



Framework Reference Number: **TfL 90865**

**Customer Research and Insight Services Framework –
Lot 3 - Accessibility Mystery Traveller Survey (AMTS)**

Date: **24th March 2017**

Schedule 6 Call-off Contract

Task P - Accessibility Insight Package

between

Transport for London

and

**Munro Market Research Limited (trading as) Future
Thinking**

SCHEDULE 6 - CALL-OFF CONTRACT

Framework Number: TfL 90865 - Customer Research & Insight - Lot 3 -
Accessibility Mystery Traveller Survey (AMTS)
Call-Off Contract Number: Task P - Accessibility Insight Package
Outline Agreement Number: 4600004831/10

THIS CALL-OFF CONTRACT is made the _____ day of _____ 2017

BETWEEN:

- (1) Transport for London (“**the Authority**”); and
- (2) Munro Market Research Limited (trading as) Future Thinking, a company registered in England and Wales (Company Registration Number 01193016) whose registered office is at Laystall House, 8 Rosebery Avenue, London, EC1R 4TD (“**the Service Provider**”).

RECITALS:

- A. The Contracting Authority and the Service Provider have entered into an agreement dated 24th March 2017 which sets out the framework for the Service Provider to provide certain Services to the Contracting Authority or the Authority (“**the Agreement**”).
- B. The Authority wishes the Service Provider to provide the specific Services described in this Call-Off Contract pursuant to the terms of the Agreement and this Call-Off Contract and the Service Provider has agreed to provide such Services on those terms and conditions set out in the Call-Off Contract.

THE PARTIES AGREE THAT:

1. CALL-OFF CONTRACT

- 1.1 The terms and conditions of this Agreement shall be incorporated into this Call-Off Contract.
- 1.2 In this Call-Off Contract the words and expressions defined in this Agreement shall, except where the context requires otherwise, have the meanings given in this Agreement. In this Call-Off Contract references to Attachments are, unless otherwise provided, references to attachments of this Call-Off Contract.

2. SERVICES

- 2.1 The Services to be performed by the Service Provider pursuant to this Call-Off Contract are set out in Attachment 1.
- 2.2 The Service Provider acknowledges that it has been supplied with sufficient information about this Agreement and the Services to be provided and that it has made all appropriate and necessary enquiries to enable it to perform the Services under this Call-Off Contract. The Service Provider shall neither be entitled to any additional payment nor excused from any obligation or liability under this Call-Off Contract or this Agreement due to any misinterpretation or misunderstanding by the Service Provider of any fact relating to the Services to be provided. The Service Provider shall promptly bring to the attention of the Call-Off Co-ordinator any matter that is not adequately specified or defined in the Call-Off Contract or any other relevant document.
- 2.3 The timetable for any Services to be provided by the Service Provider and the corresponding Milestones (if any) and Project Plan (if any) are set out in Attachment 1. The Service Provider must provide the Services in respect of this Call-Off Contract in accordance with such timing and the Service Provider must pay liquidated damages in accordance with this Agreement of such an amount as may be specified in Attachment 1. The Service Provider shall be liable for the ongoing costs of providing Services in order to meet a Milestone.
- 2.4 The Service Provider acknowledges and agrees that as at the commencement date of this Call-Off Contract it does not have an interest in any matter where there is or is reasonably likely to be a conflict of interest with the Services provided to the Authority under this Call-Off Contract.

3. CALL-OFF TERM

This Call-Off Contract commences on the date of this Call-Off Contract or such other date as may be specified in Attachment 1 and subject to Clause 4.2 of this Agreement, shall continue in force for the Call-Off Term stated in Attachment 1 unless terminated earlier in whole or in part in accordance with this Agreement.

4. CHARGES

Attachment 2 specifies the Charges payable in respect of the Services provided under this Call-Off Contract. The Charges shall not increase during the duration of this Call-Off Contract unless varied in accordance with this Agreement. The Service Provider shall submit invoices in accordance with this Agreement and the Charges shall be paid in accordance with this Agreement.

5. CALL-OFF CO-ORDINATOR AND KEY PERSONNEL

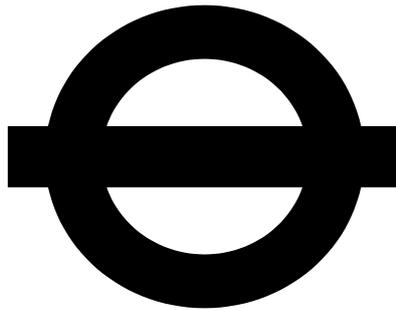
The Authority's Call-Off Co-ordinator in respect of this Call-Off Contract is named in Attachment 1 and the Service Provider's Key Personnel in respect of this Call-Off Contract are named in Attachment 2.

1. Services to be provided

Appendix 1

The Specification

TfL 90865 – Lot 3 – Task P - Accessibility Insight
Package (AIP)



Project Ref :TfL 90865 – Lot 3 – Task P

Version: V 1.4

Date: 12 December 2016

Transport
42-50 Victoria Street
London
SW1H 0TL

for London

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1. ORGANISATIONAL OVERVIEW

1.1 Transport for London (TfL)

TfL was created in 2000 as the integrated body responsible for London's transport system. TfL is a functional body of the Greater London Authority. Its primary role is to implement the Mayor of London's Transport Strategy and manage transport services to, from and within London.

TfL manages London's buses, the Tube network, Docklands Light Railway, Overground and Trams. TfL also runs Santander Cycles, London River Services, Victoria Coach Station, the Emirates Air Line and London Transport Museum. As well as controlling a 580km network of main roads and the city's 6,000 traffic lights, TfL also regulates London's taxis and private hire vehicles and the Congestion Charge scheme.

Further background on what TfL does can be found on the TfL website here:

<https://tfl.gov.uk/corporate/about-tfl/what-we-do>

1.2 Business Unit

Customer and Employee Insight provide a detailed understanding about what our customers and staff think and feel, and how they behave. This helps identify key issues and business priorities to inform our decision making and to help us understand how we are performing in meeting different customers' needs.

2. INTRODUCTION

TfL is seeking to appoint providers of insight to help develop a deeper understanding of the needs of disabled customers and our performance in meeting those, plus manage and drive insight and business action from TfL's programme of customer research to achieve the goal. The partner agency(/ies) will work very closely with TfL's Customer and Employee Insight team to plan a customer focused, effective and cost efficient programme of work. The partner agency, therefore, will need to build up an excellent knowledge of TfL's people, business and responsibilities.

TfL's Customer and Employee Insight team's goal is to be a centre of excellence for customer, stakeholder and staff insight, making insight indispensable to TfL's decision making. We are also performing a pivotal role in helping the organisation become more customer-focused.

The planned contract award date is 28th Feb 2017, with a pilot running until 31st March.

Please note: this brief should be read in conjunction with the overarching Generic Supplier Brief (TfL 90865 Lot 3) for Customer and Employee Insight Services (Appendix A), which contains key details about the requirements from suppliers around business objectives, research quality and working with TfL (note exceptions in below section 3.1).

