

Work Package Scope

Bikeability (Cycle Training) Support Contract

DfT Reference: 04/102/03



CONTENTS

1.	INTRODUCTION	3
2.	PURPOSE	3
3.	BACKGROUND TO BIKEABILITY CYCLE TRAINING PROGRAMME	4
4.	BACKGROUND TO BIKEABILITY PLUS.....	7
5.	BIKEABILITY SCHEMES, INSTRUCTORS, INSTRUCTOR TRAINING ORGANISATIONS AND TABS.....	8
6.	PROCUREMENT TIMETABLE	132
7.	SCOPE OF THE REQUIREMENTS.....	13
8.	DELIVERY OF CORE SERVICES TO DFT.....	13
9.	DELIVERY OF CORE SERVICES TO BIKEABILITY STAKEHOLDERS.....	15
10.	DELIVERY OF ADVISORY SERVICES TO DFT.....	21
11.	ADDITIONAL REQUIREMENTS.....	21
12.	SECURITY REQUIREMENTS	25
13.	SERVICE LEVELS AND PERFORMANCE.....	25
14.	CONTRACT DURATION AND INDICATIVE PROJECT PLAN.....	26
15.	PROPOSAL REQUIREMENTS.....	28
16.	FEE PROPOSAL.....	29
17.	SUBMISSION OF PROPOSAL.....	29
18.	SELECTION AND APPOINTMENT.....	29
19.	CLARIFICATION QUESTIONS.....	30
20.	TERMS AND CONDITIONS OF THE CONTRACT.....	30
21.	TRANSFER OF UNDERTAKINGS (PROTECTION OF EMPLOYMENT REGULATIONS (TUPE).....	30
22.	INSTRUCTIONS TO SUCCESSFUL CONTRACTOR.....	30
23.	EVALUATION CRITERIA.....	30
24.	CONTACT INFORMATION.....	33

ANNEX A - LIST OF COMMON DEFINITIONS, ABBREVIATIONS AND ACRONYMS

ANNEX B - TABLE SUMMARISING BIKEABILITY LEVELS

ANNEX C - SUMMARY OF EXISTING COMMUNICATION ACTIVITIES

ANNEX D- CURRENT AWARD MATERIALS RETAIL PRICE LIST

ANNEX E - CURRENT SPECIFICATIONS FOR AWARD MATERIALS

ANNEX F - AWARD MATERIALS RETAIL SALES 2014

ANNEX G - TRAVEL AND SUBSISTANCE GUIDANCE

ANNEX H - BIKEABILITY SUPPORT SERVICES HANDOVER PLAN

ANNEX I - FEE SCHEDULE AND PROPOSAL

ANNEX J - TRANSACTIONAL WORK VOLUMES FOR CORE SERVICES

ANNEX K - OUTLINE PROJECT SCHEDULE

1. INTRODUCTION

1.1 The Department for Transport (DfT (c)) is a ministerial Government department. We work with our agencies and partners to support and maintain the UK's transport network. Current priorities for the DfT include doubling the number of journey's made by bicycle and making cycling safer, so we reduce the number of cyclists and other road users killed or injured on our roads every year.

1.2 This specification is for the provision of support services to maintain the delivery of the Bikeability cycle training programme in England.

2. PURPOSE OF THE PROCUREMENT

2.1 DfT (c) wishes to tender for a new support Contractor to deliver the Bikeability cycle training programme. Bids will be received from the Specialist, Professional and Technical Services (SPaTS) Lot 1 lead suppliers and may also be supported by relevant Civil Society Organisations (SCOs) who could feature as part of the proposed supply chains.

2.2 The successful Contractor will be expected to deliver a number of core and non-core advisory services including:

- **Disbursement of Government grants:** secure and transparent handling of up to £46.8 million in DfT grants to Local Highway Authorities (LHAs), and School Games Organiser Host Schools (SGOHSs) working with the Youth Sport Trust (YST). This will include the appraisal of grant applications, recording the delivery of cycle training, verifying and paying claims.
- **Full management of Bikeability award materials:** this will include the manufacture of materials, stock monitoring, order fulfilments and storage, and the distribution of materials to registered Bikeability schemes. The service will need to use income from the sale of award materials to cover the full cost of production and distribution.
- **Bikeability scheme administration:** appraising applications from potential Bikeability schemes, co-ordinating annual scheme registration renewal
- **Bikeability instructor administration:** co-ordinating National Standard Instructor registration and re-registration

- **Quality assurance of Bikeability schemes:** this includes setting-up and managing the external assurance panel, selecting schemes to visit, moderating panel reports and acting as an adjudicator where necessary.
- **Bikeability instructor training organisation (ITO) administration:** co-ordinating the registration of new ITOs, updating registrations of existing ITOs and co-ordinating the quality assurance of ITOs.
- **Communications:** communicating with DfT officials, schemes, trainers, local authorities, parents, and other stakeholders via telephone, email, letter, social media and face-to-face meetings as appropriate. Management of the Bikeability website (preparing and updating web content).
- **Technical expertise and service development:** providing specialist advice to DfT, local authorities and other stakeholders on cycle training delivery. Undertaking specialist development projects on a call-off basis (at the direction of DfT) to help improve our understanding of Bikeability's impact and to make incremental improvements to the way the training is delivered.

2.3 Bidders intending to bid for this requirement are required to submit proposals via email to **[insert email] by 5pm on 15th July 2016**

3. BACKGROUND TO BIKEABILITY CYCLE TRAINING PROGRAMME

3.1 The Bikeability cycle training programme is managed by the DfT's Sustainable and Accessible Travel (SAT) Division. The SAT Division advises on and develops options for improving smarter, greener travel that can be accessed by all. Key activities for the Division include: promoting cycling and walking through publication of a Cycling and Walking Investment Strategy¹, completion of a national infrastructure plan as well as continued investment in the Bikeability cycle training programme.

3.2 Bikeability is designed to give children the skills and confidence they need to ride their bikes safely on today's roads and choose cycling as an automatic choice for local journeys. The programme is strongly aligned with the Government's manifesto commitments to:

- make cycling safer, so we reduce the number of cyclists and other road users killed or injured on our roads every year and;
- double the number of journeys made by bicycle

3.3 The Bikeability programme has an important role in supporting locally-led development of cycling infrastructure by providing a steady stream of potential cyclists who are keen to use good infrastructure. Since the programme's launch in 2006/07, over 1.8 million children have been trained in England (outside London).

3.4 Bikeability is not only about teaching children to ride a bike safely. It is also about introducing children to cycling as an everyday activity, as an alternative mode of transport and an enjoyable pastime, which brings a healthier lifestyle and ultimately

¹ <https://www.gov.uk/government/consultations/draft-cycling-and-walking-investment-strategy>

lots of fun. Bikeability will give children a life skill that once learnt, they will never forget.

- 3.5 Research undertaken by Ipsos MORI (2015)² shows that Bikeability is still viewed very positively by parents and children alike. 95% of parents and children said they were satisfied with the training. Nearly all children who took part in Bikeability reported an improvement in their ability to judge risks (90%), signal (86%) and keep a safe distance from parked cars (84%). Four in five parents also reported an increase in confidence in their child riding a bike on local roads after involvement in Bikeability.
- 3.6 There are three levels of Bikeability which follow the National Standard for Cycle Training³. A summary of the three levels is provided in **Annex B**. The National Standard itself, which underpins Bikeability, was developed by expert cycling organisations, road safety organisations and the UK Government. It defines the agreed training outcomes for high-quality cycle training.
- 3.7 The Bikeability programme also provides training scheme registration, quality assurance, an award scheme, information and guidance to trainers and trainees alike. A list of commonly used definitions, abbreviations and acronyms in relation to Bikeability and the National Standard is provided in **Annex A**.
- 3.8 Bikeability training is delivered by National Standard instructors, working for registered Bikeability schemes. Bikeability schemes are normally private businesses, charities, social enterprises, LHAs or SGOHSSs.
- 3.9 Participants who complete the training and demonstrate the relevant outcomes are awarded a certificate, booklet and badge appropriate for the level achieved. Bikeability can also be adapted to train individuals with a range of disabilities⁴.
- 3.10 Bikeability training is predominantly delivered in schools and organised by LHAs and SGOHSSs. In England (excluding London) approximately 107 LHAs and 76 SGOHSSs deliver Bikeability. Transport for London (TfL) funds Bikeability training in London⁵. In Scotland, 'Bikeability Scotland' is delivered by Cycling Scotland⁶ with Transport Scotland support. The Welsh Government supports national standard cycle training delivery however, this is not branded as Bikeability. In Northern Ireland⁷, the Department for the Environment offers school children the opportunity to take part in the Cycling Proficiency Scheme.
- 3.11 The DfT currently co-ordinates the Bikeability cycle training programme in England only (excluding London) and provides grant funding of up to £40 per training place to LHAs and SGOHSSs. This is for the delivery of Bikeability training

² The Ipsos MORI research report is available at: <http://bikeability.org.uk/publications/>

³ Further details on the National Standard for Cycle Training is available at: <https://www.gov.uk/guidance/the-national-standard-for-cycle-training>

⁴ DfT have published guidance on "Delivering Inclusive Cycle Training: A Good Practice Guide for Disability Cycle Training. The guidance was developed in consultation with a number of experts and provides advice to National Standard Instructors on how to deliver effective cycle training to disabled people. This guide is available at: <https://professionals.bikeability.org.uk/documents/>

⁵ <https://tfl.gov.uk/modes/cycling/cycling-in-london/cycle-training?cid=cycletraining#on-this-page-3>

⁶ <http://bikeabilityscotland.org/>

⁷ <http://www.nidirect.gov.uk/index/information-and-services/motoring/road-safety/road-safety-education-resources/road-safety-for-primary-school-children/cycling-proficiency-scheme.htm>

to children between school years 5-9 (ages 9-14). Grants are currently targeted at Levels 1 and 2 combined and/or Level 3 (Levels 1 and 2 are aimed at school years 5-7 and Level 3 is aimed at school years 7-9). In 2014/15 over 275,000 children received Bikeability training. Further details of grant awards and delivery statistics can be found on the Bikeability website: <http://bikeability.org.uk/publications/>.

- 3.12 The YST play an important role in Bikeability delivery, overseeing the grant bidding cycle and the delivery of training by SGOHSs. This network supplements LHA delivery of Bikeability (delivering approximately 55,000 out of the 275,000 training places per year). They provide expert advice and support to the DfT, particularly around school engagement and disability cycle training.
- 3.13 Currently, DfT holds a single contract with an external supplier to support the delivery of Bikeability cycle training by LHAs and SGOHSs. The services provided by the existing supplier are summarised in section 2.1 of this document under “introduction”. The new contract covered by this SoR will be seeking to replace these services to support delivery of Bikeability primarily in England outside London.
- 3.14 Whilst TfL manages its own Bikeability programme, it relies on elements of the supporting infrastructure set out in this SoR. For transparency, these are set out as follows:
 - Bikeability scheme registration and re-registration (see ER2 in Section 9)
 - Registration of National Standard Instructors (ER3)
 - Quality assurance of practical Bikeability training (ER4). TfL pays for its own quality assurance assessments, but will use the External Assurance panel managed as part of this contract.
 - Bikeability website – TfL also uses the Bikeability website for stakeholder communications (at no additional cost to the contractor)
- 3.15 DfT also provides a separate grant to the YST to facilitate the delivery of Bikeability training within schools who are part of a SGOHS. This grant agreement is continuing in 2016/17 and will therefore run in parallel with the new contract (at least up to March 2017).
- 3.16 A summary of how Bikeability support services fit into the overall delivery of Bikeability outcomes is provided in **Figure 1** (see page 11). DfT is seeking a contractor to deliver the Bikeability programme on its behalf, and to manage the grant funding for child Bikeability training in England only (outside London) from 1st September 2016. The process of re-tendering the support contract provides an opportunity to further maximise the cost-efficiency of central administration. Much has already been done in this regard, by bringing together the core support services under one single contract during the last parliament, setting-up a single integrated database with online tools for reporting and monitoring, and self-reporting by instructors. Minimising the cost of administration has helped to maximise the proportion of funding spent directly on training school children.
- 3.17 The Government is committed to supporting Bikeability until at least March 2020. A breakdown of total grant funding available (for training school children) by financial year, is provided in **Table 1** below:

Table 1: Bikeability programme funding profile 2016/17 to 2019/20

Financial Year	2016/17	2017/18	2018/19	2019/20	Total
£m	11.4	11.6	11.8	12.0	46.8

3.18 It is the Government's aspiration that all children have the opportunity to learn to ride a bike, based around the Bikeability cycle training programme⁸. The existing budget for Bikeability is only sufficient to train 50% of school children to Level 2 (normally primary school children aged 9-11). Local authority and SGOHS bids now exceed the available budget. As such, there is scope to extend training to more schools and the DfT is keen to raise additional revenue through accessing non-Government sources of funding (e.g. the Big Lottery Fund, commercial sponsorship, charitable donations and independent fundraising). We are also interested in extending the reach of the programme to support wider policy aims – through closer alignment of Bikeability with new and/or existing behaviour change programmes/interventions that promote cycling.

3.19 Strategic decisions related to the development and enhancement of the programme are taken by DfT Officials in consultation with Ministers. The DfT are currently working on a four year strategic plan for enhancing the Bikeability programme.

4. BACKGROUND TO BIKEABILITY PLUS

4.1 Bikeability Plus is a series of modules intended for providers to use in cooperation with schools, in order to ensure that children and families are given the opportunities and skills they need to make cycling a part of their everyday life. The modules were designed to address key barriers to getting children cycling more often in support of the Government's manifesto commitment to increase the number of journeys made by bicycle and increase cycle safety. The modules were developed in consultation with industry and are intended to complement and support the core Bikeability training (Levels 1, 2 and 3). Detailed descriptions of each of the modules can be found at: <https://professionals.bikeability.org.uk/documents/> under delivery guidance.

