

Invitation to Tender

Financial Inclusion Support for Residents of Wormley and Turnford February 2023

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1. Summary of Tender

Client:

Community Alliance Broxbourne and East Herts
on behalf of **Wormley and Turnford Big Local** (WTBL)

Description:

To provide benefits and financial advice and support to residents of the WTBL area until February 2024

Contract value:

The estimated value of the contract is £8,000 (inclusive of VAT and expenses)

Issue of Invitation to Tender:

13th February 2023

Closing date for tender submissions:

6th March 2023 (noon)

Project start:

The successful organization should be available to start work from 1st April 2023

Location of project delivery:

Wormley Community Centre, Fairfield Road, Wormley

Email for completed tenders:

info@wtbiglocal.org.uk

All enquiries and clarification questions should be made by email to, Ian Richardson, CEO, Community Alliance Broxbourne and East Herts ian@communityalliancebeh.org.uk

2. Background to Big Local and Wormley and Turnford Big Local

Big Local is an exciting opportunity for residents in 150 areas around England to make a massive and lasting positive difference to their communities. It is about bringing together all the local talent, ambitions, skills and energy from individuals, groups and organizations who want to make their area an even better place to live.

Big Local is run by Local Trust, who are working with over £200m from the Big Lottery Fund and a range of partners providing expert advice and support for residents.

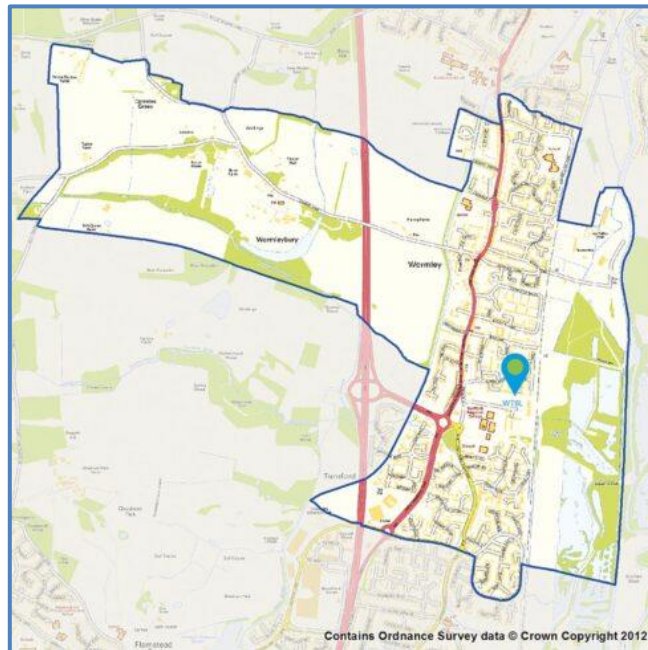
The four programme outcomes for Big Local are:

1. Communities will be better able to identify local needs and take action in response to them
2. People will have increased skills and confidence, so that they continue to identify and respond to needs in the future
3. The community will make a difference to the needs that it prioritises
4. People will feel that their area is an even better place to live.

WTBL, one of the 150 Big Local areas, is bringing £1million of Big Lottery investment to the community of Wormley and Turnford in Broxbourne, helping it to be an even better place to live.

A group of local residents, known as the WTBL Partnership work together with the staff team to manage the WTBL Big Local programme and to deliver the Community Plan. WTBL are currently in their 10th year of Big Local funding and have current plans to run until February 2024. The current Community Plan was launched in 2021 and sets out the vision for the WTBL Big Local area. It is based upon research and consultation carried out in the area.

Click here to download the WTBL Community Plan <https://wtbiglocal.org.uk/wp-content/uploads/2021/04/Final-WTBL-Community-Plan-2021-2024.pdf>



The WTBL Big Local area (outlined in blue)

The Partnership has appointed Community Alliance for Broxbourne and East Herts as their locally trusted organisation to achieve the vision that has been set for the Big Local area. As the locally trusted organisation, Community Alliance for Broxbourne and East Herts manages the Big Local money on behalf of the WTBL Big Local Partnership and is responsible for ensuring that the Big Local money is spent appropriately.

3. Background to this Invitation to Tender

Our consultation has identified support for people on low incomes as being an area of primary concern. Broxbourne CAB has delivered some services on behalf of WTBL over the past year.

10 Most Income Deprived Hertfordshire Lower-layer Super Output Areas (IMD 2015)			
Ward & District	Hertfordshire Rank	National Rank	Score
Borehamwood Cowley Hill, Hertsmere	1	1794	0.35
Waltham Cross, Broxbourne	2	3297	0.30
Northwick, Three Rivers	3	3336	0.30
Flamstead End, Broxbourne	4	3896	0.29
Bedwell, Stevenage	5	4207	0.28
Wormley & Turnford, Broxbourne	6	4269	0.28
Highfield & St Pauls, Dacorum	7	4774	0.27
Hitchin Oughton, North Hertfordshire	8	4946	0.26
Bandley Hill, Stevenage	9	5177	0.26
Peartree, Welwyn Hatfield	10	5223	0.26

As the table above, prepared as part of a 2016 Hertfordshire Community Foundation assessment shows, Wormley and Turnford is the sixth most income deprived ward in Hertfordshire. Two other wards in Broxbourne Council area are also among the ten most income deprived.

