

Invitation to tender

Data Collection Framework

17 May 2022

To find out more, please contact: Katherine Oliver,
Monitoring@sustrans.org.uk

Sustrans is the charity making it easier for people to walk and cycle.

We connect people and places, create liveable neighbourhoods, transform the school run and deliver a happier, healthier commute.

Join us on our journey.

www.sustrans.org.uk

Registered Charity No. 326550 (England and Wales) SC039263 (Scotland).



Contents

| | |
|---|----|
| Introduction | 2 |
| 1.1 Sustrans Overview | 2 |
| 1.2 Sustrans Values | 3 |
| 1.3 Sustrans Research and Monitoring Unit | 3 |
| Specification | 5 |
| Lot 1 – Route User Intercept Surveys | 6 |
| Lot 2 - Counts and Observational Studies | 8 |
| Lot 3 – Household Surveys | 10 |
| Lot 4 – Qualitative work | 11 |
| Tender Requirements | 12 |
| Timescales | 12 |
| Tender submission | 12 |
| Tender evaluation criteria | 23 |

Introduction

Sustrans are seeking to appoint a framework of suppliers to support data collection across the UK

1.1 Sustrans Overview

Sustrans is the charity making it easier for people to walk and cycle. We connect people and places, create liveable neighbourhoods, transform the school run and deliver a happier, healthier commute. Sustrans works in partnership, bringing people together to find the right solutions. We make the case for walking and cycling by using robust evidence and showing what can be done. We are grounded in communities and believe that grassroots support combined with political leadership drives real change, fast.

Sustrans are a national charity, working across the whole of the UK. We are the custodians of the National Cycle Network, a UK-wide network of traffic-free paths for everyone, connecting cities, towns and countryside, loved by the communities they serve.

We rely on statutory and voluntary income to enable us to carry out our nationwide work of improving cycling and walking infrastructure to create places with clean air and green spaces.

1.2 Sustrans Values

We include everyone

We are here for everyone. We create safe and accessible places, value difference, and support everyone to participate as fully as possible in everything we do.

We have the courage to question

We are not afraid to challenge the status quo. We say what we believe, constructively, even when it's uncomfortable.

We act local and think big

We make a difference at a local level and we work from the grassroots up. We're always thinking about the bigger picture and long-term impact.

We get things done, together

We are doers. If we see a problem we get out there and work with others to find a solution.

We're always learning

We don't have all the answers. We never stop learning from the people and world around us and we always share what we've learnt.

1.3 Sustrans Research and Monitoring Unit

Sustrans' Research and Monitoring Unit (RMU) is the leading national centre of excellence for active travel monitoring, evaluation and research with over 20 years of experience in providing independent and transparent evidence on walking and cycling.

It is RMU's mission:

To provide evidence on walking and cycling that is transparent and authoritative, and which influences and shapes policy, practice and behaviour.

The team of 80 skilled, experienced and highly capability specialists cover a range of disciplines including evaluation, monitoring, data collection, appraisal and analysis, modelling, research and Geographic Information Systems. We have also developed a close and strong external network of academics which we are able to draw into the work that we do.

We are specialists in designing and implementing approaches to assess what works in encouraging active travel behaviour and the effects of infrastructure interventions. The team designs and manages primary data collection but also have the added benefit of a Sustrans national evidence base of walking and cycling data. Our portfolio ranges from monitoring and evaluation of local projects to nationwide programmes with international significance.

RMU works across departments within Sustrans and to help delivery teams understand the impact of their projects and design effective interventions. RMU also work directly with a number of external clients including commercial and private sector organisations to provide evaluation of projects to determine the impacts of the programme and any learning to provide better design for future projects.

Some of the most influential work that we undertake involves translating research and data on the benefits of walking and cycling into policy and practice. We work with national government in both health and transport departments, local authorities, charities and other public sector organisations to provide evidence to help them to make the case for investment in walking and cycling.

RMU have multiple and far reaching partners in the active travel sector including academics and research communities, local and national government, and consultancies. We work with them to provide evidence that is transparent and authoritative and which influences and shapes policy, practice and behaviour.

Maintaining the credibility of the work we produce is key to our principles as a unit. RMU guarantees a professional service that adheres to the highest ethical standards and best practice research techniques and approaches which provides rigour and weight to the findings produced.

