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| Statement of Requirements |
| **94003 – Travel Rewards Mobile App to Influence Behaviour** |

**December 2024**

## Introduction

West Yorkshire Combined Authority is the driving force behind local partners’ collective efforts to make West Yorkshire known globally as a place where everyone can combine economic success with an outstanding quality of life**.**

Made up of Bradford, Calderdale, Kirklees, Leeds and Wakefield councils, the Combined Authority is having a significant impact on economic development, social inclusion and transportation. The appointment of our Mayor, signified our commitment and was a turning point in our collective efforts to address the challenges and seize the opportunities within the region.

The Mayor's leadership continues to serve as a driving force behind the realisation of the [West Yorkshire Plan](https://eur01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.westyorks-ca.gov.uk%2Fgrowing-the-economy%2Fthe-west-yorkshire-plan%2F&data=05%7C01%7C%7C9ea08eea82a9441b328908dbca35671a%7C34e93bfcee664345a4fe805b67e480c0%7C0%7C0%7C638326102928917894%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=2AzDSsKwCSF4HlSnypON%2FxyV0JnRWHRjXlnLb%2FK4VnU%3D&reserved=0), ensuring that our communities thrive, businesses flourish, and our region becomes a model of innovation and collaboration. Further details about the work the Mayor and colleagues within the Combined Authority deliver can be found in our [Corporate Plan](https://eur01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.westyorks-ca.gov.uk%2Fabout-us%2Fcorporate-plan-2023-24%2F&data=05%7C01%7C%7C9ea08eea82a9441b328908dbca35671a%7C34e93bfcee664345a4fe805b67e480c0%7C0%7C0%7C638326102928917894%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=gx5DmymGjm4R4K22dSRo6BCeu%2BtB10dV5Hrj3VSwEn4%3D&reserved=0).

The West Yorkshire Plan represents the culmination of extensive research, engagement with stakeholders, and a shared commitment to building a brighter future. This comprehensive blueprint outlines our strategic objectives, focusing on key areas such as transportation, economic development, social inclusion, environmental sustainability, and more. The Plan is a result of collective efforts, reflecting the aspirations and priorities of the people of West Yorkshire.

## Background

West Yorkshire Combined Authority’s Active Travel and Behaviour Change team works in partnership with a range of public, private and community organisations to encourage more people to travel actively for short journeys. Communities across West Yorkshire and York are seeing the benefits of new, high-quality cycling and walking infrastructure, including Bradford’s Canal Road Cycleway, Leeds’s City Centre Cycle Superhighway, the Castleford Wakefield Greenway, a series of canal towpath upgrades in Bradford, Kirklees and Calderdale, and Scarborough Bridge, York.

The team delivers a series of awareness campaigns and engagement initiatives, including support for businesses, schools and other grassroots projects to boost the number of people travelling actively. Alongside these campaigns, the team funds free of charge adult cycle training across the 5 districts which has resulted in over 6,000 people learn to ride with confidence and make the shift to incorporate cycling into their daily lives.

In 2022, £830 million of City Regions Sustainable Travel Settlement (CRSTS) funding was secured from government to make it easier for people to walk, cycle and use public transport over the next five years. This investment has been made possible thanks to the Mayoral devolution deal, and CRSTS will build on other transport infrastructure programmes such as the Transforming Cities Fund, West Yorkshire Plus Transport Fund and the Leeds Public Transport Investment Programme.

We are looking to commission an external organisation to engage with local communities to promote active and sustainable travel through a rewards-based platform. The successful delivery organisation should be able to offer an off the shelf app-based platform which works for all mobile operating systems, which can successfully track journeys made by a user and offer rewards for travelling on foot, by bike or on public transport. Rewards offered should be localised as much as possible within West Yorkshire and suppliers should aim to promote local business growth. Rewards should be relevant to the audience and should promote reasonable changes in travel behaviour.

## Requirement Overview/Summary

It is expected that the successful tenderer will undertake the following:

1. Offer an off-the-shelf, free to access app which is available on all smartphone platforms to the public which will track how a user travels.
2. The app will allow a user to accrue points based on journeys made by foot, on bike or using public transport. App must be able to track all three modes of travel specified.
3. Offer a range of rewards that are available to the user once they have accrued enough points. Rewards should be relevant to the user based on their location within West Yorkshire and should be achievable by those who do not usually walk, cycle or use public transport. This may include but is not limited to, hot drinks & treats at local coffee shops; discounted meal vouchers at local food establishments; free or discounted passes at local attractions. Where possible, rewards should be provided by local independent businesses to help support their growth.
4. Tailor rewards thresholds to allow for targeted campaigns in areas identified by West Yorkshire Combined Authority (WYCA).
5. Explore opportunities for special promotions around key times of the year, and alongside our other packages of work.
6. Have a designated WYCA account manager who will be responsible for:
   1. Building a network of businesses to provide rewards on a hyper local level.
   2. Marketing and promotion of the app across West Yorkshire.
   3. Creating tailored campaigns to target specific audiences.
7. Build relationships with District Councils to promote the app in their areas and potentially develop bespoke packages for them if this is something they wish to pursue.
8. Provide WYCA with high quality data insights to allow us to track trends in behavior change.
9. Provide geographical data to allow for targeted campaigns in areas near active travel infrastructure or in areas of health inequalities.
10. It would also be beneficial if the supplier could provide statistics around health improvements and carbon reductions.
11. Produce a monthly highlight report detailing progress made; progress planned within the coming month; issues/potential risks to delivery and any communications opportunities.
12. Attend quarterly meetings with WYCA and provide data analysis highlighting key successes and opportunities for future engagement.
13. Produce an annual report on the anniversary of the contract start date that details all progress within the year, noting any successes, highlights, and key learning from the project.
14. Attend meetings with district councils when required to discuss collaboration opportunities.
15. Attend meetings with WYCA Communications team to identify opportunities to tell stories and promote the success of the app.
16. All communications and materials relating to the project must be developed with WYCA and managed through the communications team and produced following relevant WYCA brand guidelines and sign off procedures.

In addition to the above, we would be keen to explore additional opportunities that can be offered. We’re open to further ideas to understand how we can maximise engagement and promotion. This includes enhanced reward offers, and additional packages which could be offered to and funded by our district council partners.

## IT Security Requirements

* 1. All personally identifiable information must be encrypted in transit and at rest.
  2. All personally identifiable information must be protected using multifactor authentication.
  3. The Supplier must be Cyber Essentials Plus accredited and /or have achieved ISO 27001.
  4. The Supplier must have put in place security solutions to prevent the likelihood of a successful cyber-attack affecting WYCA data and/or availability of the system (i.e. web application firewalls, anti-malware etc.).
  5. The solution must be built with 99% availability, ensuring no single component point of failure.
  6. The supplier must have a high-level disaster recovery plan. Details of which may be requested
  7. The supplier must ensure that the app complies fully with WCAG 2.1 AA standards, guaranteeing accessibility for users and providing an inclusive experience across all platforms.

Please note: it is preferable that user data gathered from the app is stored within the UK.

Applications will only be taken forward if they meet the required standards above and successfully pass the data protection and security questions. Applications will be reviewed by our IT Services team and may be questioned.

## Target participant Group

Our target audience is broadly car users within West Yorkshire to support our objective of modal shift. We would be keen to explore with the provider any opportunities for targeted campaigns within areas of significant health inequalities, or around areas of significant infrastructure investment. These areas will be identified in conjunction with our district partners.

## Outputs

Our ambition is to use a reward driven approach to influence travel behaviour resulting in an increase in journeys made on foot, by bike and/or using public transport. This in turn will have a lasting impact on carbon emissions and improving the overall health and wellbeing of the people of West Yorkshire.

**The successful supplier should aim to achieve the following by the end of the contract:**

- Have 10% of the adult population\* of West Yorkshire registered to use the app.

- Have 50% of the registered users actively engaging with the app. This includes regularly working towards and redeeming rewards and taking part in promotions or challenges.

- Demonstrate a 25% increase in the number of journeys being made on foot, by bike or using public transport amongst app users.

\*Adult population refers to anyone aged 18 – 64 which is estimated to be [1,461,314 people](https://citypopulation.de/en/uk/admin/E11000006__west_yorkshire/)

## Liaison Arrangements

The supplier will appoint a contract manager who will be the main point of contact for the Combined Authority in relation to project delivery. As outlined above, the supplier will also be expected to provide regular progress reports in an easy to read and process format, attend meetings when requested and notify the Combined Authority of any issues that arise that may affect the successful delivery of the project requirements.

## Timings

We aim to have a supplier appointed and commence the contract from March 2025. The contract will run to March 2027.

## Budget

The overall budget for this commission is up to £450,000 (excluding vat) for the maximum length of the contract which is 24 months (March 2025 – March 2027).

## Payment Schedule

Bidders should provide a total cost breakdown for delivery over the contract period and include everything that can be offered by completing the Tab 1 of the attached Appendix 3B (Pricing Table).

Funding will be provided in accordance with the payment schedule guidance below.