4.2 The main objectives of Bikeability Plus are to:

- increase children's participation in the core Bikeability training – a number of modules/activities will help them to prepare for Levels 1-3 e.g. Bikeability Learn to Ride, Bikeability Fix and Bikeability Balance, Bikeability Promotion, Bikeability Recycled.
- get children and adults cycling more often, by building on the skills they have learned after the core Bikeability training, and offering the opportunity to practise what they have learned e.g. Bikeability on Show, Bikeability Bus, Bikeability Transition, Bikeability Ride, Bikeability Parents.

⁸ Sporting Future: A New Strategy for an Action Nation available at: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/486622/Sporting_Future_ACCESSIBLE.pdf

4.3 Bikeability Plus was successfully piloted in 18 areas across the country from January 2015 to July 2015 with individual areas piloting different combinations of modules based on local need. A further 29 areas are currently engaged in a second tranche of pilots with delivery taking place between November 2015 and March 2016. Ministers have recently agreed to make £4.7 million of the £46.8m budget available to LHAs and SGOHSs for the delivery of Bikeability Plus between April 2016 and March 2020.

4.4 Modules have been delivered to over 16,000 children across England and have been well received by schools, children, parents and Bikeability schemes. Case study evidence from the Bikeability Plus pilots demonstrate that:

- Bikeability Plus has the capacity to improve cycling to school rates and created a real enthusiasm for cycling. During the pilot the children who 'normally cycle to school' increased from 4% to 10%. Many areas achieved an even larger increase.
- Bikeability Plus has the capacity to improve the take-up of the core Bikeability training (Levels 1-3) across the age groups.

4.5 The majority of schemes involved in the pilot cited the potential positive impact that Bikeability Plus could have on establishing longer term sustainable travel habits. A key factor in this is being able to engage with children at a much earlier stage than is currently possible with the core Bikeability training.

4.6 A detailed report summarising the findings of the pilot can be found at: <http://bikeability.org.uk/publications/> under research and analysis.

5. Bikeability schemes, Instructors, Instructor Training Organisations and TABS

5.1 Any cycle training organisation or sole trader who wishes to deliver Bikeability, (this includes using the Bikeability branding and issuing the Bikeability award materials to trainees) must first register a scheme and receive a unique scheme registration number. Scheme registration is part of the quality assurance process to help ensure organisations are delivering good quality cycle training. Once registered, schemes take part in further quality assurance activity to ensure standards are maintained. This is achieved primarily through a process of annual re-registration, self-assessment and external reviews.

5.2 In addition, Bikeability training may only be delivered by registered and qualified National Standard Instructors (NSIs) who have successfully completed a DfT recognised instructor training course⁹. All registered instructors are allocated an instructor number held on a database maintained by the Department's Bikeability support contractors.

5.3 Instructor Training Organisations – ITOs are the only bodies recognised by Government as providers of National Standard instructor training. There are currently 19 ITOs who applied during two fixed period application windows via a DfT process to become 'recognised' providers of National Standard instructor

⁹ An example NSI training course is available via this link: <https://professionals.bikeability.org.uk/documents/>

training. Only instructors trained by ITOs can be issued with a National Standard Instructor number which identifies them as providing cycle training that meets the National Standard. There are three National Standard Instructor courses plus a conversion course for those going from National Standard Assistant Instructor to National Standard Instructor:

- **National Standard Assistant Instructor (NSAI):** 2-day course to assist instructors with the delivery of Bikeability Levels 1 and 2
- **National Standard Instructor (NSI):** 4-day course for those delivering all the national standard levels (this course is 2 days if converting from assistant to instructor). Successful completion will result in a provisional pass to become a provisional National Standard Instructor (NSIP). A post-course assessment should be successfully completed within 6 months of completing the 4-day course in order to become a fully qualified National Standard Instructor (NSIQ).
- **National Standard Instructor Trainer (NSIT):** 2-day course for fully qualified NSIs to become trainers of NSAI and NSIs (if working for a recognised ITO). Successful completion will result in a provisional pass. A post course assessment should be completed within 6 months of completing the 2-day course in order to become fully qualified.

5.4 All instructors are required to be affiliated to one of the ITOs if they wish to deliver Bikeability training via a registered Bikeability scheme as well as training for LHAs and SGOHSs on courses funded by a DfT Bikeability training grant. This is to help ensure that training being delivered by DfT grant is of the quality expected. If instructors do not wish to register, they can continue to provide National Standard training but not any training branded as Bikeability.

5.5 Bikeability schemes must ensure they use registered and qualified NSIs who are members of an ITO to deliver Bikeability training. In addition, DfT provides grants to LHAs and SGOHSs to deliver Bikeability training either in-house) if they are a registered scheme using National Standard registered and qualified instructors) or via a third party Bikeability schemes/s. Grants are only be payable to eligible schemes if that are using registered and qualified instructors who are members of an ITO to deliver Bikeability training.

5.6 Individual benefits for instructors are agreed with their individual ITO. However, as a minimum, ITOs should be able to verify that an instructor has been appropriately trained. Registered trainers should have access to continuous professional development opportunities and updates to the National Standard for cycle training.

5.7 **The Association of Bikeability Schemes (TABS)** is a trade association which works with the DfT to ensure the highest quality of delivery of Bikeability cycle training. TABS aims to work in the interests of Bikeability schemes, and represents the views of the professional cycle training industry in discussions and decision-making activities with Government agencies and other public bodies.

5.8 TABS immediate aim is to give children the confidence and skills to cycle more safely on the road as a result of Bikeability training, with an ultimate aim being to get more people taking trips by bike more often and more safety.

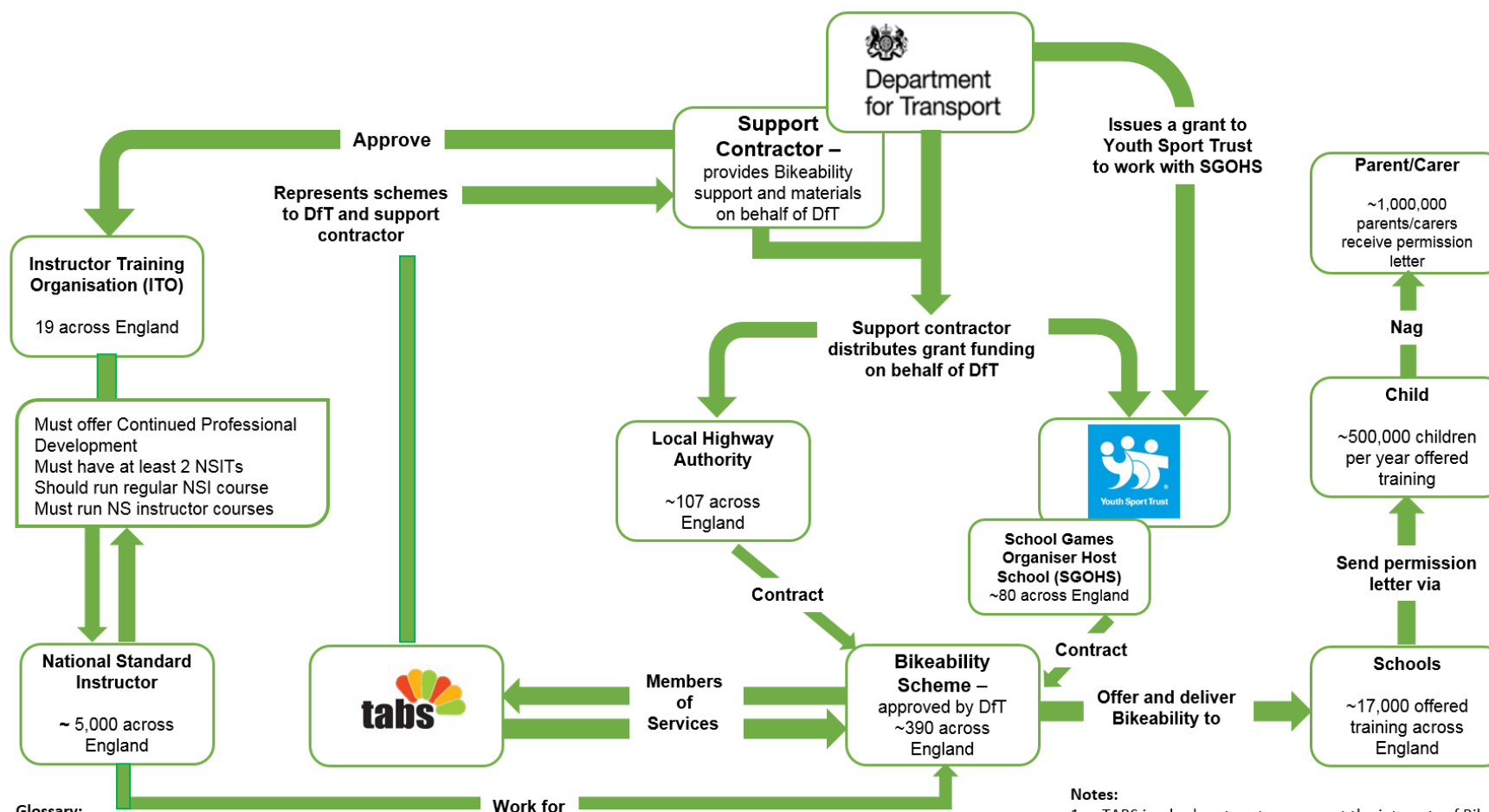
5.9 Over the next 4 years the DfT will work with TABS to continuously improve:

- professionalism in the delivery of Bikeability training
- the high and uniform quality of the cadre of National Standard instructors
- the Bikeability programmes relevance to contemporary road conditions
- “technical” cycle training content

5.10 DfT will often consult TABS to help gauge the cycle training industry’s views on new developments to the programme.

5.11 Further information about TABS can be found on their website at:
<http://www.tabs-uk.org.uk/>.

Figure 1. Bikeability delivery model



Glossary:
TABS = The Association of Bikeability Schemes
DfT = Department for Transport
NS = National Standard
NSI = National Standard Instructor
NSIT = National Standard Instructor Trainer

Notes:

1. TABS is a body set-up to represent the interests of Bikeability schemes as well as the views of the professional cycle training industry.
2. Some Bikeability schemes may also be ITOs
3. Some Local Highway Authorities and SGOHS may also be registered schemes in their own right (i.e. they do not have to contract an external scheme to deliver training)

6. PROCUREMENT TIMETABLE

6.1 The timetable for this procurement is outlined in **Table 2** below. This is intended as a guide and whilst the DfT does not intend to depart from this timetable it reserves the right to do so at any stage.

Table 2: Estimated procurement timetable for Bikeability support contract

DESCRIPTION	EXPECTED DATE
Invitation to Tender (ITT) issued by Highways England	13 th June 2016
ITT clarification period opens*	13 th June 2016
ITT clarification meeting/teleconference	21 st June 2016 at 2pm
ITT clarification period closes**	27 th June 2016 at 5pm
Closing date for submission of ITT responses	15 th July 2016 at 5pm
Evaluation of ITT responses	By 18 th – 21 st July 2016
Bidders contacted with points raised by appraisers for clarification on their tender, with 5 calendar days to respond	Bidders contacted by 22 nd July 2016 Response required by 26 th July 2016 at 5pm
Moderation/consensus panel meeting	27 th July 2016
Bidders notified of outcome of appraisal and preferred Bid (or Bidders) identified	Week commencing 1 st August 2016
Standstill period (10 calendar days)	8 th – 17 th August 2016
Contract awarded and signed	Week commencing 29 th August 2015
Contract commences	Week commencing 29 th August 2016

*if a Bidder wishes to raise any point of clarification over the procurement process, the tender requirement(s) or any other query this must be raised through Highways England

**Queries will not be answered after this date

7. SCOPE OF REQUIREMENTS

- 7.1 The support contract will cover activities needed to run and maintain Bikeability as a nationally recognised brand and scheme for high-quality cycling training, and to enable delivery of Bikeability training.
- 7.2 The activities specified for this contract will have some scope for expansion and reduction in scale (subject to minimum levels of service). This will be dependent on business need. However, an overall maximum contract value will be established at the start of any agreement.
- 7.3 The successful Contractor will need to provide a minimum number of core and advisory services to both the DfT and Bikeability partners. A description of these services is provided below. Bidders should explain in detail how they will meet these service requirements. Please note that requirements which must be provided are indicated by the presence of ER – Essential Requirement. Service requirements which are desirable (bring benefits but are not essential) are indicated by the presence of DR – Desirable Requirement.

8. DELIVERY OF CORE SERVICES TO THE DFT

8.1 ER1 - Management of Government grants

- 8.2 The successful contractor will need to manage the secure and transparent handling of up to £46.8m of DfT grants to LHAs, and SGOHSs through the YST. This service area can be divided into four main deliverables:

(i) Management of the LHA grant application process

The Contractor will need to provide a comprehensive grant application, management and delivery service to the DfT. Upon instruction from the DfT, the Contractor will need to contact all local transport authorities in England (outside London) to inform them of the of the grant availability and application requirements. The Contractor will be expected to encourage LHAs to bid and/or offer advice as required. Contractors will need to collate and assess the bids for Levels 1-3 and Bikeability Plus according to the grant eligibility rules, produce recommended bid levels and pass these onto the DfT for consideration and authorisation. Once the bid levels have been authorised, the Contractors will need to issue grant offer letters to LHAs on behalf of the DfT and chase LHAs for responses (e.g. signed grant award letters accepting the Terms and Conditions) We would expect the number of grant agreements in 2017/18 onwards to be similar to those attained in previous years (in the region of 107 local authorities).

