

## **Bike Life Residents Survey**

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Invitation to tender

October 2018

## **About Sustrans**

Sustrans is the charity making it easier for people to walk and cycle. We connect people and places, create liveable neighbourhoods, transform the school run and deliver a happier, healthier commute.

Join us on our journey. [www.sustrans.org.uk](http://www.sustrans.org.uk)

## **About Sustrans Research and Monitoring Unit**

Sustrans Research and Monitoring Unit has pioneered the development of monitoring and evaluation of sustainable travel interventions. We measure the impacts of our own work and that of partners and clients across the UK. We also undertake research collaborations with consultants and academic groups. Our aim is to establish effective, valid and rigorous ways of measuring a wide range of interventions. With others, we have developed a robust body of evidence assessing the value of sustainable travel.

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## Table of contents

Table of contents.....	3
1 Project background and briefing.....	4
1.1 Introduction.....	4
1.2 Background.....	4
1.3 Summary of service requirements.....	7
1.4 Proposed project timescales.....	9
1.5 Budget.....	9
1.6 Pricing Schedule.....	10
2 Procurement process.....	13
2.1 Selection criteria.....	13
2.2 Award criteria and weighting.....	15
2.3 Quality assessment.....	17
2.4 Price evaluation.....	18
2.5 Procurement timelines.....	19
2.6 Submission procedure and contact details.....	19
2.7 Contractual arrangements.....	21
3 Appendix 1: Survey questions.....	22

**Sustrans Ltd is not currently considered to be a ‘contracting authority’ under The Public Contracts Regulations 2015. Sustrans has opted to publish this notice on a voluntary basis and its intention is to comply voluntarily with the principles set out in the Public Contracts Regulations 2015 in this procurement: however, this does not bind Sustrans contractually in relation to the process.**

## **1 Project background and briefing**

### **1.1 Introduction**

Bike Life, the UK’s biggest assessment of cycling, is delivered by Sustrans in collaboration with cities across the UK. Bike Life is inspired by the Copenhagen Bicycle Account, and examines city cycling development, including infrastructure, travel behaviour, satisfaction, the impact of cycling, and new initiatives.

The purpose of Bike Life is to encourage the long-term development of cycling and ‘more liveable’ UK cities by:

- Encouraging and assisting in the long-term planning of provision for cyclists (particularly by helping cities to define better targets and to measure progress against those targets)
- Increasing awareness (amongst the public and decision-makers) of all of the benefits of cycling and its place in creating ‘more liveable’ cities
- Encouraging shared ambition and mutual learning between cities, and
- Securing sustained political commitment to cycling

At the heart of Bike Life is the Bike Life survey which gathers the views of residents in each Bike Life city. Residents are asked how they travel around their city and why, their satisfaction with cycling facilities, views on cycle safety, and the factors that would encourage them to cycle more. The data generated is crucial to understanding what is working in terms of cycling investment, and for making the case for further investment that effectively responds to people’s needs. It also provides key outputs for media and communication publications.

Bike Life is a highly regarded data set and it is vital we continue to produce data that is of the highest standard, is extremely robust, and which allows us to generate a representative picture of residents’ views on the state of cycling in their city.

We would like to commission a supplier to deliver two iterations of the Bike Life survey fieldwork, data cleaning, analysis and production of data outputs. The fieldwork will take place in May-early August 2019 and May-early August 2021.

### **1.2 Background**

#### **Current programme methodology**

To date, three sets of reports have been developed for the Bike Life programme in 2015, 2017 and 2018.

In 2015 and 2017 Bike Life reports were produced for seven UK cities; Belfast, Birmingham, Bristol, Cardiff, Edinburgh, Greater Manchester and Newcastle. For both sets of reports, to ensure a reliable comparison between 2015 and 2017, the research methodology and sampling approach were the same.

The survey was carried out by telephone (CATI – Computer Assisted Telephone Interviews) using a random digit dialling methodology and demographic quotas. This means that telephone numbers within eligible areas (i.e. each of the seven areas) were randomly selected for interview. 85% of the sample was made up of landline numbers, and 15% was mobile. Interviews were conducted from May to mid-July in both years.

A representative sample of 1,100 respondents per city was interviewed with quotas set by gender, age, work status, ward and ethnicity to reflect the profile of the city. The sample size was selected to ensure a statistical tolerance of at least  $\pm 3\%$  at the 95% confidence interval. In addition, booster interviews were conducted to ensure a minimum of 300 interviews with ‘cyclists’ in each city (defined as those who had cycled in the last four weeks). The cyclists boosts are to ensure there are some cyclists in the sample to aid modelling and trip estimate work.

The average interview length was 15 minutes. Various weights were applied to the dataset to ensure it was representative of each city’s population. This included weights for age, gender, ethnicity, working status, and population spread by ward or local authority within each city.

In 2018, funding was secured and Bike Life assessments were conducted in Glasgow, Perth and Stirling. Given the variation in city sizes and the desire for Glasgow to be comparable with the Edinburgh Bike Life reports, a mixed sampling approach was utilised. In Glasgow, the methodology and approach replicated that used for the 2015 and 2017 reports. However, in Perth and Stirling a face-to-face random location quota sampling approach utilising (CAPI-Computer Assisted Personal Interviews) was used. The sample for all three cities was 1,100 but with a smaller cyclist boost of 100 extra cyclists, in addition to the 180-200 cyclists captured by the main sample in each city.

