



# **Good Home Lincs Evaluation**

**Deadline for Tender Submissions:**

***5pm 29<sup>th</sup> May 2024***

# Contents

Contents .....	2
1. About us .....	4
2. Contract Overview .....	5
2.1 Introduction to our Homes programme .....	5
2.2 Scope of the contract.....	6
2.3 Background to the project.....	7
2.4 Service being evaluated: Good Home Lincs .....	8
2.5 Methodology .....	10
2.6 Deliverables.....	10
2.7 Contract term.....	11
2.8 Budget.....	11
2.9 Insurances.....	11
2.10 Timescales .....	11
2.11 Terms and Conditions.....	12
3. Invitation to Tender evaluation criteria.....	13
3.1 Scoring .....	13
4. Bid return and Tender evaluation process.....	15
4.1 Amendments to the Invitation to Tender .....	15
4.2 Procedure for the submission of clarification questions.....	15
4.3 Procedure for the submission of bids.....	15
4.4 Content of bids .....	16
4.5 Evaluation of bids .....	16
5. Important notices for bidders .....	17
5.1 Accuracy of information and liability of Ageing Better and its advisers .....	17
5.2 Anti-collusion .....	17
5.3 Non-canvassing.....	18
5.4 Copyright .....	18
5.5 Tax Liability .....	18
5.6 Modern Slavery Act 2015 .....	18
5.7 Confidentiality .....	19
5.8 Ageing Better's right to reject bids .....	19
5.9 Time .....	19
5.10 Tender withdrawal .....	19
5.11 Bid costs and loss of profits .....	19

Appendix 1: Conditions of Contract .....	20
Appendix 2 – Pricing Document .....	21
Pricing Preambles .....	21
Schedule of Rates .....	21
Appendix 3 – Written Return .....	23
Section 0 – General Information .....	24
Section 1: Project team skills and experience .....	26
Section 2: Evaluation approach and methodology .....	27
Section 3: Project management.....	28
Section 4: Risk Management.....	29
Appendix 4 – Form of Tender.....	30
Appendix 5 – Anti-Collusion Certificate .....	32
Appendix 6 – Non-Canvassing Certificate .....	34
Appendix 7 – Supply Chain of Conduct.....	35
Appendix 8 – Good Home Lincs: potential performance indicators and outcome measures	38
Local Energy Advice Demonstrators (LEAD) Data Collection Returns (DfESNZ).....	45

# 1. About us

Everyone has the right to a good life as they get older and our whole society benefits when they do. But stark and widening inequalities mean more and more people are going to live in poor health and face poverty and discrimination as they get older. This is unacceptable and has huge consequences for these millions of individuals and for all of us.

We have identified three main areas where we think we can make real progress.

## 1. Challenging ageism and building an Age-friendly movement

We are confronting the pernicious ageism that exists across society. Ageism affects people of all ages, but it can limit people's lives profoundly as they get older, whether through discrimination in the workplace or being denied access to potentially life-saving healthcare. Ageism means we don't value older people or invest in ways to help people age well. Everyone, everywhere has a stake in changing this and we are building an age-friendly movement across the country, inspired by a new campaign to stamp out ageism.

## 2. Creating age-friendly homes

Most people want to live in their own home, in the communities they belong to, for as long as possible. But far too many older people are currently living in homes, that are endangering their lives. Much of the housing in England is dangerous or unsuitable for older people. Homes are not safe or warm. They have hazards and are inaccessible for anyone with a disability. This needlessly costs society millions each year in NHS and social care costs. We want to make homes more age-friendly so that more people can remain living independently, healthily and happily as they grow older.

## 3. Fostering an age-friendly work culture

There is no expiry date for workers, but as people get older many face discrimination on the basis of their age - or challenges accessing the work that works for them. Our country wastes a huge amount of talent, skills and experience by denying older workers the chance to stay in jobs or find new ones. This comes with a huge price tag for society, with hundreds of thousands of people in their 50s and 60s who want to work shut out of the labour market for good. With employers facing labour shortages and productivity challenges, they cannot afford to lose or ignore this part of the workforce. We are working with employers to create an Age-friendly Employment culture and workplace practices so that everyone can remain in good jobs for as long as they want and are able to.

## 2. Contract Overview

### 2.1 Introduction to our Homes programme

Just under 8 million people are living in poor-quality homes that are a serious risk to their health and wellbeing. Many people need to make changes to keep their homes accessible, safe and warm but do not have the information and support they need.

The Centre for Ageing Better's [Good Home Inquiry](#) identified the need to increase the confidence, means and capability of individuals to make changes to their home. A key recommendation was to make sure that everyone has access to local delivery bodies that provide or signpost to information and advice, finance, home repairs, adaptations and energy efficiency services. Ideally these services would be organised as a one-stop shop from the consumer perspective, even if delivered by various organisations. We call this model (Figure 1) a [Good Home Hub](#).

Figure 1: Outline of Good Home Hub model



We recognise this model can take many forms and there is already much good practice across England. However, whilst most areas have some form of support, the offer varies significantly by local area with respect to the services provided, eligibility and, we can assume, impact.

The Centre for Ageing Better wants to see a national cross, government strategy to make all homes warm and safe, delivered at a local level through a network of Good Home Hubs. In order to aid learning, spread good practice and build support for the Good Home Hub model, Ageing Better is:

- Working with our strategic partners in Lincolnshire to design, pilot and evaluate a Good Home Hub in the county.
- Evaluating different models of housing support across England to gather evidence of 'what works'.
- Producing case studies of good practice models developed across England for financing home improvements.
- Bringing together local authorities in our Good Home Network to share learning, encourage peer support and inspire innovation in home improvement services.

This Invitation to Tender is in relation to our work in Lincolnshire, specifically the evaluation phase.