A typical LHA grant cycle would include:

- Receipt of LHA bids – December/January
- Grant offers sent out to LHAs – February
- Confirmation of LHA grants (signed agreements) – March/April

- LHA grant interim monitoring – June and September through to December

Current grant agreements with LHAs and SGOHSs end in March 2016. To ensure there is no gap in provision the DfT have asked LHAs and SGOHSs to submit interim grant applications for delivery from 1st April to 31st August 2016. The DfT plans to undertake a further bidding round to cover the remaining period from 1st September 2016 to 31st March 2020. All grants will be subject to review and the annual signing of a new grant agreement before the start of each financial year. The Contractor will be expected to manage and coordinate this process on behalf of the DfT.

(ii) Overseeing the SGOHS grant application process

The SGOHS grant application process operates slightly differently to the LHA process as the YST liaise directly with SGOHSs on behalf of DfT. YST take the lead on the management, administration and implementation of all SGOHS grant applications. This includes collating and assessing SGOHS bids, issuing grant letters to Host schools and chasing them for responses

The Contractors role will be to work with YST to coordinate the invitation and assessment of SGOHS and LHA bids to ensure that grant funding is allocated appropriately. The Contractor (in liaison with YST) will need to ensure that delivery plans are not duplicated in areas where both local authorities and SGOHSs are active in Bikeability delivery. The Contractor will be expected to maintain a good working relationship with YST to ensure the efficient management of the grant application process.

(iii) Payment of grants to LHAs and SGOHSs

The Contractor will need to ensure the timely payment of grant to eligible LHA claims (in arrears). The Contractor will need to draw down funding from the DfT in advance of any claim, and disburse this money to grant claimants as set out in their grant agreements. The Contractor will be expected to manage draw-downs of DfT funding to minimise the amount of funding held at any given time, and the duration for which it is held. Time intervals for claims to be processed will be agreed with the DfT, but it is expected to be monthly. The Contractor will also be expected to promptly report any underspends to DfT Officials at agreed intervals throughout the year.

Contractors will also need to manage the payment of grants to SGOHSs (in advance of delivery) in accordance with the grant agreement made between YST and DfT.

(iv) Monitoring of grant expenditure by LHAs and SGOHSs

The Contractor will need to utilise the existing online monitoring tools to collect Bikeability delivery data. All grant recipients are required to declare the schools trained, the number of training places bid for and actually delivered, via the online monitoring tool twice per financial year. Contractors will need to ensure the timely upload of the delivery data by all grant recipients. The Bikeability database is the property of DfT and will

pass to DfT (including all data and source codes) at the end of the contract. Contractors will also need to undertake periodic spot checks of the information uploaded onto the database (checking grant recipients' booking confirmations and attendance sheets).

The Contractor will be expected to assess all grant amendment requests and examine whether they can be accommodated. These requests then need to be sent to DfT for authorisation.

The YST currently leads on SGOHS data collection. The Contractor's role will be to provide advice and support to the YST as required.

The Contractor will also need to produce year-end monitoring reports for DfT summarising the delivery figures for Bikeability training in England (excluding London), which are published on the Bikeability website.

9. DELIVERY OF CORE SERVICES TO BIKEABILITY STAKEHOLDERS

9.1 Bikeability stakeholders include organisations which either deliver, or commission Bikeability training in their communities as well as those who undertake the training. These include:

- LHAs
- SGOHSs
- Bikeability schemes (cycle trainers or cycle training organisations registered to deliver Bikeability training)
- ITOs
- Children and their family
- YST
- TABS

9.2 This service area can be divided into ten main deliverables:

9.3 ER2: Bikeability scheme registration and re-registration

9.4 The Contractor will need to assess and approve applications from National Standard cycle trainers or businesses to become registered Bikeability schemes. Applications will be assessed against standard criteria agreed with DfT. Registered Bikeability schemes are the only organisations that can offer and deliver Bikeability training. All registered schemes need to re-new on an annual basis. The Contractor will need to ensure that all schemes re-register using the online monitoring tool. Accurate records of Bikeability scheme registration and subsequent amendments will need to be securely maintained by the Contractor.

9.5 ER3: Registration of National Standard Instructors

9.6 The Contractor will need to maintain DfT's database of National Standard Instructors (NSIs). This will include working with ITOs to register new instructors and issue NSI numbers to new instructors, as well as responding to enquires from instructors, Bikeability schemes or ITOs. Contractors will also need to interrogate the NSI database as necessary, including verifying instructors' National Standard status (subject to DfT approval).

9.7 ER4: Quality assurance of practical Bikeability training

9.8 The Contractor will be expected to manage the quality assurance system for practical Bikeability training. Quality assurance consists of two parts: internal quality assurance (scheme led) and external quality assurance. External quality assurance involves the observation of cycle training being delivered in practice by a Bikeability scheme. DfT (through the Bikeability support contract) is responsible for selecting schemes for external assurance and agreeing a programme of visits by the External Assurance panel. There are currently 25 people on the External Assurance panel (14 from the Bikeability industry and 11 independent cycling experts).

9.9 Approximately 25 external quality assurance visits are carried out per year in England (excluding London). The successful Contractor will need to agree contracts with the panel members. TUPE does not apply to the current External Assurance panel however, Contractors will be expected to appoint the existing panel members in the short-term to maintain the quality and consistency of the programme and ensure the successful transition of this service. During the transition period Contractors will be expected to adopt a similar approach to that currently in place - organising visits to schemes, reviewing reports generated by panel members and following-up the results with schemes as appropriate. Proposals that set-out cost-effective approaches to undertaking the external quality assurance of training will be welcomed.

9.10 Further information about the external and internal quality assurance system can be found in the professionals section of the Bikeability website under delivery guidance: <https://professionals.bikeability.org.uk/documents/>.

9.11 ER5: Communications to stakeholders

9.12 The Contractor will be expected to communicate with stakeholders regarding Bikeability, the National Standard for Cycle Training, and relevant development in national and local cycling policy (**Annex C** provides an overview of the current Bikeability communications activity, along with an assessment of the impact of those activities to date). The successful Contractor will need to continue to build the profile of the Bikeability brand, and seek to involve schemes, LHAs, schools, children and parents to get exposure of the brand to existing and potential consumers. The DfT is currently developing a communications plan for the programme and the successful Contractor will play a key role in its delivery.

9.13 The DfT would like to increase awareness of the Bikeability brand. This will not just be about recognition of the logo, but also about increasing understanding of what the programme does and how it helps young people. For the last 5 years there has been no centralised marketing approach. Subsequently there has been a decline in the number of non-participating children who would like to take part based on the latest Ipsos MORI research (58% in 2015 vs 83% in 2010).

9.14 Similarly, there has also been a decline in the number of parents who would be likely to give permission for their children to take part in Bikeability (69% in 2015 vs 87% in 2010). The DfT would like to better engage parents in the programme which should in turn generate more demand for training. Promoting the programme and the Bikeability brand will be key to achieving this.

9.15 Any promotional work undertaken will need to deliver measurable outcomes that meet Bikeability's/governments objectives. Bidders should explain in their proposal how they can support DfT in developing the Bikeability brand, how they plan to cover the costs incurred in relation to any promotional activities and how they plan to demonstrate its effectiveness.

9.16 As set out in section 5.9, DfT will work with TABS to continuously improve:

- professionalism in the delivery of Bikeability training
- the high and uniform quality of the cadre of National Standard instructors
- the Bikeability programmes relevance to contemporary road conditions
- “technical” cycle training content

9.17 Bidders should clearly set-out in their proposal how they would facilitate joint working with TABS to achieve these goals.

9.18 **ER6: Management of the Bikeability website and database**

9.19 The successful Contractor will need to make arrangements for hosting the Bikeability website and engage with the incumbent Bikeability website hosts to ensure the successful transition of these services.

9.20 Contractors will also be expected to update and maintain the website as appropriate. The website has recently been re-designed and brought up-to-date so that it remains relevant and appealing to visitors. There are two Bikeability websites: one for members of the public looking for general information about Bikeability, and the other for Bikeability professionals – schemes, instructors, ITOs, and anyone looking for information about how to start providing Bikeability. This has helped to ensure that the public is as clean and focussed as possible.

9.21 The main public site for Bikeability is at: www.bikeability.org.uk. The professional's site is at www.professionals.bikeability.org.uk. To ensure that members of the public automatically land on the main site, the professional's website does not show up on internet searches for Bikeability. Both websites have a responsive design, which means that they are easier to use with tablets and smartphones.

9.22 The Contractor will also need to make arrangements for hosting the monitoring database with the incumbent supplier to ensure the successful transition of these services.

9.23 **ER7: Management of the annual Bikeability scheme survey**

9.24 All registered, active Bikeability schemes are invited to respond to an online survey each year. The survey was first undertaken in 2011 and has become an important way to engage with schemes. The survey comprises a mix of regular questions which are repeated year on year as well as specific questions around recent new initiatives, and ideas for the future. The survey gives scheme organisers the opportunity to tell us about ways in which Bikeability works well, or what can be done to make things better. Previous surveys have focussed on increasing participation in Bikeability, performance of the Contractor in delivering

the core services and the quality assurance processes with questions around schemes own internal quality assurance practice, and their experiences of the external quality assurance system.

9.25 The recommendations and conclusions from previous surveys have helped to identify and prioritise areas for development within the wider Bikeability programme.

9.26 The successful Contractor will be expected to manage all elements of this service including: drafting the survey questions in collaboration with the DfT, inviting all registered Bikeability schemes to complete the survey, collating their responses and preparing a report summarising the results of the survey for the DfT.

9.27 **ER8: Management of Bikeability award materials**

9.28 The successful Contractor will be expected to manage the production, storage and distribution of the current range of Bikeability award materials including award materials for Bikeability Plus modules. This will include handling and fulfilling customer orders. The maximum response time for the fulfilment of customer orders (i.e. from an order being placed via the Bikeability website's online shop through to delivery to the customer) should be 5 calendar days.

9.29 The existing stock of award materials (approximate value £80K) will be transferred from the incumbent supplier to the successful Contractor. The Contractor will be required to take ownership (including storage and distribution) of the existing stock by the end of September 2016.

9.30 The core award materials currently comprise a badge, certificate and booklet for each of the Levels 1-3. These are presently sold in combinations of badge and certificate, and a complete award pack (badge, certificate and booklet). **Annex D** provides the current award materials retail price list.

9.31 Bikeability Plus award materials currently comprise of certificates for Bikeability Fix and Bikeability Learn to Ride as well as certificates and stickers for Bikeability Balance.

9.32 Only registered Bikeability schemes are eligible to buy and award the materials. Schemes place orders for award materials by logging-in to the Bikeability professional's site with their unique scheme number and password. All orders for Bikeability award materials must be placed through the website.

9.33 Instructor badges are also available to registered schemes for £1 (inc. VAT) and are ordered through the professional's website.

9.34 Level 2 resources generate the highest volume of sales, with over 276,000 Level 2 badges, 251,000 Level 2 certificates and 100,000 handbooks sold in 2014. Level 1 resources generate sales at approximately half the volume of Level 2. In 2014 there were 152,000 Level 1 badges, 166,000 Level 1 certificates and 38,000 booklets sold. Sales of Level 3 resources are significantly less. In 2014 15,000 badges, 14,500 certificates and 4,000 booklets were sold. **Annex F** provides further details of unit sales per month. The volume of materials sales for Bikeability Plus are yet to be established. **Contractors will be required to provide the DfT**

with unit sales figures for Bikeability and Bikeability Plus award material sales on a monthly basis. A report confirming annual sales figures will need to be submitted to DfT at the end of each financial year.

9.35 The number of orders received for the core award materials fluctuates throughout the year. The number of orders placed decreases during winter months when fewer training places are delivered and peaks towards the end of the school summer term when the majority of training is scheduled.

9.36 The successful Contractor will be required to:

- Manage production of the materials: source and be responsible for the production and purchase of the core award materials, which must include the badges, certificates and booklet currently on offer. They will also need to manage all materials associated with the Bikeability Plus modules.
- As described in section 9.29 the Contractor will be required to take ownership of the existing stock which will be transferred from the incumbent supplier by the end of September 2016 and to use the materials as prescribed in this tender document.
- The DfT has previously used badge manufacturers located in China and the UK. The successful Contractor will not be bound to use the previous manufacturers, however, the quality, look and feel of the current award materials must be matched.
- Store the materials: the Contractor will be responsible for storing all materials at a safe and secure location.
- Receive orders from customers: the Contractor will be expected to provide an order handling service that can accept orders from the Bikeability professional's site.
- Handle payments from customers: the Contractor will be responsible for customer invoicing including the administration of VAT on orders and recovery of late payments.
- Manage the distribution of orders to Customers: the Contractor will be responsible for the timely distribution of orders.
- Respond efficiently and effectively to Customer enquiries: the contractor will be expected to provide an excellent level of customer service, finding solutions and dealing with customer enquiries promptly.
- Provide a monthly report to the DfT on the volume of award materials ordered (including unit sales and value of award materials ordered).

9.37 Bidders should clearly set out in their proposal how they intend to deliver the above requirements.

9.38 As a minimum, the successful Contractor will be required to match the quality, look and feel of the current award materials. Current specifications for the award materials are provided in **Annex E**.

