

COMMERCIAL IN CONFIDENCE

Statement of Requirements

Sustainable Travel Planning Programme

September 2018



Statement of Requirements: Make Your Way Sustainable Travel Planning

A) Purpose of the work

The Rural Development Trust wishes to commission a sustainable travel action planning programme for communities in rural South Lanarkshire, to assist communities assess, evaluate, and plan action to increase active and sustainable travel. This programme is part of **Make Your Way**, a project supported by South Lanarkshire Council, Paths for All Smarter Choices Smarter Places fund and supported by staff from the Rural Development Trust's Community Action Lanarkshire project.

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.

This programme will develop and deliver a series of local community workshops to increase community awareness of existing active and sustainable travel opportunities, gather baseline data on people's travel needs, analyse current arrangements, and identify gaps in current provision.

Following on from the engagement, baseline collection and analysis, community endorsed actions plans will be produced, identifying fundable and achievable sustainable and active travel projects, with the aim of informing service providers and securing future funding from wind farm, other community benefit funds and even future rounds of SCSP.

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 towards sustainable travel options
- Increased walking and cycling to school
- Increase in sustainable travel for longer journeys
- Reduced car use and reduced driver only journeys
- 9 sustainable and active travel community action plans with an evidence base and projects for future funding applications or service amendments
- Concurrently with this contract, a separate contract will run to deliver hands on sustainable and active travel activities in the same communities, necessitating close working between contractors. This contract will deliver the following: 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

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 and an RDT project that offers capacity building support for rural communities across North and South Lanarkshire. CAL is a legacy of the Clyde and Avon Valley Landscape Partnership (CAVLP), in which RDT was a partner. 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.

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 contract value is for £44,250 plus VAT to the end of March 2019

D) Methodology and Requirements

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

- Identifying key groups to engage in consultation
- Gathering of baseline data on existing local sustainable and active travel opportunities and current patterns of travel behaviour
- Media and marketing campaign attached to any workshops and events
- Close liaison with Active Travel Campaign to ensure all messages and interpretation outputs also boost the active travel message
- Production of community endorsed sustainable travel plans for each community
- Monitoring and evaluation of the programme

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 Development Officer.

Add in similar timescales to the Active travel campaign

| | | |
|---|---|---|
| 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> | Week 1 | Timescales and forward programme to be agreed, including agreement of communities and groups to be engaged and relevant contact details |
| Desk study data review, Community research, develop programme plan | Review 2 weeks after contract start Programme developed 4 weeks after contract start | To develop partnership work with active travel programme |
| Community Programme implementation including marketing of this | Commence 5 weeks after contract start | To engage communities by implementing the programme |
| Quarterly monitoring to CAL | | To provide updates on project progress and promote partnership working |
| Ongoing social media communications around the community workshops and one final project press release | | Developed off the back of the community workshops |
| Final report | 3 rd week in March 2019 | |
| Final payment following acceptance of Final report | April 2019 | |

H) Payments

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

| | |
|------------------------------------|-----|
| Payment stage 2 (end November) | 34% |
| Payment stage 3 (end January 2019) | 33% |
| Payment stage 3 (end April 2019) | 33% |

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 CAL 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 art materials, design 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 | 28 Sep 2018 |
| Tender return date | 19 Oct 2018 |
| Evaluation of Proposals | 20 Oct 2018 |
| Notification of Award Decision to All Tender Invitees | 21 Oct 2018 |
| Award Contract | 21 Oct 2018 |
| Contract start date | 01 Nov 2018 |

Tenders should returned by email to ewan.bachell@ruraldevtrust.co.uk entitled Sustainable Travel Planning Programme by 5pm on 19 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> | 9 sustainable travel action plans in 9 rural communities in South Lanarkshire Active travel programme in these same rural communities working with local schools (separate contract) 1 feasibility study on a local services / homeworking hub (separate contract) 1 marketing campaign |
| 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 campaign. Note: this may sound a lot but social media and newspaper coverage can pick up a lot of this, we are aiming for quality and inclusive consultation rather than trying to achieve this many people attending workshops or completing surveys. |
| Evaluation Method | <i>Provide information on <u>how you will measure the impact</u> of the initiative, e.g. resident surveys, intercept surveys, electronic user data.</i> | Record numbers attending 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. Document sustainable travel plans Measure number of people reached through marketing campaigns –social media and press,. |
| Timing | <i><u>When will you measure the impact</u> of the initiative?</i> | On an ongoing basis at events and workshops, through monthly communications reports and at the project end on completion of action plans and feasibility studies |
| 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> | Minimum of 9 community workshops to produce up to 9 community sustainable travel action plans 1 marketing campaign 1 end of project report |
| 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 9 community action plans |