## 2.2 Scope of the contract

The Centre for Ageing Better is seeking to commission a process and impact evaluation of a new service in Lincolnshire, 'Good Home Lincs', that brings together a number of new and existing services identified in the Good Home Hub model outlined in Figure 1.

See section 2.4 for a full description of the service and service timelines.

We are seeking to commission evaluators to conduct a process and impact evaluation of the service. The objectives of the evaluation are as follows:

- Describe the Good Home Lincs service model (e.g. aims and objectives, implementation process, partners, beneficiaries, the user journey).
- Regularly provide quantitative and qualitative insights/ emerging findings into the service and whether programme activities are being implemented as intended.
  - Example process measures: How is the programme being implemented? How effective are the referral routes in and are the intended recipients being reached? When and where have activities taken place? What are the enablers and barriers to implementation? Are Good Home Hub service elements working cohesively with each other and wider Lincolnshire services? What are the main constraints on the service?
  - Example impact measures: What do service users think of the service? Who has been impacted by the service (e.g. person, households, services and system)? How and why? What impact has it had on individual health and wellbeing? If possible, an economic analysis of the impact on local systems.
- Provide a final, summative evaluation report covering the measures listed above.
- Ensure that the research includes feedback from those facing the most disadvantage (see description below), through a variety of quantitative and qualitative evidence.
- Understand the demand for Good Home Lincs and identify next steps and priorities for developing the service (including expanding the service to incorporate other Good Home Hub elements).

- Create shareable learning throughout the evaluation (e.g. recommendations and actionable insights) to support and inspire other local areas to develop a Good Home Hub.

We would also like bidders to reflect on how a cost-benefit analysis of Good Home Lincs could be conducted. **Appendix 8** lists proposed performance indicators and outcome measures for the service to support bidders in writing their proposal.

As the service model is new, we would like the successful bidder to take a collaborative approach to the evaluation, with regular feedback sessions with Lincolnshire and Ageing Better staff on emerging findings. Our aim is that the service is improved throughout the pilot period to maximise its chance of success. It is also important for Lincolnshire commissioners to receive tentative feedback on the impact of the service throughout the course of the evaluation in order to inform future funding discussions.

This evidence will be fundamental in underpinning decisions on the next steps for the Good Home Lincs service model. It will also provide information to support Ageing Better to articulate how Good Home Hubs lead to impact for people, supporting both local and national policy makers in decisions related to these services across the country.

When responding to this tender, it is important to consider in your approach that equity and respect are a central outcome in Ageing Better's strategy. We strive to reduce the gap between the most and least advantaged people by improving outcomes for the least advantaged. We identify these people by socio economic status and deprivation, protected characteristics, vulnerable groups in society, or 'inclusion health' groups and by geography. We would expect considerations of this to apply to all aspects of the evaluation, including but not limited to project design, sampling and ethics.

## 2.3 Background to the project

Lincolnshire County and District Councils (with the support of the Centre for Ageing Better) have undergone a service design process to develop the Good Home Hub model to be piloted in Lincolnshire. This process involved speaking to residents, local authority staff as well as community organisations to understand issues facing residents in the home, barriers to making changes and gaps in local services. For further information see, ['Building effective local home improvement services: Good Home Hubs'](#) and ['Putting ideas into action: Developing a local Good Home Hub'](#).

The service design process identified the following priorities for the local area – some of which will be implemented this year:

- **Simplified access to information and services** – providing good quality accessible information, and advice and casework for those that need it so residents can complete work themselves or know where to go next for further advice and support.
- **Healthy home assessment** – upskilling residents and services going into homes to identify and prioritise work to their home through a standard assessment tool and training.
- **Keeping warm/ energy efficiency** – supporting residents to identify and implement suitable energy efficiency measures to reduce their home energy costs.

- **Trusted tradespeople** – information and advice to find tradespeople residents can trust.
- **Financial solutions** – supporting residents to understand the options for how they may pay for work to their homes and developing new options where there are gaps in the market.
- **Support to commission work** – a bespoke service to help residents to identify and specify work needed, contract works, manage their delivery and sign-off completion.
- **Advice on all options** – help residents to consider alternative options to completing work to their home such as moving to a different home that better meets their needs.
- **Practical support** – help residents to deal with practical issues which may be barriers to completing work to their homes or moving, such as moving furniture, having a clear out and dealing with utilities.

Lincolnshire are taking a phased approach to develop their Good Home Hub: Good Home Lincs. The intention is to learn from the implementation of the first phase of Good Home Lincs to make the case for ongoing funding.

## 2.4 Service being evaluated: Good Home Lincs

Good Home Lincs will bring together a number of different services to test a new approach to improving the quality of residents' homes. These elements are outlined below. The evaluation should seek to understand the quantitative and qualitative impact and reach of these services and their interconnectivity and operability as Good Home Lincs.

### 1. A core information and signposting service (launching from April 2024 – June 2026)

- Lincolnshire are building new webpages to provide wide ranging advice on how to maintain and improve your home – this will include advice on all options (e.g. moving home) and signposting to existing community and local authority services that provide practical support, financial support and support to access trusted tradespeople.
- An online assessment form (Healthy Home Assessment) has been developed (to be launched between April 2024 and September 2024) to:
  - i. Support residents to undertake an assessment of their property, identify issues and be signposted to information and services on the website that can support them; and
  - ii. Provide a resource for house-visiting professionals to help identify common housing issues and signpost to available support (including a new advice and casework service for those requiring further help, see below).

### 2. Advice and Casework service (launching in September 2024 and running until June 2026)

- Lincolnshire are piloting an advice and casework service for ~18 months. The pilot will recruit 3 staff to:
  - Provide triage for those completing the Healthy Home Assessment;
  - Provide advice and support to residents to help them to maintain and improve their home, including home visits when necessary to assess the works that need carrying out;
  - Liaise with relevant organisations to resolve housing condition issues for residents, including supporting individuals on an ongoing basis as part of a caseload when required;
  - Help residents to access any available funding; and
  - Co-ordinate a holistic response to issues, helping to access a range of other services.