9.39 Bidders should clearly set out how they plan to cover the costs incurred in relation to the production of the award materials. Bidders will need to consider how the fees for this service could be drawn from the award materials sales revenue. It is expected that the successful Contractor will generate profit from the sale of Bikeability materials. Bids which include proposals for returning a share of this profit to the Bikeability programme will be welcomed.

9.40 The Contractor's stock levels will fluctuate as materials are ordered, stored and purchased. The successful Contractor will be under an obligation ensure the effective management of award materials particularly in the run-up to the end of the contract. Please note there is no commitment from the DfT to purchase any surplus, unsold stock after the contract has expired. The successful Contractor will be permitted to source funds from the profit generated by award materials sales in the form of a contingency budget which may be used to buy back any surplus stock at the end of the contract.

9.41 **ER9: Other Bikeability goods and materials**

9.42 The Contractor will be expected to procure, store and distribute other Bikeability materials at the request of DfT and ensure that any such materials are both appropriate and of suitable quality in order to protect the reputation of the Bikeability brand. **The Bikeability brand is the property of the Crown and is owned by DfT.** If a Bidder is considering producing Bikeability materials over and above the current standard, this must be agreed with DfT. Manufacture quality must be appropriate for the standards of the brand.

9.43 **ER10: Advice and support: 0800 helpline and web-based support**

9.44 The successful Contractor will need to set-up and manage a Bikeability helpline service (by phone and e-mail) for LHAs, SGOHSs, Bikeability schemes and the general public. This service typically generates around 2,000 telephone enquires per year and 4,000 to 6,000 email enquires per year.

9.45 Helpline services will be expected to be available during normal working hours (Monday to Friday from 09:00 to 17:00) with calls being answered on a first call basis in 90% of cases. The majority of issues should be resolved either immediately or within one working day, with more complicated issues (including those requiring referral to DfT) being resolved to a timeline agreed with the relevant customer.

9.46 **ER11 – Delivery of Bikeability Plus**

9.47 The Contractor will be expected to manage the national delivery of Bikeability Plus and build on the development work undertaken by the incumbent Contractor. This may include:

- Development and integration of quality assurance processes
- Modification of the online monitoring tool to incorporate Bikeability Plus
- Development of proposals for refining the collection of effectiveness data
- Working in partnership with TABS to develop guidance and training standards for the Bikeability Plus modules
- Assisting DfT with evaluating the impacts of this new programme

9.48 The amount of grant available for the national delivery of Bikeability Plus from 2016/17 to 2019/20 will be approximately £4.7m.

10. ER12 - DELIVERY OF ADVISORY SERVICES TO DfT (NON-CORE ACTIVITIES)

10.1 Advisory deliverables will be agreed between DfT and the successful Contractor as discrete work items within the overall contract value as and when required. The scope of these services could cover cycle training, management of delivery services, data and evidence collection and analysis. This will be operated on a call-off basis, with no guaranteed activity. For illustrative purposes the deliverables requested could include:

- Implementing the enhancements set-out in the DfT's strategic plan for Bikeability and Bikeability Plus (currently under development)
- Developing the evidence base evaluating the medium and long-term impacts of Bikeability training and Bikeability Plus training, particularly whether the programme encourages children to cycle more often, improves their safety and builds children's confidence and skill levels to ride on the road
- Analysis of Bikeability and Bikeability Plus data and comparison with other datasets
- Providing advice on updating and maintaining the National Standard
- Developing courses and mechanisms to expand the audience for Bikeability training (e.g. using digital channels to develop social media toolkits for schemes and schools and/or using digital media to create a network of brand ambassadors)
- Building on the instructor training and development review undertaken by the incumbent Contractor
- Assisting the DfT with the implementation of any sponsorship/commercial partnership arrangements for Bikeability and/or Bikeability Plus

10.2 Advisory deliverables will be more flexible, and the contract should allow some capacity for demand-driven technical advice and support on cycle training, management of delivery, evidence gathering and data-analysis.

10.3 Copies of CVs should be supplied for all members of the proposed support team as part of submitted bids. The quality of staff identified to carry out the advisory services will be considered as part of the quality factors, when scoring tenders. Day rates should be stated in the bids.

10.4 DfT is considering the potential for 'in kind' and commercial sponsorship of the Bikeability brand. If taken forward, a sponsorship agreement may require changes and additions to materials produced and distributed by the sponsor, and changes to communications undertaken by the Contractor.

11. ADDITIONAL REQUIREMENTS

11.1 DR1: Extending the reach of the Bikeability programme

11.2 DfT is interested in exploring opportunities to extend the reach of the programme to support wider cycling policy aims. This could be through closer alignment of training with existing behavioural interventions and/or wider cycling infrastructure (i.e. overlapping Bikeability with the provision of safer routes to

schools). It could also be through accessing non-Government sources of funding (e.g. the Big Lottery Fund, undertaking independent fund raising etc.) to pay for additional training places. Bidders are encouraged to include innovative and creative ideas about how they might extend the reach of the programme and how this would be funded.

11.3 **ER13: Contract management**

11.4 The Sustainable and Accessible Travel Team will be responsible for managing the contract with the successful Contractor. It is expected that arrangements will be made with a single Contractor. This will not preclude a supplier from making further arrangements with other companies to provide the overall service, but it will be for the successful Contractor to manage these arrangements with the need for DfT involvement.

11.5 Work will be expected to be carried out by those staff members identified in the proposal. Once the contract has been signed, any changes to the staff identified (including additions and removals as well as replacements), will have to be agreed with DfT.

11.6 **ER14: Review meetings**

11.7 Regular review meetings are required between DfT and the Contractor (on a monthly basis). Meetings will be held in DfT central offices based in London. The purpose of these meetings will be to monitor and direct the delivery of the Bikeability programme. Issues that may be discussed include:

- Progress and action on the delivery of core contractual services
- Progress and action on the delivery of non-core contractual services
- Future development of the Bikeability programme
- Any other issues relevant to the contract and Bikeability delivery

11.8 Weekly telephone updates will also require between the DfT and the Contractor to update the contract manager on progress with delivery of the core and non-core contractual services.

11.9 **ER15: Travel and subsistence expenses**

11.10 If the successful contractor will incur travel and subsistence (T&S) as a result of carrying out the services outlined in this specification this will be reimbursed **at cost**, subject to the upper limit of allowances payable to DfT staff of equivalent status (please see **Annex G** for further information). Claims for T&S must be related to the performance of services outlined in this specification and be certified as such. All T&S costs must be agreed in advance with the contract manager.

11.11 **ER14: Subcontractors**

11.12 The Contractor may wish to subcontract some parts of the project to ensure different tasks are being undertaken in the most cost effective way and/or if specific technical expertise is required. The Contractor will be responsible for the

management of all its appointed subcontractors and provide quality assurance for all subcontracted tasks. The Contractor will be the sole point of contact for any issues relating to the subcontracted work.

11.13 **ER15: Handover following award of contract**

11.14 On commencement of the contract, the successful Contractor will be expected to facilitate handover responsibilities from the incumbent suppliers as quickly as possible. A draft handover plan is provided in **Annex H**. DfT will communicate the contract award to Bikeability schemes and other relevant partners by the week commencing 1st August 2016. The Contractor will be expected to provide contact details from day one with at least the capacity to answer customer calls and emails and provide a timescale for providing a fully operational service.

11.15 Throughout the duration of the agreement, the Contractor will draft and maintain procedure documents and service records which allow simple and accurate handover of responsibility of Bikeability support services at a later date back to DfT. It is expected that a handover plan will be drafted by the Contractor in a similar format to the plan provided in Annex H.

11.16 **ER16: Project management**

11.17 Proposals should clearly explain how the project will be managed and which individual members of the team will be assigned to manage and undertake the various tasks.

11.18 Bidders should specify the quality assurance and audit processes to be used, and identify who will be responsible for quality assurance of the overall project. The quality assurance function should be undertaken by somebody independent of the project manager.

11.19 DfT will require the Contractor to assess and manage any risks to the final delivery of Bikeability training itself. Bikeability is widespread and highly visible to schools, parents and children. Therefore, poor delivery carries significant reputational risks for DfT. If failures on behalf of the lead Contractor, cause issues with delivery of Bikeability training, DfT will consider this a serious performance issue. For example, failure to issue grant letters and/or funding in time to enable delivery, which ultimately leads to the cancellation or delay of courses.

11.20 Any publicity relating to the Contractors role in delivering the support services for the Bikeability programme will need to be discussed and agreed in advance with the DfT contract manager.

11.21 **ER18: Handling grant funding**

11.22 The Contractor will be provided with grant funding at agreed times to allow payments to partners. The supplier will be required to (a) keep DfT funds clearly separate from supplier funds and (b) minimise the amount of funding held and (c) regularly monitor and report any grant underspend so it can be appropriately reallocated by the DfT.

11.23 ER19: Charges and payments

11.24 Invoices will be accepted by DfT on a monthly basis in arrears.

11.25 Prior to submission of each invoice the Contractor will need to provide a draft invoice by email to the Contract Manager (and copied, for resilience purposes, to a second DfT contact to be nominated) for approval. This draft will set out (a) the amount proposed for the invoice (b) breakdown of activities being claimed for, identifying the person, organisation and/or subcontractor undertaking the work and the amount of time claimed and (c) a brief narrative of the tasks undertaken.

11.26 The Contractor will also need to provide information on the volume of telephone enquires received each month, volume of email correspondence received each month, the number of schemes registered/re-registered each month, volume of material orders (i.e. unit sales and value of material orders), number of grant claims and the number of instructor registrations/updates.

11.27 The Contractor will also need to provide forecast figures for all the core and advisory services on a monthly basis.

11.28 All invoices must be submitted to the DfT Shared Services Centre. Invoices must include the Purchase Order number provided by DfT at the start of the contract. Invoices should be submitted to:

DfT Shared Service Arvato
Accounts Payable
5 Sandringham Park
Swansea
SA7 0EA
United Kingdom

11.29 ER20: Qualifications of staff

11.30 For delivery of the advisory services, Contractors should have at least one member of staff who is a registered National Standard cycling instructor (having completed the relevant 4-day course and been registered on the national database with an official NSI number). Details should be supplied in your bid.

11.31 ER21: Arrangement for end of contract

11.32 The Contractor will be required to fully cooperate with DfT to ensure a fair and transparent re-tendering process for this contract. This may require the Contractor to demonstrate separation between teams occupied on the existing contract and those involved in tendering for the replacement contract to prevent actual (or perceived) conflicts of interest arising. The Contractor will be expected to draft a handover plan similar to the one provided in Annex H to ensure a successful handover/transition of the services outlined for this contract.

12. ER22:- SECURITY REQUIREMENTS

- 12.1 Bidders should be aware of the requirement of the Data Protection Acts and must ensure that information they hold under the contract is handled accordingly.
- 12.2 Information is a key asset and its proper use is fundamental to the delivery of public services. Therefore, there is a continual need to ensure protection of personal information. This also applies to information that may be managed or processed by third parties.
- 12.3 The Data Handling Procedures in Government report outlines a number of mandatory standards for data handling, in order to provide a minimum baseline level for protection and handling of personal data.
- 12.4 All proposals must demonstrate how they meet or exceed the relevant mandatory requirements laid down in the Security Policy Framework (SPF). The SPF can be found at: <https://www.gov.uk/government/publications/security-policy-framework/hmg-security-policy-framework>. Failure to do so will negatively impact on your bid.
- 12.5 Bidders must set out in their responses if data will be stored, processed or accessible from outside the UK. Please note the requirement to provide a draft security policy plan with your response.
- 12.6 Occasionally, it might be necessary for the Contractor to undertake a school visit, for example to observe Bikeability or Bikeability Plus training. Disclosure and Barring Service (DBS) checks are therefore required for all staff who may be interfacing with schools/children. It is the Contractors responsibility to ensure these checks have been undertaken.

13. SERVICE LEVELS AND PERFORMANCE

- 13.1 The level and quality of customer service that will be provided by the successful contractor is very important. Bidders are asked to set out how they will provide an excellent service to DfT and Bikeability customers. DfT will measure the quality of the successful Contractors services by:
- The number of grant offers and/or grant amendments agreed in time to allow partners sufficient time to deliver training
 - Payment of grant claims within service level timescales agreed with the DfT contract manager. Grant claims are expected to be paid monthly.
 - Monitoring of grants and delivery by LHAs and SGOHSs – collecting information (via the online monitoring tool) at an interim stage, and for all partners that ultimately claim their grant
 - Website usage figures
 - Customer feedback for the core services – through the annual Bikeability scheme survey
 - The number of new LHAs or SGOHSs enrolled to deliver Bikeability
 - Award materials distribution covering at least 90% of known-grant funded Bikeability training places. Total response time and procedures for handling

customer queries. It is expected that the maximum response time for the fulfilment of customer orders (i.e. from an order being placed via the Bikeability website's online shop through to delivery to the customer) will be 5 calendar days.

- The number of email and telephone enquires received and resolved per month. Calls should be answered on a first call basis in 90% of cases. The majority of issues should be resolved either immediately or within one working day, with more complicated issues (including those requiring referral to DfT) being resolved to a timeline agreed with the relevant customer.

