

COMMERCIAL IN CONFIDENCE

Statement of Requirements

Active Travel Campaign for Rural South Lanarkshire

Sep 2018



Statement of Requirements: Active Travel Campaign

A) Purpose of the work

The Rural Development Trust wishes to commission an Active Travel Campaign for nine rural school communities throughout South Lanarkshire. This campaign is part of **Make Your Way**, a project supported by South Lanarkshire Council and Paths for All Smarter Choices Smarter Places fund.

This project will build on the Smarter Choices Smarter Places (SCSP) work through the Clyde and Avon Valley Landscape Partnership (CAVLP), changing the geographic focus to rural South Lanarkshire.

Working alongside another contractor who will be undertaking community workshops and developing sustainable travel action plans, this campaign will provide a programme of activities and courses with the aim of encouraging active and sustainable travel in rural areas, particularly in relation to school travel. These will include guided walks, cycle training and maintenance, awareness events and parental engagement with the aim of encouraging more people to cycle, walk, bus, car share and drive efficiently as sustainable travel options (as some of these schools are very rural).

The selected contractor will be proactive in working with identified schools and community organisations who have an existing audience, as well as providing opportunities for wider community engagement.

We anticipate the proposed programme to include:

- 5 guided walks/cycle rides
- 2 walk leader courses
- 1 cycle ride leader courses (Sarah found this hard to fill last time so we can try 1 course)
- 2 bike maintenance courses
- 2 community bike days to promote cycling to a wider audience including Dr Bike sessions, pump track, etc.
- 1 Step Count Challenge type activity

Evaluation should be built in to the project from the start in order to measure the impact on the desired outcomes (also see Evaluation Plan in Annex B):

The expected outcomes for the Make Your Way project are:

- Increase in awareness and improved attitude of sustainable travel options
- Increased walking and cycling to school
- Increase in sustainable travel for longer journeys
- Reduced car use and reduced driver only journeys

Project background and examples of recently completed projects in the area can be viewed at www.communityactionlan.org

B) Background

The Rural Development Trust Ltd. (RDT) is a company limited by guarantee with charitable status, controlled by a Board of Directors consisting of representatives of public agencies, community organisations and local business sectors. RDT is based in and operates from South Lanarkshire's rural area. The Trust has a strong recent track record of developing and delivering projects that address rural issues in a strategic and effective manner. The company has a business ethos but with a social objective and believes in being prudent with its cost base and keeping business overheads at manageable levels.

Community Action Lanarkshire (CAL) is a LEADER supported programme that offers capacity building support for rural communities across North and South Lanarkshire, and is a legacy of the Clyde and Avon Valley Landscape Partnership (CAVLP). CAL are funded to support the delivery of community-led plans where there are none, or to refresh plans where an old one exists. The plans will provide an opportunity for people to get involved in community development, to say what's important to them and what needs to happen to make their communities better places to live for now and for generations to come. CAL also support the development and implementation of community projects, of which Make Your Way is one.

Smarter Choices Smarter Places (SCSP) is Paths for All's grant scheme to support behaviour change initiatives to increase active and sustainable travel modes. CAVLP Lead Partner, South Lanarkshire Council, has secured SCSP funding since 2015/16 for CAVLP projects.

C) Operational Project Delivery

The maximum contract value is for £45,000 plus VAT to the end of March 2019 when the final report is due in to South Lanarkshire Council and Paths for All.

Close liaison and synergy with the Sustainable Travel Action Planning Workshops and the CAL Community Plans initiative is expected as it will help engage people in the various facets of this project.

D) Methodology and Requirements

It is envisaged that the methodology will include the following requirements:

- Establishing the baseline through an up-to-date Hands Up Survey in each school
- Evidence gathering – there are a number of sources of existing information to help establish the baseline for mode of travel in the area. Additional survey work should be undertaken to gather more area focussed data
- Promotion and delivery of hands on school workshops, community events and training to deliver on the outcomes above
- Monitoring and evaluation of the campaign

E) Contract management

All correspondence and queries relating to the delivery of the contracted work will be directed to the CAL Development Officer in the first instance. They will be responsible for ensuring the quality and delivery of the outputs in accordance with the agreed timetable.

