

### 3. CRITERIA FOR ASSESSMENT OF PROPOSALS

Agencies are invited to describe how they would deliver against TfL's requirements detailed in this specification. All stages of the research need to be carried out with rigorous attention to quality control.

TfL will use the following criteria to evaluate research proposals:

- Understanding of requirements and risk
- Technical strength and ability to deliver accurate and valid data on time
- Fieldwork capability and management
- Quality and experience of proposed TfL account team

Details of the personnel who would be working on the design and management of the project should be provided in the Proposal. This should include seniority, experience, and responsibility, in addition to their proposed role in managing the study. An indication of the amount of time each member of staff will spend working on the study each month should also be provided.

Please refer to the Technical Questionnaire (Appendix 2) for full details.

## 4. SURVEY OVERVIEW

### 4.1 BACKGROUND – LONDON UNDERGROUND (LU)

LU TIQS has been running since the late 1990s. We have an established methodology and considerable historical data. It is of utmost importance that TIQs maintains:

- Consistency in terms of the frequency and quality of data collection
- Comparability of the data collected by each survey

TIQS data is used as a KPI on LU station scorecards, as part of the Journey Time Metric<sup>1</sup> and to assess ticket machine requirements at each station.

### 4.2 BACKGROUND – TFL RAIL

TfL began managing the Liverpool Street to Shenfield rail service in May 2015. Currently operating as TfL Rail, this service will form the part of the Elizabeth line which opens fully in December 2019.

TfL Rail TIQs was introduced in Q1 15/16. Though not as established as LU TIQs, consistency and comparability are again essential.

The TfL Rail Concessions Agreement includes a target specifying that 95% of queuing times at TOMs and POMs must be less than or equal to three minutes. This target applies to each individual ticket retailing location within a station, and covers both staff and passenger operated ticket issuing facilities. The TIQs TfL research project measures compliance to this target.

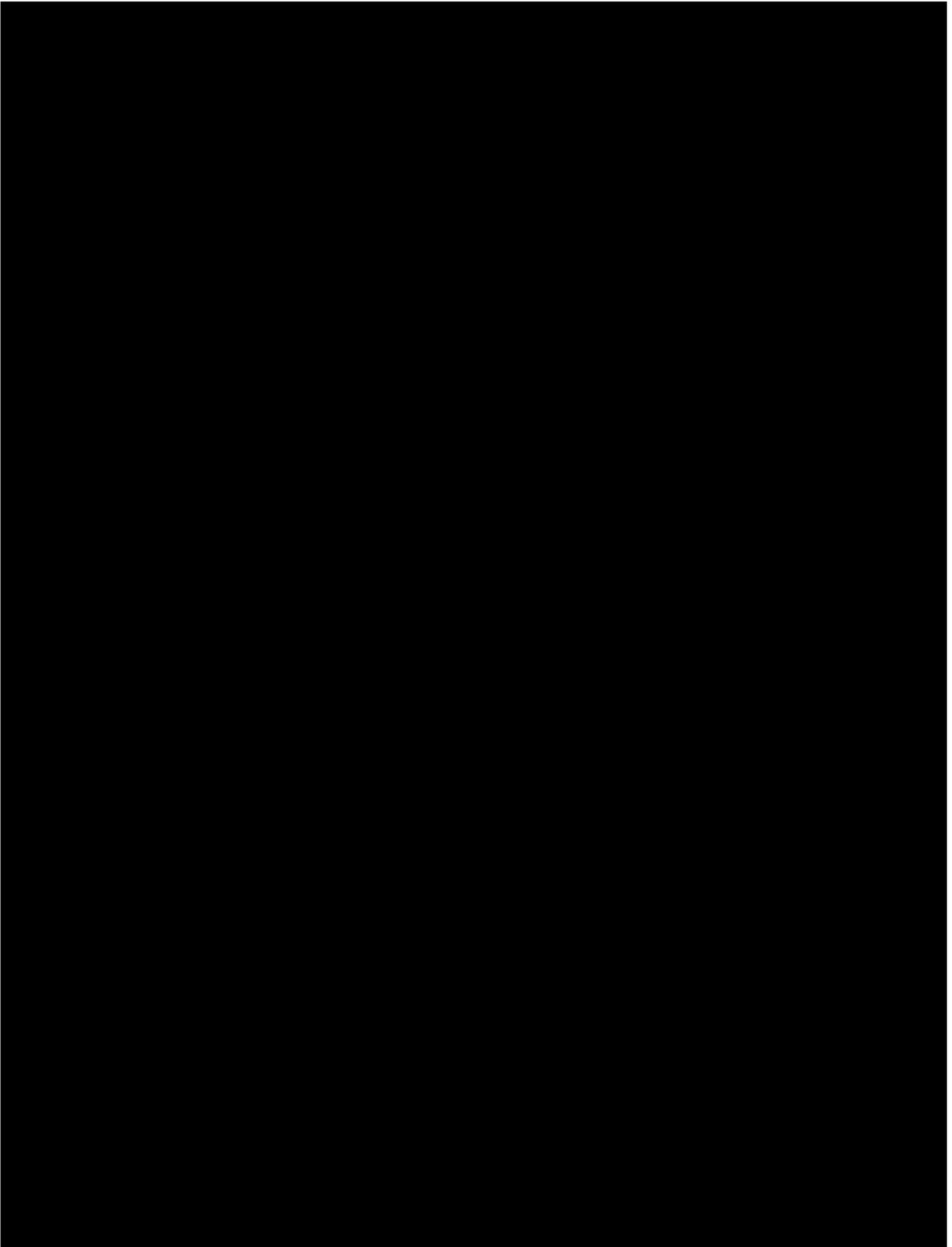
The survey is also used to measure the success of 'queue-combing' initiatives, where members of staff encourage customers in TOMs queues to use POMs.