3. WORKING IN PARTNERSHIP WITH TFL

The Customer and Employee Insight (C&EI) team aim to build partnerships with their suppliers in order to deliver greater insight to the organisation and strengthen understanding of our customers across TfL.

TfL has been working this way for a number of years. It has enabled the in-house Customer and Employee Insight team to work alongside the agencies to develop in-depth knowledge of internal stakeholders' business and research needs, and deliver consistencies in approach and quality. This has ensured efforts and resources can be concentrated on delivering insight and business value while maximising efficiencies and cost-effectiveness.

Agencies will be required to work with us in a flexible way, ensuring there is a good fit with our ethos. They will also be expected to work collaboratively with our other partner research agencies (in particular other agencies providing insight around issues affecting disabled customers), and with our advertising and media agencies, in order to produce and disseminate insight with impact.

Over the past six years, the C&EI team has developed to being an internal consultancy to the organisation and a thought-leader, and a driver of the organisation's customer strategy. Going forward, the team will be occupied with the usage and application of existing insights as well as the creation of new ones. Given the current financial climate, cost savings are becoming increasingly important. However, while there are cost savings and efficiencies in reducing the amount of primary research that we run, the developments are also partly the result of a macro-environment in which customer focus is increasingly important to TfL and a general upskilling of its C&EI team in the application of insight must continue. Agencies should describe in their proposal how they propose to deliver insight and contribute to building customer understanding for TfL in a cost efficient way.