14. CONTRACT DURATION AND INDICATIVE PROJECT PLAN

14.1 The contract will start by September 2016 or as soon as feasible after this time. The contract will run for an initial two year period (from the 1st September 2016 until 31st August 2018) with an option to extend for two further years in one year increments, at DfT's discretion, and subject to acceptable performance by the Contractor. There will be at least two break points in the contract to assess the Contractor's performance. The break points will be:

- 31st August 2018 - at the end of the initial 2 year contract
- 31st August 2019 – at the end of the first 1 year (optional) extension

14.2 An indicative project plan for the Bikeability (cycle training) support contract is set out below. An outline project schedule is set-out in **Annex K**

Table 3: Bikeability (cycle training) support contract indicative project plan

Work area and core service deliverables	Dates
Inception meeting	From start of the contract
Handover with incumbent supplier (please see Annex G for the draft handover plan)	1 st September – 30 th September 2016
Management of LHAs grants including: <ul style="list-style-type: none"> • Management of LHAs grants including: • Reviewing bids received in the 3.5 year bidding round • Issuing grant letters • Monitoring grant expenditure and underspend • Managing grant payments to LHAs and SGOs in liaison with the YST • Collation and publication of grant award statistics on website 	From start of contract onwards
Scheme registration and re-registration including: <ul style="list-style-type: none"> • Assessing and approving applications (around 40* new schemes are registered each year) • Maintaining an accurate record of Bikeability scheme registration and making any amendments 	From start of contract onwards.
Registration of National Standard Instructors including: <ul style="list-style-type: none"> • Registering new instructors and issuing NSI numbers • Interrogating the NSI database on an annual basis (approximately 1,000* instructors per year are registered/need their details updated) 	From start of contract onwards.

<p>Management of external quality assurance process including:</p> <ul style="list-style-type: none"> • Set-up the External Assurance panel • Manage the External Quality Assurance panel • Organise visits to schemes • Review Panel reports • Follow-up results with schemes as appropriate and inform DfT of any issues 	From start of contract onwards
<p>Management of Bikeability award materials including:</p> <ul style="list-style-type: none"> • Transfer of existing stock from the incumbent supplier to the successful Contractor (by 30th September 2016) • Appointment of a distributor • Processing and distributing material orders • Controlling stock and handling payments • Providing annual reports to DfT of material sales • Provide monthly updates on volume of materials ordered 	From the start of the contract onwards
<p>Management of helpline and web-based support including:</p> <ul style="list-style-type: none"> • Setting-up and managing the helpline service (email and phone). This service typically generates around 2,000 telephone enquires per year and 4,000 to 6,000 email enquires per year* • Updating and maintaining the Bikeability website and preparing content as appropriate 	From start of contract onwards
<p>Management of the online monitoring tool and grant monitoring including:</p> <ul style="list-style-type: none"> • Ensuring schemes upload delivery data • Undertaking regular grant interim monitoring • Collating final delivery statistics and presenting these data in a report to DfT 	<ul style="list-style-type: none"> • Current FY's interim grant monitoring should typically take place from June onwards • Previous FY's grants claims and monitoring data should be submitted by June
<p>Attending client and team meetings and providing technical expertise to the DfT including:</p> <ul style="list-style-type: none"> • Monthly contract management meetings with the DfT • Weekly phone calls with the DfT • Attending meetings with key Bikeability stakeholders as and when requested by the DfT contract manager 	From start of contract onwards

***Figures are based on current work volumes. It must be accepted by the Contractor that no guarantees relating to the number of transactions that may occur with the Bikeability (Cycle Training) support contract can be given.**

14.3 The Contractor will need to ensure that each version of the plan is approved by the DfT. The Contractor will be expected to maintain and update the plan on a regular basis to reflect the current services required by the DfT.

14.4 DfT has the right to ask the Contractor to include any reasonable changes or provisions in each version of the plan.

14.5 The Contractor will need to perform its obligations in order to achieve each deliverable/task by the deliverable date.

14.6 Changes to the deliverables and/or tasks can only be made through the variation procedure, provided that the Contractor does not attempt to postpone any of the deliverables using the variation procedure or otherwise (except in the event

of a sub-contractor defaulting which may affect the lead Contractors ability to achieve a deliverable by the relevant deliverable date).

15. PROPOSAL REQUIREMENTS

15.1 Proposals should follow the format as described below. Failure to comply with the specified format may result in your bid being rejected.

15.2 **Front of document:** please ensure that the name of the Bidder is displayed on the front of the document

15.3 **Introduction:** the introduction section of the bid should be around 2-3 pages and incorporate the following mandatory information:

- An executive summary
- A nominated point of contact with telephone, email and postal address details for any post-tender questions. If the Bidder is an existing DfT Vendor, details of VAT status and Vendor number are required.
- Details of any proposed subcontractors.

15.4 **Main tender submission:** as a guide this should be around 20-30 pages and comprise the following:

15.5 **Technical solution proposed and competence:**

- An explanation of how the requirements specified in this document will be met
- Outline project plan. Bidders should describe how the project will be managed to ensure that all deliverables will be achieved on time and on budget, explaining how different organisations/subcontractors will interact to deliver the requirements.
- Details of any relevant projects Bidders have been involved in which demonstrate their ability to successfully deliver the requirements

15.6 **Supplier resources and capabilities:**

- Details of the resources proposed and their organisation, including a clear explanation of the roles and responsibilities of the proposed team, particularly where proposals include a multi-firm approach including:
 - An outline of other work commitments that might impact on the ability to resource this contract
 - A summary of the key staff and their areas of expertise that will have most influence on the success of delivering the requirements.
 - How staff will be organised and managed in order to undertake the work and how the team would interact with DfT.
 - Details of any subcontractors and key supporting suppliers
 - Details of any other resources in addition to personnel that may be key to delivering the requirement
 - A guarantee that the service of named personnel will not be replaced without prior agreement with DfT.

15.7 Suitability of proposed processes:

- Bidders should identify any risks to delivery and outline steps that will be taken to mitigate those risks.

15.8 Bidders are responsible for highlighting any current and/or potential conflicts of interest and indicating how these will be managed. Conflicts of interest will also be considered when evaluating responses.

15.9 **Page set-up and format:** one page constitutes one printed side of A4. For the main text the minimum font size is 11pt and minimum line spacing is single line. Double-sided printing is permitted. Bidders are encouraged to use a simple presentation style, avoiding expensive binding, colour photographs and other high cost elements of production which do not directly add value to the substance of the tender response.

15.10 Bidders must not submit marketing material or any other documents in addition to the documents requested as part of the tender response.

15.11 **Annexes to the bid:** the following elements of the bid will need to be included as annexes:

- Fee proposal (see **Annex I**)
- Curriculum Vitae for all resources the Bidder intends to deploy on this contract (if successful), whether as employees or consultants. These must detail the skills, experience and qualifications of each person. Changes to personnel may not be made without the DfT's permission.
- Draft outline security plan and policy as requested

16. FEE PROPOSAL

16.1 An indicative fee proposal must be provided on a time and materials basis for the two year contract and separately for the optional two one-year extension periods by populating the Fee Schedule supplied in **Annex I** of the tender and included as part of Bidders tender response.

16.2 It is expected that all reasonable and necessary expenses will be covered by the successful Contractors tendered charges (on a time-charge basis) for the deliverables identified in this specification.

17. SUBMISSION OF PROPOSAL

17.1 Proposals will need to be submitted to HE via email to [insert email address] by 5pm on 15th July.

18. SELECTION AND APPOINTMENT

18.1 Responses to the specification will be evaluated against pre-defined criteria (see section 23 pages 30-33). Additionally, selection will be based on the proposal

which demonstrates a very high degree of overall value for money, competence, credibility and ability to deliver. DfT is not bound to accept the lowest priced bid or any bid received in connection with this ITT.

19. CLARIFICATION QUESTIONS

18.1 Clarification questions will need to be submitted to HE via email to [insert email address] by 5pm on the 15th July 2016. There will also be an opportunity for Bidders to attend a clarification meeting/teleconference with DfT on 21st June at 2pm

18.2 Bidders will be contacted by HE with any points/questions raised by appraisers for clarification on their tender by 22nd July 2016. Bidders will need to submit their responses to HE via email [insert email address] by 5pm on 26th July 2016.

20. TERMS AND CONDITIONS OF THE CONTRACT

20.1 The Terms and Conditions set out in HE's SPaTS framework will apply to any contract let as a result of this ITT. A copy of these terms and conditions has been provided, as part of this ITT.

21. TRANSFER OF UNDERTAKINGS (PROTECTION OF EMPLOYMENT) REGULATIONS – TUPE

21.1 If there are any costs incurred as a consequence of the application of TUPE these will be borne by the successful Contractor. The Terms and Conditions set out in HE's SPaTS framework will apply to this contract.

22. INSTRUCTIONS TO SUCCESSFUL CONTRACTOR

22.1 The information provided within this document, concerning the service requirement and business activity of DfT is the best available at the time of issue. Whilst every endeavour has been made to give the successful Contractor an accurate description of the requirements, the Contractor should form their own conclusions about the methods and resources needed to meet them.

23. EVALUATION CRITERIA

23.1 Selection will be based on the evaluation criteria encompassing the most economically advantageous tender, which demonstrate a high degree of overall value for money, competence, credibility and the ability to deliver. The DfT is under no obligation to select the lowest or any bid submitted.

23.2 This tender will be evaluated using the following weightings in **Table 4** to obtain the optimal balance of quality and cost.

Table 4: Evaluation criteria		Score
Quality Factors		70%
Financial / Price Factors		30%

23.3 Proposals will be evaluated against the evaluation criteria listed above. The following weightings and sub-criteria will be utilised in the evaluation to ascertain the best value for money proposition. It should be noted that the method of allocating scores for finance/price factors also takes into account the quality factors. Price factors will only be scored if tenders meet the minimum quality score requirements detailed in **Table 5**.

23.4 Proposals will be evaluated by a panel drawn from the DfT, including members of the SAT team.

Table 5: Work Package Evaluation Criteria: Quality Factors

Primary Criteria	Sub-criteria	Score	Weighting %	Weighted Score
Resources and capabilities	Do the skills and experience of staff proposed for providing the core services demonstrate sufficient breadth and expertise to deliver high-quality support to the DfT and Bikeability partners?		10	
	Do the skills and experience of staff proposed for providing the discretionary advisory services demonstrate sufficient breadth and expertise to deliver high-quality advice and delivery support to the DfT?		10	
	Does the Bidder (or relevant subcontractors) have access to recognised expertise in the planning and delivery of cycle training to the National Standard?		2	
	Does the bid demonstrate expertise (or access to expertise) in managing a supply chain for the award materials? Does the bid provide options for off-setting costs of delivery by money raised in providing badges and certificates etc.?		8	
	Has the Bidder demonstrated their ability and competence to engage effectively with a) LHAs and other public bodies b) private sector and civil society organisations?		2	
Technical solution proposed and competence	Has the Bidder demonstrated that they have understood the needs of the DfT and Bikeability stakeholders?		2	
	Has the Bidder demonstrated they can deliver the core service requirements to the DfT and Bikeability stakeholders?		10	
	Has the Bidder demonstrated their ability to deliver the advisory services to the DfT?		10	
	Has the Bidder put forward clear plans for project management and quality control?		2	

Framework Work Package Scope

	Has the Bidder provided a credible plan for producing, storing and distributing Bikeability award materials to the required standard?		5	
	Has the Bidder provided creative, innovative and cost-effective ideas for extending the reach of the Bikeability programme?		5	
Suitability of proposed processes	Has the Bidder provided a robust plan for identifying and managing risks?		2	
	Has the Bidder demonstrated a robust approach to (a) handling public money (b) handling data to Government standards?		2	
Subtotal				
Total	Total Mark (Subtotal x 100/140)			

23.5 Quality Factors Scoring Methodology

23.6 The assessment panel will use the marking system in accordance with **Table 6**, to award marks for approach or evidence, as relevant to the sub-criteria in **Table 5**.

Table 6: Quality Scoring Marking Scheme

Score	Reason	Mark
Weak	The proposed approach fails to demonstrate an adequate understanding of the project objectives and fails to address adequately the risk management issues. There is little evidence that the proposed approach has been influenced by experience on other projects.	1-4
Acceptable	The proposed approach demonstrates an adequate understanding of the project objectives; it addresses the success factors and risk management issues to an acceptable standard. There is an adequate level of evidence that the proposed approach has been developed as a result of successful experience on other projects.	5-7
Good	The proposed approach demonstrates a good understanding of the project objectives; it addresses fully the success factors and risk management issues and provides for delivering continuous improvement over the life of the framework. There is substantial evidence that the proposed approach has been developed from other projects using formal continual improvement processes.	8-9
Excellent	The proposed approach has been tailored specifically to deliver the project objectives, and deals comprehensively with the risks to maximising performance against Key Performance Indicators and to delivering continuous improvement. There is substantial evidence that the approach has been developed using continual improvement processes, which are routinely used to develop approaches and deliver the objectives successfully on all projects.	10

23.7 The marks awarded in accordance with **Table 6** above will then be adjusted in accordance with the weightings.

23.8 The proposal with the highest mark will be given a score of 100. The score of other competing suppliers will be calculated by deducting from 100 one point for each full percentage point by which their mark is below the highest mark. The minimum requirement for this Work Package is to reach a threshold of 60. A submission that has failed to achieve the minimum quality requirements may not be considered further in the assessment.

23.9 Financial/Price Factors Scoring Methodology

23.10 The lowest priced tender will be given a score of 100. The score of other competing suppliers will be calculated by deducting from 100 one point for each full percentage point by which their price is above the lowest price. The overall quality score and the finance score will be combined in the ratio 70:30 applied to the quality and financial scores respectively.

23.11 Following receipt of your evaluation reports the rejection/acceptance letter will be sent out by the Framework team. Before the contract can be officially awarded, a 10 day "standstill" period needs to elapse.