This data shows that there is a need for locally based services that are provided with and for local residents to address income inequality and the attendant issues of poor health and well-being, isolation and a lack of affordable space.

The Partnership would like to see incomes of all residents maximised and recognise that some households need support to understand their entitlement and make claims.

The Partnership would like to commission an organisation to deliver a range of solutions that it believes will work towards resolving these issues.

Identified issues that WTBL aims to tackle with this Invitation to Tender are:

- Income maximisation
- Access to benefits
- Lack of knowledge / understanding regarding budgeting and managing household finances.
- Support for resident with language, literacy and numeracy issues.
- Predatory lending
- Fuel Poverty
- Unexpected drops in income (benefit sanctions, redundancy, changing jobs, job loss)
- Being unable to access free or low-cost independent financial advice.
- Sustainability of these services once funding from WTBL ceases

We recognise that bidders may have knowledge that would identify additional issues and the WTBL Partnership would welcome any such issues being included in responses to this tender.

4. Specification

We have grouped the services to be provided into four areas:

1. **Income maximization** - This includes benefit checking, applying for additional benefits and/or grants, assisting with appeals and advice on utility providers.
2. **Education** - This includes budgeting advice, general money management, shopping habits & food waste education, promotion of savings schemes e.g. credit union.
3. **Tackling Debt** - Advising individuals who are over-indebted including, but not exclusive to, homeowners, private tenants, and social tenants.
4. **Sustainability** – How will these services continue once WTBL funding ends? E.G. The ability of the provider to access external funding resources and/or the cascading of training of local volunteers to deliver the service.

We envisage that all delivery would be through 1-2-1 sessions and recognise that some individuals may need ongoing support with some of these issues. Any services provided need to comply with current financial regulations. The services will be limited to people who live or work within the WTBL Big Local area.

WTBL would assist with publicity for the services and provide space for session delivery.

5. Submission guidelines

Please include all of the following in your submission.

- i. Background information on your organisation and the resources and expertise you have available to you.
- ii. Details of relevant insurance held.
- iii. Details of your proposed approach and methodology including your plans for sustainability/continuation of the service in Wormley and Turnford after the period covered in this tender.
- iv. Information on the team that would deliver the services detailing any specific experience and qualifications.
- v. Details of any sub-contracted third parties you would be using.
- vi. A proposed timeline of activity and an outline project plan from 4/23 – 2/24.
- vii. A breakdown of your total costs to complete the project Inc. VAT and expenses.
- viii. The contact details of two referees for whom you have completed similar work.

- ix. Any added value your organisation would deliver in carrying out this work.
- x. The latest annual accounts for your organisation.

6. Terms and conditions

- i. This Invitation to Tender is not an agreement with you. It is a request to receive proposals from organisations that are interested in delivering this project.
- ii. Any points of clarification about this Invitation to Tender must be made by the date specified in Section 1 (Summary of tender) to the email address of the contact person specified in Section 1.
- iii. Community Alliance Broxbourne and East Herts reserves the right to accept or reject any tender and does not bind itself to accept the lowest price or any tender. It shall not be liable for any costs or expenses incurred by bidders in preparing and submitting a response to this Invitation to Tender.
- iv. Tenders will be evaluated against the criteria set out in section 8.
- v. Bidders should be prepared to meet with WTBL Big Local and possibly Community Alliance for Broxbourne and East Herts to discuss their response to this Invitation to Tender.
- vi. The preferred bidder will not be permitted to enter into negotiations on the terms of the Contract once the tender is submitted.

7. Tender documents

- i. Tenders and correspondence must be written in English.
- ii. All pages of the tender must be numbered sequentially.
- iii. It is the bidder's responsibility to ensure that all of the information required is supplied.
- iv. Tenders must be submitted by a person authorised to respond to invitations to tender on behalf of your organisation.
- v. Tenders must be submitted by email to info@wtbiglocal.org.uk before noon on 6th March 2023.

8. Evaluation Criteria

Tender submissions will be evaluated against the following criteria. An interview may also be required as part of the evaluation process.

Criteria	Weighting
Quality of the proposal demonstrating a clear understanding of the brief and the outcomes we want from this work.	25%
The proposal's inclusion of a realistic timeline and budget.	20%
Sustainability of the service delivery post funding	20%

Credibility and proven relevant experience of the organisation and the staff that will be assigned to carrying out this work.	15%
Ability to work effectively with the WTBL Partnership and local residents.	15%
Any added value offered by the bidder.	5%
Total	100%