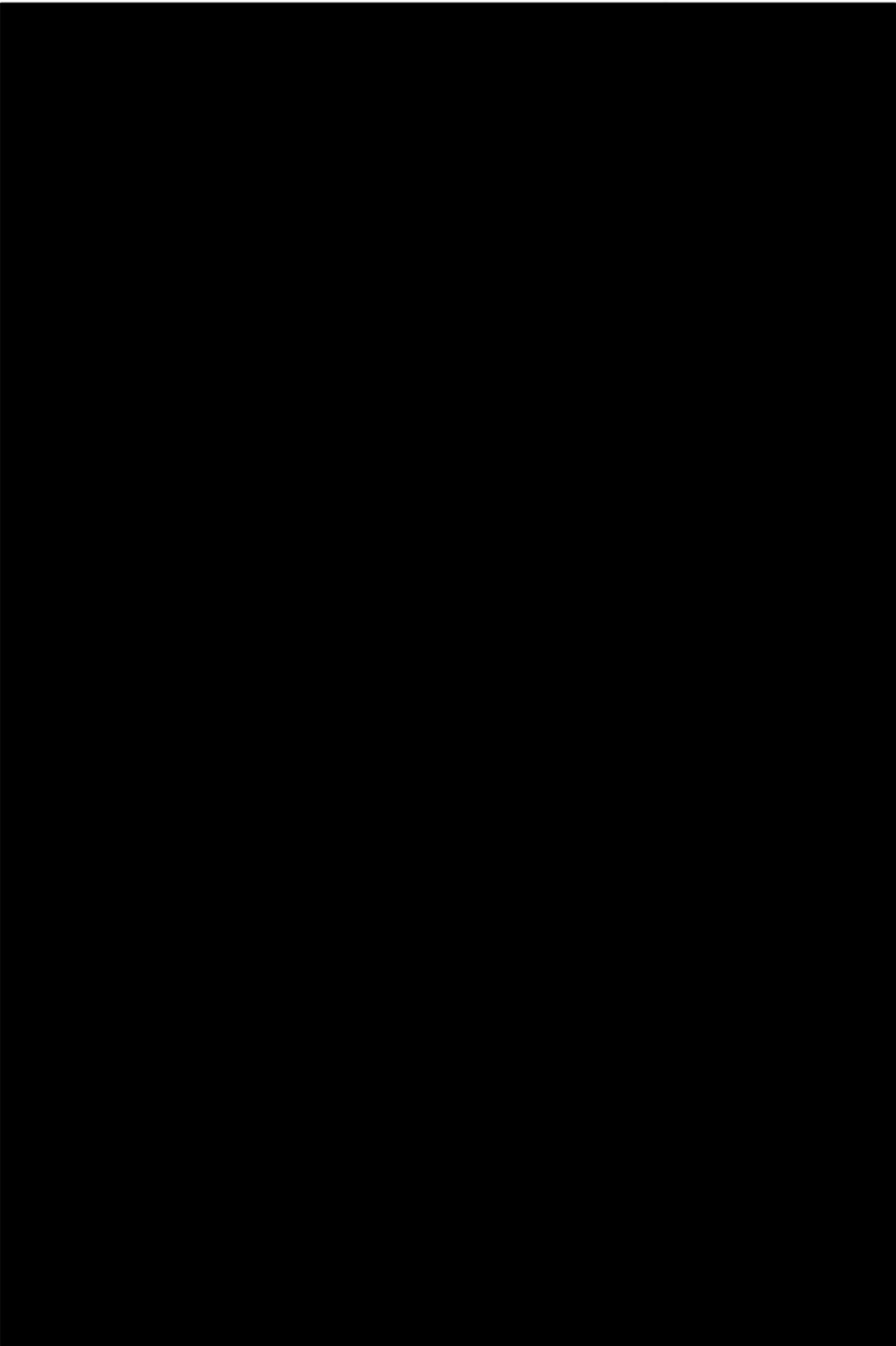


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<sup>1</sup> The Journey Time Metric combines a number of data sources to model the time taken per customer journey