- Note, Lincolnshire will begin recruitment for staff in April and will provide on boarding, induction and training activities between June – August, with the service due to be fully operational by September.
- The Advice and Casework service will be able to support residents of all funding district councils of any housing tenure and any age. However, it is not envisaged that the service will directly support tenants who rent their home where landlords are not fulfilling their obligations (e.g. to maintain the home). These residents will be signposted to another team.
- It is anticipated that demand for the Advice and Casework service will be initially restricted to referrals from key partners (e.g. Fire & Rescue, Asthma Practitioners, Occupational Therapy Teams and the Lincolnshire Wellbeing Service).
- As the pilot progresses and if capacity allows, the intention will be to increase the number of referral routes into the service. This will be achieved either by increasing the number of referral partners, and/ or establishing a direct self-referral route for those who have completed the Healthy Home Assessment.

### 3. Energy efficiency services (currently operational – March 2025)

- Lincolnshire has been successful in securing Government funding to operate 2 independent Energy Advice Demonstrator programmes in Central & South Lincolnshire (Lincs 4 Warmer Homes), and South-East Lincolnshire (Home Energy Advice and Retrofit Team (HEART)). These cover the full Good Home Lincs/ Lincolnshire County Council area.
- Both demonstrators are currently collecting monthly performance data which is being reported to the Department for Energy, Security and Net Zero.
- The demonstrators focus on providing in-person advice to hard-to-reach consumer groups (such as those with no access to the internet, on low incomes or in homes that are harder to retrofit, such as listed buildings or homes in conservation areas).
- Both demonstrators have recruited teams of advisors (3-4 each) to attend community events and run drop-in advice sessions in targeted parts of Lincolnshire. They will also visit people in their homes to establish what work is needed and support people to undertake work.
- The initiatives aim to tackle fuel poverty, support people to live more comfortably in their homes and save money on energy bills.

### 4. Hoarding support project (one year pilot, starting earliest April 2024)

- This pilot project is to inform commissioners what is needed from a potential countywide service to help people declutter their home and overcome hoarding behaviour.
- It will improve understanding of when hoarding is a barrier to other home improvements/ adaptations being completed, and whether these are achieved following hoarding support or would not be achieved in the absence of specialised support.
- It will employ 3 new staff on a full-time basis (one Hoarding Co-ordinator alongside two Hoarding Support Workers) and will be operating in the east of the county only.
- It will support a small group (c.<25) of individuals already known to the Neighbourhood team with more complex hoarding behaviours to establish how these individuals can be better supported and linked with relevant services.
- Staff involved in supporting individuals will help with goal setting, practical support around clearances and with making onward referrals to other services and support as required.

## 2.5 Methodology

We do not have any predefined research methods, data collection techniques or approaches to analysis however, we anticipate a range of methods and techniques (e.g. user case studies, staff and user feedback, reviewing monitoring data) will be required to address different aspects of the evaluation (process and impact).

We are seeking the expertise of the successful bidder to define the exact scope of the evaluation and its research questions.

## 2.6 Deliverables

- A project plan that clearly sets out the research questions, methodology, outputs, engagement sessions, a project timeline and key milestones. We expect this to be co-created with Ageing Better and Lincolnshire.
- Regular virtual project team meetings (to include Ageing Better and Lincolnshire staff) run and organised by the successful bidder.
- Written updates and workshops (virtual and face-to-face) with Ageing Better, Lincolnshire staff and key stakeholders on findings at regular intervals to be agreed with the successful bidder.
- Interim outputs to provide recommendations for Good Home Lincs and/ or for external publication to feed into Ageing Better's national influencing work and support for local areas.
  - At a minimum this must include, 1) an interim evaluation report in March 2025; 2) a year of delivery impact report; a 3) report recommending next steps for Good Home Lincs in March 2026 (as the advice and casework service begins to wind down); and a 4) final evaluation report in July 2026 sharing findings from the evaluation (note: we acknowledge this may mean findings on the impact so far rather than through to the end of the pilot), as well as recommendations for other local areas looking to develop a Good Home Hub and national government.
  - We would welcome bidder's other suggestions on providing outputs during the life of the evaluation, such as service user stories and any tools/ resources being developed.
- Written case studies of individuals who have experienced the service.
  - The successful bidder will be expected to ask all research participants if they would like to tell their story directly to Ageing Better to use in our external work and/ or become a member of our Experts by Experience network. Participation is optional but information about the opportunity must be passed onto them.
  - There is also an opportunity to commission a videographer to capture some of these stories on film – funded and organised separately by Ageing Better.

Outputs will be published on Ageing Better's website and disseminated via our networks and newsletters. The successful bidder may want to be involved in the launch and dissemination

of outputs (e.g. this may involve webinars, blogs, events), although this is not a requirement of the contract.

## 2.7 Contract term

We anticipate the contractor will be appointed in July/ August 2024 and the evaluation will run for a maximum of 2 years.

## 2.8 Budget

The budget for the evaluation is **£137,419 excluding VAT**.

With respect to publication, we do not expect bidders to include any costs related to the design and external publication of written outputs. Ageing Better has reserved an additional £5,000 to cover these costs.

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 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.

## 2.9 Insurances

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

- Public Liability insurance – £1 million
- Employer's Liability insurance – £5 million
- Professional Indemnity insurance – £1 million

## 2.10 Timescales

The indicative timetable for the procurement is as follows:

Stage	Date
Invitation to Tender issued to Bidders	8 <sup>th</sup> April 2024
Deadline for clarification questions	<b>5pm</b> , 29 <sup>th</sup> April 2024
Clarification questions published	3 <sup>rd</sup> May 2024
Deadline for bid submission	<b>5pm</b> , 29 <sup>th</sup> May 2024
Bidder Interview	20 <sup>th</sup> June 2024
Notification of result	w/c 24 <sup>th</sup> June 2024
Contract commencement	July/ August 2024

Ageing Better reserve the right to amend these dates.