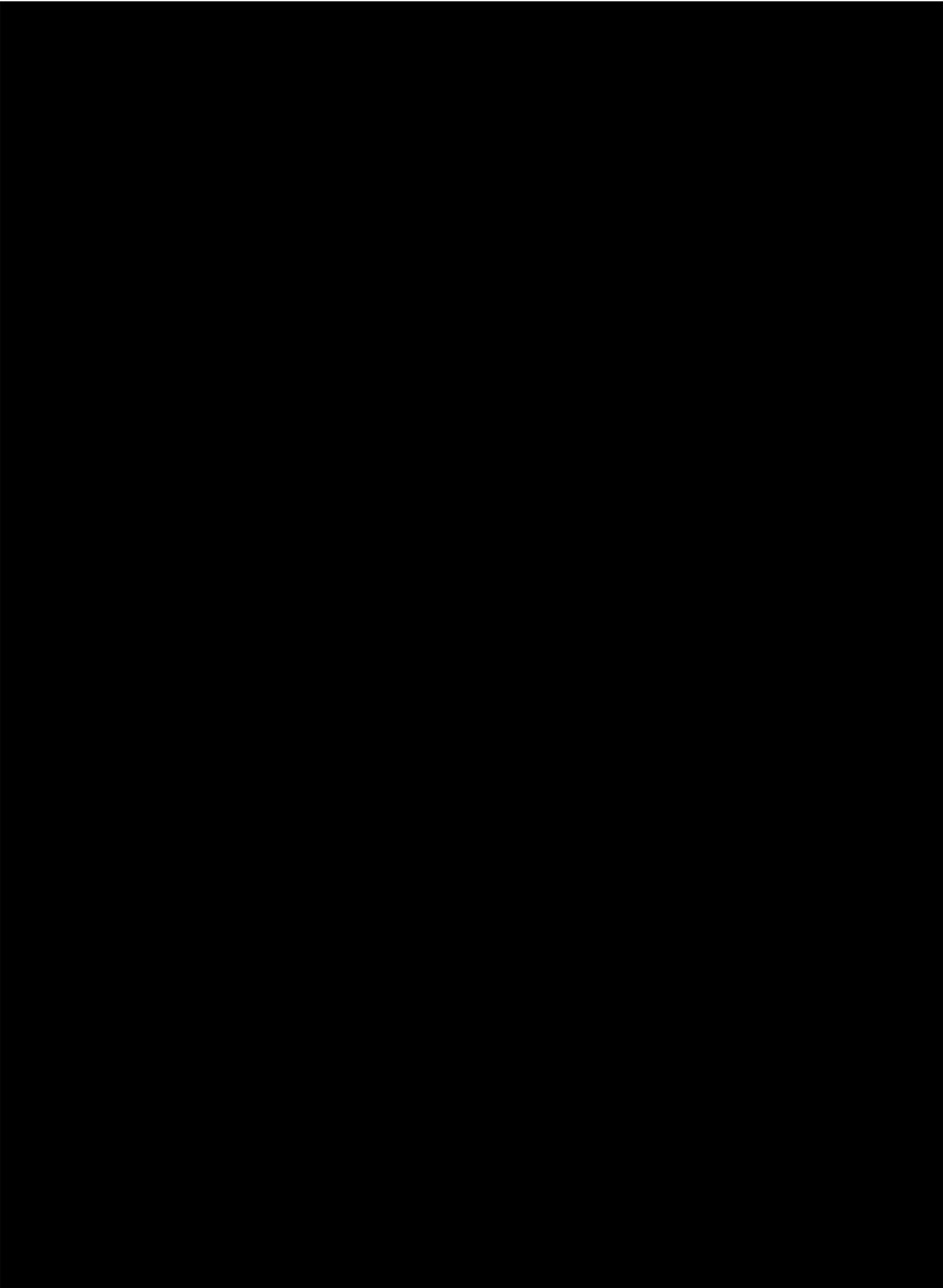
3.1 Agency Team

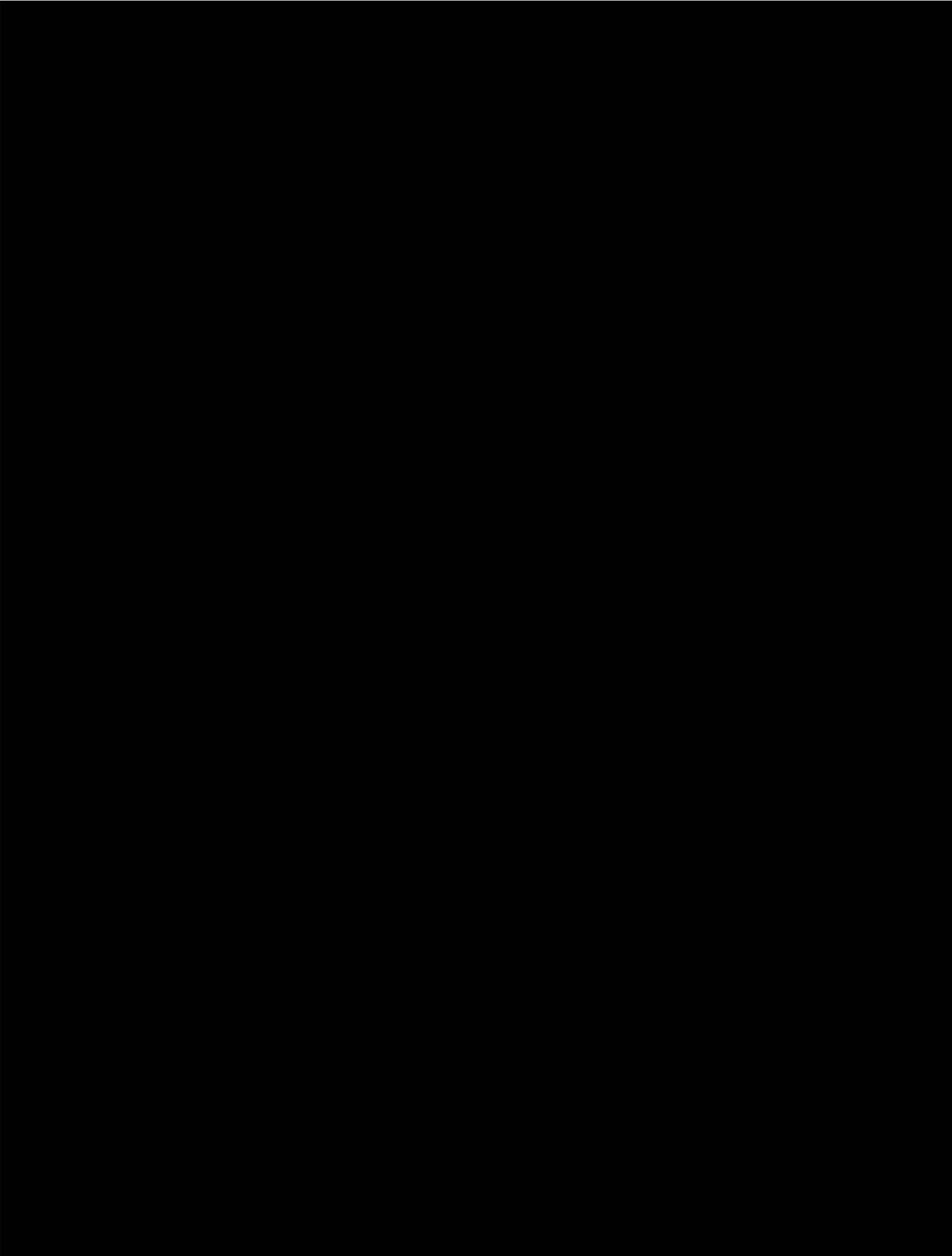
A single point of contact at the agency is required to act as Contract Manager, but it is expected that different individuals within the agency will carry out the work. The Contract Manager must be able to fulfil the following requirements:

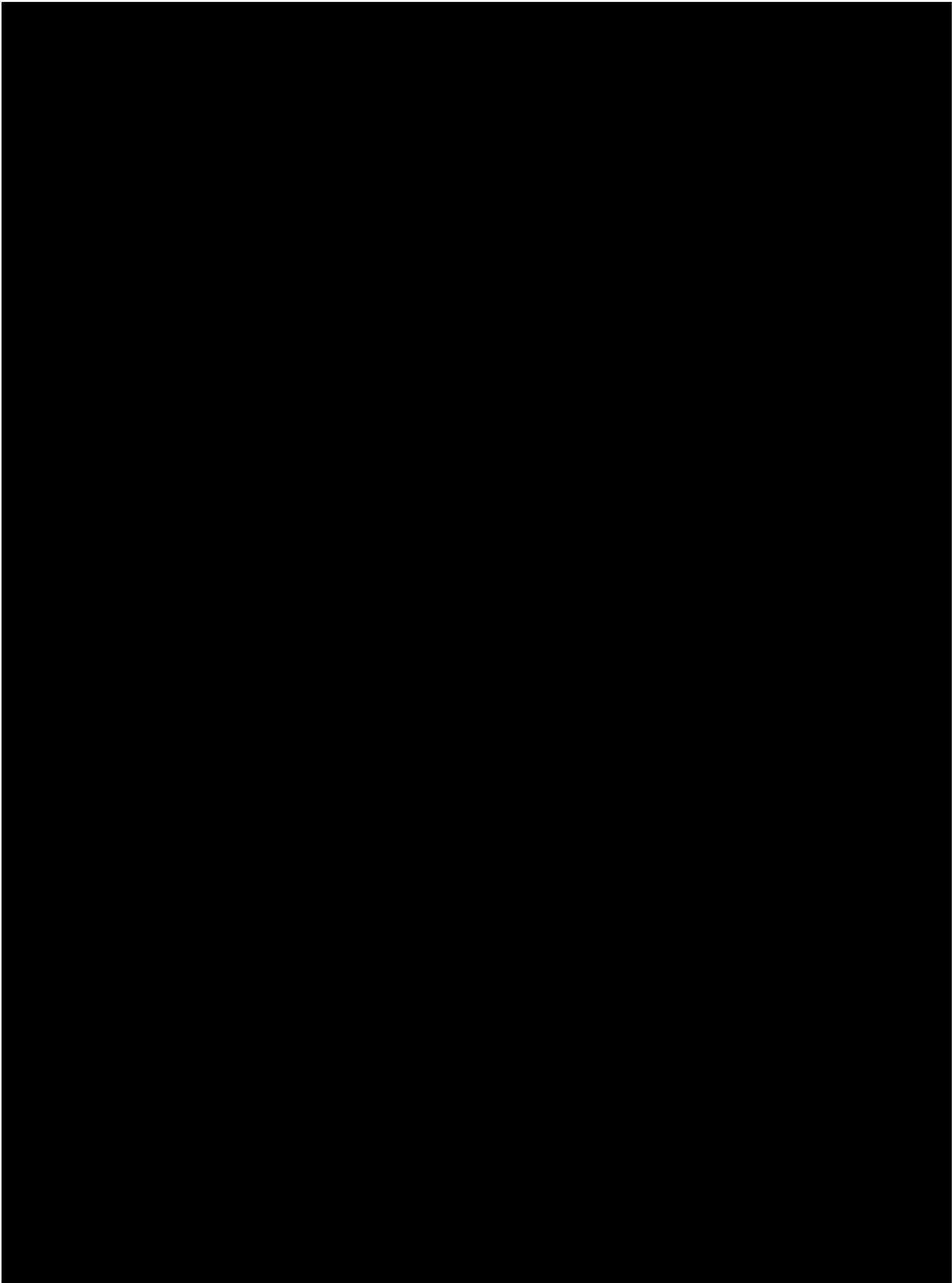
- Ensure results are presented engagingly, with a clear story.
- Be the central point of contact and take responsibility for problem solving
- Ensure quality control, especially regarding communications, report quality and tailoring outputs to different clients
- Introduce processes that ensure all jobs are managed seamlessly, delivered on time and to the required standard,
- Manage communications across internal agency teams, ensure that new agency staff are briefed about TfL's business, aims, organisation culture and the agency's way of working with TfL
- Ensure good communications between the agency and the TfL contact points.

