Tender submission to the last minute. Ageing Better will not be held liable for failures to submit an Invitation to Tender on time due to technical issues reported less than 24 hours before the submission deadline.

### **5.4 Content of bids**

All bids must consist of the following items/documents:

Invitation to Tender for age-friendly and inclusive volunteering grant programme: Learning and evaluation



- Confirmation of acceptance of the Conditions of Purchase as set out at Appendix 1;
- A completed Pricing Document as set out at Appendix 2;
- A completed Written Return, specifying how the Bidder will carry out the Services to be provided under the Contract, and CVs of each team member as set out at Appendix 3
- A copy of the Form of Tender as set out as Appendix 4 signed by the authorised signatory submitting the bid on behalf of the Bidder;
- A completed Anti-Collusion Certificate as set out at Appendix 5, signed by the authorised signatory submitting the bid on behalf of the Bidder;
- A completed Non-Canvassing Certificate as set out as Appendix 6, signed by the authorised signatory submitting the bid on behalf of the Bidder.

## **5.5 Evaluation of bids**

- Bids will be checked initially for compliance with this Invitation to Tender and for completeness. Bids that are not substantially complete and/or compliant with this Invitation to Tender may be rejected;
- During the evaluation period, Ageing Better reserve the right to call for further information/clarifications from Bidders to assist it in its consideration of their bids. Note that Ageing Better reserve the right to adjust the scoring of a Bidder's bid if information is established during clarifications that fundamentally changes any tendered proposal.
- Ageing Better reserves the option to invite Bidders to attend an interview at Ageing Better's offices to further explain their bid proposals. The provisional dates for these interviews are shown in Section 7 (Timetable) of this Invitation to Tender. The dates, times and venues of the interviews (if held) will be confirmed with Bidders under separate cover;
- The purpose of the Bidder interview is to allow Ageing Better to achieve a more rounded appreciation of Bidders' proposals. Note that Ageing Better reserve the right to adjust the scoring of a Bidder's bid if information is established during the interview that fundamentally changes any tendered proposal.

## 6. Important notices for bidders

### 6.1 Confidentiality

Subject to the exceptions referred to below, the information in this Invitation to Tender is made available by Ageing Better on condition that Bidders shall:

- at all times treat such information as confidential;
- not disclose, copy, reproduce, distribute or pass the information to any other third person or allow any of these things to happen; and
- not use the information for any purpose other than for the purpose of making (or deciding whether to make) a bid for the Contract.

Notwithstanding the conditions referred to above, Bidders may disclose, distribute or pass information to another person if:

- it is done for the sole purpose of enabling a bid to be made and the person receiving the information undertakes in writing to keep the information confidential on the same terms as set out in this Invitation to Tender; or
- Ageing Better gives its prior written consent in relation to such disclosure, distribution or passing of information.

Ageing Better may disclose any information relating to the bids to its directors, officers, employees, agents or advisers. Ageing Better also reserve the right to disseminate information that is materially relevant to the Contract to all Bidders, even if the information has only been requested by one Bidder. Ageing Better will act reasonably as regards the protection of commercially sensitive information relating to the Bidder.

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

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

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

### 6.3 Anti-collusion

Any Bidder who, in connection with the competition for the selection of Bidders for the Contract:

- Fixes or adjusts its bid by or in accordance with any agreement or arrangement with any other Bidder;
- Enters into any agreement or arrangement with any other Bidder to refrain from making a bid or to alter, in any way, the content of any bid to be submitted;
- Causes or induces any person to enter into any such agreement as referred to above or to inform any other Bidder of the content of any other bid for the Contract;
- Offers or agrees to pay or give or does pay or give any sum of money, inducement or valuable consideration directly or indirectly to any persons for doing or having done or causing or having caused to be done any act or omission in relation to any other bid or proposed bid for the Contract; or
- Communicates to any person (outside its consortium, its professional and financial advisers other than Ageing Better or any person duly appointed by Ageing Better) the content of its proposed bid, will be disqualified (without prejudice to any other civil remedies available to Ageing Better and without prejudice to any criminal liability that such conduct by a Bidder may attract) from further participation in the competition for the Contract. Bidders are required to return with their bid the Anti-Collusion Certificate set out at Appendix 6.

### 6.4 Non-canvassing

Any Bidder who, in connection with its bid for the Contract:

- offers an inducement, fee or award to any representative of Ageing Better or any person acting as an adviser to Ageing Better in connection with the selection of Bidders for the Contract; or
- does anything which would constitute a breach of the Bribery Act 2010, will be disqualified (without prejudice to any other civil remedies available to Ageing Better and without prejudice to any criminal liability that such conduct by a Bidder may attract) from further participation in the competition for the Contract. Bidders are required to return with their bid the Non-Canvassing Certificate set out at Appendix 7.

## **6.5 Copyright**

The copyright in this Invitation to Tender is vested in Ageing Better and may not be reproduced, copied or stored in any medium without the prior written consent of Ageing Better. This Invitation to Tender and any document issued to Bidders supplemental to it shall remain the property of Ageing Better and shall be returned upon demand.