## 2.11 Terms and Conditions

Below are the terms and conditions, to be signed at contract award. Suggested amendments or queries should be submitted in Section 14 of the Supplier Questionnaire. Ageing Better cannot guarantee adhering to proposed changes.

Conditions of Contract



Conditions of  
Contract Good Home

### 3. Invitation to Tender evaluation criteria

Criteria	Sub Criteria	Weighting
Price (20%)	Pricing	20%
Quality (80%)	Project team skills and experience	30%
	Evaluation approach and methodology	30%
	Project management	10%
	Risk management	10%
	<b>Total</b>	<b>100%</b>

#### 3.1 Scoring

##### Scoring

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

Score	Description
5	Exceptional. Demonstrates strengths, no errors, weaknesses or omissions and exceeds expectations in some or all respects.
4	Good. The standard of response fully meets expectations.
3	Satisfactory. The response is acceptable but with some minor reservations.
2	Poor. The response is deficient in certain areas where the details of relevant response require the reviewer to make certain assumptions.
1	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.

Price is weighted at 20%. The Bidder that submits the Lowest Bid Total shall receive the maximum score of 20%. All other Bidders' Bid Totals shall be evaluated using the following formula:

Lowest Bid Total

\_\_\_\_\_ X 20

Other Bidder's Bid Total

If a Bidder is successful in its bid for the Contract, then the Pricing Document is 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.

## 4. Bid return and Tender evaluation process

### 4.1 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 listed on the funding opportunities section of our website and bids will be assumed to take account of any such modifications and amendments.

### 4.2 Procedure for the submission of clarification questions

Bidders shall submit clarification questions to this Invitation to Tender by no later than **5pm on 29<sup>th</sup> April 2024** via e-mail to: [ploy.suthimai@ageing-better.org.uk](mailto:ploy.suthimai@ageing-better.org.uk).

Responses to clarification questions will be openly published on our website for all interested parties to view.

### 4.3 Procedure for the submission of bids

Bidders shall submit one electronic copy Invitation to Tender by no later than **5pm on 29<sup>th</sup> May 2024** via e-mail to: [ploy.suthimai@ageing-better.org.uk](mailto:ploy.suthimai@ageing-better.org.uk).

The Invitation to Tender return shall state the following title:  
**‘Good Home Lincs 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.

#### **4.4 Content of bids**

All bids must consist of the following items/documents:

- 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, 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.
- A signed Supply Chain of Conduct as set out at Appendix 7, signed by the authorised signatory submitting the bid on behalf of the Bidder.

#### **4.5 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.
- 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.



## 5. Important notices for bidders

### 5.1 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.

### 5.2 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 5.

### **5.3 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 6.

### **5.4 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.

### **5.5 Tax Liability**

Ageing Better and its subsidiaries, conducts their activities with integrity, transparency and fairness. Ageing Better are committed to the prevention of the facilitation of tax evasion as they recognise the importance of fostering a positive culture of tax compliance and maintaining the confidence of students, staff, partner organisations, other customers and the tax authorities.

Ageing Better and its subsidiaries do not and will not work with others who do not share their commitment to preventing the facilitation of tax evasion.

### **5.6 Modern Slavery Act 2015**

The Bidder recognises that Ageing Better has a legal and moral commitment to ensuring that Ageing Better, through its staff, associates, agents, service providers and suppliers, conducts its business in accordance with the highest standards of ethical behaviours, transparency and probity. The Bidder shall, upon the request of Ageing Better, provide evidence of the steps the Bidder is taking to ensure that slavery and human trafficking is not taking place in any part of the Bidder's own business or supply chain in accordance with the provisions of the Modern Slavery Act 2015.

## **5.7 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).

## **5.8 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.

## **5.9 Time**

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

## **5.10 Tender withdrawal**

Ageing Better reserves the right to withdraw the tender for any reason, at any time.

## **5.11 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.

## **Appendix 1: Conditions of Contract**

**Whilst Ageing Better cannot guarantee agreeing to amendments in its Terms and Conditions, all queries and suggested changes must be noted in the Bidder's submission documents.**



Conditions of  
Contract Good Home

## Appendix 2 – Pricing Document

### Pricing Preambles

1. The Pricing Document contains the Bidder's rates (excluding VAT).
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. 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.
4. 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.
5. Payment shall be made in accordance with the Pricing Document and the procedures described in the Conditions of Contract attached at Appendix 1.
6. The Bidder shall include all mileage, subsistence and expenses costs within the submitted rates.
7. 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

Team member	Role	No. of days	Price per day (excl. VAT)	Total days
Total (excl. VAT)				£

Please detail an approximate budget for any further anticipated expenditure, including how much you plan to spend on the following:

- Expenses
- Venue/ room hire
- Incentives

**Tender total**

Total price for this tender (excl. VAT)	£
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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

Please write a return that uses the Invitation to Tender Evaluation Criteria detailed in Section 3 as section headings for your return. Weightings for each section are shown in the headings for the return.

Each section shall be scored on a scale of 0 to 5 by reference to the scoring guide detailed in Section 3 of this ITT document:

Bidders shall note that there is a 3000 word limit for the entire written return. Words that are used in diagrams are included in the word limit but it doesn't apply to Bibliographies, reference lists or CVs.

## 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
10	<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>	
	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.