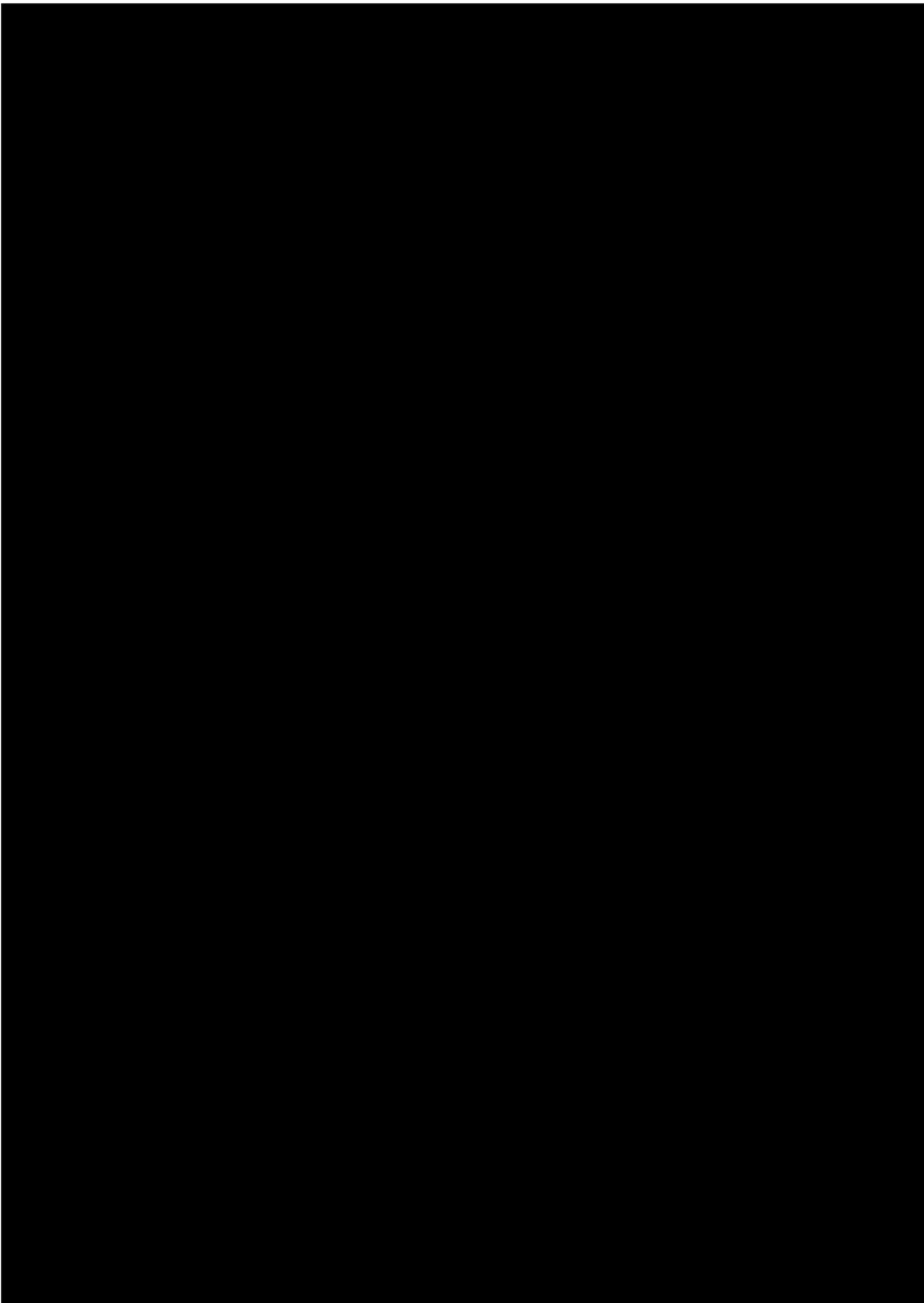
Agencies are required to resource the programme of work with an agency team who will deliver the quality and experience required by TfL, to provide insightful reporting, a high standard of process management and to build a strong relationship with us.

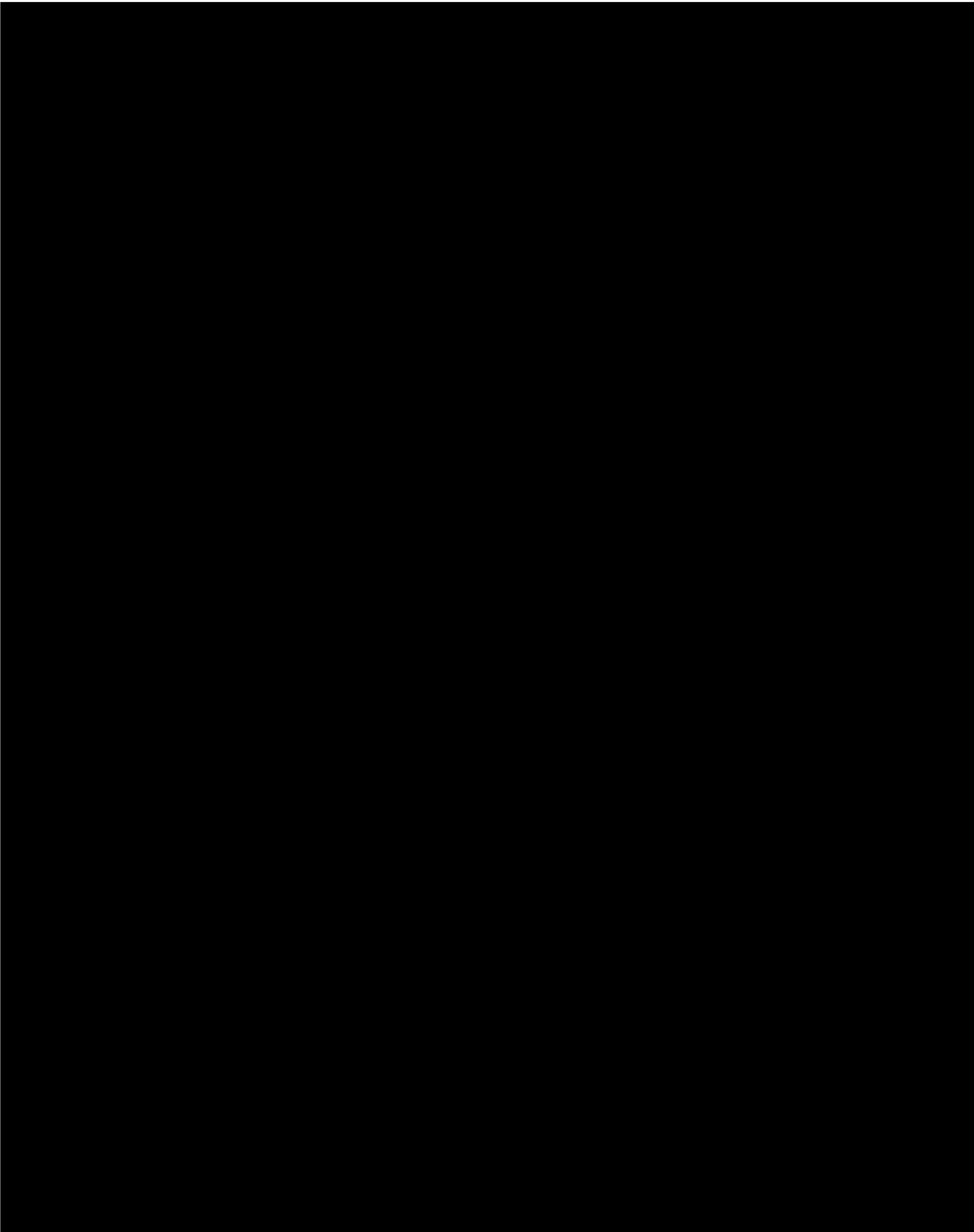
Please note that the requirement at section 4.1 in The Generic Brief for all Lots (Appendix A) that "TfL strongly prefers that all key staff spend at least 50% of their time on TfL business..." is not applicable to this brief. Please also note the section around "agency staff working part-time with the CR&I team" in section 3.1 of The Generic Brief for all Lots (Appendix A) is also less applicable to this brief. While we envision working closely with the partner agency(/ies) and that this will involve visiting TfL's offices and stakeholders, particularly at the set-up period, a 6 month agency placement (for example) is less likely.