24. CONTACT INFORMATION

Role	Location	Phone
Project Sponsor: Richard Mace	Sustainable and Accessible Travel Division, Great Minister House, London	0207 944 6647
Project Manager: (Currently being recruited)	Sustainable and Accessible Travel Division, Great Minister House, London	
Lot 1 Framework Manager: Hannah Milliner	Temple Quay, Bristol	0300 470 4210
Procurement Officer: Rob Amor	The Cube, Birmingham	0300 470 2790
DfT Lead Business Partner: Gilly Faulkner	Group Commercial Services. Great Minster House, London	07500 071 026

ANNEX A – LIST OF COMMON DEFINITIONS, ABBREVIATIONS AND ACRONYMS

- **Bikeability:** a national cycle training scheme, owned by DfT, providing branding, an attainment award, quality assurance and other support services to the delivery of National Standard cycle training
- **Bikeability Plus:** is an initiative consisting of 11 modules that are intended to provide trainees with additional skills development and cycling opportunities around the core Bikeability training they receive.
- **Bikeability scheme:** an individual, company or other organisation, registered to deliver training under the Bikeability brand. Only Bikeability schemes can give trainees a Bikeability award.
- **CTSB – Cycle Training Standards Board:** is an advisory body to the DfT on the National Standard for cycle training.
- **ITO – Instructor Training Organisation:** a body recognised by DfT as providers of high standard instructor training. Only instructors trained by an ITO will be recognised by the DfT as a National Standard Instructor.
- **Local Highway Authority (LHA):** is an organisation that is responsible for the maintenance of public roads.
- **National Standard for cycle training:** the outcomes for high-quality cycle training agreed by the UK government, road safety organisations, and cycling organisations.
- **NSI – National Standard Instructor:** a cycle trainer who has successfully completed the 4-day National Standard instructor course as delivered by an ITO and is registered on the DfT National Standard Instructor database (and therefore holds an NSI number).
- **NSIT – National Standard Instructor Trainer:** an NSI who can also train new instructors
- **SGOHS - School Games Organiser Host School:** are a group of schools that work together to develop physical education and sport opportunities to young people.
- **SGO – School Games Organiser:** supports the delivery of school games, driving both primary and secondary school participation in inter- and intra- school games competitions
- **TABS – The Association of Bikeability Schemes:** a body set-up to represent the interests of Bikeability schemes as well as the views of the professional cycle training industry.
- **YST – Youth Sport Trust:** is an independent charity that supports the delivery of high quality physical education and sports opportunities to young people in schools.

ANNEX B: TABLE SUMMARISING BIKEABILITY LEVELS

Level	Age	Size of training groups	Minimum course timing	Incentives
Level 1 During Level 1 riders learn to control and master their bike. The training takes place in an environment away from cars or traffic – usually in a playground or closed car park.	*5 years and over (usually 9 to 11 year olds)	3 to 12 (Maximum instructor to trainee ratio 1:15).	2 hours	A certificate and red badge is awarded to children who successfully complete the course. (Booklets are also available).
Level 2 During Level 2 Bikeability training riders get out on the roads! Level 2 gives real cycling experience so that trainees are able to deal with traffic on short journeys, such as cycling to school.	*6 years and over (usually 9 to 11 year olds)	3 to 12 (Maximum instructor to trainee ratio 1:6) Note: Level 2 courses with more than 3 trainees per instructor must be taught in 2 or more sessions and courses should not be delivered in a single day.	Minimum on road course times vary according to number of trainees. For the following number of trainees per instructor: 2 hours for 1 or 2 trainees, 4 hours for 3 trainees, 5 hours for 4 trainees and 6 hours for 5 or 6 trainees	A certificate and orange badge is awarded to participants who successfully complete the course. (Booklets are also available).
Level 3 During Bikeability Level 3 training riders learn the skills to tackle a wider variety of traffic conditions than on Level 2. When trainees reach Level 3 standard they should be able to deal with all types of road conditions and more challenging traffic situations.	Mainly teenagers and adults	1 to 3 (Maximum instructor to trainee ratio 1:3 although usually done 1:1)	All courses are based on a 2 hour session but longer times or additional sessions may be needed for groups of 2 or 3. When training 1:3 it is recommended that at least 2 instructors are present.	A certificate and green badge is awarded to participants who successfully complete the course. (Booklets are also available).

***Subject to parental consent and full risk assessments**

Further details on course content and delivery can be found at:

<https://professionals.bikeability.org.uk/documents/> under Bikeability Delivery Guide.

ANNEX C – SUMMARY OF EXISTING COMMUNICATION ACTIVITIES

This Annex outlines the range of communications activities and associated channels that are currently in use, including a high-level assessment of the effectiveness and impact of those activities, and identification of future opportunities for communications.

Objectives of existing communication activities

Back in 2012 the DfT identified three objectives for the planned communications activity within the current contract period. These were:

- Improvements to the quality of grant applications received from local authorities.
- Increased awareness of the Bikeability brand among stakeholders.
- Improved knowledge sharing and dissemination of best practice.

These objectives were aligned with the priorities for Bikeability at the time, which included a focus on driving quality standards within the scheme, and, relatedly, securing Bikeability's reputation as the quality standard for cycle training schemes. With the exception of objective 2, 'Increased awareness of the Bikeability brand among stakeholders', working towards the objectives required a minimal level of engagement with public, external audiences, and more focused engagement with 'internal' audiences, including Bikeability schemes, instructors and grant recipients.

Audiences, messages and current activities

The main external and internal audiences for Bikeability communications are outlined in the table that follows, along with an assessment of how well the current communications activities perform in the delivery of key messages.

Value of existing communications activities

Monthly website hits and website evaluation info.

Summary of opportunities

- Need to have some way that allows the public to interact with Bikeability and allows them to act as ambassadors for Bikeability if they feel positively about it – the call to action needs to be defined, however.
- Need to have some pro-active communications to influence opinion re. Bikeability and value of Bikeability.
- Schemes and instructors need to be suitably equipped to be ambassadors for Bikeability – empower stakeholders to co-ordinate their own communications activity. And make sure that their comms are on message and of good quality.
- Communications need to be more public facing (and therefore more pro-active) in future to grow the value of the brand / meet the new objectives.

TABLE SUMMARISING EXISTING COMMUNICATION ACTIVITIES

Audience	Message(s)	Desired action(s)	Ways in which these messages are disseminated	Strengths and weaknesses of this approach	Opportunities
Children (core audience Year 5 and Year 6 children, aged 9-10)	<ul style="list-style-type: none"> Bikeability is fun and exciting and taking part means that you can ride your bike more often. 	<ul style="list-style-type: none"> Want to take part in Bikeability and convince parents to let them take part. Encourage friends and siblings to take part in Bikeability when their turn comes. Cycle more often and / or further as a result – start a lifetime of cycling. 	<ul style="list-style-type: none"> Communications from Bikeability schemes – presentations at school, letters home. Bikeability training. Badges, certificates and handbooks. Bikeability website. 	<ul style="list-style-type: none"> Whether the message is delivered / desired actions are taken is currently very dependent on the quality of their interaction with the training itself, and the quality of communications from Bikeability instructors and schemes. Without a good first interaction with Bikeability there is a risk that none of the supporting materials (including the website) are seen. A child's interaction with the brand can be a one-off experience if there is no encouragement to engage further. 	<ul style="list-style-type: none"> Ensure best possible trainee experience during Bikeability delivery – the training itself is a great opportunity to communicate with this audience in a focused, targeted and personal way. Instructors and schemes need to be 'on message' and have proper support to ensure they are communicating the messages effectively.
Parents (core audience parents of children in Years 5 and 6, aged 9-10)	<ul style="list-style-type: none"> Bikeability teaches children to cycle safely and well, equipping them with the skills and confidence to cycle on today's roads. Learning how to cycle safely and well is a life skill, and all children should have the opportunity to take part. 	<ul style="list-style-type: none"> Recognise Bikeability as the quality standard for cycle training. Allow children to participate in Bikeability when they are given the opportunity. Challenge local barriers to Bikeability. Allow children to put the training they have received into practice. 	<ul style="list-style-type: none"> Communications from Bikeability providers – letters home, permission forms etc. Bikeability website. Badges, certificates and handbooks. 	<ul style="list-style-type: none"> There is nothing specifically aimed at parents to drive demand for Bikeability from the grassroots, and a parent's perception of Bikeability is likely to be driven by the quality of the interaction their child has during training (rather than any prior interaction with Bikeability). The refreshed badges, certificates and handbooks were designed and written to allow better communications with parents, and the new (public) Bikeability website was designed with parents in mind. These refreshed materials / channels are much better at communicating the key messages than before – but it is likely that they are only seen once or twice, immediately before or after their child takes part in Bikeability. 	<ul style="list-style-type: none"> Opportunity for more active communications with parents to enhance their understanding of Bikeability before their child takes part – this will help to drive demand for Bikeability. Parents should also have the appropriate tools to act as ambassadors for Bikeability, and to drive demand from the grassroots. It is likely that some form of social media is most appropriate for this.

Framework Work Package Scope

				<ul style="list-style-type: none"> There is no specific call to action for parents through any of the existing communications, however, and no official forum for parents to go to in order to interact with Bikeability – this means that parents, who could promote Bikeability to others following positive interactions with the brand, do not have sufficient opportunity to do so. 	
Teachers / schools	<ul style="list-style-type: none"> Bikeability teaches children to cycle safely and well, equipping them with the skills and confidence to cycle on today's roads. Learning how to cycle safely and well is a life skill, and all children should have the opportunity to take part. Bikeability complements other aspects of the curriculum and enhances learning, and it is easy to include within the plan for the year (limited additional effort required from teachers or other school staff). 	<ul style="list-style-type: none"> Recognise Bikeability as the quality standard for cycle training. Allow children to participate in Bikeability when they are given the opportunity and encourage whole-class participation. Challenge local barriers to Bikeability (within the school or at the authority level). 	<ul style="list-style-type: none"> Communications from Bikeability schemes – phone conversations, letters, face to face meetings. Bikeability website, including classroom resources (lesson plans etc.). Badges, certificates and handbooks. 	<ul style="list-style-type: none"> Teachers are more likely to engage with locally-led communications (from individual Bikeability schemes / their local authority) than they are to with something 'from the centre', so it is appropriate that schemes make a decision about how best to engage with teachers and schools. This works well for areas in which there is an established relationship between the scheme and the school, however. Schemes still state that it can be difficult getting into certain schools or clusters of schools – it is in these cases that more active communications are required to help 'prepare the ground' for a scheme to start their own relationship at a later date. 	<ul style="list-style-type: none"> Ensure that the key messages are getting through to teachers and schools (specifically that all children should have the opportunity to take part in Bikeability, and that Bikeability is easy to include within the plan for the year). Bikeability schemes should be provided with the support they need to ensure that their own communications are 'on message'. Communications from 'the centre' should target schools that do not receive Bikeability – this would be a precursor to communications from a scheme at the local-level. Similarly to parents, teachers should have access to a forum that allows them to interact with Bikeability so that they can act as ambassadors for Bikeability, and share

Framework Work Package Scope

					ideas with other teachers re. lesson plans etc.
Adults seeking cycle training	<ul style="list-style-type: none"> Bikeability is a modern, up to date and more comprehensive form of 'cycling proficiency'. Bikeability is not just for children. 	<ul style="list-style-type: none"> Request Bikeability training from a local provider. Encourage others to request Bikeability training. 	<ul style="list-style-type: none"> Local authority / Bikeability scheme websites and advertisements. Bikeability website. Badges, certificates and handbooks. 	<ul style="list-style-type: none"> The current Bikeability resources are very child and parent focused and the badges, certificates and handbooks are unlikely to appeal to adults undertaking training. Resources developed at the local level by individual schemes are much more tailored and appropriate, but often do not use the Bikeability brand. 	<ul style="list-style-type: none"> Opportunity to develop the adult brand ideas and support Bikeability schemes with communications to adult trainees.
The public	<ul style="list-style-type: none"> Bikeability is a modern, up to date and more comprehensive form of 'cycling proficiency'. Bikeability equips cyclists with the skills and confidence to keep them safe on the road. Bikeability recommends that cyclists position themselves in the middle of the lane when this is the safest option for them. 	<ul style="list-style-type: none"> Recognise Bikeability as the quality standard for cycle training and cycling in general. Understand the outcomes of Bikeability so that drivers and cyclists have a mutual understanding of each other's behaviour, encouraging positive and safe. 	<ul style="list-style-type: none"> The Bikeability website. 	<ul style="list-style-type: none"> This requires a member of the public to visit the website to find out about Bikeability. This is probably unlikely for a member of the public who does not have school age children, or some other involvement with the scheme as a whole. 	<ul style="list-style-type: none"> Opportunity for more proactive engagement with the public to enhance understanding of Bikeability and its outcomes.
Bikeability schemes	<ul style="list-style-type: none"> Bikeability is the quality standard for cycle training. 	<ul style="list-style-type: none"> Promote Bikeability to Bikeability's external audiences. Drive quality standards within the scheme. 	<ul style="list-style-type: none"> Bikeability professionals website and resources. Emails from Bikeability Support Team (approximately one per quarter, but ad hoc, as announcements / knowledge sharing is required). 	<ul style="list-style-type: none"> Information is shared as needed and there are a number of communications channels through which to disseminate information. However, there is very little support for schemes for their own communications with external audiences – it is likely that schemes find it difficult to promote Bikeability in a way which is completely 'on message'. The industry-body, TABS, has taken the lead on the dissemination of good practice and it is appropriate that this function sits 	<ul style="list-style-type: none"> Opportunity to better support schemes with their own communications to external audiences so that they are excellent ambassadors for Bikeability.