<b>Section 1: Project team skills and experience</b>	<b>Weighting</b>
	<b>30%</b>
<p>Please outline the team’s knowledge and experience of the topic area of housing issues, as well as evaluation, including experience with similar contracts. Please include CVs of those working on the project – these will not be included in the word limit.</p>	
<b>Bidder’s Response</b>	
This area is intentionally left blank for the bidder's response	

<b>Section 2: Evaluation approach and methodology</b>	<b>Weighting</b>
	<b>30%</b>

Please outline your approach to the evaluation to demonstrate your understanding of the requirements, familiarity with the subject area, and the key research methods and evaluative techniques that will be required to undertake the evaluation. This should include:

- Overall project plan and timescales
- How the evaluation will consider both process and impact, as well as conduct a cost-benefit analysis
- How the evaluation will approach evaluating the four linked services that make up Good Home Lincs
- The suggested points and intervals at which the evaluation team will engage with the service throughout the pilot period
- How impact on disadvantaged groups will be considered

**Bidder's Response**

<b>Section 3: Project management</b>	<b>Weighting</b>
	<b>10%</b>
<p>Please outline the evaluation team’s preferred approach to work with the Lincolnshire and Centre for Ageing Better core project team, and wider stakeholders involved in delivering services as well as decision-making. This should include:</p> <ul style="list-style-type: none"> <li>• Proposed staffing structure and roles and responsibilities</li> <li>• Proposed engagement strategy with key stakeholders</li> </ul>	
<b>Bidder’s Response</b>	

<b>Section 4: Risk Management</b>	<b>Weighting</b>
	<b>10%</b>
<p>Please outline the main risks associated with the Contract and how you intend to manage the project to mitigate these risks.</p>	
<b>Bidder's Response</b>	

## Appendix 4 – Form of Tender

To: **Centre for Ageing Better**

Re: **Good Home Lincs 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: **Good Home Lincs 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: **Good Home Lincs 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 – Supply Chain of Conduct

Ageing Better is committed to carrying out procurement activities in an environmentally, socially, ethically and economically responsible manner and to entering into agreements and contacts with suppliers that share and adhere to its vision

To demonstrate this commitment, Bidders are asked to acknowledge their compliance with the principles of the Supply Chain Code of Conduct for this Contract, below, with respect to their organisation and their supply chain:

### **With respect to Social Compliance Tenderers shall:**

#### **(i) Not use forced, involuntary or underage labour**

- Employees should be free to choose their employment and leave that employment without hold by financial deposit of personal items
- Forced, bonded or involuntary prison labour shall not be used
- Support the effective abolition of child labour
- Comply with the national minimum age for employment, or minimum age 15, whichever is the higher unless a lower minimum age is permitted under International Labour Organisation (ILO) convention 138
- Where any child is found to be engaged in performing child labour, to provide support for that child to enable them to complete, as a minimum, their compulsory education (even if they shall cease to be involved in child labour) or an equivalent education level, as provided for under the UNI Covenant on Economic, Social and Cultural Rights. Such support by the Tenderer should recognise and not prove detrimental to the conditions of the child or those that their work supports

#### **(ii) Provide suitable working conditions and terms**

- At least statutory minimum wages (or if none, a realistic living wage) must be paid without discrimination to all employees and all non-statutory deductions must be with the consent of the employee.
- Working hours must be excessive (not over 48 hours per week, excluding overtime) and must allow for at least 1 day off for each 7 day period on average. Working beyond this should be non-regular and of employees own will
- A safe and hygienic working environment must be provided, including any catering or accommodation areas. Any hazardous working, as defined by ILO, should only be carried by persons age 18 years or over
- All equipment must be safe for use and processes must allow a safe working environment
- Policies and processes must be in place for recording and eliminating occurrence / reoccurrence of health and safety related incidents.

#### **(iii) Treat employees fairly**

- Allow employees the freedom of association to join (but not be forced to join), or be represented by, a trade union or similar organisation of their choice, and be free to leave organisations
- Not discriminate or unfairly treat any employee for any reason including education, social class/ caste, nationality, trade union membership or any of the 9 Protected Characteristics of the UK Equality Act 2010

- Provide a workplace free from discrimination, harassment or victimisation
- Treat all employees with respect and dignity, and not accept inequality as justifiable on a basis of culture
- Remunerate all employees equally at the same employment grade, regardless of any characteristics listed above, unless statutory conditions require otherwise.

**With respect to Ethical Compliance & Economic Development Tenderers shall:**

- As a minimum, comply with all laws and regulations of the countries they are working in, manufacturing in or trading with, as applicable
- Not be involved in any way with acts of corruption or bribery, or support acts of violence or terrorism or abuse of individual people or communities
- Not force unsustainable or unfair contract terms on their suppliers, or throughout their supply chain, nor allow unfair exploitation of a dominant market or customer position
- Support fair trade conditions for producers, where applicable
- As a minimum, comply with all financial regulations and taxations of the countries they are working in, manufacturing or trading with, as applicable
- Include community benefit delivery in the locality of where the contract is performed (including publishing and delivering levels of local training and employment opportunities)
- Appoint sub-contractors through an open and fair process, such as public advertising of such opportunities wherever possible
- Act at all times with respect and integrity, including open and transparent accounting
- Allow staff protection if reporting misconduct or raising concerns with respect to their own, or another organisation, and ensure all affected staff are treated in a fair and transparent manner

**With respect to Environmental Compliance Bidders shall:**

- As a minimum, comply with all local and national environmental laws, regulations and directives of the countries they are working in, manufacturing in or trading with , as applicable
- Actively avoid causing environmental damage and / or negative environmental impact through manufacture and supply of the goods or services and disposal of supply chain waste
- Have a business plan in place, and be acting on it, to minimise their environmental impact year on year and adopting or working towards internationally recognised environmental standard and/ or behaviours
- Encourage the development and use of environmentally friendly technologies
- Promote positive environmental impacts (such as reduced carbon emissions, better carbon management, waste management and water management, reduced pollution levels and technological improvements) through their activities wherever possible.

