

**COMMERCIAL IN CONFIDENCE**

## **Statement of Requirements**

### **Make Your Way – Key Links**

**Rural South Lanarkshire**

**July 2020**



## **Statement of Requirements: Make Your Way - Key Links**

### **A) Purpose of the work**

The Rural Development Trust wishes to commission an Active Travel project for three communities in rural South Lanarkshire, to enable local people to choose walking, cycling and wheeling for everyday functional journeys. Three communities have been selected in the rural Clydesdale area of South Lanarkshire, where in each community there is a missing key link in infrastructure which would enable active everyday travel. The purpose of the work is to produce three feasibility studies to assess options for infrastructure to complete these missing links.

The three communities and identified links are:

- Leadhills to Wanlockhead
- Douglas to NCN74
- Abington Village to Abington Services

This project is funded and supported through the Sustrans Places for Everyone grant scheme and is managed by staff from the Rural Development Trust's Community Action Lanarkshire project. The project builds on previous work undertaken through Smarter Choices Smarter Places projects, and also complements existing work developing community mapping.

### **B) Background**

Community Action Lanarkshire (CAL) is a project overseen by the Rural Development Trust that offers capacity building support for rural communities across North and South Lanarkshire.

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.

The Places for Everyone scheme is funded by the Scottish Government through Transport Scotland and is administered by Sustrans. The aim of Places for Everyone is to create safe, attractive, healthier places by increasing the number of trips made by walking, cycling and wheeling for everyday journeys. Places for Everyone contributes to the Scottish Government's aim for a healthier, environmentally sustainable nation with a strong economy and communities, as laid out in the National Performance Framework.

### **C) Task**

The contractor will undertake the necessary surveys, appraisals and assessments to determine options for linking infrastructure in each of the three communities. These may include topographical surveys, road audits, equality impact assessment etc. Further to these surveys, a concept design will be created following community, stakeholder and landowner engagement. All designs must follow

Sustrans design principles, and take into consideration public realm improvements at either end or along a route.

Routes identified must extend through the middle of the settlements they are connecting to ensure safe use of the linking route at both ends, and to also encourage use of the route within settlements.

The contractor, supported by the CAL Project Officer, will undertake and lead on community, stakeholder and landowner engagement using appropriate methods and following an agreed Community Engagement Plan.

#### **D) Outputs**

Feasibility studies and concept designs for key linking infrastructure in three identified communities.

To deliver this the anticipated outputs are:

- Appropriate surveys, appraisals and assessments including Equality Impact Assessment and Preliminary Ecological Appraisal.
- Options Appraisals
- Community Engagement Plan to include appropriate consultation events.
- Feedback reports from stakeholder and landowner consultation.
- Appropriate permissions from Local Authority and other bodies where necessary.
- Maps and visualisations where necessary.
- Full Feasibility Study and Concept Design.
- Support for developing project beyond 20-21

*The exact format of outputs may change depending on proposed methods and will be agreed between the contractor and the CAL Project Officer.*

For guidance on outputs from Sustrans please review Stages 0 – 2 on pages 30-38 of the Places for Everyone guidelines

([https://www.sustrans.org.uk/media/5769/places\\_for\\_everyone\\_application\\_guide\\_v20.pdf](https://www.sustrans.org.uk/media/5769/places_for_everyone_application_guide_v20.pdf)).

#### **E) Support for developing project beyond 20-21**

It is anticipated that this project will be the first stage of a multi-year project, depending on funding, which will ultimately achieve the installation of the required infrastructure. It is hoped that there will be continuity in the contractor used for all stages, and so it is anticipated that the successful contractor will support the development of the ongoing project particularly in providing information and indicative costs for project development and funding applications.

#### **F) Operational Project Delivery**

The project must be completed by the end of April 2021, to allow for funding claims to be completed before the final funding deadline of mid-May 2021. We would expect that the successful contractor would agree a delivery timeline which would be reviewed on a regular basis.

Close liaison with the CAL Project Officer, wider community groups, businesses, individuals, Councillors and local authorities will be necessary. The Project Officer will provide local knowledge and guidance, and will ultimately sign off on the programme of events.

## **G) Reporting**

The CAL Project Officer will act as the key facilitator in this project and will work closely with the contractor to engage with local communities. There is also likely to be a community Steering Group for each community, which will review all reports and outputs and provide community input and scrutiny. The CAL Project Officer will lead these Steering Groups and will be the first point of contact for the contractor.

The CAL Project Officer and contractor will have monthly progress meetings as a minimum, along with all expected correspondence related to the project.

A draft of all survey reports, studies and maps should be provided for review in MS Word or PDF format before a final version is issued.

## **H) Monitoring and Evaluation**

Monitoring and evaluation will be built into the project from the beginning in order to measure the impact on the desired outcomes. This will be led by the CAL Project Officer following a Monitoring and Evaluation plan, however the contractor will be required at times to provide information to support this and may be asked to collect information during the course of the project.

