RSSB Request for Proposal for

Improving Membership Engagement with RSSB Products and Services

Deadline for quotes:

8th of July @ 17:00pm

Reference: RSSB2183

1.1 Introduction to the requirements:

RSSB are seeking experienced independent advice to assist with developing a member-centric approach to its Products and Services (online) with the aim of improving Membership Engagement with these

The outcomes for the work package for which we are requesting tenders are:

1. Stage 1 - To work with RSSB in mapping current member engagement with its online content and producing a report and designs proposing how the delivery and quality of this content can be refined and then promoted to increase member engagement
2. Stage 2 - Work with RSSB through to implementation of these recommendations and deliver greater member usage
3. Stage 3 - To provide clear KPIs/Member benefit measurements and advise on tools to track success of any change
4. Stage 4 - To transfer learning to RSSB staff on maintaining and increasing member use of such Products and Services

These outcomes are to be fully delivered by 31st October 2016.

The successful supplier needs a detailed understanding of customer engagement and user centred design/content delivery, preferably within the Rail industry, NGO or Membership organisations but this is not a prerequisite. Calling on multiple skill sets to understand how the rail industry engages with the RSSB and the issues and opportunities involved.

Furthermore, the successful supplier will need to have experience in the following areas:

- providing strategic level advice

- customer insight

- customer experience design

- refining personas

- mapping content journeys

- multichannel content delivery

- measuring engagement

- interviewing stakeholders

- supporting a business through change/new ways of working

- training to allow an organisation to be self sufficient

The requirement will require presentation of findings and recommendations to RSSB’s Senior Leadership Team.

The maximum budget for this work is £50,000. Any proposals that exceed this sum will be considered as unacceptable.

1.2 Contact and questions

Should you have any queries, please email shareditt@rssb.co.uk.

In order to ensure equal and fair treatment to all suppliers, RSSB may anonymise these questions, remove confidential information and publically publish any question received along with the answer RSSB gives to the question.

No approach should be made to any other person in connection with this document unless directed by the above.

1.3 RSSB overview

We help the industry understand risk, guide standards, manage research, development and innovation and collaborate to improve.

The rail industry in Britain is made up of many different organisations, but they all form a system and share a common purpose, to move people and freight safely and efficiently by rail. RSSB bring all parts of this system together to support shared decisions, products and services, to help industry drive out unnecessary cost, improve business performance and develop long-term strategy.

Our activities involve:

* **Understanding risk** – Using safety intelligence from across the rail industry and elsewhere with the latest risk modelling to inform members and support safe decision making.
* **Guiding standards** – Creating, reviewing and simplifying GB standards to align with European requirements; managing the Rule Book and making it easier for the railway to deliver efficiently and safely.
* **Managing research, development and innovation** – Undertaking, commissioning and managing research and innovation programmes to address current needs, provide knowledge for decision making now and for the future, and promoting step changes to deliver the Rail Technical Strategy.
* **Collaborating to improve** – As an independent cross-industry body with a critical mass of technical expertise, supporting activities which require collaboration. These range from supplier assurance schemes (RISQS, RISAS) to confidential reporting (CIRAS), from health and wellbeing strategies to sustainability principles.

We are run by the industry, for the industry, with member companies from across the mainline system. The demand for our services comes from the industry itself, and from the involvement of cross-industry groups. For more information go to [www.rssb.co.uk](http://www.rssb.co.uk)

1.4 Procurement process

Suppliers may quote by submitting the information requested in this document by email to shareditt@rssb.co.uk by 8th of July @ 17:00pm

RSSB invites representatives from each supplier to join a virtual meeting in order:

• for RSSB to clarify the scope and process of the procurement

• for RSSB to answer initial questions from Tenderers, which can then be discussed before being updated and issued to all Tenderers in writing

• for Tenderers to provide feedback on the specification

• for RSSB to understand the market’s ability to deliver the specification.

The virtual meeting will take place on 24th June 2016 13.30pm. If you would like to take part, please contact Shareditt@RSSB.co.uk and further details will be provided.

We expect the virtual meeting to be a two-way dialogue, on the day we will cover questions based on the procurement documentation, process and the project requirement.