I confirm that I am authorised and have all requisite corporate authority to make this declaration on behalf of the entity referred to below

I hereby confirm that the entity referred to below adheres to this Supply Chain Code of Conduct and , if successful in this procurement exercise , shall ensure its supply chain adheres to the Code of Conduct also in order to enforce and promote sound social, ethical , environmental and economic practices

<b>Entity</b>	(Enter text here)
<b>Name</b>	(Enter text here)
<b>Title</b>	(Enter text here)
<b>Position in Entity</b>	(Enter text here)
<b>Date</b>	(Enter text here)

## Appendix 8 – Good Home Lincs: potential performance indicators and outcome measures

Indicator	Type	Measures	Data source	Data collector/ owner	Reporting frequency
<b>Number of people accessing the website</b>	Output	<ul style="list-style-type: none"> <li>Number of web hits</li> <li>Number of Page / content views</li> <li>Number of link 'click through' / by link</li> <li>Number of unique users</li> </ul>	Website analytics	Connect to Support	Monthly
<b>Website users found what they were looking for</b>	Output	<ul style="list-style-type: none"> <li>Webpage survey – “did you find what you were looking for?” / “was the information provided helpful”</li> </ul> <p>Satisfaction scale 😊 😐</p>	Website analytics	Connect to Support	Monthly
<b>Support for local events</b>	Output	<ul style="list-style-type: none"> <li>Number of events attended / supported by GHA advice and casework team</li> <li>Number of instances of advice provided at events</li> </ul>	Local GHA team recording	GHA team	Ad-hoc
<b>Healthy Home Assessment (HHA) form completion</b>	Output	<ul style="list-style-type: none"> <li>Number of times HHA accessed via GHA webpages</li> <li>Number of HHA forms completed</li> <li>Number of HHA forms completed AND emailed to occupant</li> <li>Number of people who complete and consent to further contact from GHA team</li> </ul>	Web analytics	Connect to Support	Monthly
<b>HHA satisfaction</b>	Output / Performance	<ul style="list-style-type: none"> <li>Number of surveys sent (online completions)</li> <li>Number / % of surveys returned</li> <li>Number / % of responders who found what they were looking for</li> <li>Number / % of responders who requested further advice and support</li> <li>Number / % of respondents provided with further advice</li> <li>Number / % of survey responders who progress to Casework pathway</li> </ul>	Local GHA team recording	GHA team	Monthly

<b>Advice pathway</b>	Output / Performance	<ul style="list-style-type: none"> <li>• Number of cases accessing advice</li> <li>• Number of instances of advice given</li> <li>• Type of advice given <ul style="list-style-type: none"> <li>○ Information &amp; signposting</li> <li>○ Healthy Home Assessment</li> <li>○ Keeping warm / energy efficiency</li> <li>○ Finding Trusted Tradespeople</li> <li>○ Financial solutions</li> <li>○ Advice on options</li> </ul> </li> <li>• Number / % of cases accessing advice by referring agency/partner <ul style="list-style-type: none"> <li>○ Visiting professional (by profession)</li> <li>○ Customer contact centre</li> </ul> </li> <li>• Number / % of respondents provided with further advice</li> <li>• Number / % of resolved cases (advice only)</li> <li>• Number / % of cases that progress to Casework pathway</li> </ul>	Mosaic / GHA recording system	Mosaic team	Monthly
<b>Casework pathway</b>	Output / Performance	<ul style="list-style-type: none"> <li>• Number of cases accessing Casework pathway</li> <li>• Number / % of cases accessing advice and casework pathway with completed HHA</li> <li>• Number / % of referrals accessing advice and casework pathway with short-form HHA completed</li> <li>• Number / % of cases referred directly (no HHA form)</li> <li>• Number / % of HHA forms completed as part of Casework pathway: <ul style="list-style-type: none"> <li>○ Number / % completed in home with GHA support</li> <li>○ Number / % completed remotely with GHA support</li> <li>○ Number / % completed by Occupant</li> </ul> </li> <li>• Number / % of cases with "Types of support provided"</li> </ul>	Mosaic / GHA recording system	Mosaic team	Monthly

		<ul style="list-style-type: none"> <li>○ Information &amp; signposting</li> <li>○ Healthy Home Assessment</li> <li>○ Keeping warm / energy efficiency</li> <li>○ Finding Trusted Tradespeople</li> <li>○ Financial solutions</li> <li>○ Support to commission work</li> <li>○ Practical support</li> <li>○ Advice on options</li> <li>● Number / % of cases with risks identified: <ul style="list-style-type: none"> <li>○ Risks associated with falls</li> <li>○ Risk of hospital admission / delayed discharge</li> <li>○ Likely to require otherwise residential care</li> <li>○ Receiving day care (or likely to receive) due to housing conditions</li> <li>○ Living in cold / damp home</li> </ul> </li> <li>● Number / % of cases with other interventions identified: <ul style="list-style-type: none"> <li>○ Works to improve energy efficiency of a home</li> <li>○ Works to maintain independence at home</li> <li>○ Help to move to a more suitable home</li> <li>○ Help to find financial solutions</li> </ul> </li> <li>● Number / % of cases referred to other services (by service/referral type)</li> <li>● Number / % of cases closed with resolution and solutions implemented</li> <li>● Number of cases closed without fully resolving issues identified.</li> </ul>			
<b>Casework pathway - Referral demographic data:</b>	Output	<ul style="list-style-type: none"> <li>● Vulnerability (reason for support)</li> <li>● Age</li> <li>● Tenure</li> <li>● Living arrangements (living with others etc.)</li> </ul>	Mosaic / GHA recording system	Mosaic team	Monthly



