

**Tender for Strategic Plan 2018-2020**

Age & Opportunity is the national organisation providing programmes in arts and creativity, physical activity and active citizenship and lifelong learning so that all older people can have a rich and varied life in Ireland. Our work is primarily funded by the HSE, Sport Ireland and the Arts Council of Ireland.

Each of our key areas of activity has its own specific mission, tying in with the overall organisation:

* In **arts and culture**, we foster and inspire creativity among older people. We promote the skills, experiences and exposure that can lead to a rich creative life for all older people. We also support the arts community to continue to work and to inspire and train other artists to engage in the area of creative ageing and intergenerational work. We do this though our annual Bealtaine arts festival and through our Cultural Companions programme.
* In **sport and physical activity**, we get ‘more older people, more active more often’ as our Go for Life slogan runs. We do this through the use of peer-led interventions to create increased sport and physical activities for people, such as PALs workshops, the Go for Life Games and FitLine. We have also developed CarePALs for giving care workers the skills they need to introduce physical activity into care settings.
* In **active citizenship and lifelong learning**, we provide innovative learning opportunities to older people and to organisations delivering services to older people. Our primary focus is on facilitated learning experiences in areas such as community participation and age friendly environments through our Get Engaged programme and accredited vocational training through Creative Exchanges. We provide developmental and educational experiences for older people, such as Changing Gears and Ageing with Confidence and those who work with them such as AgeWise.

**Mission, Vision and Values**

Age & Opportunity’s **mission** is to inspire and empower older people to live healthy and fulfilling lives and to influence policy to ensure the active participation of older people in ways that benefit our communities and wider society.

Our **vision** is of a world where, as we age, we have the right and the opportunity to realise our potential. We have the right to shape decisions that affect our lives and the life of our community. Age & Opportunity will lead the debate on the issues concerning contemporary ageing and older people.

At the heart of our work is a set of **values** and **beliefs** which inform every aspect of our programmes, policies and practices.

A&O Values graph 4.emf

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| --- | --- | --- |
| recognising older people as decision-makers | seeing older people as a resource | valuing equality & diversity in older people |
| involving older people from backgrounds of disadvantage | **Beliefs** | promoting the message that ageing means growth and creativity |
| challenging ageism | focusing on quality of life | inspiring older people and seeking their participation |

**Requirements**

Our current Strategic Plan is coming to an end in December 2017, and we are now seeking a contractor to develop a new plan for the next three years from 2018 to 2020. It is envisaged that the plan will be prepared in a similar format to our current strategic plan (see [www.ageandopportunity.ie](http://www.ageandopportunity.ie)/about/governance)

**Timeframe and Process**

It is envisaged that the successful tenderer will produce the following outputs during the period of late-September 2017 to mid-January 2018:

* Conduct individual interviews with the CEO and eight other senior staff
* Conduct individual interviews with all eleven Trustees
* Conduct interviews with a number of stakeholders in the sector
* Facilitate a strategic planning session with the Board of Age & Opportunity, examining strengths, weaknesses, opportunities and threats, and exploring our mission and vision and key priorities
* Facilitate a strategic planning session with all staff of Age & Opportunity, examining strengths, weaknesses, opportunities and threats, and exploring our mission and vision and key priorities
* Complete an outline draft strategic plan and present at the Board meeting in early December
* Finalise the strategic plan by mid-January 2018

**Ethics and Values**

We expect the successful tenderer to adhere to Age & Opportunity’s values and beliefs and to follow any of our policies which are deemed appropriate.

**Accountability and Management**

The contract for services rests with Age & Opportunity. The primary point of contact for the successful tenderer will be Karen Smyth, CEO, Age & Opportunity.

The successful tenderer will be expected to:

* Maintain regular contact with the CEO, responding to communications in a timely manner
* Be flexible and responsive to the needs of the organisation as they arise.

**Deliverables and schedule of work**

We expect the successful tenderer to:

* Commence the strategic planning process in late-September 2017
* Provide regular progress updates to the CEO
* Provide a draft strategic plan in early December 2017
* Produce the final strategic plan in mid-January 2018

**Competency and expertise requirements**

The successful tenderer will:

* Have a proven track record in strategic planning
* Have experience of working with age-related organisations
* Demonstrate an understanding of and have experience working with NGOs
* Provide details of relevant experience and qualifications in delivering on all aspects of the tender, and provide two referees associated with the two most appropriate pieces of work.