The data produced from the fieldwork generates the key perception data points featured in the Bike Life reports. It also feeds into a model developed by Sustrans’ Research and Monitoring Unit, used to estimate trip levels in each city and the economic and health impacts of cycling.

For more details on the reports and methodology please visit <https://www.sustrans.org.uk/bikelife>.

## **Moving forward**

The Bike Life programme is evolving to include a larger and more diverse spread of urban areas including cities, combined authorities and a London borough. In 2019, a total of 14 urban geographic areas will participate in Bike Life (hereafter described as cities). In addition some previous cities have changed their geographic coverage. The areas being assessed are:

- **Previous cities/areas continuing:(5)**
  - Belfast
  - Bristol
  - Cardiff
  - Edinburgh
  - Greater Manchester (City of Manchester, Stockport, Tameside, Oldham, Rochdale, Bury, Bolton, Wigan, City of Salford, Trafford)

- **New cities:** (9)<sup>1</sup>
  - Aberdeen (provisional)
  - Dundee
  - Greater Cambridge (Cambridge and South Cambridgeshire)
  - Inverness (provisional)
  - Liverpool City Region (Halton, Knowsley, Liverpool, Sefton, St. Helens, Wirral)
  - London Borough of Tower Hamlets
  - Tyneside (Newcastle, Gateshead, North Tyneside)
  - Southampton (various MSOAs from Test Valley Borough Council and New Forest District Council, and all MSOAs from Eastleigh Borough Council and Southampton City Council)
  - West Midlands Combined Authority (Birmingham, Coventry, Dudley, Sandwell, Solihull, Walsall and Wolverhampton)

This diverse range of cities provides opportunities and challenges in the production of comparable reports. We require a strong and robust sampling and methodological approach that can capture consistent data across all these geographic areas.

Importantly, in the Bike Life programme, the key outputs are the individual reports produced for each city. However, in 2017 we also produced a programme wide **Summary report**<sup>2</sup>. For Bike Life it is becoming increasingly important to produce **both** robust area specific reporting and programme level reporting (across cities). With the diversity of cities in the programme, a robust way of developing these outputs would need consideration.

We are also trying to get more out of the data with the publication of programme wide reports on a range of themes. The most recent publication was a gender and inclusive cycling report which used data from across the seven Bike Life cities. More details can be found- <https://www.sustrans.org.uk/bikelifewomen>. We plan to continue with these additional publications throughout the lifetime of the project.

### **Wider considerations for tenderers**

After an examination of the social and market research sector, for this tender Sustrans is open to receiving tender responses from those organisations recommending a **telephone random-digit dialling (CATI) approach** or a **'push to online' or 'web-first' approach**. We will also allow some flexibility to provide a F2F approach in specific contexts. Bike Life is at a stage, given the new composition of the cities and areas, where we need to assess approaches to make sure that they will provide a robust data set across a long time period.

We expect tenderers to propose only CATI or push to online for all areas with the following exceptions: Tower Hamlets and the smaller Scottish cities.

- The London Borough of Tower Hamlets is a city partner of the Bike Life programme. They conduct an Annual Residents Survey in January to March (the latest survey took place during January to March 2018). The survey is conducted via face to face (F2F) interviews. Tower Hamlets has indicated that in the past telephone surveying is ineffectual in this area due to non-response and issues of language barriers, issues which are less problematic on the

<sup>1</sup> We will provide boundary maps

<sup>2</sup> [https://www.sustrans.org.uk/sites/default/files/file\\_content\\_type/bike-life-2017-summary-report.pdf](https://www.sustrans.org.uk/sites/default/files/file_content_type/bike-life-2017-summary-report.pdf) Accessed 11/09/2018

doorstep. The 2011 Census found that 34 per cent of Tower Hamlet residents use a main language other than English – around 18 per cent per cent are Bangladeshi residents who speak Bengali (mainly Sylheti). While many residents are bi-lingual there will be some whose English is less fluent and others who may require interpretation. The Council is keen to ensure that all residents are able to participate fully in the Bike Life survey. We won't be considering telephone for Tower Hamlets so F2F will need to be done if this is your proposed method. For those recommending a push to online approach you will have to provide cost for F2F. However there is an option to provide an indication of the price, if you recommend that the push to online approach can work in this context.

- In previous iterations of the Bike Life survey, smaller Scottish cities have adopted a face to face approach rather than telephone (i.e. Perth and Stirling) due to a limited sample frame. In 2019, the potential inclusion of Dundee, Aberdeen and Inverness may present similar challenges. Tenderers can recommend that these cities use the main methodology proposed, but there is flexibility to propose F2F if it would be more appropriate to generate a decent sample.