		<ul style="list-style-type: none"> <li>• Address</li> <li>• Ethnicity</li> <li>• ...</li> </ul>			
<b>Accessing information to find a trusted tradesperson</b>	Output	<ul style="list-style-type: none"> <li>• Number of webpage hits – trusted trades people</li> <li>• Number of webpage link click through – trusted trades people</li> </ul>	Website analytics	Connect to Support	Monthly
<b>Accessing information to find financial solutions</b>	Output	<ul style="list-style-type: none"> <li>• Number of web page hits – Paying for works (by level 1 and level 2)</li> <li>• Number of webpage click through – paying for works (by level 1 and level 2)</li> </ul> <p>Level 2:</p> <ul style="list-style-type: none"> <li>• Self funding</li> <li>• Grants <ul style="list-style-type: none"> <li>◦ DFG</li> <li>◦ Energy schemes</li> </ul> </li> <li>• Loans</li> <li>• Charitable and financial support</li> </ul>	Website analytics	Connect to Support	Monthly
<b>Reduced falls</b>	Outcome	<ul style="list-style-type: none"> <li>• Number / % of cases with interventions delivered to reduce the risk of a fall</li> </ul>	Mosaic / GHA recording system Pre-Post intervention Assessment	Mosaic team Caseworker recording	Monthly
<b>Reduced hospital stays</b>	Outcome	<ul style="list-style-type: none"> <li>• Number / % of cases with interventions delivered to reduce hospital stays</li> <li>• Number / % of cases with interventions unable to be delivered to reduce hospital stays</li> </ul>	Mosaic / GHA recording system Pre-Post intervention Assessment	Mosaic team Caseworker recording	Monthly
<b>Reduced likelihood for residential care</b>	Outcome	<ul style="list-style-type: none"> <li>• Number / % of cases with interventions delivered to delay or reduce likelihood of accessing residential care</li> <li>• Number / % of cases with interventions unable to be delivered to delay or reduce likelihood of accessing residential care</li> </ul>	Mosaic / GHA recording system Pre-Post intervention Assessment	Mosaic team Caseworker recording	Monthly
<b>Reduced need for day care packages</b>	Outcome	<ul style="list-style-type: none"> <li>• Number / % of cases with interventions delivered to reduce number of day care hours required</li> </ul>	Mosaic / GHA recording system	Mosaic team	Monthly

		<ul style="list-style-type: none"> <li>Number / % of cases with interventions unable to be delivered to reduce number of day care hours required</li> </ul>	Pre-Post intervention Assessment	Caseworker recording	
<b>Reduction in cold, damp homes</b>	Outcome	<ul style="list-style-type: none"> <li>Number / % of cases with interventions delivered to reduce cold, damp home</li> <li>Number / % of cases with interventions unable to be delivered to reduce cold, damp home</li> </ul>	Mosaic / GHA recording system Pre-Post intervention Assessment	Mosaic team Caseworker recording	Monthly
<b>Improved energy efficiency</b>	Outcome	<ul style="list-style-type: none"> <li>Number / % of cases with interventions delivered to improve the energy efficiency of a home</li> </ul>	Mosaic / GHA recording system Pre-Post intervention Assessment	Mosaic team Caseworker recording	Monthly
<b>Maintaining independence</b>	Outcome	<ul style="list-style-type: none"> <li>Number / % of cases with interventions delivered to help maintain independence at home</li> </ul>	Mosaic / GHA recording system Pre-Post intervention Assessment	Mosaic team Caseworker recording	Monthly
<b>Moving home</b>	Outcome	<ul style="list-style-type: none"> <li>Number / % of cases with help provided to move or to a more suitable home</li> </ul>	Mosaic / GHA recording system Pre-Post intervention Assessment	Mosaic team Caseworker recording	Monthly
<b>Financial support</b>	Outcome	<ul style="list-style-type: none"> <li>Number / % of cases with help provided to find financial solutions to enable works / moves / independence</li> <li>Number / % of cases supported to apply for a grant: <ul style="list-style-type: none"> <li>By LA grant type – i.e. DGF / Discretionary Housing Financial assistance / Energy schemes.</li> </ul> </li> </ul>	Mosaic / GHA recording system Pre-Post intervention Assessment	Mosaic team Caseworker recording	Monthly
<b>Homes sold</b>	Outcome	<ul style="list-style-type: none"> <li>Number / % of cases with help provided to sell a home</li> </ul>	Mosaic / GHA recording system	Mosaic team	Monthly

				Pre-Post intervention Assessment	Caseworker recording	
<b>Homes let</b>	Outcome	<ul style="list-style-type: none"> <li>Number / % of cases with help provided to let a home</li> </ul>	Mosaic / GHA recording system	Pre-Post intervention Assessment	Mosaic team Caseworker recording	Monthly
<b>Trusted traders</b>	Outcome	<ul style="list-style-type: none"> <li>Number / % of cases with help provided to find a trusted trader</li> </ul>	Mosaic / GHA recording system	Pre-Post intervention Assessment	Mosaic team Caseworker recording	Monthly
<b>Support to commission works</b>	Outcome	<ul style="list-style-type: none"> <li>Number / % of cases with support provided to commission works</li> </ul>	Mosaic / GHA recording system	Pre-Post intervention Assessment	Mosaic team Caseworker recording	Monthly
<b>Confidence to meet goals</b>	Outcome	<ul style="list-style-type: none"> <li>Number / % of cases who report: <i>"I feel confident that the information I have been provided, services I have been signposted to or referrals that have been accepted will help me to meet my identified goals."</i></li> </ul>	Mosaic / GHA recording system	Pre-Post intervention Assessment	Mosaic team Caseworker recording	Monthly
<b>Self-reported improvement: Housing control</b>	Outcome	<ul style="list-style-type: none"> <li>Number / % of cases who report improved confidence in control over their housing</li> </ul>	Mosaic / GHA recording system	Pre-Post intervention Assessment	Mosaic team Caseworker recording	Monthly
<b>Self-reported improvement: Safe &amp; Secure</b>	Outcome	<ul style="list-style-type: none"> <li>Number / % of cases who report improved feelings of safety and security over their housing</li> </ul>	Mosaic / GHA recording system	Pre-Post intervention Assessment	Mosaic team Caseworker recording	Monthly