Specification

Sustrans works with many partners to monitor and evaluate schemes that support walking and cycling. This may mean counting and surveying route users, counting vehicles and observing vehicle movements, conducting household based surveys, or qualitative studies. Sustrans is seeking to appoint a framework of suppliers to support us in this data collection across the UK. The framework is divided into the lots below.

- Lot 1 – Route User Intercept Surveys
- Lot 2 – Counts and Observational Studies
- Lot 3 – Household based surveys
- Lot 4 – Qualitative research

Suppliers may apply to more than one lot.

The Framework will be established for an initial period of 2 years with an option to extend for a further period or periods up to a total of 2 years taking the contract term to a maximum of 4 years. The framework is anticipated to start from August 2022.

The total value of the framework is estimated at £390,000 per year. This is not guaranteed but is based on the range of schemes we are likely to deliver and spend patterns in prior years.

The aim of this framework is to identify a pool of contractors to deliver the services required for monitoring and evaluation studies.

Sustrans will invite suppliers appointed to the relevant framework lots to call-off tenders for packages of surveys, as and when required. There is potential for Direct Award for local suppliers who can offer value for money and have a proven track record.

Sustrans will appoint 4-6 suppliers to each lot (depending on geographical location).

Any communication regarding this framework, including clarifications should be sent to Monitoring@sustrans.org.uk.

Lot 1 – Route User Intercept Surveys

Route User Intercept Surveys (RUIS) are one of the core tools used by Sustrans' Research and Monitoring Unit (RMU) to monitor usage by cyclists and pedestrians of the National Cycle Network and other routes. Surveys are undertaken across the UK, as part of monitoring to meet the aims and objectives of both Sustrans and external funders.

Route User Intercept Surveys generate data on the volume and characteristics of journeys on a route at a particular point in time. Repeat iterations of surveys are used to monitor changes in use over time, often in relation to the implementation of interventions.

Complete details of the RUIS programme are provided below.

RUIS comprise two parts:

- Four 12-hour manual counts of all route users broken down into half hour intervals by estimated age, gender, mode of travel and direction
- Structured interviews of adult route users over the same 12-hour periods as the manual count

Manual counts and surveys are performed on four individual days – weekdays and a weekend day, usually each in term time and school holiday time, as specified by Sustrans. The format and layout of the surveys will be tailored to meet the needs of the project in question therefore it is possible that we will require shorter or longer monitoring periods as well as manual counts conducted without surveys. Surveys generally record details of the activity undertaken (for example, walking, cycling, dog walking), journey purpose, perceptions of the route and demographic information. Surveys comprise approximately 30-40 questions, and typically take between five and eight minutes to complete.

Sustrans will provide the supplier with the following documents:

- An electronic copy of the survey form to be used on site
- An electronic form which can be used to record the count data on site
- Instructions on how each question should be asked, and how the survey and count should be undertaken
- Full and complete details of the location of the survey site and the directions of travel to be counted
- A survey order form keeping a record of the agreement of the commission

Please note: Sustrans wishes to conduct RUIS and manual counts using online technologies. We currently design surveys and forms using Snap Survey Software, with responses uploaded via a Snap App for analysis/reporting purposes. It would be advantageous if suppliers utilised Snap or similar online survey software.

Sustrans will also inform the supplier how busy the location is likely to be to help inform the number of enumerators and surveyors required at the site, where this is available.

The supplier is expected to:

- survey, as a minimum, 10-15% of users counted at busier sites, but might stipulate a minimum actual sample of 120 (we require suppliers to inform us during the data collection process if the sample size is at risk)
- ensure surveys encompass an approximately representative sample of the full range of route users (ie compared to manual count)
- comply with Sustrans' quality requirements in terms of survey delivery and data quality
- Provide a record of contextual information about the data collection, including images of the site location, a record of weather conditions and observations that affect usage/experience such as events or adverse conditions
- complete suitable risk assessments for staff welfare and survey feasibility (in liaison with Sustrans)
- return data to Sustrans in the agreed format within 2 weeks of the survey unless otherwise specified

In addition, suppliers should demonstrate their quality assurance processes and any relevant accreditations eg adherence to the MRS Code of Conduct and/or IQCS (Interviewer Quality Control Scheme). Sustrans may carry out random audits of surveys.