The Supplier day will be accessible virtually through Skype, Lync and telephone using the below details:

🡪 [Join Skype Meeting](https://meet.rssb.co.uk/vikram.gudra/MN157LY8)

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| This is an online meeting for Skype for Business, the professional meetings and communications app formerly known as Lync. |

Join by phone

0203 142 5510 (United Kingdom - London) English (United Kingdom)

[Find a local number](https://dialin.rssb.co.uk)

Conference ID: 509344

 [Forgot your dial-in PIN?](https://dialin.rssb.co.uk) |[Help](http://o15.officeredir.microsoft.com/r/rlidLync15?clid=1033&p1=5&p2=2009)

RSSB encourages suppliers to read the procurement documents provided and prepare questions in advance of the Supplier Q&A, then email these to shareditt@rssb.co.uk by 22/06/16 @ 12:00 to ensure their questions can be answered on the day.

RSSB will select suppliers on the basis of the information for qualitative selection submitted by applying the selection criteria detailed in the procurement documents, who pass the pass/fail exclusion and selection criteria and who then score highest overall on the scored selection criteria detailed in these procurement documents.

The indicative timetable for this process is set out in this document.

Contract award is subject to the formal approval process of the RSSB. Until all necessary approvals are obtained, no Agreement(s) will be entered into.

Once RSSB has reached a decision in respect of contract award, it will notify all suppliers of that decision.

The successful bidder will be required to execute a formal contract based on the draft agreement included.

It is anticipated that any contract issued, as a result of this procurement process and subject to the satisfactory provision of service will run for an initial term between July and October 2016.

* 1. Indicative procurement timetable

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| **Activity** | **Deadline** | **Time** |
| Invitation for Proposal issued | 17/06/16 |  |
| Deadline for suppliers to submit questions | 22/06/16 | 12:00 |
| Clarification of scope virtual meeting | 24/06/16 | 13.30 |
| **Deadline for submitting proposals** | **08/07/16** | **17:00** |
| Estimated notification of award decision | 19/07/16 |  |
| Target contract commencement date | 25/07/16 |  |

* 1. Preparation of responses

Quotes must be emailed in word document format with a file size of less than 15mb to shareditt@rssb.co.uk by no later than the deadline specified in the timetable.

The Supplier shall not enter in any agreement or arrangement with any third party which would in any way cause RSSB or its members to incur any financial obligations to the Supplier or any third party.

The documents enclosed are to be accepted in their entirety. No alteration will be allowed, unless notified and confirmed in writing by RSSB’s Representative before the date stated for the receipt of quotes. If any alteration is made or these instructions to Suppliers are not fully complied with the quote may be invalidated.

The conditions of contract included in this Request for Proposal apply. The Suppliers standard terms of business or trade will not be accepted.

The Supplier shall be deemed to have satisfied itself as to the nature, extent and the content of the goods, services or works to be provided, the extent of staff required and all other matters, which may affect the quote.

It is the Suppliers responsibility to ensure the Proposal is correct at the time of submission. No amendment to the Proposal will be allowed after the due date.

Proposals received after the closing date and time will not be considered.

RSSB’s Representative reserves the right to correct any omissions or inaccuracies in the Request for Proposal and to clarify and/or amend any requirements, up to two days before the return of quotes.

All information supplied by RSSB must be treated in confidence and not disclosed to third parties except insofar as this is necessary to obtain sureties or quotations required during the preparation of the Proposal. All information provided by Suppliers will be treated in confidence except where references may be sought.

1.6 Price quotation

All prices quoted to be GBP (unless otherwise requested) exclusive of Value Added Tax and firm.

A full and comprehensive breakdown of all costs and expenses to provide the goods, services or works requested in this Request for Proposal must be provided and all assumptions must be clearly stated.

Failure to provide adequate detail may cause your Proposal to be judged non-compliant.

We require the following information:

* A breakdown by grade and named individual, indicating the number of days to be worked on each task and the daily rate to be charged.
* A list of sub-contracts with prices and copies of quotations where available (a similar breakdown by grade, named individuals and rates, as above, is required where the sub-contract is for manpower).
* Details of any other costs, such as hire charges for equipment.
* Details of travel and subsistence and all expenses to be incurred.
	1. Payment schedule

A suitable invoicing schedule must be provided in the Proposal where applicable.