### 1.3 Summary of service requirements

For this project we will require the following from a supplier:

<p><b>Project Management and Quality Assurance</b></p>	<ul style="list-style-type: none"> <li>• A senior project sponsor who has overall accountability and oversight for the project</li> <li>• A dedicated project manager for this project</li> <li>• A dedicated highly qualified team with strong expertise in all aspects of the project. There must be enough capacity assigned to ensure the project is delivered to time and to a high standard</li> <li>• A project management and communication strategy; including an inception meeting, regular project meetings and weekly fieldwork updates</li> <li>• Quality assurance systems and processes to ensure the data is of the highest quality. A quality assurance plan for this project should be developed</li> <li>• A risk management plan and mitigation strategies</li> </ul>
<p><b>Methodological Development and Sampling</b></p>	<ul style="list-style-type: none"> <li>• Utilise a robust methodological approach. This should limit errors and biases from affecting the sample and must have long-term sustainability</li> <li>• Develop a sampling strategy that allows for a representative sample to be generated</li> <li>• Develop an approach for gathering high levels of responses from cyclists. We currently define cyclists as respondents that had cycled</li> </ul>

	<p>at least once in the four weeks prior to being interviewed (we are open to amending the definition of cyclists)</p> <ul style="list-style-type: none"> <li>• Provide recommendations on how we can use the data collected to produce programme wide reporting and thematic reporting</li> <li>• A minimum sample of 1,100 respondents in each city, to ensure a small margin of error</li> <li>• Pilot study if a new approach is recommended</li> </ul>
<b>Survey development</b>	<ul style="list-style-type: none"> <li>• Provide advice and finalise the survey design; to be approved by Sustrans and partners prior to commencement of data collection</li> <li>• <b>NB:</b> We would like to make changes to a range of questions in the survey, while maintaining consistency with questions asked in 2015, 2017 and 2018</li> </ul>
<b>Fieldwork/Data collection</b>	<ul style="list-style-type: none"> <li>• Deliver a high quality fieldwork programme commencing after the first Thursday in May (elections date) and concluding by 16<sup>th</sup> August.</li> </ul>
<b>Data cleaning</b>	<ul style="list-style-type: none"> <li>• Conduct general data cleaning to ensure the data is fit for purpose prior to analysis</li> <li>• Conduct specific data cleaning based on requirements specified by Sustrans</li> </ul>
<b>Data analysis and outputs</b>	<ul style="list-style-type: none"> <li>• Appropriate analysis and weighting of the data, final weighting approaches to be agreed with Sustrans</li> <li>• Provide an interim dataset at an agreed date during survey delivery in order to allow Sustrans to test the data through our Bike Life model and processes</li> <li>• Provide a series of summary tables with lists of values for easy inclusion into our analysis and modelling tools. Sustrans will provide details of what is required and a template</li> <li>• Provide data sets with useful cross-tabulations of various variables such as gender, age, ethnicity, social class across a range of questions for each city. The final format will be approved by Sustrans.</li> <li>• Provide the complete set of raw data in .csv or .xls format, where each case is an individual respondent, and include details of any coding applied</li> <li>• Provide a detailed technical report which includes all processes, including data cleaning</li> </ul>

## 1.4 Proposed project timescales

Date	Activity
7 <sup>th</sup> January 2019	Enter into contract
Within the w/c 21 <sup>st</sup> Jan 2019	Inception meeting
28 <sup>th</sup> January 2019 – 17 <sup>th</sup> April 2019	Confirm all methodological, sampling and weighting approaches.  This period can also be used for piloting
2 <sup>nd</sup> May 2019	Survey fieldwork commences
29 <sup>th</sup> July 2019	Survey company to provide preliminary data
9 <sup>th</sup> August, 2019	Survey completed by supplier
2 <sup>nd</sup> September (+2 days tolerance)	Data outputs provided to Sustrans

## 1.5 Budget

Bike Life will be dealt with as one project but for financing purposes it will be split into two categories, each requiring a separate invoice.

Please note that the costs for Category 1 and Category 2 are for the proportions for that activity for these categories. For e.g. a supplier will not be expected to have two inception meetings. The need to separate costings is for invoicing and funder reasons.

### Category 1: Bike Life UK

This category includes the following cities: Belfast, Bristol, Cardiff, Edinburgh, Greater Cambridge, Greater Manchester, Liverpool City Region, London Borough of Tower Hamlets, Tyneside, Southampton and the West Midlands Combined Authority.

This category includes two iterations of the Bike Life programme (**2019 and 2021**). The maximum budget available for this category is **£574,000 (exclusive of VAT)**.

### Category 2: Bike Life Scotland

This category includes three Scottish cities.

This category includes one iteration of the Bike Life programme (**2019 only**). The maximum budget available for this category is **£96,000 (exclusive of VAT)**.

**Total maximum budget (excluding costs for optional requirements and VAT) =£670,000**

## 1.6 Pricing Schedule

Please provide costs for each category listed below which should be fixed until the end of the contract.

The costs below must be fully inclusive of all costs (including expenses and administrative costs) that are necessary for the completion of this contract.

Please indicate the level of inflation used in the calculations for 2021.

The maximum budget available is:

- Category 1 UK - £574,000 (exc. VAT) for both 2019 and 2021 combined
- Category 2 Scotland - £96,000 (exc. VAT) for 2019 only
- This is the funding secured to date
- Scoring for the core price will be for prices inside the bold box
- Scoring for optional prices will be for prices outside the bold box
- The sections in grey are non-applicable costs
- All prices should be quoted exclusive of VAT

### Pricing schedule

Stage	Summary of Activity	2019	2019	2021	2021
		Category 1 11 cities	Category 2 3 cities	Category 1 11 cities	Category 2 (Please base your price on 3 provisional cities. This is <u>not</u> included in the main contract price: core costs)
<b>Project set up</b> (inception meeting, agree methodology development and sampling)		£	£	£	£
<b>Project management and quality assurance</b>		£	£	£	£
<b>Survey development</b>		£	£	£	£
<b>Fieldwork/Data collection ( main methodology)</b>		£	£	£	£
<b>Fieldwork/ data collection: fixed price for Tower Hamlets for face to face only</b>		£		£	