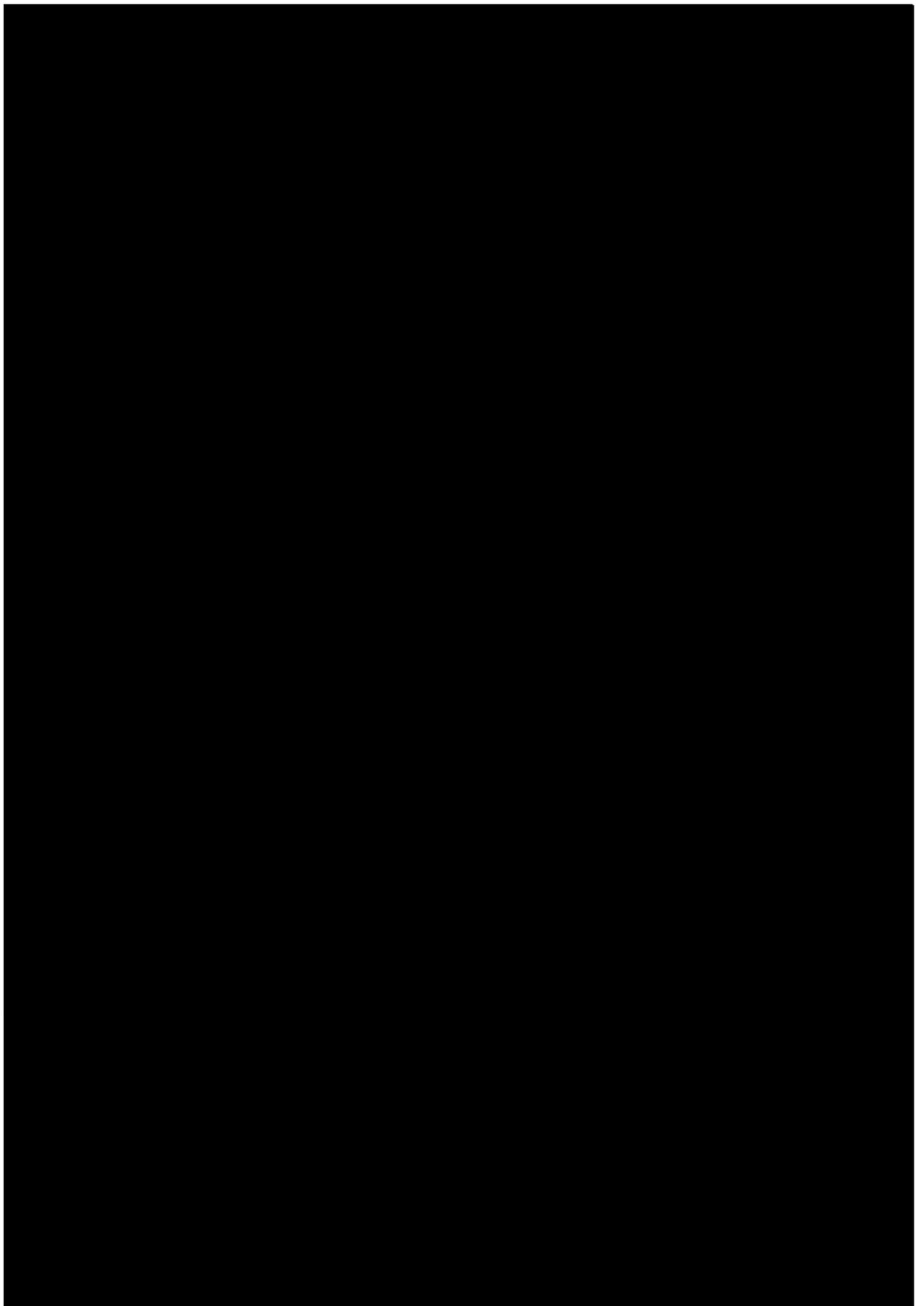
4.4 ASSESSMENTS



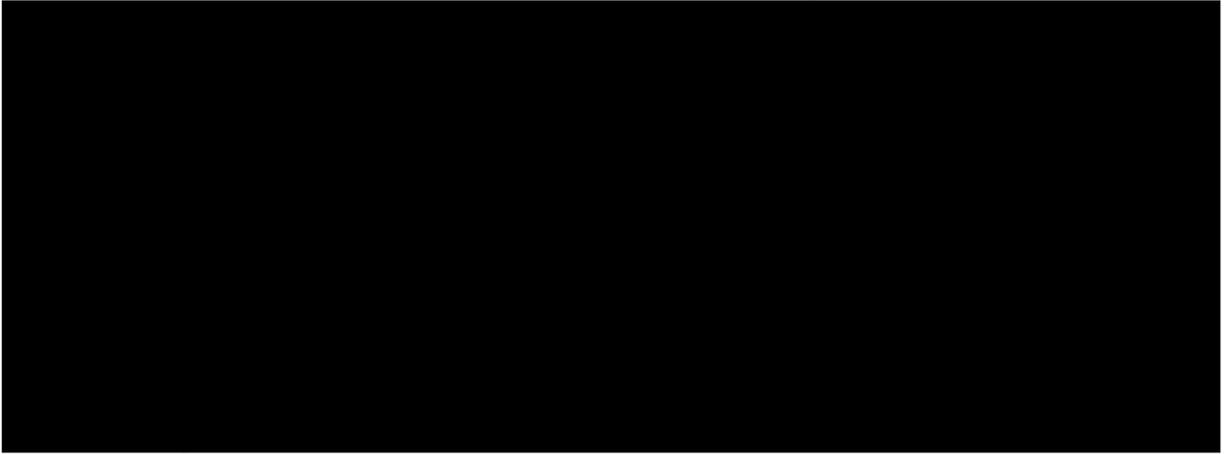


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## 5. SAMPLE

Agencies are required to produce fieldwork schedules annually for each of the 13 periods, based on the pre-defined guidance outlined in section 4.1 and 4.2 below. In addition, some further refinements to the fieldwork schedules should be made on a Period by Period basis:

- **Planned engineering works**

It will be the responsibility of the agency to check and incorporate any planned closures or service interruptions into the fieldwork schedule. Any assessments that are rescheduled should be conducted at the same time/day of the week as originally planned, within the fieldwork period.

- **Public Holidays and Industrial Action**

Primarily, data collected should represent an average day. Therefore to maintain relevance it is necessary to re-schedule shifts that either fall on Bank Holidays or are affected by industrial action. For TfL Rail, the shift should be replaced for a like-for-like day and assessment time. For London Underground, the following rules apply:

- o Monday shifts are re-scheduled for the following Tuesday (another Monday in the same period should be the last resort).
- o Tuesday shifts are re-scheduled for the following Wednesday.
- o Wednesday, Thursday and Friday shifts are re-scheduled for any weekday (not Monday or Tuesday).
- o Saturday and Sunday shifts must be re-scheduled for the same day of the week within the period.
- o Unions are required to give seven days notice of Industrial action – once this is given schedules should be rearranged to accommodate. Sometimes unions call off strikes at the last minute following this notice period, however, in order to prevent cancellation costs shifts should be re-scheduled around the strike days

Agencies should be prepared to offer a flexible approach to shift allocation and have a mobile team of fieldworkers who can access stations in all parts of London. No more than 30% of all shifts in any given period should be conducted in a single week.