## **6.6 Confidentiality**

Bidders shall not undertake (or permit to be undertaken) at any time, whether at this stage or after conclusion of the Contract, any publicity activity with any section of the media in relation to the Contract other than with the prior written consent of Ageing Better (in relation to the form and content of the proposed publicity).

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

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

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

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

## **6.8 Time**

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

## **6.9 Bid costs and loss of profits**

Bidders shall bear their own costs and in no circumstances whatsoever shall Ageing Better become liable for any bidding costs, nor shall Ageing Better be liable for any loss of profits, loss of Contracts or other costs or losses suffered or incurred by a Bidder as a result of that Bidder not being awarded one or more Contracts pursuant to this procurement process. Ageing Better shall similarly not be liable in the event that the procurement process is cancelled, whatever the reason.

## 7. Timetable

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

Stage	Date
Invitation to Tender issued to Bidders	7 February 2019
Deadline for clarification questions	15 February 2019
Clarification questions published	18 February 2019
Notification of intention to bid	20 February 2019
Deadline for bid submission	5pm 11 March 2019
Bidder Interviews	21 March 2019
Notification of result	22 March 2019
Inception meeting	28 March 2019
Attendance at workshop to meet grant-funded projects	3 April 2019

Ageing Better reserves the right to amend the above timetable.

## Appendix 1: Conditions of Contract



Conditions of  
Contract 0.2.docx

## Appendix 2: Pricing Document

### Pricing Preambles

1. The Pricing Document contains the Bidder's rates.
2. The descriptions in the Pricing Document shall not be regarded as an exhaustive statement of everything included in the Contract; refer to the Specification for the full Contract requirements. The rates in the Pricing Document shall include for all work shown or described in the Contract as a whole and for all work not described but apparent as being necessary for the provision of the Services.
3. The rates in the Pricing Document shall include for the whole of the Bidder's obligations under the Contract whether expressly stated or reasonably implied. No additional request for payment will be permitted unless authorised in writing by Ageing Better.
4. All rates quoted are to be fixed until April 2020. Rates from April 2020 onwards shall be subject to review between the parties, and any proposed increase shall be agreed in writing by Ageing Better. Any rate of increase shall be limited to a maximum of the prevailing CPI rate at the time of the review, published by the Office for National Statistics.
5. Where quantities are stated in the Pricing Document the Bidder should note that they may vary and there is no guarantee of quantity. The rates quoted in the Pricing Document shall apply regardless of the actual quantity of Services subsequently ordered.
6. The rates shall be sufficient to provide the Services in the Specification in isolation from any other requirement and in any quantity.
7. No quantity or continuity of work is guaranteed to the Bidder and this should be taken into account when completing the Pricing Document. Unless expressly stated to the contrary, any quantities given in the Pricing Document are indicative only.
8. Payment shall be made in accordance with the Pricing Document and the procedures described in the Conditions of Contract attached at Appendix 1.
9. The Bidder shall include all mileage, subsistence and expenses costs within the submitted rates.
10. The Bidder shall include all costs for the production of any documentation and the attendance of any meetings required by Ageing Better under the Contract within the submitted rates.



**Schedule of Rates**

Insert day rates by team member


The above rates shall include for all work shown or described in the Contract as a whole and for all work not described but apparent as being necessary for the provision of the Services.

## **Appendix 3: Written Return**

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

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

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

Bidders shall note that there is a 4000-word limit for the total Written Return response. Bidders should also include CVs for all team members, but these do not count towards the word limit.

## Centre for Ageing Better

### Section 0 – General Information

1	Bidder name	Insert details
2	Registered address	Insert details
3	Name of person completing the Invitation to Tender	Insert details
4	Telephone number	Insert details
5	E-mail address	Insert details
6	Company status (e.g. Ltd, Plc, sole trader, Charity, Community Benefit Society, etc.)	Insert details
7	VAT registration number	Insert details
8	Company registration number and/or charity number	Insert details
9	Date of incorporation	Insert details
10	<p>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.</p>	
	Insert details	

### NOTE TO BIDDERS

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

Section 1	Weighting
Experience of the team	30%
Please outline your experience in relation to similar projects and highlight your knowledge of the topic areas. Please also highlight involvement of specific staff.	
Bidder's Response	

Section 2	Weighting
Methodology	40%
<p>Please outline your approach to the project, showing how you will approach each aspect of the work including any specific methods or techniques. Highlight any challenges you foresee and how these might be overcome.</p>	
<p>Bidder's Response</p>	

Section 3	Weighting
Project Management and Quality Assurance	20%
<p>Please set out team members roles in delivering the work, including days, rates and activities. Explain how the project will be managed. Outline your approach to QA of processes and outputs. If you are bidding as a consortium, please highlight how you will work together and mitigate risk.</p>	
Bidder's Response	
Empty space for bidder's response	

Section 4	Weighting
Value for money	10%
<p>Please outline how your bid demonstrates value for money. We are not looking to award higher points to the cheapest bid here – but to understand the ways in which value is being offered by bidders.</p>	
Bidder's Response	
Empty space for bidder's response	