<b>Self-reported improvement: Physical health</b>	Outcome	<ul style="list-style-type: none"> <li>Number / % of cases who report improvements in being able to manage their physical health</li> </ul>	Mosaic / GHA recording system Pre-Post intervention Assessment	Mosaic team Caseworker recording	Monthly
<b>Self-reported improvement: Mental Health</b>	Outcome	<ul style="list-style-type: none"> <li>Number / % of cases who report improvements in being able to manage their mental health</li> </ul>	Mosaic / GHA recording system Pre-Post intervention Assessment	Mosaic team Caseworker recording	Monthly
<b>Self-reported improvement: Isolation</b>	Outcome	<ul style="list-style-type: none"> <li>Number / % of cases who report that they feel less isolated in their home</li> </ul>	Mosaic / GHA recording system Pre-Post intervention Assessment	Mosaic team Caseworker recording	Monthly
<b>Self-reported improvement: Financial stress</b>	Outcome	<ul style="list-style-type: none"> <li>Number / % of cases who report they feel less anxious about managing their household finances and expenses</li> </ul>	Mosaic / GHA recording system Pre-Post intervention Assessment	Mosaic team Caseworker recording	Monthly
<b>Self-reported improvement: Maintaining a healthy home</b>	Outcome	<ul style="list-style-type: none"> <li>Number / % of cases who report that they feel confident that they can maintain and look after their home</li> </ul>	Mosaic / GHA recording system Pre-Post intervention Assessment	Mosaic team Caseworker recording	Monthly
<b>Satisfaction</b>	Performance	<ul style="list-style-type: none"> <li>Number / % of cases who report they are satisfied or very satisfied with the casework service provided.</li> </ul>	Mosaic / GHA recording system Pre-Post intervention Assessment	Mosaic team Caseworker recording	Monthly

## Local Energy Advice Demonstrators (LEAD) Data Collection Returns (DfESNZ)

Indicator	Type	Measures	Data source	Data collector/owner	Reporting frequency
<b>Consumers advised</b>	Quantitative	<ul style="list-style-type: none"> <li>Number of consumers reached with in-person retrofit advice service</li> <li>Number of consumers provided with in-person retrofit advice</li> <li>Number of hard-to-reach consumers provided with in-person retrofit advice</li> </ul>	LEAD Data Collection Return	Lincs 4 Warmer Homes HEART	Monthly
<b>Homes assessed</b>	Quantitative	<ul style="list-style-type: none"> <li>Total number of homes assessed</li> <li>Total number of hard-to-treat homes assessed</li> </ul>	LEAD Data Collection Return	Lincs 4 Warmer Homes HEART	Monthly
<b>Referrals</b>	Quantitative	<ul style="list-style-type: none"> <li>Number of consumers signposted to Great British Insulation Scheme</li> <li>Number of consumers signposted to Home Upgrade Grant 2</li> <li>Number of consumers signposted to Boiler Upgrade Scheme</li> <li>Number of consumers signposted to Energy Company Obligation 4 scheme</li> <li>Number of consumers signposted to other government funding scheme</li> <li>Total number of consumers signposted to government funding schemes</li> <li>Number of consumers signposted to other sources of finance</li> <li>Number of consumers signposted to installers</li> </ul>	LEAD Data Collection Return	Lincs 4 Warmer Homes HEART	Monthly
<b>Consumer feedback</b>	Quantitative	<ul style="list-style-type: none"> <li>Number of consumers providing feedback on customer satisfaction</li> <li>Percentage of consumers 'satisfied' or 'very satisfied' with advice received</li> </ul>	LEAD Data Collection Return	Lincs 4 Warmer Homes HEART	Monthly
<b>Measures installed</b>	Quantitative	<ul style="list-style-type: none"> <li>Number of energy efficiency measures installed following advice</li> </ul>	LEAD Data Collection Return	Lincs 4 Warmer Homes	Monthly

		<ul style="list-style-type: none"> <li>• Number of clean heat measures installed following advice</li> <li>• Total number of households with retrofit measures installed following advice</li> </ul>		HEART	
<b>KPIs</b>	Quantitative / Qualitative	<ul style="list-style-type: none"> <li>• KPI 1 - Number of people provided with in-person advice</li> <li>• KPI 2 - Number of households with retrofit measures installed following advice</li> <li>• KPI 3 - Customer satisfaction with advice (as a % of all users)</li> <li>• Number of off-gas-grid homes with measures installed following advice.</li> <li>• Number of solid-walled homes with measures installed following advice.</li> <li>• Number of homes with clean heat technologies installed following advice (e.g., electric storage heaters, air source heat pumps, ground source heat pumps).</li> </ul>	LEAD Data Collection Return	HEART	Monthly
<b>Project Milestones</b>	Quantitative / Qualitative	<ul style="list-style-type: none"> <li>• Harder-to-treat homes identified locally, and barriers to retrofit identified and overcome.</li> <li>• Vulnerable consumers identified locally, and barriers to retrofit identified and overcome.</li> </ul>	LEAD Data Collection Return	HEART Lincs 4 Warmer Homes	Monthly
		<ul style="list-style-type: none"> <li>• Number of properties improved to a C rating or above following advice.</li> <li>• Number of referrals to other advice providers for non-energy efficiency related subjects e.g. wellbeing services</li> <li>• Number of visits made by the Energy Van</li> </ul>	LEAD Data Collection Return	HEART	Monthly