Framework Work Package Scope

			<ul style="list-style-type: none"> • Other interaction with the Bikeability Support Team via helpline and email support. • The Association of Bikeability Schemes (TABS) Newsletter, seminars and annual conference. 	with TABS, but there should be a formal agreement to check consistency and accuracy of TABS-led communications.	
National Standard Instructors	<ul style="list-style-type: none"> • Bikeability is the quality standard for cycle training. 	<ul style="list-style-type: none"> • Promote Bikeability to Bikeability's external audiences. • Take responsibility for own professional qualifications and CPD in order to play part in professionalisation of industry / quality standards. 	<ul style="list-style-type: none"> • Bikeability professionals website and resources. • Interaction with scheme and Instructor Training Organisation (face to face interactions, phone conversations and emails). • Other interaction with the Bikeability Support Team via helpline and email support. 	<ul style="list-style-type: none"> • Individual instructors will feel much better connected to their scheme (and perhaps their ITO) rather than to the Bikeability scheme as a whole. The extent to which an individual instructor is promoting Bikeability to external audiences (and the extent to which they are 'on message') will vary from scheme to scheme. 	<ul style="list-style-type: none"> • Opportunity for more centralised communications for instructors to ensure consistency and accuracy of communications.

ANNEX D – CURRENT AWARD MATERIALS RETAIL PRICE LIST

Item	Number in one unit	Retail price online
L1 Badge & Certificate	50	£25
L2 Badge & Certificate	50	£25
L3 Badge & Certificate	20	£10
L1 Badge, Certificate & Booklet	50	£40
L2 Badge, Certificate & Booklet	50	£40
L3 Badge, Certificate & Booklet	20	£16
Instructor badge	1	£1
L1 Supplementary Certificate	50	£5
L2 Supplementary Certificate	50	£5
L3 Supplementary Certificate	20	£5
L1 Supplementary Booklet	50	£15
L2 Supplementary Booklet	50	£15
L3 Supplementary Booklet	20	£6

ANNEX E- CURRENT SPECIFICATIONS FOR AWARD MATERIALS

Badge specification:

- Soft PVC badge
- Non-ferrous metal pin with non-ferrous metal “butterfly” clutch
- 37mm long, 3mm thick PVC
- 3 versions:
 - A **Red** badge: pantone 805, black & white; with the number 1 on it
 - An **Orange** badge: pantone 804, black & white; with the number 2 on it
 - A **Green** badge: pantone 802, black & white; with the number 3 on it
- Each badge should be individually poly-bag wrapped with safety message printed on the bag: “this is not a toy, contains small parts, pin has sharp point”
- Badges must be batched in bags of 50 for red and orange colours and in bags of 20 for green

Bikeability certificate specification:

- **Stock:** Regency Satin 250gsm FSC Mix
- **Inks:** 3 x PMS + black + seal
- **Extent:** 2pp
- **Size:** A5 portrait
- **Finish:** trimmed to size, shrink wrapped, label each pack, packed in cartons

Bikeability booklet specification:

- **Stock:** Regency Satin 150gsm FSC Mix (self-cover)
- **Inks:** 3 x PMS + black + seal
- **Extent:** 16pp
- **Size:** A6 portrait
- **Finish:** trim, folded, 2 wire stitch and trimmed to size, shrink wrapped, label each pack, packed in cartons, label each carton

ANNEX F – AWARD MATERIALS UNIT SALES 2014

Bikeability Materials Sales 2014

Units										
month	L1 badge	L2 badge	L3 badge	L1 certs	L2 certs	L3 certs	L1 handbk	L2 handbk	L3 handbk	Total
January	3200	5300	220	3350	5500	0	1000	1500	0	20070
February	7950	20550	600	8900	21700	0	2150	6050	0	67900
March	19800	38200	2660	20850	39400	1580	3050	10200	840	136580
April	10000	11450	1120	11100	12850	1120	4150	4750	580	57120
May	15850	39250	3280	19650	46100	3540	4150	10850	660	143330
June	15200	19950	1880	17750	26050	2160	3900	6850	480	94220
July	13250	16000	780	13300	16250	1220	2250	11900	480	75430
August	6900	21400	2780	6950	21500	2780	1050	2600	240	66200
September	11150	23650	700	15700	27650	800	7700	19900	400	107650
October	26300	28650	440	26550	32400	540	4450	17800	460	137590
November	19850	20450	620	20050	20850	640	3600	11500	20	97580
December	2450	6600	200	2450	6600	200	550	4700	160	23910
	151900	251450	15280	166600	276850	14580	38000	108600	4320	1027580

ANNEX G – TRAVEL AND SUBSISTENCE GUIDANCE – UK TRAVEL

Travel by Rail

All Contractors must travel **standard class** irrespective of grade, except under certain circumstances, including;

- Temporary or permanent disability; a temporary disability might include things such as a broken leg or arm, or any injury or other condition that affects mobility. A permanent disability is as defined by the Equality Act 2010.
- Pregnancy related reasons

Air Travel within the UK

All Contractors must travel **economy class** irrespective of grade except under certain circumstances, including;

- Temporary or permanent disability (see paragraph 8 for further guidance)
- Pregnancy related reasons

Sea Travel

When travelling by sea, all journeys will be **economy** or **standard** class irrespective of grade, except under certain circumstances, including;

- Temporary or permanent disability (see paragraph 8 for further guidance)
- Pregnancy related reasons

Use of privately owned motor vehicles for UK travel

Motor mileage allowance

Contractors are entitled to be paid motor mileage allowance either at public transport rate (PTR) or at standard mileage rate (SMR). Contractors should note the maximum limit of 10,000 miles per annum that may be reimbursed at the higher SMR rate. The current rates are set out below.

UK travel rates

	First 10,000 miles	Over 10,000 miles
	per tax year	per tax year
Cars and vans	45p	25p
Motor cycles	24p	24p
Bicycles	20p	20p
Passenger rate	5p	5p
Public Transport rate	25p	25p
Equipment supplement (taxable)	2p	2p

Hire cars

If it is more cost effective to use a hire car for journeys Contractors cannot claim motor mileage allowance but you are entitled to be reimbursed all the costs associated with the hire of the vehicle.

Day subsistence

There are separate day subsistence indicative levels for each of the following periods of time spent away from your normal workplace on official business (these are set by HMRC).

- **Breakfast rate;** you are entitled to claim up to the breakfast rate level if you leave home earlier than usual and before 6.00 am and incur a cost on breakfast taken away from your home after the qualifying journey has started. If you usually leave before 6.00 am the breakfast rate does not apply.
- **5 hour rate;** to cover the costs of one meal
- **10 hour rate;** to cover the costs of two meals
- **Late evening meal rate;** you are entitled to claim this, if at the Department's request you agree to work later than 8pm after having worked your normal day and have to buy a meal which you would usually have at home.

The breakfast and late evening meal rates are for use in exceptional circumstances only and are not intended for employees with regular early or late work patterns. Day subsistence payments must be limited to three meal rates on one day or 24 hour period.

Indicative UK subsistence levels are provided below:

UK subsistence indicative levels: day subsistence

- | | |
|--|----------------|
| • Breakfast indicative level (irregular start before 6.00 am) | • up to £5.00 |
| • One meal indicative level (Five hour rate) | • up to £5.00 |
| • Two meal indicative level (Ten hour rate) | • up to £10.00 |
| • Late evening meal indicative level (irregular late finishers only) | • up to £15.00 |

ANNEX H: BIKEABILITY SUPPORT SERVICES DRAFT HANDOVER PLAN

Handover details are provided for the following core services and development projects:

Service	Processes to handover	Documents and records to transfer	Commentary on timings and mechanics of handover
Grant payments and bank account	<ul style="list-style-type: none"> Monthly processing of claim forms Payment sign-off from DfT Payment sign-off from YST Processing reclaims 	<ul style="list-style-type: none"> Payment master log showing payments made under this contract Grant guidance documents 2011-15 Claim forms and amendment request templates Active grant allocations spreadsheet and list of any outstanding reclaim payments due General calendar of grant payment actions for the year e.g. when to send mid-year monitoring requests and timescale for final claims Copies of claim forms received since 2011 and before (records from AEA) Grant agreement letters 2012-13 to 2015-16 LA contact details spreadsheet LA returned finance details (for our set up in Agresso) SGO returned finance details (for our set up in Agresso) Any outstanding grant funding returned to DfT from our DfT-SDG account Bikeability Grants email account 	<ul style="list-style-type: none"> SDG to notify all grant recipients about change of grant provider as soon as this and details on the new supplier's timescales are known Assume the new supplier would need up to one month to make their grant payment mechanism operational, this may necessitate SDG doing a further payment run once their contract is in place to ensure continuity of service to grant recipients and DfT, provided we have a contract to do so Final reconciliation of the DfT-SDG bank account Closure of DfT-SDG bank account as soon as possible after final payment run and the return of any remaining funds to DfT
Monitoring	<ul style="list-style-type: none"> Administration of the online monitoring tool Access to the 'old' monitoring tool containing data to March 2015 	<ul style="list-style-type: none"> New monitoring tool (if being transferred to new supplier's servers) Old monitoring tool (if being transferred to new supplier's servers) Monitoring Tool User Guide 	<ul style="list-style-type: none"> Face to face briefing for the new supplier at SDG offices on how to use the monitoring tool in the first month of their new contract New supplier to assume responsibility for monitoring once this briefing has taken place SDG on hand to answer queries from supplier about the tool for the remaining duration of SDG's contract
Phone and email support	<ul style="list-style-type: none"> Redirection of emails sent to SDG inboxes (bike.ability@sdgworld.net, bikeabilitygrants@sdgworld.net and 	<ul style="list-style-type: none"> Formal complaints form contactus@bikeability.org.uk email address 	<ul style="list-style-type: none"> Briefing on responses to frequently asked questions contactus switchover to occur from start date of new contractor, as soon as email address handed over

Framework Work Package Scope

	<ul style="list-style-type: none"> nsi@sdgworld.net) and autoreplies to direct people to new supplier's email address 	<ul style="list-style-type: none"> Email archive 	<ul style="list-style-type: none"> Phone line to be provided exclusively by new supplier from their start date SDG's Bikeability number to be either switched to new supplier's internal phone system or closed
Quality assurance (including scheme registration, registration renewal and External Assurance (EA))	<ul style="list-style-type: none"> How to check applications for scheme registration Process for re-registering schemes including the timescale for emails and letters Process for allocating EA visits 	<ul style="list-style-type: none"> Copies of all registration documents Copies of all External Assurance reports and visit logs Details of External Assurance panel members Copy of visit confirmation template provided to EA panel members Overview of process of scheduling an EA visit Copy of EA feedback report template EA panel policy documents (travel and expenses, cancelled visits, health and safety) –largely for information only to ensure the new supplier is aware of our current arrangements with the team Copy of post-visit questionnaire 'Surveymonkey' form Copy of contract agreement with freelance EA panel members – for information only ITO delivery data (monitoring forms returned by ITOs and corresponding spreadsheet) 	<ul style="list-style-type: none"> New supplier to undertake scheme registrations from their contract start date SDG handover any in-progress registrations at new supplier contract start date, for new supplier to complete, notifying the organisation(s) seeking registration New supplier to arrange new EA visits from the start of their contract SDG would continue to arrange for EA visits to take place up to the start point of the new supplier's contract and after the start date would complete the reporting process for those EA visits. The new supplier would be responsible for organising new visits once their contract has started. The EA panel members are subcontractors to SDG. TUPE would not apply to the EA panel Briefing of new supplier on how to use online re-registration within one month of their contract start date
Communications	<ul style="list-style-type: none"> Crisis management plan Auto-replies to Bikeability inboxes 	<ul style="list-style-type: none"> Crisis management plan Mailchimp template for newsletters Mailing lists for grant recipients and Bikeability Updates 	<ul style="list-style-type: none"> Transfer (SDG/DfT action) and update (new supplier action) the crisis management plan from the start of their contract Handover of documents and mailing lists on the start date of the new supplier's contract Set auto-replies to SDG Bikeability inboxes from the start of the new supplier's contract
Award materials	<ul style="list-style-type: none"> Online shop website, payment portal Stock reordering details Purchase of bulk stock from CTA by SDG on behalf of DfT 	<ul style="list-style-type: none"> Stock Any in progress transactions Log of orders received and fulfilled Bulk supplier (reorder) details 	<ul style="list-style-type: none"> Specifics very dependent on the new supplier and their proposed arrangements for award materials SDG fulfilment stop date to be agreed with DfT and new supplier once in place to help minimise disruption

Framework Work Package Scope

			<p>to Bikeability providers i.e. existing sales and fulfilment to continue beyond new contractor's start date provided SDG still have a contract with DfT</p> <ul style="list-style-type: none"> • Buy-back of stock from CTA and either transfer to storage for DfT or directly to new contractor • Final reconciliation of orders received and payment of final profit share (this could be off-set against the stock buy-back)
Website and database	<ul style="list-style-type: none"> • Website hosting • Monitoring database hosting 		<ul style="list-style-type: none"> • The new supplier would need to engage Superfantastic to provide the current hosting services or make their own arrangements for hosting the website • Steer Davies Gleave would transfer the monitoring database from our server to the new supplier for hosting
Bikeability Plus	<ul style="list-style-type: none"> • Grant allocation process • Grant monitoring process 	<ul style="list-style-type: none"> • Bikeability Plus certificates and stickers (not currently part of main award materials management) • Grant funding guidance documents for 2015 pilot and 2015/16 extended pilot • List of LAs involved in both pilots • Survey monkey monitoring survey • [Bikeability Plus Grant agreements and claim forms provided as part of main grant payment and bank account service (see above)] • Information collected as part of Bikeability Plus pilot evaluation 	<ul style="list-style-type: none"> • Transfer to new supplier at the start of their contract
Reforming instructor training	None	<ul style="list-style-type: none"> • Scoping and early planning reports as issued to DfT 	<ul style="list-style-type: none"> • Transfer to new supplier at the start of their contract

Communicating to stakeholders about handover

Preparation of briefing papers and notes for new supplier once this is known and has been confirmed as chargeable under the current support services contract.