F) Reporting

1. Successful contractors must report using the monitoring and claim forms which will be provided.
2. A draft final and a final report will be required.
 - Two bound colour copies of the final report are to be supplied in addition to MS Word and PDF files
 - Draft reports are to be emailed or sent on CD in the above formats unless otherwise agreed.

G) Key Stages

The key stages of the project are detailed below with the indicative timetable to be agreed between the consultant and project manager.

Inception Meeting <i>Contract particulars confirmed, and to ensure understanding of the contract by all parties, hand over any information and contact details, etc</i>	3rd week in October	Timescales and forward programme to be agreed, including agreement of schools to be included
Contact and meetings made with schools and relevant community partners	By first week in November	To get school and community buy in and dates for activities
<i>Delivery of schools and community work</i>	Nov - March	November-March
Promotional activities to ensure project success – One press release at start and end of project. Social media updates on project activities tagging relevant contacts. Posters put up in local communities	November to March	Once a week as a minimum for social media. 2 press releases as a minimum.
Reporting		To update on progress on outputs / outcomes and promote partnership working
Draft	Mid March	For comment to CAL Development Officer
Final report	End March	
Final payment following acceptance of Final report	April	

H) Payments

Payment will be made following acceptance of the specified outputs as follows:

Payment stage 1 (end November)	25%
Payment stage 2 (end February)	50%
Payment stage 3 (final report acceptance – April)	25%

Payments will be made by BACs within 30 days of receiving an invoice. If an alternative schedule is preferred due to cash flow issues, this can be discussed with the project Development officer.

I) Submission

Submissions should include the following:

- Confirmation of the proposed method and programme of work. This should specify how the contractor will apply the methodology, in line with the aims and objectives specified above.
- Details of all methodologies where these have been requested
- The key sources and contacts to be used in undertaking the work
- Confirmation that the requested report formats will be provided in the final document
- A note of any dependencies or assumptions that have been made in developing the methodology (e.g. any information that the CAVLP Development Officer may be expected to provide to assist the consultant in undertaking the work)
- CVs of all Personnel involved
- A short description of any similar work recently undertaken by the contractor

Consultants shall provide a breakdown of costs as follows:

- A total cost for professional services
- The total number of days required to undertake the work
- Total number of days allowed for each person at each stage of the work, and relevant day/hourly rates for each team member
- Itemised and total travel and subsistence costs
- Itemise any other expenses such as films, reprographics, and printing
- Total cost, excluding VAT
- VAT status

It is acceptable for a team of consultants to be formed and for elements of the work to be sub-contracted. Where any arrangement has been made between parties, the 'lead' consultant will be deemed to be the consultant invited to respond to this invitation, and be the nominated contact for correspondence with the client.

The lead consultant will be responsible for ensuring that all of the information is collated and presented as single piece of work, and should supply information for

each member of the team as noted above, identifying the names of team members and likely time input to the project.

J) Procurement Process

3. The intended timetable for this tender process is:

Activity	Date
Issue Invitation to tender	01 Oct 2018
Tender return date	19 Oct 2018
Evaluation of Proposals	22 Oct 2018
Notification of Award Decision to All Tender Invitees	23 Oct 2018
Award Contract	23 Oct 2018
Contract start date	24 Oct Nov 2018

Tenders should returned by email to ewan.bachell@ruraldevtrust.co.uk entitled Active Travel Campaign by 5pm on Friday 19th October 2018.

K) Evaluation criteria

The suppliers' responses will be evaluated against the following list of criteria:

Evaluation Criteria	Weighting
Schedule of Costs - Assessment of suppliers' costs / fees etc.	30%
Objectives and Scope of Service – Suppliers demonstrate their ability to fully meet the requirements detailed in this document and any annexes etc.	20%
Experience / Technical Knowledge of Proposed Personnel – Based on CVs etc submitted	20%
Timetable – Suppliers demonstrate their ability to meet the contract timeframe indicated.	30%
Sustainability – Suppliers demonstrate their experience and track record with respect to sustainability within similar contracts within the public and/or private sectors	Optional
Health & Safety/ Terms & Conditions – Suppliers demonstrate their ability to meet all requirements	Mandatory

For details of Terms and Conditions and Health and Safety and Insurance requirements please see Annex A.