## Appendix 4: Form of Tender

To: Centre for Ageing Better

Re: Age-friendly and inclusive volunteering grant programme: Learning and evaluation (the “Contract”)

Dear Sirs

1. Having examined the Invitation to Tender and having satisfied ourselves as to all other matters relevant thereto, we confirm our tender for the Contract.
2. We enclose our tender, and confirm that these comprise all of the documents required to be submitted in accordance with the matters set out in the Invitation to Tender. We acknowledge that we are bound by our proposals submitted pursuant to the Invitation to Tender.
3. We hereby unconditionally and irrevocably offer to provide the Services requested to be provided and performed under the Invitation to Tender in accordance with the Contract and at no greater rates or prices than the rates or prices stated in the Pricing Document.
4. We confirm that we are fully conversant with all the Invitation to Tender documentation and that this tender is submitted strictly in accordance with the Invitation to Tender.
5. We agree that this tender shall remain open to be accepted or not by Ageing Better and shall not be withdrawn for a period of twelve (12) months from the deadline for receipt of tenders as set out in the Invitation to Tender, or such longer period as may be agreed with Ageing Better.
6. We undertake to execute the Contract for the proper and complete fulfilment of the Services required or any part or parts thereof, as you may in your absolute discretion award to us.
7. We agree that we shall commence and undertake the Services required when instructed to do so pursuant to the terms of the Contract.
8. We certify that the details of this tender and the Invitation to Tender documentation have not been communicated to any other person or adjusted in accordance with



any agreement or arrangement with any other person or organisation.

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: Age-friendly and inclusive volunteering grant programme: Learning and evaluation (the “Contract”)

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

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

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

In this certificate

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

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

Signed: \_\_\_\_\_

Name: \_\_\_\_\_

Position/Status: \_\_\_\_\_

On behalf of:  
(name of Bidder) \_\_\_\_\_

Date: \_\_\_\_\_

## Appendix 6: Non-Canvassing Certificate

To: Centre for Ageing Better

Re: Age-friendly and inclusive volunteering grant programme: Learning and evaluation  
(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: \_\_\_\_\_

## Appendix 7: Sample projects

**Please note these are for illustrative purposes only.**

### **Sample project one:**

Run by a local volunteering centre with five paid members of staff, this project aims to overcome barriers to volunteering by:

- Supporting older people to identify barriers faced and how to overcome them, including issues such as home-volunteering options, helping with travel costs, or peer support to boost confidence. They anticipate working with 30 potential volunteers over the life of the project.
- Working with five local volunteer involving organisations and businesses to identify more flexible volunteering opportunities within their organisation e.g. short-term pieces of work, flexible hours etc.
- Raising awareness with other organisations about the advantages of offering flexible volunteering opportunities through a series of five workshops for the wider community of employers and volunteer involving organisations
- Matching potential volunteers to organisations and offering ongoing support. They will also continue to liaise with volunteer involving organisations and businesses to see how it is working from their end.

At the end of the project the volunteering centre would like to create a toolkit to show other volunteer centres how they could learn from the experience of the project. They would also like to have some of the volunteers write blog posts for their websites sharing their journey.

### **Sample project two:**

This is a national organisation that organises cooking classes for people on a low income, including for children and their families. The classes are designed to help people to learn how to cook and encourage healthy eating. The organisation works in twenty towns across England and relies heavily on volunteers to teach the classes.

They have noticed that in some areas a greater number of older people from the classes have gone on to volunteer very successfully, compared to other areas. They have identified that the areas with more older volunteers are following some of the age-friendly principles and believe this explains why there are differences in who is volunteering.

The project plans first to talk to their older volunteers about why they are volunteering, what enables them to do this, and what other barriers they may be facing. They also want to talk to some of the people taking part in classes who are not volunteering to find out if there are barriers for them that are not being addressed.

Following on from this they will share the learning with two other areas to see if that enables more older people to volunteer. This will enable them to test this model more widely and see the most effective ways of encouraging more older people to volunteer. They hope to get ten additional volunteers in each of the two localities.

They believe this model will be of interest to other organisations running volunteer led groups but are not yet sure of the best way to share this.

### **Sample project three:**

This organisation is primarily based in community centre located in a small city. They run a variety of programmes to support people of all ages around issues such as employment, finances, and benefits. They also run support groups for people with long term health conditions, with a few of the people attending having moved into the role of supporting the group. They now want to expand this model, encouraging older members to volunteer both within the groups and in the wider centre, reflecting that one of this groups' major barriers is a lack of confidence.

They plan to work with the groups to see how they can encourage more older members to start volunteering and see what kind of volunteer opportunities they would find most suitable. They'll then look to design suitable roles within the organisation and help older people move into these. They think that this type of model would be of interest to a wide range of community groups, and other peer support groups. They'll work with older people in five different groups and aim to help 20 of them start to volunteer either within the groups or in the centre.

The organisation is very interested in tracking changes but has very little experience of monitoring and evaluating this type of thing. They are particularly interested in how they can use film to share this model, as they feel the voices of the people they are working with are the most powerful tool there is – but also recognise the need for practical “how to” approach to this.