All stakeholders to receive email and phone contact details for new supplier once these and contract start date are known.

The stakeholders highlighted with a * will need to receive more substantive information/details regarding handover of processes that affect them specifically.

The Bikeability stakeholders are:

- * All registered Bikeability schemes
- * All LA grant recipients
- * All SGO grant recipients
- TABS/TABS Board
- Youth Sport Trust
- Transport for London
- The London boroughs, via TfL (to pick up any that are not registered schemes e.g. Croydon, City of London)

The table below sets out details of the subcontractors that have been involved in delivering specific parts of the Bikeability Support Services contract and relevant key contacts.

Subcontractor organisation name	Key contact	Goods or services provided
Cycle Training Affinity (CTA)		Support across the project Award materials fulfilment
Superfantastic		Website design Website hosting Core award materials design
External Assurance panel members (industry side)	Individual panel member contract details to be provided	Undertaking EA visits and reporting
Coachwise 1st4sport		1st4sport EA panel members Advice on quality assurance set up
The Association of Bikeability Schemes (TABS)		Specialist workshops and training delivery guidance
Brother Bear		Bikeability Levels 1-3 videos (in 2015)
Ipsos MORI		Parent and child perception research (in 2015)
National Foundation for Educational Research (NFER)		Hazard perception research (in 2014)
Research Now		Brand awareness research (in 2013)
Evolve Secure Solutions		Database accreditation (in 2013)

Framework Work Package Scope

Strata Designs		Production and shipping of bulk award materials (in 2013)
Fisher Outdoor Leisure		Award materials fulfilment (in 2012, pre-transfer to CTA)

ANNEX I - FEE SCHEDULE AND PROPOSAL

Fee Proposal

The contract will have a set maximum value for the duration of the agreement (initially two years) and payments will be made on the basis of **actual services delivered (on a time-charge basis) in accordance with the monthly work programmes to be agreed with the DfT contract manager** to provide the deliverables defined in **sections 7-12** (pages 13-25), **Table 3** (pages 26-27) and **Annex K** of this specification. It is recognised that the estimated number of transactions will impact on the transactional unit charges that Contractors will set. As a guide, we have included transactional work volumes for a number of the core services in **Annex J** for the period 2011/12 up to 2015/16. **It must be accepted by Contractors however that no guarantee relating to the number of transactions that may occur with the Bikeability (Cycle Training) Support contract can be given.**

Bidders are required to set-out their pricing proposals in 3 parts:

- **Part 1:** pricing proposal for delivery of the core services as set-out in **sections 7-9** and **Table 3**. Bidders will need to complete:
 - **Table 1a** providing estimates of the staff effort required to deliver each of the core services. This will need to link to their responsibilities within the project team.
 - **Table 1b** daily rates of staff for the initial contract period of two years, and each possible one year extension.
 - **Table 1c** total estimated costs for delivering the core services, including total staff costs, sub-contractor costs, travel and equipment costs or any other relevant non-staff costs.
- **Part 2: Table 2a** rates for staff that will be put forward to carry out tasks to deliver the discretionary non-core advisory services as described in **section 10** (page 21).
- **Part 3: Table 3a** pricing proposal for delivery of the production, storage and distribution of award materials for training Levels 1-3 and Bikeability Plus only. Bidders are strongly encouraged to consider options for using the receipts from the sale of award materials to offset the costs of production, storage and distribution.

Any tenders which are not accompanied by a completed fee proposal will be non-compliant and will not be considered further by the DfT.

Format of fee proposal

Bidders are asked to populate the tables below with their prices and estimated staff effort and include them as part of their tender submission. Prices and staff effort are required for the two year contract, and each possible once year extension.

Part 1: Core services

Table 1a: Estimated staff effort for delivery of core services¹⁰

- (a) Please state how many working days equals one staff year
- (b) Please show the staff years (to first decimal place only) expected to be spent working on the core service deliverables for each pertinent Grade or person, during each 12 month period of the project.

Organisation	Grade or Person	Area(s) of responsibility in project team	ESTIMATED STAFF TIME (person years)				Total time
			Financial Year 2016/17	Financial Year 2017/18	Financial Year 2018/19	Financial Year 2019/20	
TOTAL STAFF YEARS							

Table 1b: Day rates of staff delivering the core services

Organisation	Grade or Person	Primary expertise	Daily Rate (excluding VAT) £			
			Financial Year 2016/17	Financial Year 2017/18	Financial Year 2018/19	Financial Year 2019/20

¹⁰ The DfT's financial year is from 1 April to 31 March.

Table 1c: Estimated total staff costs for delivery of core services

	Financial Year 2016/17 (£)	Financial Year 2017/18 (£)	Financial Year 2018/19 (£)	Financial Year 2019/20 (£)	TOTAL NET COST (£)
TOTAL STAFF COSTS EXCLUDING VAT (£)					
TOTAL STAFF COST INCLUDING VAT (£)					

Part 2: Discretionary non-core advisory services

Table 2a: Day rates of staff available to deliver the discretionary non-core advisory services

Grade or Person	Primary expertise	Daily Rate (excluding VAT) £			
		Financial Year 2016/17	Financial Year 2017/18	Financial Year 2018/19	Financial Year 2019/20

Part 3

Table 3a: Production, storage and distribution of award materials for Bikeability Levels 1, 2 and 3 and Bikeability Plus only

		Time Period			
		Financial Year 2016/17	Financial Year 2017/18	Financial Year 2018/19	Financial Year 2019/20
Unit costs	Proposed unit costs per 1,000 badges distributed				
	Proposed unit costs per 1,000 certificates distributed				

Framework Work Package Scope

	Proposed unit costs 1,000 booklets distributed				
	Proposed unit costs of 1,000 stickers distrusted				
Retail Price	Proposed retail price of badge				
	Proposed retail prices of certificate				
	Proposed retail price of booklet				
	Proposed retail price of stickers				
Cost to DfT	Any proposed costs to be invoiced to the DfT per 1,000 certificates				
	Any proposed costs to be invoiced to the DfT per 1,000 badges				
	Any proposed costs to be invoiced to the DfT per 1,000 booklets				
	Any proposed costs to be invoiced to the DfT per 1,000 stickers				

Income estimates should be based on a combined badge/certificate retail price of no more than £1

ANNEX J – TRANSACTIONAL WORK VOLUMES FOR CORE SERVICES

Table 7: Monthly transactions volumes for core services

Month	E-mail enquiries	Telephone enquiries	Scheme Registrations	Instructor registration/update	Material orders	Grant payments	Grant claims
Oct-11	240	70	5	140	£19,643	£228,697	15
Nov-11	232	50	6	184	£17,985	£441,107	24
Dec-11	225	45	3	142	£7,610	£495,621	18
Jan-12	294	100	4	48	£15,345	£298,662	14
Feb-12	245	110	3	114	£14,564	£755,670	16
Mar-12	297	136	6	112	£19,714	£707,449	15
Apr-12	278	94	5	172	£20,780	£869,048	25
May-12	392	124	4	186	£16,460	£838,780	24
Jun-12	266	182	5	148	£13,454	£2,512,143	85
Jul-12	291	100	3	160	£14,175	£762,557	16
Aug-12	413	81	4	129	£7,385	£330,337	9
Sep-12	543	153	4	63	£21,413	£243,160	8
Oct-12	353	215	1	173	£13,063	£301,343	14
Nov-12	405	132	7	140	£674	£876,870	22
Dec-12	246	171	1	40	£0	£143,880	6
Jan-13	208	101	2	105	£34,704	£974,768.86	32
Feb-13	319	126	3	154	£10,714	£536,133.21	17
Mar-13	529	232	6	175	£19,988	£564,274.33	12
Apr-13	354	156	2	95	£14,420	£1,138,083.26	27
May-13	300	185	8	110	£24,875	£1,785,692.00	89
Jun-13	370	145	4	183	£18,111	£1,134,131.83	26
Jul-13	332	109	1	131	£7,605	£737,996.00	21
Aug-13	276	168	2	159	£13,275	£602,214.23	27
Sep-13	316	179	1	115	£19,458	£570,751.36	31
Oct-13	321	80	0	116	£12,843	£509,006.30	24
Nov-13	375	102	0	151	£9,242	£811,738.00	27

Framework Work Package Scope

Dec-13	205	111	1	84	£1,971	£437,249.24	12
Jan-14	382	192	1	78	£5,163	£902,210.53	71
Feb-14	274	175	7	121	£17,240	£882,011.19	27
Mar-14	418	150	15	179	£34,746	£582,015.00	20
Apr-14	367	126	5	98	£14,381	£1,661,195.14	67
May-14	335	145	5	99	£34,879	£2,328,412.56	61
Jun-14	314	162	6	114	£22,777	£1,443,661.00	65
Jul-14	360	185	2	0	£17,693	£360,834.20	12
Aug-14	326	221	2	tbc	£16,332	£390,596.00	10
Sep-14	595	181	4	107	£23,730	£743,234.00	45
Oct-14	664	165	1	85	£34,918	£530,306.00	38
Nov-14	562	112	0	100	£25,058	£766,184.00	17
Dec-14	476	96	3	100	£6,248	£1,565,684.83	57
Jan-15	682	121	1	26	£18,630	£751,722.16	33
Feb-15	858	156	2	110	£31,691	£606,308.00	39
Mar-15	828	138	8	86	£23,230	£820,588.00	33
Apr-15	401	119	5	85	£24,965	£505,204.00	18
May-15	414	106	0	55	£24,697	£2,128,541.00	89
Jun-15	558	153	1	73	£25,059	£1,480,231.00	32
Jul-15	540	108	1	40	£15,716	£3,261,927.00	58
Aug-15	273	109	1	42	£26,070	£753,255.87	18
Sep-15	459	145	0	121	£28,242	£1,211,920.00	37
Oct-15	389	119	0	15	£22,420	£666,691.00	58
Nov-15	440	116	1	62	£19,262	£656,780.00	50
Dec-15	359	102	2	36	£8,405	£622,483.00	42
Jan-16	441	91	0	16	£20,512	£1,050,064.82	47
Feb-16	492	57	1	31	tbc	£614,162.00	24
Mar-16	tbc	tbc	tbc	tbc	tbc	tbc	tbc
TOTAL	20,832	7,007	165	5,408	£931,535.14	£46,140,328.55	1,724

Table 8: Summary of transactional volumes for core services

Year	E-mail enquiries	Telephone enquiries	Scheme Registrations	Instructor registration/update	Material orders	Grant payments	Grant claims
2011/12	1533	511	27	740	£94,861.00	£2,927,206.00	102
2012/13	4243	1711	45	1645	£172,810.14	£8,953,293.90	270
2013/14	3923	1752	42	1522	£178,949.00	£10,093,098.94	272
2014/15	6367	1808	39	925	£269,567.00	£11,968,725.89	477
2015/16	4766	1225	12	576	£215,348.00	£12,198,003.82	473

ANNEX K – OUTLINE PROJECT SCHEDULE

Work Package		Core service deliverables	Date																										
			Sep-16	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	June-17	July-17	Aug-17	Sep-17	Oct-17	Nov-17	Dec-17	Jan-18	Feb-18	Mar-18	April-18	May-18	June-18	July-18	Aug-18	Sep-18 – Aug-19	Sep-19 - Aug-20	
Project management	Inception meeting with DfT																												
	Handover with incumbent supplier																												
	Contract management meetings																												
	Contract breakpoint meetings																												
Management of Bikeability grants	Processing of local authority grant claim forms																												
	Payment sign-off from DfT and payment of Bikeability grants to Local authorities																												
	Processing local authority grant reclaims																												
	Reviewing bids received in the 3.5 year bidding round																												
	Collation and publication of grant award statistics on Bikeability website																												
	Liaison with YST to manage Bikeability grant claims/re-claims from SGOHSs																												
	Payment sign-off from YST + DfT and payment of Bikeability grants to SGOHS and																												
	Monitor grant funding position and report to DfT on monthly basis																												
	Management of online monitoring tool and grant monitoring	Send out reminders to grant recipients to upload Bikeability and Bikeability Plus delivery data and review progress with this																											
		Analyse monitoring data and collate final delivery statistics for each FY and present these data in a report to DfT																											
Publication of Bikeability delivery data on the website																													
Bikeability and Bikeability Plus scheme registration and re-registration	Assessing and approving applications																												
	Maintaining an accurate record of Bikeability and Bikeability Plus scheme registration and making any necessary amendments to the database																												
Registration of National Standard Instructors	Registering new instructors and issuing NSI numbers																												
	Interrogating the NSI database on an annual basis																												
Management of the external quality assurance process	Set-up the External Assurance panel																												
	Manage the External Quality Assurance panel																												
	Organise visits to schemes																												
	Review Panel reports																												
	Follow-up results with schemes as appropriate and inform DfT of any issues																												
Management of Bikeability award materials	Transfer of existing stock from the incumbent supplier to the successful Contractor																												
	Appointment of a distributor																												
	Processing and distributing material orders																												
	Controlling stock and handling payments																												
	Providing annual reports to DfT of material sales																												
	Provide monthly updates on volume of materials ordered and sold																												
Management of helpline and web based support	Setting-up and managing the helpline service (email and phone).																												
	Updating and maintaining the Bikeability website and preparing content as required by the DfT contract manager																												

59