Data cleaning and analysis		£	£	£	£
Outputs development		£	£	£	£
Piloting (Optional)		£	£	£	£
Incentives ( if required)		£	£	£	£
Sampling boosts for cyclists (minimum 300+ responses)		£	£	£	£
<b>ANNUAL TOTALS</b>		£	£	£	£
<b>GRAND TOTAL of Core costs</b>				£	
Price increase per additional city using your recommended methodology		(Indicate if CATI or Push to Online) £	(Indicate if CATI, Push to Online or F2F) £	(Indicate if CATI or Push to Online) £	(Indicate if CATI, Push to Online or F2F) £
Price reduction per city omitted using your recommended methodology		£	£	£	£
Price for sample boost, per 1,000 responses in one city using your recommended methodology		(Indicate if CATI or Push to Online) £		(Indicate if CATI or Push to Online) £	

### Additional cost

**\*\*\*For push to online tenderers: Provide an optional cost for Tower Hamlets for the fieldwork element if you wish to recommend push to online £- xx \*\*\***

### Pricing instructions:

#### Core costs

- Provide costs for the methodological approach you are recommending for the programme
- Provide the costs for Category 1 for 11 UK (2019, 2021) cities using your main methodology according to the categories provided
- Provide the separate costs for Tower Hamlets face to face fieldwork – thus any costs relating to Tower Hamlets should be wrapped up in the other elements
- If you are recommending a push to online approach and you think that it would be best for Tower Hamlets to be included in the main methodology please include the price in a separate table

- For Category 2, 2019: three Scottish cities, please include the costs for your proposed methodology this could be a combination of telephone and face to face, push to online and face to face, telephone only, push to online only

### **Optional prices**

- For Category 2, 2021 3 Scottish cities please include the costs for your proposed methodology this could be a combination of telephone and face to face, push to online and face to face, telephone only, push to online only

### **For the following costs, tenderers should provide a price for their proposed main survey method only.**

- Price increase per additional city
- Price reduction per city omitted
- Price for sample boost, per 1,000 responses in one city

### **Daily and hourly rates**

Please also provide an indication of the daily and hourly rates used to develop your costs. Please note all daily rates should be based on a 7.5 hour day. **We are looking for a generic list of roles and their daily rates so please append a document in your tender response containing these rates.**

### **City considerations**

In 2021, the same cities should be included in Bike Life. However, we do not have confirmation if Aberdeen, Dundee or Inverness will continue or/and Glasgow, Perth or Stirling will be surveyed in 2021. It is also possible that other cities may need to step away from the programme in 2021. Thus, Sustrans reserves the right to amend the profile of cities and agree a project variation based on the costs provided in this tender.

## 2 Procurement process

The following should be included in any tender response:

- A filled in SSQ and associated evidence
- Your written tender response
- Your pricing schedule

Tender responses will be assessed:

- Firstly against the selection criteria, to determine if the tenderer is able to perform the proposed contract
- Secondly against the award criteria, to determine the most economically advantageous tender.

### 2.1 Selection criteria

Sustrans is following the Open procedure laid out in Public Contracts Regulations 2015.

As part of this process all tenderers will need to fill in a **Standard Selection Questionnaire (SSQ)**. This will be used to assess whether the tenderer meets the minimum requirements to be considered for this project. Please include this section at the start of your response to this ITT. If this is not filled in the tender response will be considered incomplete and void. If a tenderer fails any section of the SSQ they will be rejected and their tender will not be evaluated further.

The SSQ can be found in the procurement documents folder accessed via this url - <https://share.sustrans.org.uk/share/Handlers/AnonymousDownload.ashx?folder=6f2f02de>

**The table below details what questions will be assessed as pass/ fail and which are for information only.**

Section	Title	Pass/fail requirements
<b>Part 1: Potential Supplier Information</b>		
Section 1.1	Potential supplier information	For information Only
Section 1.2	Bidding model	For information Only
Section 1.3	Contact details and declaration	For information Only
<b>Part 2: Exclusion Grounds</b>		
Section 2.1	Grounds for mandatory exclusion	Pass / fail
Section 3.1	Grounds for discretionary exclusion	Pass / fail
<b>Part 3: Selection Questions</b>		
Section 4	Economic and Financial Standing Minimum annual turnover £5m	Pass / fail
Section 5	Wider group / Consortia details	Pass / fail
Section 6	Technical and Professional Ability	Pass / fail

	<p>Examples will be used to verify tenderers' technical and professional ability by confirming:</p> <ul style="list-style-type: none"> <li>• Does your organisation have the necessary geographic reach to deliver in the 14 cities named?</li> <li>• Does your organisation have the necessary skills and resources to generate the sample required for this project?</li> <li>• Do they have a skilled project manager with relevant experience to manage the project?</li> <li>• Do have a skilled data processing and data analysis resource who has relevant experience and qualifications?</li> <li>• Do you have a data protection specialist in your organisation?</li> <li>• Is your organisation signed up to the MRS Code of Conduct?</li> </ul> <p>We will use the references provided in 6.1 to verify the information provided.</p>	
Section 7	Modern Slavery Act 2015: Requirements under Modern Slavery Act 2015	Pass / fail
Section 8	Additional Questions	
Section 8.1	<p>Insurance</p> <p>We have specified the levels of insurance required within the SSQ</p>	Pass / fail
Section 8.2	<p>Data protection policies</p> <p>Bidders must be certified compliant with ISO27001 and ISO20252.</p>	Pass/ fail

## 2.2 Award criteria and weighting

The tender responses will be assessed to find the most economically advantageous tender. The below shows the relative weighting that is attributed to quality and price.