**Tender Requirements**

Tenders for this work must include:

1. Name of applicant / organisation name, address and contact details. In the case of consortia, please assign one person / organisation as the principal contact
2. A statement outlining the understanding of the brief (max 600 words)
3. Personnel involved – details of all personnel who will be involved, including a short CV (no more than 600 words) which outlines their qualifications / experience
4. Description of proposed project approach, methodology, actions and timeframe (max. 1200 words)
5. Examples of two relevant previous projects along with a separate referee, including contact details, for each project
6. Costs – detailed per day cost and any associated costs, including VAT
7. Notification of any potential conflicts of interest

Evaluations of tender submissions will be based on criteria specified in the tender requirements, using the following award criteria:

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| --- | --- | --- | --- |
| No | Requirements / Criterion | Weighing Criteria | Minimum Scoring Required |
| 1 | Understanding the Brief | 20% - 20 marks | 60% of marks required (12/20) |
| 2 | Relevant Knowledge, Expertise, Experience and Resources Allocated | 30% - 30 marks | 60% of marks required (18/30) |
| 3 | Content and Quality of Proposed Plan and Methodology | 30% - 30 marks | 60% of marks required (18/30) |
| 4 | Cost | 20% - 20 marks | 60% of marks required (12/20) |
|  | Total marks | 100 |  |

1. Understanding the brief

Those tendering should demonstrate in their proposals a good understanding of the brief and issues which this strategic plan is seeking to address, including an excellent understanding of issues relating to strategic planning, NGOs and issues relating to contemporary ageing.

1. Relevant knowledge, expertise, experience and resources allocated

The highest scores will be awarded to the tenderers with the most appropriate knowledge and experience in delivering similar projects. The tenderer must supply a CV of the person who will be carrying out the work.

1. Content and quality of proposed plan and methodology

This refers to the proposed approach to the design and development. Tenderers must demonstrate their capability to bring the contract to a satisfactory conclusion by describing the methodology of approach to accomplish the project’s required outcomes within the stated timeframe.

1. Cost

This must include all costs and expenses for the work. Quotations should be inclusive of VAT, and should be quoted in Euro. All prices quotes must remain valid for the duration of the work.

Following completion of the tender evaluation, the successful tenderer will be notified in writing. Once the offer is accepted, letters will be issued to the unsuccessful tenderer/s notifying them of the result.

A tender assessment panel is in place to assess the applications and to award the contract to the successful tenderer. The panel will have to be satisfied that the method and programme of work meet the requirements outlined and are cost effective. The panel does not commit itself to accepting the lowest tender and will not accept any responsibility for any expenses incurred in the preparation and submission of a tender. The panel may cancel the process at any time. Age & Opportunity will not engage in any discussions or negotiations in advance of adjudication. Adjudication will be made on the English-language version of the tender only.

**Budget and schedule of payments**

The maximum budget for this strategic plan is €16,500 (inclusive of VAT). The price will be inclusive of all expenses, travel, subsistence and administration. For clarity, Age & Opportunity will not make any payments other than the price in the quotation response document. Payments will be made in instalments, based on deliverables.

Any quotations exceeding this amount will not be evaluated and will be eliminated from the process. Quotations with lower pricing will receive a proportionally higher score under the award criteria total cost.

**Shortlisting and clarification meetings**

Age & Opportunity may shortlist applicants.

Age & Opportunity may hold clarification meetings with those shortlisted. Applicants attending such meetings will do so at their own expense.

**Tax Clearance Certificate**

Before the contract is awarded, the successful tenderer will be required to produce a valid Tax Clearance Certificate, and if the certificate should expire within the course of the contract, a new certificate will be required. All payments under the contract will be conditional on the person / organisation being in possession of a valid certificate at all times.

**Insurance**

The successful tenderer must produce evidence of valid insurance prior to the signing of the contract.

**Ownership of material resulting from this work**

Ownership of material and documentation resulting from the development of this Strategic Plan will reside with Age & Opportunity, and must be returned to Age & Opportunity at the request of Age & Opportunity or on termination of any contract, in the format requested by Age & Opportunity, and may not be used without the consent of Age & Opportunity.

**Closing date for receipt of tender**

The closing date for receipt of three (3) signed paper copies of the tender and an electronic copy to Age & Opportunity is **12 noon on Monday the 4th of September 2017**. Any tenders received after this time and date will not be considered for adjudication. Please leave enough time for postage and emailing in order to meet the deadline. Any discrepancy found between the electronic and paper copies may mean the tenderer is disqualified from the adjudication.

**Tender submissions should be addressed to:**

Karen Smyth

CEO

Age & Opportunity

St Patrick’s Hall

Marino Institute of Education

Griffith Avenue

Dublin 9

[Karen. Smyth@ageandopportunity.ie](mailto:Karen.%20Smyth@ageandopportunity.ie)