5. THE ACCESSIBILITY INSIGHT PACKAGE

5.1 Topics

We require to have a holistic view of our delivery around accessibility in terms of the three broad categories:

- Staff
- Infrastructure
- Information

However, each mode has their own priority areas (noted in the appendix B) and the 'Accessibility Insight package' will need to cover each of these, as well as picking up on new issues that may arise.

5.2 Sampling and quality

We require suppliers' recommendation on providing feedback which we can look at:

- a) By impairment type, incl. hidden disabilities
- b) By different mode (including attribution to licensee, operators etc.)
- c) Across different parts of London

It is requested that the below are factored in when it comes to sampling and quality:

- The experience of different disabled customers across a spread of different impairment categories
- Some impairments are visible and some are less obvious. Analysis should allow us to differentiate hidden and visible disabilities and the impact this may have on staff behaviour etc.
- While the respondents / panel members may not need extensive training, it will be important that they are aware of what transport modes TfL are responsible for and what belongs to other providers e.g. at the less 'obvious' National Rail serviced stations such as West Ham, Richmond, Stratford, Upminster. TfL will provide more information on this as required.

- Whilst we don't have set requirements in terms of regional coverage and spread of trips, this should be broad, and cover both inner and outer London journeys, within the M25.

5.3 Recruitment avenues

We require to understand what recruitment options or recommendations agencies would suggest. *Potential* routes for respondent recruitment through TfL are noted below, however we would need to be mindful about overburdening or oversampling any one route.

- TfL's accessibility database
- Twitter feed followers e.g. of @TfLaccess
- 'Croydon Accessibility' group (Trams in particular)
- Current accessibility panel members / stakeholder contacts

5.4 Reporting and outputs

As mentioned, the presentation, insights and structure of the reporting (for both AFP and the whole Accessibility Insight Package) is extremely important – the outputs need to be clear, concise, insightful and suitable for a range of audiences who are interested in different levels of detail. The C&EI Insight team and internal stakeholders will be the most frequent users of the reports, but other important users will include:

- Senior Directors such as Vernon Everitt (Customers, Communication & Technology MD)
- The Equality and Inclusion team in TfL Planning
- Advisory / Interest / Stakeholder groups such as IDAG (Independent Disability Advisory Group)
- Contractors and Operators such as Arriva (LO), MTR (TfL Rail), Abellio (Bus)
- Other internal teams such as Transport Planning

The outputs therefore are required to provide a clear summary up front of insights, pulling out the key priority points, in addition to providing the detail behind it elsewhere within the document, should we need to dig into it further. The outputs are

required to be easy to navigate and appealing in order to maximise use, and therefore influence and action. We will work with appointed supplier(s) and internal stakeholders to develop these as part of the set up of the AIP.

6. KPI'S AND SLA'S

KPI's and SLA's are as per Lot 3 of the TfL 90865 Framework agreement, with the below additional specific KPI's and SLA's. Further KPI's and SLA's to be agreed with the successful supplier(s) on contract award.

- Initial weekly set-up meetings/Client Review Meetings (then at each quarter)
- Cost Control - work towards achieving cost stability across all activities via effective sampling. Achieve agreed budget targets
- Output is delivered on time and to budget each wave

7. APPENDICES

Appendix A Supplier Brief TfL 90865 Lot 3

Appendix B Priority areas per mode

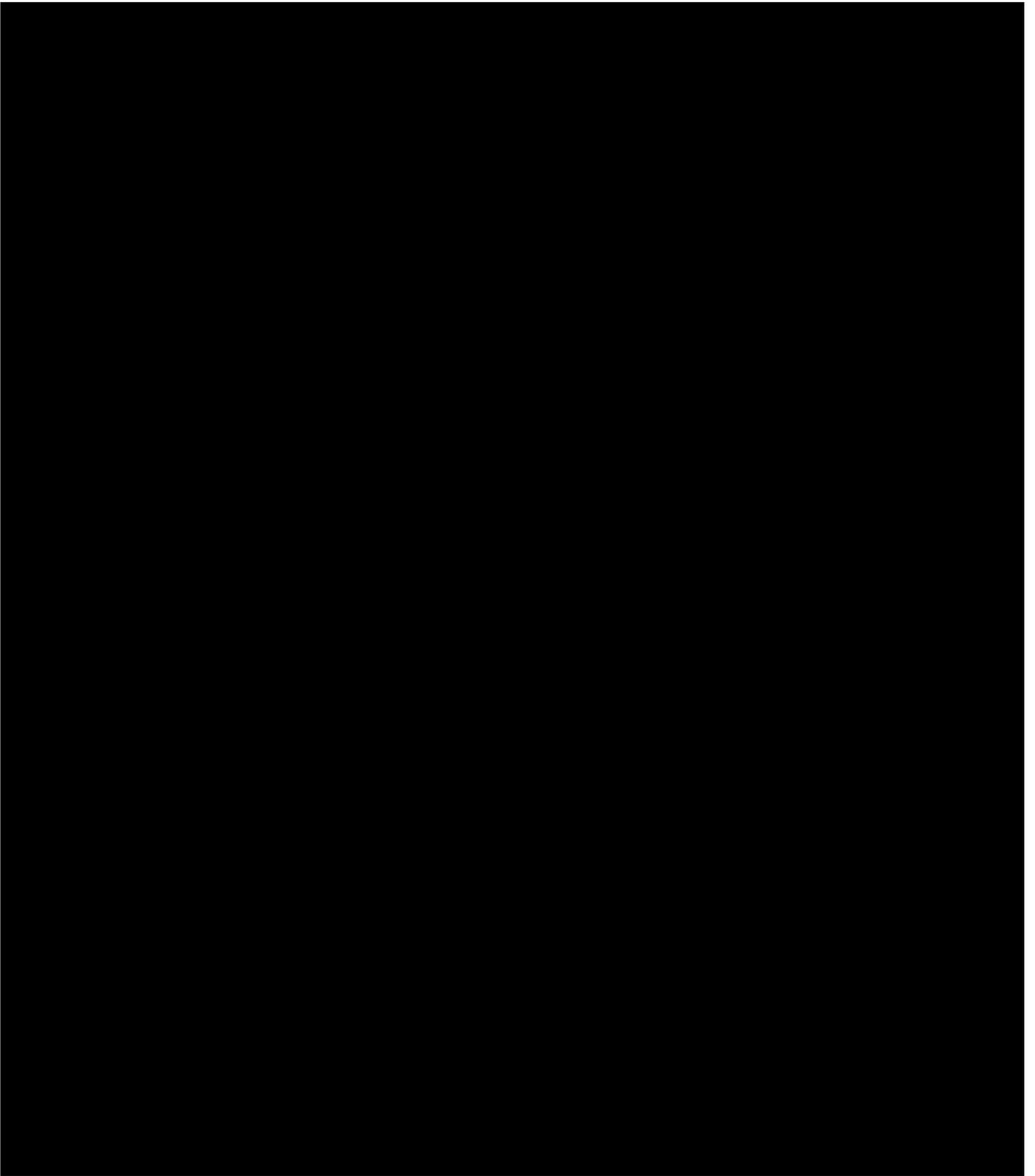
Appendix C Potential alternate data sources