Quality: 75% made up of:	Cost: 25% made up of
<b>1. Methodological merit: 30%</b>	<b>Contract price (core price): 20%</b> <b>Optional costs: 5%</b> This is made up of the areas below 1. 2021 Category 2 (2%) 2. Price increase per additional city (1%) 3. Price reduction per city omitted (1%) 4. Price for sampling boost per 1000 responses (1%)  Note that Category 2 for 2021 falls entirely in the optional costs, <u>not</u> in the main contract price  Also note we will not be evaluating costs provided by push to online tenderers for including Tower Hamlets in the main methodology
<b>2. Project management: 20%</b>	
<b>3. Quality control : 15%</b>	
<b>4. Organisation, qualification and experience of staff assigned to performing the contract: 10%</b>	

### Content that needs to be provided and which the assessment will be based on are:

#### Methodological merit

- Fully explain the rationale for recommending your methodological approach including strengths and limitations
- Provide an analysis of the strengths and weaknesses of the method you propose, compared to other methods including telephone, push to online and face to face
- Identify the strengths and limitations of the sampling method in terms of making claims about the general population of a city from the sample
- Explain in full detail how the sample will be generated for the relevant geographic areas and any specific implications for any city or area
- Address how the recommended sampling approach will ensure a robust and representative spread of residents in a city or area
- Indicate how a minimum sample of 1,100 can be achieved for each city
- Explain how sufficient cyclist responses will be collected, addressing methodological implications and stating how many cyclist responses can be guaranteed

- If you are recommending incentives please indicate the rationale for this and any methodological implications
- Recommend how you would address the considerations highlighted for Tower Hamlets and smaller Scottish cities
- Survey development – provide advice on the survey and recommendations for any changes required given your suggested methodology. This should also include your approach to developing and finalising surveys for the proposed method. The 2017 survey can be found in **Appendix 1**
- If a mobile phone sample is to be included, please indicate how this sample is generated for the specific geographic areas in the Bike Life programme
- For the fieldwork - include details of steps that will be taken to ensure ‘hard to reach’ groups i.e. younger people and BAME communities are not under-represented in the sample
- Explain how you will limit bias and how you will ensure certain groups are not over-represented or the survey being co-opted by special interest groups
- There may be a desire for combined authorities (Liverpool, Greater Manchester and the West Midlands) to boost their sample by one thousand. Indicate how this will be done using your recommended method
- Discuss your approach to weighting of the survey results
- Share recommendations for using the data sets for both individual city reporting and programme wide reporting

### **Project Management**

- Your proposed management and delivery structure , including the relationship management approach for engagement with Sustrans
- Detailed proposed timescales (including start and end dates for data collection, completion date for final outputs and return of raw data to Sustrans). The successful supplier will be required to confirm delivery dates within two weeks of award of contract, to be agreed by Sustrans prior to the commencement
- Evidence of awareness of risks and identification of appropriate mitigating measures to deal with them ( Risk register)
- Explain what outputs you will produce based on our requirements

### **Quality Control**

- Please detail what systems you will use for data collection, data cleaning and analysis
- Discuss your approach to any required data cleaning of questions and rationale behind this
- How your quality control procedures will ensure Sustrans’ requirements (in terms of survey delivery and data quality) are met

- How your procedures will ensure full and complete compliance with data protection regulations in relation to survey delivery, data processing, data storage and data transfer
- Additional value added for Sustrans and partners through working with the tendering organisation

**Organisation, qualification and experience of staff assigned to performing the contract**

- Solid evidence of how your previous experience of successful delivery of similar data collection and analysis projects will be used and applied for the benefit of this contract
- Please include the CVs of core members of your team and details of individuals’ relevant experience and professional qualifications who will be used for this project

**2.3 Quality assessment**

The content of the tender will be judged against the quality assessment criteria. Each of the Quality sections numbered 1 to 4 in the table in 2.2.above will be scored according to the following assessment criteria

Each weighted quality section will have a maximum score of 10.

**Quality assessment criteria for award scoring**

Score	Criteria for awarding score
0	Completely fails to meet required standard or does not provide evidence
1-2	Proposal significantly fails to meet the standards required, contains significant shortcomings and/or is inconsistent with other proposals, does not provide confidence in the approach
3-4	Proposal falls short of achieving expected standard in a number of identifiable respects and there is little confidence in the approach
5-6	Proposal meets the required standard in most material respects, but is lacking or inconsistent in others and there are minor reservations or weaknesses in the approach
7-8	Proposal meets the required standard in all material respects, provides good confidence in the approach
9-10	Proposal meets the required standard in all material respects and for all of the major requirements and provides strong confidence in the approach.

## 2.4 Price evaluation

**Please build our pricing schedule table into an Excel file and provide this to us along with your tender response.**

The Grand total of the Core costs from the pricing schedule will be awarded a score proportionate to the lowest priced (tender / item) according to the following formula:

**Price score for bidder = (lowest price / bidder's proposed price) x 20  
(Maximum score 20)**

For this figure we will use the total for Category 1 – 11 cities (2019, 2021) (including the fixed price for face to face for TH), plus the Category 2 2019 for the Scottish cities

Tenders with a core price which exceeds the £670,000 cap will be rejected as non-compliant.