Payment must be based on deliverables that must be accepted by the RSSB Manager before payment is released.

2. Required information

Please complete the table of information required below. This information is not assessed but must be completed in full. Proposals missing significant information will be considered irregular and will not be accepted.

Please complete in full answering all the sections as accurately and concisely as possible or mark those sections not applicable as ‘N/A’ and provide an explanation.

This must be completed by, and should only contain information about, the supplier named in Question 1 which, if successful, would be the supplier which will contract with RSSB.

In order to simplify this process, please provide only the information, supporting evidence and specific documents requested. You do not need to provide any further supporting documentation at this stage. However, RSSB may ask to see supporting documents at a later stage, so please ensure they can be made available upon request.

1. Legal entity name of Supplier

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1. Contact person's name, email address, telephone number and postal address for enquiries relating to this procurement

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| Name: Email address:Telephone number:Postal address: |

1. Supplier’s registered address

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1. Supplier’s website address (if available)

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1. Please explain the legal form of the supplier

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| * Sole Trader
* Partnership
* Limited Liability Partnership
* Private Limited Company
* Public Limited Company
* Local Council
* Voluntary/ charitable/ not for profit organisation
* Other (please specify below)
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1. If ‘Other’ has been selected from the question above please provide details.

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1. If your business is a registered company, charity or any other registered organisation (including limited, non-limited or Industrial and Provident Society), please state your registration number. This must be the registration number of the Supplier named in Q1, providing the country and date of incorporation / registration if other than the UK.

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1. Name of ultimate parent company (if this applies)

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1. Companies House Registration number of ultimate parent company (if this applies)

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1. Please confirm whether or not you have formed, or are forming a consortium for the purpose of tendering for this requirement.

If you answer 'No' to this question, please mark subsequent questions on consortia “N/A” and proceed with the remaining questions

If you answer ‘ Yes’ to this question, all members of the consortium will be required to provide the information required in all sections of the procurement documents as part of a single composite response to RSSB (so each member of the consortium is required to contribute to completing the response documents.)

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| Yes / No  |

1. If you have answered 'Yes' to question 10 above, please list the names of your consortium members and their registration numbers (if applicable). Please note RSSB reserves the right to obtain additional information on the consortium members.

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1. If you have answered 'Yes' to question 10, please confirm the structure of the Consortium (e.g. One Legal Entity, Lead Organisation on behalf of the consortium, External Non-Delivering Organisation).

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1. Qualitative information for selection, questions and selection criteria

Please respond to the qualitative information for selection by answering each of the questions in the table below:

* provide each response in the same order they are given below
* fully answer the question given
* explaining how you meet the criteria given and provide evidence to support your response
* If your response does not achieve a ‘pass’, you will be eliminated from the remainder of the tender process.

**Please provide no more than 15 pages including images in response to these questions.**

| Reference | Qualitative Information for selection | Question | Selection criteria |
| --- | --- | --- | --- |
| Selection 1 | Suppliers must have demonstrated experience of providing similar services in the rail sector or for Membership type organisations/services | Please provide two real case studies demonstrating how you have:- mapped customer engagement with online content and successfully designed how the delivery of this content can be refined and promoted to increase engagement - measured and demonstrated the success of any change- transferred learning to users within organisations on maintaining and increasing customer use of content and services | Selection criteria: **pass/fail**Two case studies provided, detailing experience of refining customer personas, defining customer content journeys/content delivery strategies with measurable improvements to engagement etc.  |
| Selection 2 | Insurance | Please confirm whether you have the required insurance cover detailed below, or commit to obtaining this if you are successful in being awarded the contract.£2 million Professional Indemnity (for the life of the contract plus 6 years) £5 million Public Liability | Selection criteria: **pass/fail**Confirmation that the supplier has the required insurance or has committed to obtaining the required insurance if successful in being awarded the contract. |

4 Requirements, questions and evaluation criteria

Listed below are the requirements. In your response, please fully answer the question given, explaining how your solution meets the requirement and provide evidence to support your score against each requirement.