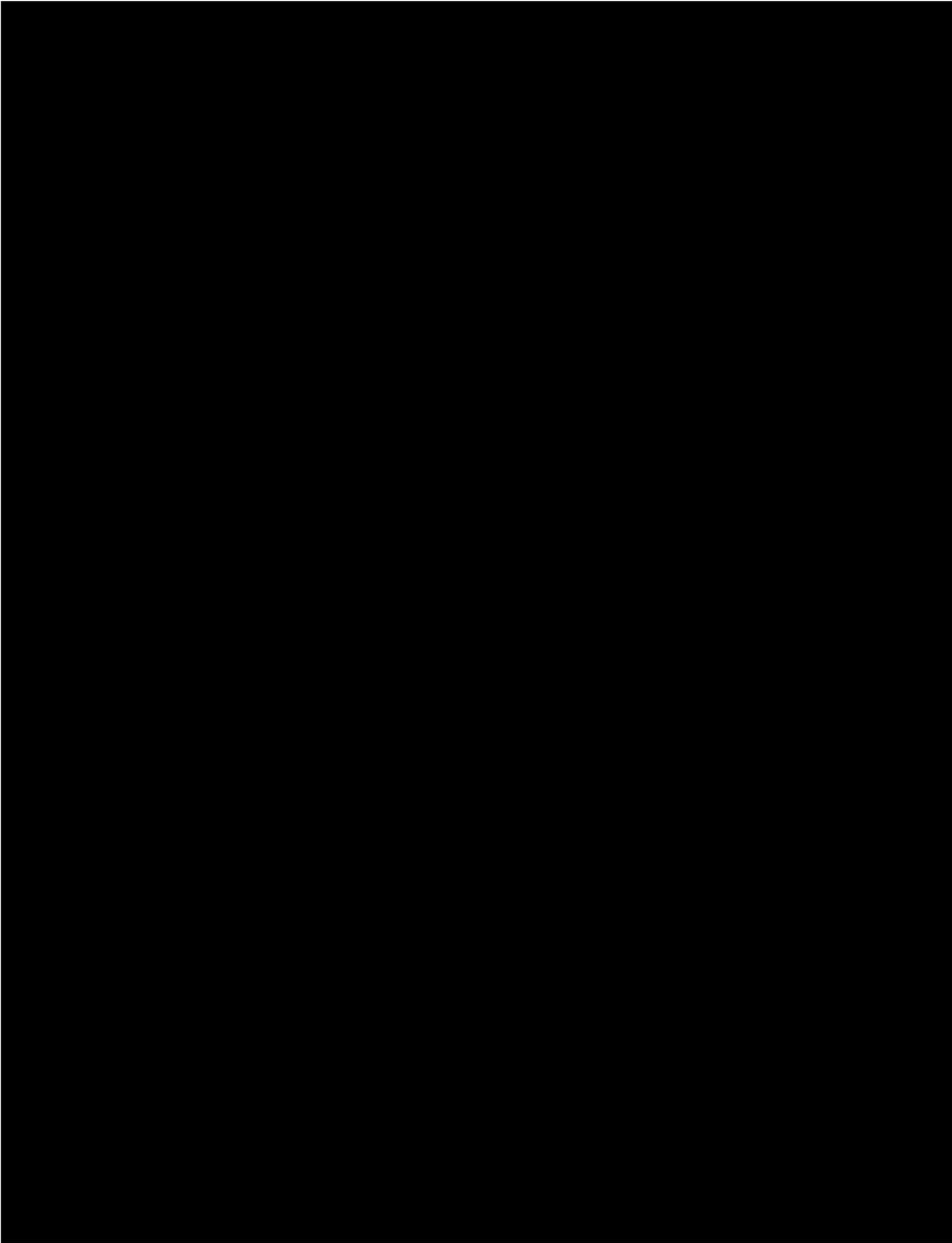
Appendix D Lift Failures LO Period 7-2016

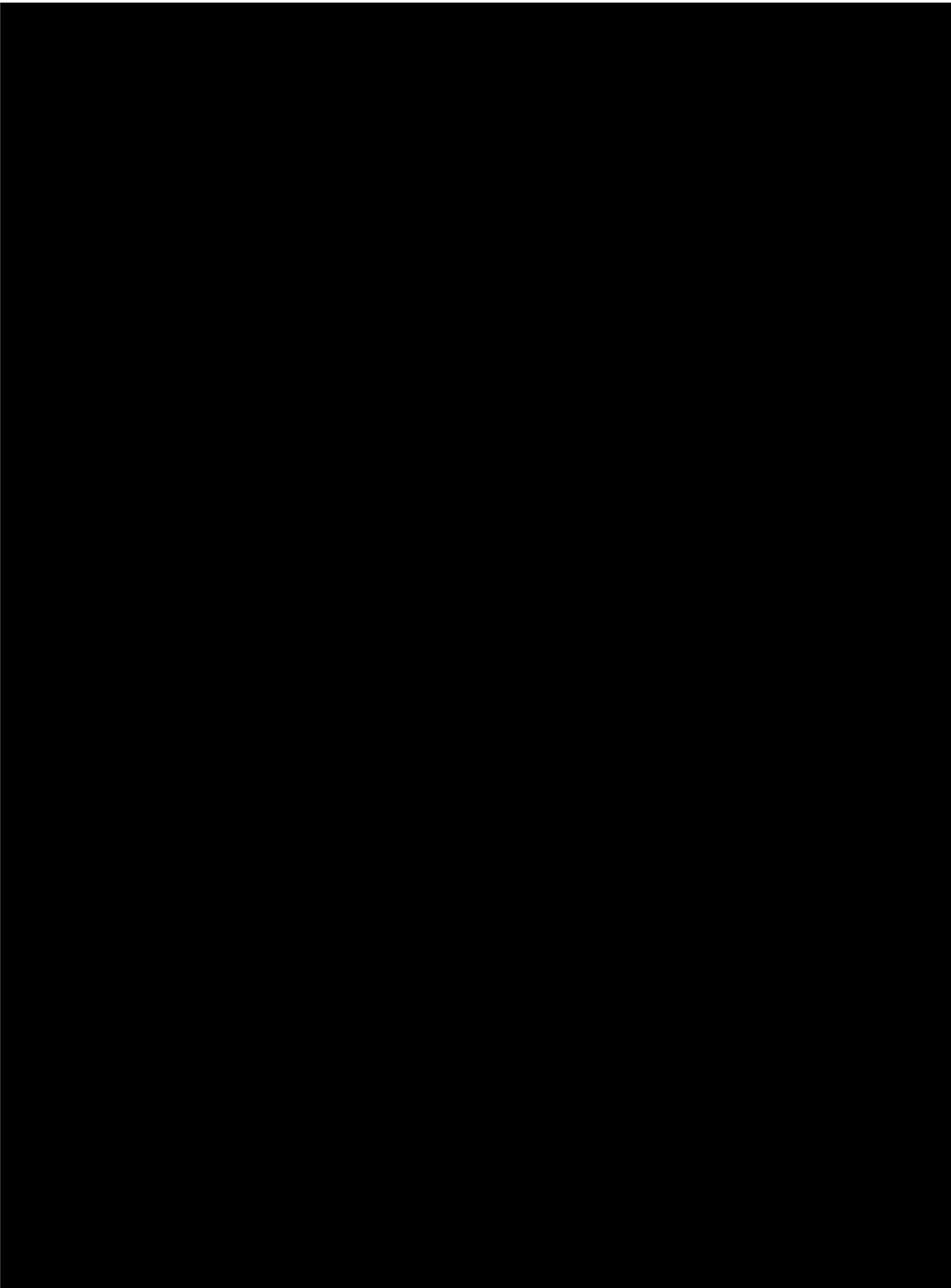
Appendix 2 Technical Evaluation Questionnaire