**Optional Prices =**

- 2021 Category 2 (2%) : (Lowest price /price proposed) x2 (maximum score 2)
- Price increase per additional city (1%): (Lowest price /price proposed) x1 (maximum score 1)
- Price reduction per city omitted (1%): (Reduction proposed/greatest reduction x 1)
- Price for sampling boost per 1000 responses (1%): (Lowest price /price proposed) x1 (maximum score 1)

**NB: For the following:**

- **Price increase per additional city**
- **Price reduction per city omitted**
- **Price for sampling boost per 1000 responses**

The price used for the optional costs price evaluation is for your proposed method so if you are recommending telephone only include the CATI price. If you are recommending push to online please provide a price for this alone. If you are recommending a mixed method for Scotland include those prices.

**NB:** Costs provided by those tenderers who are recommending that Tower Hamlets can be done by push to online will not be assessed and evaluated for the purpose of the price category.

### **Abnormally low or high tender responses**

Abnormally low or high tender responses may distort evaluation of tenders, and where Sustrans considers a tender response to fall into one of these categories the Tenderer will be required to explain the price or costs proposed in their tender in accordance with the guidelines laid out in regulation 69 of the Public Contracts Regulations 2015. If the Tenderer's explanation/evidence does not satisfactorily account for the low level of price or costs proposed, then that Tenderer will be rejected and will not form part of the price evaluation.

## 2.5 Procurement timelines

Date	Activity
10 <sup>th</sup> October 2018	Invitation to tender issued by Sustrans
24 <sup>th</sup> October 2018 at 12.00 noon	Deadline for questions on invitation to tender <b>(Questions and responses will be shared with all tenderers)</b>
21 <sup>th</sup> November 2018 at 12:00 noon	Deadline for tender responses
21 <sup>th</sup> – 30 <sup>th</sup> November 2018	Review of applications
4 <sup>th</sup> December 2018	Contract award notice and start of standstill period
14 <sup>th</sup> December 2018	End of standstill period
7 <sup>th</sup> January 2019	Enter into contract

### Mistakes

Information supplied to tenderers in writing, or contained in any publication notified to the tenderer, is only for general guidance in the preparation of a tender response. Tenderers must satisfy themselves, by their own investigations, with regard to the accuracy of any such information, and no responsibility is accepted by Sustrans Ltd for any direct or consequential loss or damage, of whatever kind and howsoever caused, arising from the use by Tenderers of such information.

## 2.6 Submission procedure and contact details

The named contact for this tender is:

Louann Sugden

Sustrans Research and Monitoring Unit

**monitoring@sustrans.org.uk**

Tenderers should note the procurement table in section 2.6, particularly the final submission time and date. Tenderers should also note the award criteria.

Any questions or clarifications must be sent to **monitoring@sustrans.org.uk**. The deadline for questions is the **24<sup>th</sup> October at 12:00 noon**. Responses to enquiries will then be circulated to all tenderers via email. Any enquiries received after this date may not be responded to prior to the deadline.

The completed tender response must be submitted to <https://share.sustrans.org.uk/share/Handlers/AnonymousDownload.ashx?folder=0aeb5476> no later than **12:00 noon on the 21st November**.

### Instructions:

When you enter this url you will land on a page similar to Image 1

## Image 1

### ▲ Upload files to this folder

You can upload files to this folder. Click "browse" button below and select files.

Note! Your browser supports multiple files selection at once.

Note! The maximum size of all uploaded files shouldn't exceed 2 GB.

Choose Files	No file chosen

In the field below you can specify a subdirectory name (folder will be created if it doesn't exist) in which the files will be uploaded:

Upload

Please upload your files here and also in the field 'In the field below you can specify....'; please include the name of your organisation. Don't forget to click 'Upload'. You will then receive a message confirming the upload. Any issues please contact [monitoring@sustrans.org.uk](mailto:monitoring@sustrans.org.uk). It is advisable not to leave your submission to the last minute.

Tender responses submitted by any other means will not be considered.

Tenderers are expressly directed to note that it is entirely their own responsibility to ensure that the completed and priced tender response is lodged in the manner described above not later than the prescribed date and time or the tender response will NOT be accepted.

All prices quotes must be in Sterling and exclude Value Added Tax. Please indicate your VAT status within your submission.

In submitting a tender response, the tenderer warrants that they have complied in all respects with the requirements described in the statement of requirements and that it is a bona fide submission, intended to be competitive and it has not fixed or adjusted the response by, under or in accordance with any agreement or arrangement with any other person or tenderer.

In submitting a tender response, tenderers warrant that they are of sound financial standing, that they have sufficient working capital available, that they have full power and authority to enter into and carry out the contract and that they can provide the service in accordance with the single supplier framework agreement.

### Changes to tender procedure

**Sustrans Ltd** reserves the right to suspend or terminate the procurement process at any time, to change the tender timetable, to reject any or all the Proposals received or not to invite any tenderer to

proceed further. Under no circumstances shall **Sustrans Ltd** incur any liability in respect thereof. Sustrans will never be liable, in any circumstances, for the tenderers' tender response costs.

## **2.7 Contractual arrangements**

The contracting authority is **Sustrans Ltd**.