The expected outcomes for this project are:

1. There will be more everyday journeys made by walking, cycling or wheeling.  
*Feasibility studies will be completed to identify safe multi-use routes which will overcome barriers to active travel, as the first stage towards new or upgraded infrastructure.*
2. Communities will be involved in planning strategic active travel routes.  
*Communities will be involved in workshops and consultations to identify missing infrastructure links and barriers to active travel.*
3. Communities will have a better understanding of active travel.  
*Through workshops and events, people will gain a higher understanding of personal journey planning and current opportunities for active travel.*
4. People will be more confident using multi-modal transport.  
*Communities will take part in workshops and events, during which planning tools will be used to show how to plan multi-modal travel.*

## **I) Budget**

The anticipated value of this contract is £36,000 ex VAT.

## **J) Contract management**

All correspondence and queries relating to the delivery of the contracted work will be directed to Jemma Campbell, Project Officer, CAL at [jemma.campbell@ruraldevtrust.co.uk](mailto:jemma.campbell@ruraldevtrust.co.uk).

**K) Key Stages**

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

<b>Stage</b>	<b>Timescale</b>	<b>Progress</b>
Pre Contract	July	Community engagement and promotion of project  Creation of steering groups in each village (Douglas, Leadhills and Abington)
	<b>Mid August</b>	<b>Tender return and Scoring with steering group</b>
Stage 1	<b>Late August</b>	<b>Project start meeting with contractor and steering groups.</b>  <b>Agreed timeline and deadlines for work.</b>
	September - October	First stage consultation/ survey (dependant on method of contractor)  Initial landowner contact  Stakeholder engagement and consultation (Local Authority)  Community events for consultation and gathering local knowledge
Stage 2	November	Further surveys to determine options
	December	First draft of options appraisal to Steering Group for review  Further community consultation on options
Stage 3	January – February	Ongoing appraisals and surveys to determine best options.  Formal landowner discussions for permissions
Stage 4	March	Draft of Full Report, Options Appraisal and Recommendations.  Steering group assessment of report + feedback.
Stage 5	April – May	Final draft of Full Report, Options Appraisal and Recommendations.

## **L) Payments**

Invoices should be made to: Community Action Lanarkshire, Rural Development Trust, 1 Powell Street, Douglas Water, Lanark, ML11 9PP and emailed to the Project Officer.

Payment will be made following completion of each of the specified stages, according to a payment schedule to be agreed between CAL and the successful contractor.

Payment will be made by BACS within 30 days of receiving invoice.

## **M) 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 information 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 deliverable formats will be provided
- 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
- Venue hire with refreshments during any events/workshops
- 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.

## N) Procurement Process

The intended timetable for this tender process is:

Activity	Date
Issue Invitation to tender	W/B 14 <sup>th</sup> July 2020
Tender return date	14 <sup>th</sup> August 2020
Evaluation of Proposals	W/B 17 <sup>th</sup> August 2020
Notification of Award Decision to All Tender Invitees	24 <sup>th</sup> August 2020
Award Contract	31 <sup>st</sup> August 2020
Contract start date	31 <sup>st</sup> August 2020

*The dates for evaluation of proposals and notification of award may be subject to change.*

## O) Evaluation criteria

Each consultant will be selected on the basis of the suitability for the project and their availability at the time required. The suppliers' responses will be evaluated against the following list of criteria:

Evaluation Criteria	Weighting
<b>Schedule of Costs</b> - Assessment of suppliers' costs / fees etc.	30%
<b>Objectives and Scope of Service</b> – Suppliers demonstrate their ability to fully meet the requirements detailed in this document and any annexes etc	20%
<b>Experience / Technical Knowledge of Proposed Personnel</b> – Based on CVs etc submitted	20%
<b>Timetable</b> – Suppliers demonstrate their ability to meet the contract timeframe indicated.	30%
<b>Health &amp; Safety/ Terms &amp; Conditions</b> – 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.**

## P) Questions

Questions relating to the brief should be made by e-mail to Jemma Campbell [jemma.campbell@ruraldevtrust.co.uk](mailto:jemma.campbell@ruraldevtrust.co.uk) or via the Public Contract Scotland system by 5pm on 24<sup>th</sup> July 2020. Responses will be made available to all consultants by 5pm on 30<sup>th</sup> July 2020.

**Q) Fee Submission**

The consultant should include for all services needed to deliver the project, including sub-contracted works, travel, venue hire, postage, refreshments, promotional materials etc.

Priced Tenders completed in all parts and signed and dated, along with the Stage breakdown below should returned by email to Jemma Campbell (jemma.campbell@ruraldevtrust.co.uk) entitled Make Your Way – Key Links by 5pm on Friday 14<sup>th</sup> August.

<b>Professional Services</b>	<b>Fee:</b>
Stage 1	£
Stage 2	£
Stage 3	£
Stage 4	£
Stage 5	£
<b>TOTAL FEE SUBMISSION</b>	£ _____

Signature ..... Practice .....

Capacity ..... Address .....

Date ..... .....

Tel No: ..... E-mail .....



## **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'.**