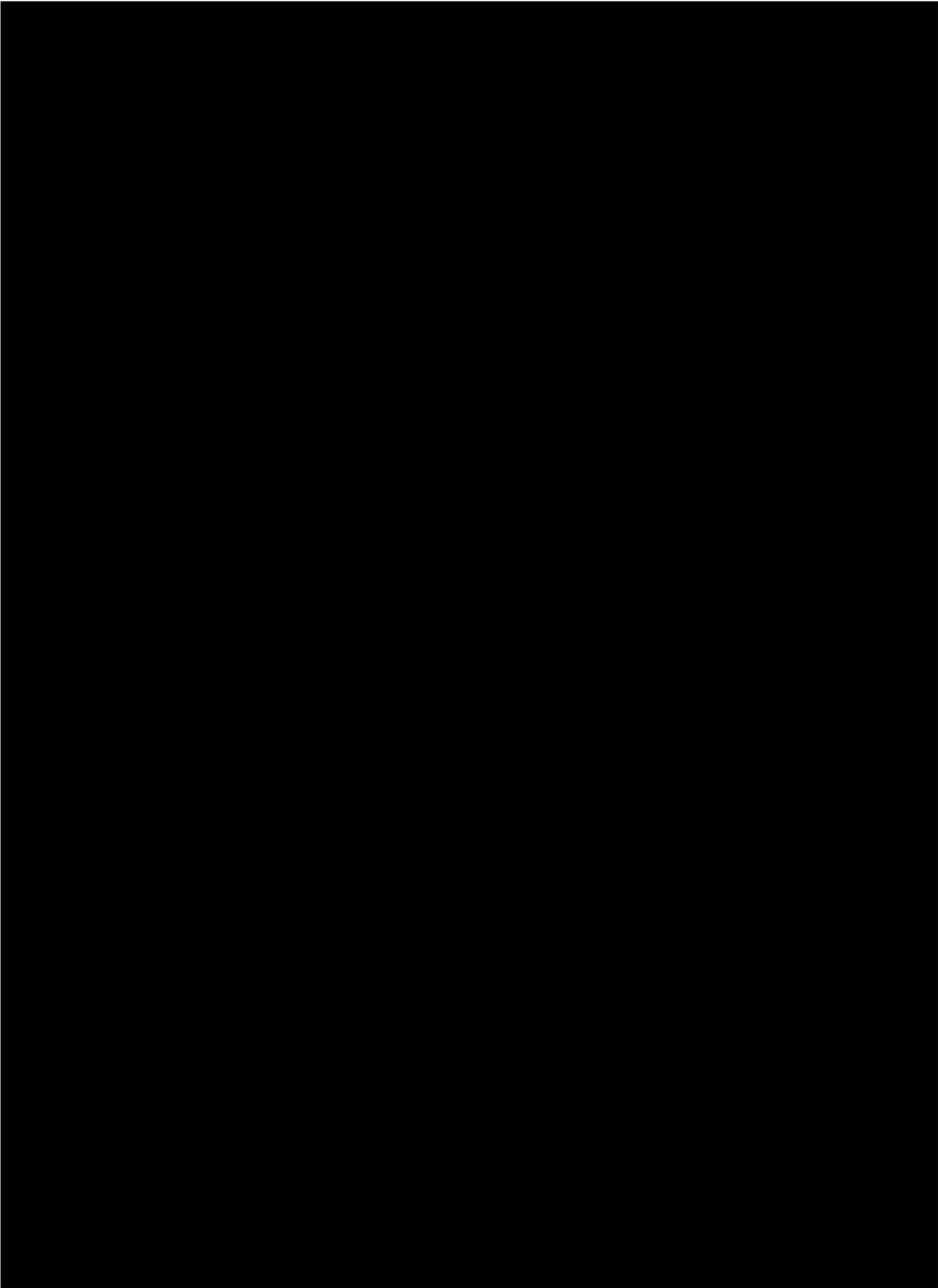
Appendix 3 Commercial Pricing Schedule

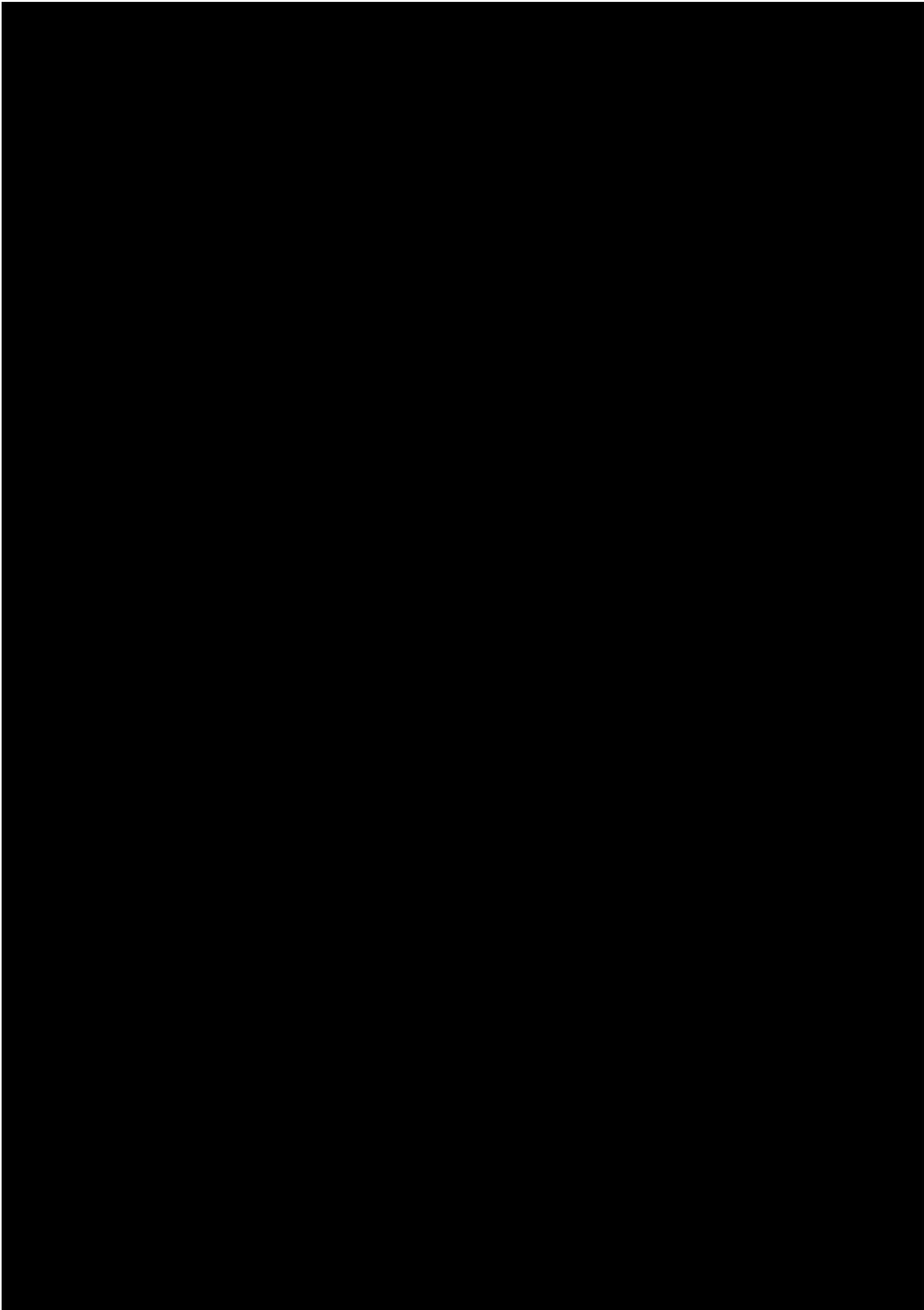
Appendix 4 Call-Off Contract Template

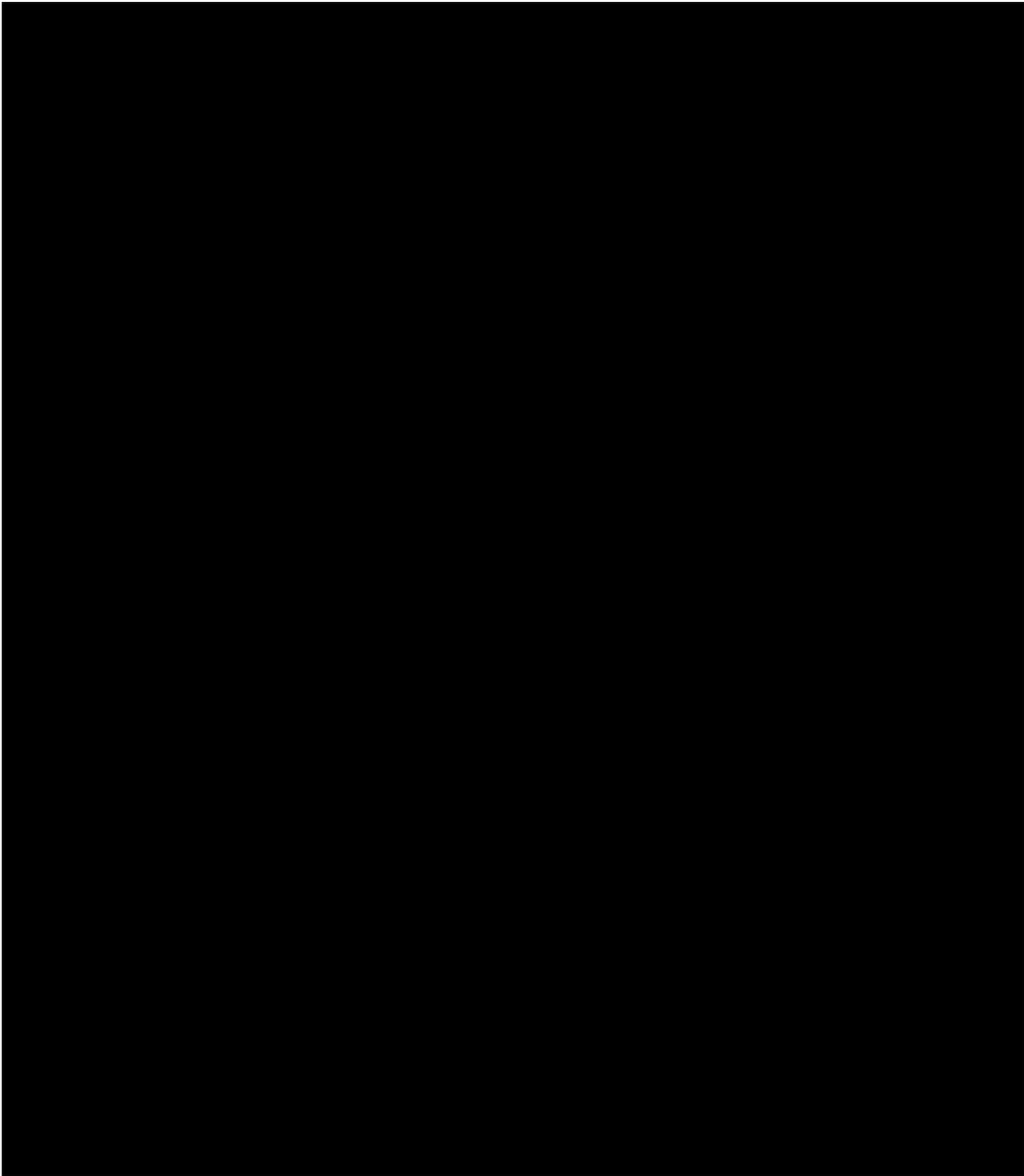












SCHEDULE 7 - FORM FOR VARIATION

Agreement Parties: *[to be inserted]*

Call-Off Contract Number: *[to be inserted]*

Variation Number: *[to be inserted]*

Authority Contact Telephone *[to be inserted]*

Fax *[to be inserted]*

Date: *[to be inserted]*

AUTHORITY FOR VARIATION TO AGREEMENT (AVC)

Pursuant to Clause 32 of this Agreement, authority is given for the variation to the Services and the Charges as detailed below. The duplicate copy of this form must be signed by or on behalf of the Service Provider and returned to the Call-Off Co-ordinator as an acceptance by the Service Provider of the variation shown below.

DETAILS OF VARIATION	AMOUNT (£)
ALLOWANCE TO THE AUTHORITY	
EXTRA COST TO THE AUTHORITY	
TOTAL	

.....
For the Authority

ACCEPTANCE BY THE SERVICE PROVIDER	
Date	Signed