Work shall be delivered in accordance with a single supplier framework agreement. This is attached as a separate file in the procurement pack.

Please confirm your acceptance of the proposed single supplier framework agreement terms and conditions. A rejection of the proposed terms and conditions will render a tender response non-compliant.

The intellectual property in all tools developed, raw data collected and analysed and reports produced shall vest solely in Sustrans.

Sustrans will determine a schedule of payments with the successful contractor within two weeks of their appointment.

Time shall be of the essence of the contract, and should the supplier not comply with the deliverables and parameters as agreed with Sustrans then Sustrans reserves the right to terminate the contract.

This ITT is not a contract offer by **Sustrans Ltd** and, therefore, a response to this ITT does not bind **Sustrans Ltd** in any way. In the event of award, the successful proposal will be governed by the terms and conditions in the single supplier framework agreement.

### 3 Appendix 1: Survey questions

#### Please see the survey questions currently being used for Bike Life

There is scope for some of the questions to change but the length of the survey will be maintained unless there is a strong rationale to amend this.

The draft survey includes the following questions:

#### Demographic

- Gender ((this is not asked, this is judged from the interviewee's voice by the interviewer) Male; Female) in 2018 a option of 'In another way' or 'prefer not to say' was added
- In order that we interview a representative cross-section of the population, please can you tell me your age? (Numerical age value)
- Working status (Working full time (30+ hours a week); Working part time (8-29 hours a week); Unemployed- Not seeking work- Excluding Retired/Student; Unemployed- seeking work; Student; Retired; Other)
- Socio-economic status ((Socio-economic grade classifications based, custom look up on Chief Income Earners work status and job title) A; B; C1; C2; D; E)
- To which of these ethnic groups do you consider you belong? (Census 2011 narrow categories)
- Is the house or flat in which you live owned by you or by another member of your household or is it rented or rent free? The house or flat is...? (Owned outright (without mortgage); Owned with a mortgage or loan; Rent free; Rented from someone else; Rented from the council; Refused)
- Do you have a longstanding physical or mental condition or disability that has lasted or is likely to last 12 months and which has a substantial adverse effect on your ability to carry out day-to-day activities? (Yes – mental condition; Yes – physical condition; Yes – disability; Yes; – other; No; Refused; Don't Know)
- Please could you tell me the number of children under 18 in your household? (One; Two; Three +; None; Refused)
- So that we can understand what people think about cycling in specific parts of <<CITY>> it would be useful for us to have your full postcode. We will pass your responses and postcode to the charity Sustrans and their local council partners. It would be used for research purposes only; it would not be passed onto any marketing or advertising company. (Postcode)

#### Travel behaviour

- How many cars or vans are owned, or are available for use in your household? (One; Two; Three+; None)
- How many adult bicycle do you own in your household? (One; Two; Three; Four or more; None)

- How many children's bicycles do you own in your household? (One; Two; Three; Four or more; None; No children in household)
- Thinking of how you usually travel around, how often do you...? (Five sub statements):

Travel in a car or van as a driver;  
 Travel in a car or van as a passenger;  
 Walk;  
 Cycle;  
 Use public transport

- Daily;
  - 5-6 days a week;
  - 2-4 days a week;
  - At least once a week;
  - At least once a fortnight;
  - At least once a month;
  - Less often;
  - Never
- Have you cycled at all in the last 4 weeks? (Yes; No; Can't remember)
  - ASK ALL THAT SAID 'YES' FOR 'HAVE YOU CYCLED AT ALL IN THE LAST 4 WEEKS?'  
 Have you cycled exclusively for enjoyment or fitness in the past 4 weeks? (Yes; No; Can't remember)
  - ASK ALL THAT SAID 'YES' FOR 'HAVE YOU CYCLED AT ALL IN THE LAST 4 WEEKS?'  
 How often do you cycle ....? (five sub statements)

When travelling to work;  
 When travelling to school;  
 When travelling to college or university;  
 When travelling for other purposeful trips such as shopping;  
 Exclusively for enjoyment or fitness.

- Daily;
  - 5-6 days a week;
  - 2-4 days a week;
  - At least once a week;
  - At least once a fortnight;
  - At least once a month;
  - Less often;
  - Never
  - Not applicable
- ASK ALL EXCEPT THOSE WHO SAID 'NEVER' OR 'NOT APPLICABLE' FOR 'HOW OFTEN DO YOU CYCLE ....?' (PURPOSE) Thinking about your typical cycling trip ....., how far do you usually cycle? Please give your best estimate for this one way trip in miles. (five sub statements)
- When travelling to work;
  - When travelling to school;
  - When travelling to college or university;
  - When travelling for other purposeful trips such as shopping;
  - Exclusively for enjoyment or fitness

- (ASK ALL EXCEPT THOSE WHO SAID 'NEVER' OR 'NOT APPLICABLE' FOR 'HOW OFTEN DO YOU CYCLE ....?' PURPOSE) Thinking about your typical cycling trip....., how long do you usually cycle? Please give your best estimate for this one way trip in minutes. (five sub statements)
  - When travelling to work;
  - When travelling to school;
  - When travelling to college or university;
  - When travelling for other purposeful trips such as shopping;
  - Exclusively for enjoyment or fitness
- How do you usually travel...? (four sub statements)

To and from work;  
 To and from school;  
 To and from college or university;  
 For other purposeful trips such as shopping)

- Car or van as driver;
- Car or van as passenger;
- Bicycle;
- Bus;
- Train;
- Train or tram;
- Train or metro;
- Tram;
- Walking;
- Other;
- Not applicable

### Awareness

- How much, if anything, would you say you know, about the following in <<city>>? (four sub statements):

Cycle routes on or alongside roads;  
 Traffic-free cycle routes away from roads, through parks or along canals and former railway paths;  
 Other cycling facilities like cycle parking;  
 Initiatives to increase the number of people riding a bike.