**Payments to be frontloaded with exception of final payment.**

**Future payments subject to successful delivery in previous milestone.**

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| **Payment Process** | **Deliverable** | **Payment (%) of Total** | **Payment Process** | **Deadline for deliverables** |
| Pre milestone | Inception meeting and produce rewards partnership development plan. | 0 |  | Commencement of contract |
| 1 | A minimum of 3 rewards partners per district within close proximity to public transport hubs/active travel infrastructure  2 x monthly rewards partnership development reports and catch up meetings  App launch campaign plan. | 10 | March 2025 (Payment processed following inception meeting) | May 2025 |
| 2 | App launch  App availability on e-stores (Google Play, Apple Store, etc.) beginning of May  App launch report and June/July monthly progress report and catch up meeting.  School holidays campaign plan | 10 | June 2025 | July 2025 |
| 3 | School holidays 2025 campaign launch  August/September monthly progress reports and catch up meetings  2 additional rewards partners per district localised to tourist locations accessible by active and sustainable travel  Autumn campaign plan | 10 | August 2025 | September 2025 |
| 4 | Autumn 2025 campaign delivery  October, November reports and catch up meetings.  New Year, New You campaign plan | 10 | October 2025 | November 2025 |
| 5 | New Year, New You campaign launch  December, 2025; January and February 2026 monthly reports and catch up meetings | 10 | December 2025 | February 2026 |
| 6 | Halfway point  10 rewards partners within each district.  5% of population registered to use the app.  March, April and May 2026 monthly reports and catch up meetings.  Annual report following launch of the app. | 10 | March 2026 | May 2026 |
| 7 | June, July & August monthly progress reports and catch up meetings  Expect to see continued growth of rewards partners and app registrations/usage. | 10 | June 2026 | August 2026 |
| 8 | Autumn 2026 campaign delivery  September, October, November monthly progress reports and catch up meetings.  Expect to see continued growth of rewards partners and app registrations/usage.  New Year, New You campaign plan | 10 | September 2026 | November 2026 |
| 9 | New Year, New You campaign launch  December, January, February reports & catch up meetings. | 10 | December 2026 | February 2027 |
| 10 | Project completion and evaluation report. | 10 | March 2027\*  Final payment processed following completion of evaluation report & evaluation meeting demonstrating successful delivery of project. | March 2027 |

## Form of proposal

Proposals should refer to the requirements overview and may include screenshots to evidence examples of functionality. Examples of data insights may also be included, but please remember to anonymise any report. Case studies of similar projects carried out would also be beneficial. Any information submitted must be referenced in the responses given to the quality question within the ITT document.

## KPI’s/SLA’s

The supplier will have their performance in delivering the contract monitored. The following Key Performance Indicators (KPIs) will be used:

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| **Key Performance Indicator (KPI)** | **Measured by** | **KPI Target %** | **Control Measures** |
| **1. Cost Avoidance** | | | |
| The supplier to maintain and keep costs within the proposed contract budget. | Invoices submitted according to the budget for the deliverables. | 100 | Continuous engagement with the Supplier on how to ensure costs are kept within the budget. |
| **2. Contract Delivery** |  |  |  |
| The supplier to complete all tasks within the stated timescale in the SOR | Dates of submission of deliverables against the deliverable schedule. | 100 | Continuous engagement with the Supplier on how to ensure costs are within budget. |
| **3. Contract Management** | | | |
| 3.1 The Supplier to attend all required meetings. | Meetings attended against Total meetings held in a period. | 80 – 100 | * Email sent to Supplier after two consecutive absences at scheduled meetings. * Further discussion to improve their performance. |
| 3.2 The Supplier to communicate effectively with Stakeholders to ensure successful results. | Response time to emails from the CA. |
| 3.3 The Supplier to anticipate contract risk and actions to check them. | The actual risks that materialise during the contract. | 100 | Implement the actions in the risk management plan. |
| **4.** **Customer Satisfaction** | | | |
| The deliverables and services under this contract should be to the satisfaction of the CA. | E-mail confirmation by the CA of the supplier’s performance against the SOR.    Confirmation of payment to be sent by the CA. | 100 | Continuous engagement with the Supplier on issues around communications and project delivery.  Issuing a Performance letter as a reference for future patronage. |

## Legislation

The relevant laws that are applicable to this procurement include:

1. Public Contracts Regulations (PCR) 2015.
2. The Public Services (Social Value) Act 2012.
3. UK GDPR.
4. Modern Slavery Act 2015.
5. Intellectual Property Act 2014 (if the App will bear the WYCA Logo).
6. Consumer Protection Rights 2015 – describing the App; ensuring it’s fit for purpose and free from defects; being clear about its usage Terms and Conditions.
7. Contract Law – End User Licence Agreement (EULA), explaining how users can use your app, their rights, and the limitations of your liability.
8. Equality Act 2010 – Apps made available to all users, including those with disabilities. Development should meet the Web Content Accessibility Guidelines (WCAG 2.1 AA onwards).
9. Compliance with Platform-Specific Terms and Conditions – Apple App’s Store, Google Play, etc.
10. Any other relevant legislation.