L) Project Manager

The Development Officer for this project is Ewan Bachell, Community Action Lanarkshire, Langloch Farm, Lanark, ML11 9TA; ewan.bachell@ruraldevtrust.co.uk, 01555 664665

Any supplier requiring further clarification of any points in this SoR should address their enquiries in writing (email will suffice) to the Development Officer.

Annex A

TERMS AND CONDITIONS / HEALTH & SAFETY REQUIREMENTS

As part of any contractual relationship, both parties have duties under Health & Safety legislation. Similarly, if a supplier employs sub-contractors to carry out some or all of the work contained within the specification given for the contract, all parties have health and safety responsibilities. The extent of the responsibilities of each party will depend on the individual circumstances of the project.

It is essential that prospective suppliers are competent to undertake the work described and have health & safety policies and procedures in place. These must address employee training and safety and the risks and hazards associated with the work.

To this end, the following information is required:

1. Evidence of Competency (e.g. qualifications, training, experience, references, CV's etc).
2. A copy of your Health and Safety Policy Statement.
3. A statement showing your 'Safe Method of Operation' and any generic risk assessments for the type of work you intend carrying out (if applicable).
4. A copy of both your current Professional Indemnity, Public and, where appropriate, Employer's Liability Insurance Certificates.
5. A statement of your procedures for appraising the competence of any sub-contractor that you intend to use on the project.
6. In addition to your own statutory responsibilities under the Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR) 1995. You will be required to report all accidents, dangerous occurrences and near-misses that occur whilst undertaking the specified work to the Project manager.

The successful supplier will be required, in liaison with the Project manager, to identify hazards associated with the work, to complete the necessary COSHH (Control of Substances Hazardous to Health) and final Risk Assessments, and to confirm their 'Safe Method of Operation' statement. This will include ensuring that any previously supplied generic risk assessments have been tailored to the specific work to be undertaken. This must be agreed with the Project manager before work commences.

If suppliers fail to provide suitable information, they may be regarded as 'non-compliant'.

Annex B - Evaluation Plan

Initiative	<i>Provide the <u>name</u> of the initiative</i>	Make Your Way
Description	<i>A brief <u>description</u> of what the initiative involved (20 words max.).</i>	Active travel programme in these same rural communities working with local schools
Baseline levels	<i>Provide the <u>existing levels</u> of walking, cycling, public transport and/or car use in your target audience prior to intervention.</i>	Primary School results 40% walk, 3.6% cycle, 3.4% scoot, 11% park and stride, 29% driven, 10% bus, 2.% taxi (South Lanarkshire average stated here as there is a huge variation between different rural schools, but we will use the baseline for each rural school as identified in the Hands Up Surveys with some having 100% bus use and others with nearly 50% walking): South Lanarkshire Modal split travel to work 2014, Scottish Household Survey 71% drive 5% car sharing 8% walk 0.4% cycle 8% use the bus 5% use the train (increase trend, all others above are decreasing)
Population reached	<i>Provide the <u>number and percentage</u> of the potential target audience that you intend to reach.</i>	The population area is 2800 and we would expect to reach at least 50% of these people (1400) through local schools, community groups and the project marketing.
Evaluation Method	<i>Provide information on <u>how you will measure</u> the impact of the initiative, e.g. resident surveys, intercept surveys, electronic user data.</i>	Record numbers attending events, training and workshops Evaluate impact on sustainable travel awareness, attitudes and behaviour including increase in walking / cycling for short journeys, increased use of sustainable travel and decreased driver only car use for longer journeys. Measure number of people reached through promotional campaigns –social media and press,
Timing	<i><u>When will you measure</u> the impact of the initiative?</i>	On an ongoing basis at events and workshops
Output	<i><u>What (and how much) do you intend to deliver</u> as part of the initiative, e.g. reports, leaflets, events, surveys completed, travel plans etc.</i>	1 end of project report 6 week active travel programme in 9 rural schools 5 guided walks or cycle rides 2 walk leader training courses 2 bike maintenance courses 2 community sustainable travel days 1 Step Count Challenge campaign for teams across the project area
Anticipated Outcomes	<i><u>What do you expect the impact of the intervention</u> will be, e.g. changes in awareness, changes in mode of travel?</i>	Increase in awareness and improved attitude of sustainable travel options Increased walking and cycling to school Increase in sustainable travel for longer journeys Reduced car use and reduced driver only journeys