Please note that RSSB encourages innovation and welcomes alternative methods of meeting the specified requirements. Please do respond with alternative methods of meeting individual requirements and, where doing so, please explain how your proposed method works and why this is beneficial for RSSB.

For any mandatory questions, any Proposals that do not achieve a ‘pass’ will be eliminated from the tender.

**Mandatory Question**

**Please write no more than 300 words or 1 page including images in response to the mandatory question below.**

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| Reference | Requirement  | Question | Evaluation criteria |
| Mandatory 1 | The supplier must be available to commence work from the 25th July 2016 with suitable resources. | Please provide an outline resource plan explaining resource availability and indicative assignment of suitable resources against the tasks envisaged to support this work. Please include CVs. | Mandatory: **pass/fail**Confirmation of availability to start as required.Suitable resource (including CVs) and project plan |

**Evaluation Questions**

**Please write no more than 2000 words or 6 pages including images in response to these questions below.**

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| Reference | Requirement  | Question | Evaluation criteria |
| Evaluation 1 | To undertake a review of member engagement and need states regarding RSSB products and services and support RSSB in delivering against these.* To produce a written proposal and designs that can be implemented in response to these member needs
 | Please provide an outline proposal and methodology for work with RSSB on the following tasks:- refining member personas- development of a Products and Services engagement plan - delivering designs and a content plan- providing advice and learning to RSSB engagement & communications team  | 50% weightingQuality of methodology and structure of engagement plan  |
| Evaluation 2 | Identifying and engaging relevant stakeholders within the GB rail industry and RSSB | Please detail the stakeholders to be engaged and the approach that would be taken. | 30% weightingUnderstanding of experience design and content strategy. Quality of understanding of approach to engaging members/customers and proposed approach.  |
| Evaluation 3 | Total cost of ownership | Please provide a firm price for providing the advice detailed here, production and presentation of report and a breakdown of resources and rates used, including expenses. | 20% weightingThe Proposal with the lowest total cost of ownership for the duration of the contract will receive 100% of the available weighted score.* Other supplier’s Proposals will receive a pro-rated relative to the lowest total cost of ownership according to the following formula:

Score of other quote = lowest quote total cost of ownership / other quote total cost of ownership x 100%. |

4 Evaluation of quotes

Evaluation is based on the most economically advantageous quote, with a Quality-Price ratio of 80% Quality and 20% Price.

The relative importance of each criterion is established by giving it a percentage weighting so that the total available weighted score is 100%.

All scored criteria will be scored according to the following:

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| **Score** | **Score definition** |
| 0 | The response is entirely unacceptable:The response is that the Supplier cannot meet RSSB's stated requirements at all or the response does not demonstrate that the tender complies with RSSB’s stated requirements at all. |
| 1 | The response is weak: The response fails to adequately address the relevant criterion, and may focus on elements of only limited relevance. The response demonstrates only a general understanding of issues likely to be faced by RSSB, with little or no attempt to address the characteristics of the Project. The response generally fails to set out an effective proposition for managing identified issues, with some exceptions. There may be some concerns as to compatibility with RSSB’s stated requirements.  |
| 2 | The response is good: The response addresses the relevant criterion, although the treatment of some limited elements may be weak. The response demonstrates an understanding of most of the principal issues likely to be faced by RSSB with respect to that criterion, and sets out a proposition for managing them that instils some confidence with at most a few minor reservations. The response may not demonstrate any added value or this may be limited. |
| 3 | The response is excellent: The response addresses the relevant criterion directly in a very comprehensive, succinct and clear manner, demonstrating a full understanding of the issues likely to be faced by RSSB with respect to that criterion (with an analysis fully tailored to the particular characteristics of the Project), setting out an effective proposition for managing them that instils full confidence and raising no concerns as to compatibility with RSSB’s stated requirements. The Bidder’s proposition is likely to bring very significant added value to RSSB. |

5 Conditions of Contract

All goods and services provided by third parties to RSSB are governed under our terms and conditions. Please find the draft terms and conditions of contract attached as a separate contract.