## Data Protection

Data protection terms and conditions will be included in the contract conditions provided which the successful bidder must agree to. Where the successful bidder is processing personal data on behalf of the Combined Authority, they will also be required to:

• Follow any instructions supplied by the Combined Authority in the Data Protection Annex of the contract.

• Assist in the completion of a Data Protection Impact Assessment (DPIA) pre-award, where appropriate.

• Comply with the Combined Authority’s data-handling minimum security standards (table below). Bidders are expected to confirm in their bid that they can comply.

• If intending to process personal data outside of the UK or a country subject to an adequacy decision, notify the Combined Authority and provide information on how the processing will be compliant with the UK GDPR.

For the purposes of any contract arising from this Invitation to Tender (ITT):

West Yorkshire Combined Authority will be the data controller, and the appointed provider will also be a data controller in their own right.

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| Data Handling Instructions | **Personal Data** | **Special Category Personal Data** |
| Internal Mail | **Must** be in an envelope.  **Must** be clearly addressed to an individual or department. | **Must** be in a sealed envelope.  **Must** be addressed to a specific individual. |
| External Mail | **Must** include return address on the outer envelope, in the centre of the flap at the back.  Any passwords required to unlock any encrypted digital media assets **must not** be sent with the asset. These **must** be provided in a different format e.g. email to the recipient, text message etc. | Use **registered** Royal Mail service or **reputable commercial courier’s ‘track and trace’** service.  Inform the recipient once the item has been sent. |
| Moving assets by hand | Precautions taken against overlooking when working in transit:  Kept with the authorised individual **at all times**.  Signed in/out correctly based on your districts/departments/units’ procedure. | Those stated under Personal Data as well as:  Be highly vigilant when transporting the asset.  Gain authorisation from the originator for significant volume of records/files with special category personal data. |
| Removal Media e.g. CDs USB etc. | Encrypted either by Winzip or 7zip software (CD/DVD only).  Encrypted to a minimum of AES256 - FIPS 140-2 (USB etc. **not** CD/DVD). | Those stated under Personal Data. |
| Storage | Storage **must** be under a barrier and/or lock and key.  Digital files should be saved either to a secure cloud service e.g. SharePoint, AWS or have technical security measures in place e.g. network segregation and firewalls. Combined Authority documents must not be saved locally to devices’ C:\ | Those stated under Personal Data. |
| Disposal | Dispose of documents containing personal data in a confidential waste bin. | Those stated under Personal Data. |
| Email | Can be sent to any email internally and externally.  Assess the contents of the email chain before forwarding it on – the email may now contain additional personal or special category data. | Can be sent only to secure email addresses.  When sending special category datavia email, consider protecting the document with encryption or a password. If using a password, send this to the recipient via a different communication method than the document e.g. phone call, text message, an email to a different mailbox. Double-check the email address before sending the document. |
| Telecoms | Personal data should be transmitted via secure methods e.g. via Microsoft Teams.  Mobile devices must use an up-to-date Operating System i.e. the latest version of Android or iOS and anti-virus software installed. | In addition to measures listed under Personal Data, avoid discussing special category personaldata on the phone when it is possible to be overheard by others who are not entitled to know the information. |
| Copy & Scan | Keep copying to a minimum and review spare copies regularly with the aim of destruction.  When using photocopiers, the designated operator **must** ensure all documents are removed from the machine.  Users should remain with the scanner throughout the scanning process. | Those stated under Personal Data. |
| Staff Training | Staff should undertake Data Protection training at least once every two years. | Those stated under Personal Data. |
| Infosec/Technical/Cloud Security | Devices must run a supported version of Windows 10, Mac or Linux e.g. W10 1909 or later.  All laptop devices that handle data must follow minimum password requirements in line with Microsoft best practice and have multifactor authentication enabled and anti-virus software installed.  Cloud Services must follow the NCSC 14 Cloud Security Principles before storing any CA data. | Those stated under Personal Data. |
| Data Protection | A Data Protection policy **must** be in place to ensure that personal data is processed in compliance with the seven principles of data protection.  Procedures should exist for handling data subject rights requests, providing privacy notices when collecting personal data, investigating data security incident etc. | Those stated under Personal Data. |



## Find out more westyorks-ca.gov.uk

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All information correct at time of writing