Is that a...? (asked for each statement):

- A great deal;
- A fair amount;
- Just a little;
- Nothing at all;
- Don't know

### Satisfaction

- Whether you cycle or not, I would like to ask you what you think about riding a bike in <<CITY>>. For each of the following ((eight sub statements)

<<city>> overall as a place to ride a bike;  
The amount of cycle routes;  
The directness of cycle routes;  
The condition of cycle routes;  
The signposting of cycle routes;  
Safety of riding a bike;  
Safety of children's cycling;  
Security of cycle parking)

Please tell me whether you think it is/they are good or bad? (asked for each statement):

- Very good;
- Quite good;
- Neither good nor bad;
- Quite bad;
- Very bad;
- Don't know

## Safety

- Thinking about other forms of traffic and anti-social behaviour, generally speaking, how safe or unsafe do/would you feel when doing the following? ((eight sub statements)

Walking around <<city>> during daylight hours;  
Walking around <<city>> during hours of darkness;  
Riding a bike around <<city>> during daylight hours;  
Riding a bike around <<city>> during hours of darkness;  
Using public transport around <<city>> during daylight hours;  
Using public transport around <<city>> during hours of darkness;  
Driving a car in and around <<city>> during daylight hours;  
Driving a car in and around <<city>> during hours of darkness)

Is that very or quite safe/unsafe?

- Very safe;
- Fairly safe;
- Neither safe nor unsafe;
- Quite unsafe;
- Very unsafe;
- Don't know;
- Not applicable

- For each of the following please tell me whether you think safety needs to be improved? (four sub statements)

Walking around <<city>>;  
Riding a bike around <<city>>;  
Using public transport in and around <<city>>;  
Driving a car in and around <<city>>

If yes, is that improved a great deal, a fair amount or just a little? (asked for each statement)

- Yes - A great deal;
- Yes - A fair amount;
- Yes - Just a little;
- No - Not at all;

- Don't know

### Potential for change

- Which one of the following statements best describes you? Would you say you are...

Someone who does not ride a bike but would like to;  
 Someone who does not ride a bike and does not want to;  
 New to riding a bike;  
 Starting to ride a bike again;  
 An occasional bike user;  
 Experienced, regular bike user

- How useful, if at all, would any of the following be to help you start cycling/cycle more? (five sub statements)

More bus lanes that you can also cycle in;  
 More cycle lanes, painted on the road with a white line;  
 More cycle tracks along roadsides but physically separated from traffic and from pedestrians by kerbs or something similar;  
 More pavements shared with pedestrians you can legally cycle on;  
 More traffic free cycle routes away from roads through parks or along canals and former railway paths

- Very useful;
- Fairly useful;
- Not very useful;
- Not useful at all;
- Don't know

### Place shaping

- How much do you agree or disagree with each of the following statements? (five sub statements):

Things would be better if people in general cycled more;  
 Things would be better if my friends and family cycled more;  
 I feel I should cycle more;  
 More cycling would make the area a better place to live and work;  
 When I see someone riding a bike I generally think positively about that person

- Strongly agree;
- Tend to agree;
- Neither agree nor disagree;
- Tend to disagree;
- Strongly disagree;
- Don't know;
- Not applicable

- ASK THOSE THAT AGREE: Why do you feel things would be better if people in general cycled more? (Interviewer codes the response to a pre-defined list of reasons)

Better health and fitness;  
 Reduced traffic;

Less pollution;  
Better for the environment;  
Cost savings;  
Quality of life;  
Other;  
Don't know

- ASK THOSE THAT DISAGREE: Why do you not feel things would be better if people in general cycled more? (Interviewer codes the response to a pre-defined list of reasons):

Dangerous or unsafe;  
Bikes cause congestion;  
Cyclists are a nuisance;  
Poor roads / lack of facilities for cyclists;  
Cyclists need training / be more responsible;  
Not practical or convenient;  
Health/fitness;  
No real advantage;  
Disagree with cycling / dislike it in general;  
Other;  
Don't know

## Investment

- Whether you ride a bike or not, would you like to see more money spent on cycling in <<city>>? (Yes; No; Level of spending is about right; Don't know)
- I'm about to read you a list of possible ways to improve your city. If you were in charge of the transport budget, which one of the following policies would you choose first in order to...? (four sub statements):

Improve health and fitness;  
Improve air quality in your city;  
Keep your city moving;  
Make streets and public spaces more attractive)

Policy options:

- Use more street space for car drivers;
  - Use more street space for people on bikes or on foot;
  - Use more street space for buses;
  - Keep things as they are;
  - Other;
  - Don't know
- To what extent do you support or oppose the creation of more roadside cycle lanes? These are physically separated from traffic and pedestrians by kerbs or something similar, and can mean less room for other road traffic? Is that strongly or tend to support/oppose...?
  - Strongly support;
  - Tend to support;
  - Neither support nor oppose;
  - Tend to oppose;
  - Strongly oppose;

- Don't know