Sustrans RUIS work is UK wide therefore it is important that suppliers are clear about their geographic capabilities ie UK wide, England only etc. Limited geographic coverage will not rule out a supplier from the framework but we do need to understand geographic coverage.

Surveys will be procured in batches of between 10 and 20 sites but may also be procured one site at a time. This is because several Sustrans colleagues require RUIS and their needs vary in size and complexity. There may be occasions when Sustrans requires unexpected ad hoc surveys at short notice. Suppliers will need to explain how they would handle such situations.

First surveys likely to be commissioned starting in July/August 2022.

Lot 2 - Counts and Observational Studies

Traffic, Speed and Volume surveys (TSV), along with video/manual counts (VMC) are core tools used by Sustrans' Research and Monitoring Unit (RMU) to monitor usage by cyclists, pedestrians and vehicles on existing and new routes. These surveys are undertaken across the UK, as part of monitoring to meet the aims and objectives of both Sustrans and external funders.

These tools generate data on the travel mode, speed and volume of journeys on a route at a particular point in time. Repeat iterations of surveys are used to monitor changes in use over time, often in relation to the implementation of interventions.

These tools include:

- Automatic traffic counts and speed surveys (using pneumatic tubes)
- Video surveys
 1. Counts of route users, including gender, approx. age, and transport mode
 2. Junction turning counts
 3. Pedestrian movement and dwell times surveys

A brief outline of the typical process involved in commissioning these tools is provided below

Traffic, Speed and Volume surveys

- Typically, the TSV exercise is conducted at one location for 7 consecutive term-time days, with counts covering 24 hours per day
- Sustrans will advise on the best location for counting equipment to be placed and will provide information on typical or historic usage figures for the area in question
- Sustrans will provide a TSV data entry spreadsheet. This should be used to record data in a vehicle-by-vehicle format ie one row of the spreadsheet for each vehicle counted
- The data entry spreadsheet will record: date, time, direction of travel, speed, and vehicle class
- Alongside the data entry spreadsheet Sustrans will also require the standard TSV output from the exercise

The supplier is expected to:

- Count the required time period ie 7 days x 24 hours

- Ensure the survey collects data accurately, flagging any issues as early as possible so that the survey period is not compromised
- Comply with Sustrans' quality requirements in terms of survey delivery and data quality
- Complete suitable risk assessments for staff welfare and survey feasibility (in liaison with Sustrans)
- Return data to Sustrans in the agreed format within the time specified in the survey order form.

Video Manual Count

- Typically, the VMC exercise is conducted at one location for 7 consecutive term-time days, with counts covering 12 hours per day (0700-1900)
- Sustrans will advise on the best location for counting equipment to be placed and will provide information on typical or historic usage figures for the area in question
- Sustrans will provide a VMC data entry spreadsheet. This should be used to record key characteristics of route users ie gender, age, mode of transport, direction of travel

The supplier is expected to:

- Count the required time period ie 7 days x 12 hours, with a full and accurate count ie 100% of route users, high accuracy in recording age, gender etc
- Ensure the survey collects data accurately, flagging any issues as early as possible so that the survey period is not compromised
- Comply with Sustrans' quality requirements in terms of survey delivery and data quality
- Complete suitable risk assessments for staff welfare and survey feasibility (in liaison with Sustrans)
- Return data to Sustrans in the agreed format within the time specified in the survey order form.

In addition, for both TSVs and VMCs, suppliers should demonstrate their quality assurance processes and any relevant accreditations. Sustrans may carry out random audits of surveys.

Sustrans RUIS work is UK wide therefore it is important that suppliers are clear about their geographic capabilities ie UK wide, England only etc. Limited geographic coverage will not rule out a supplier from the framework but we do need to understand geographic coverage.

First surveys likely to be commissioned starting in August 2022.

Lot 3 – Household Surveys

Household surveys (conducted either face-to-face, phone, online or postal), are core tools used by Sustrans' Research and Monitoring Unit (RMU) to monitor behaviour and perceptions of active travel in specific neighbourhood areas or boroughs. These surveys are undertaken across the UK, as part of monitoring to meet the aims and objectives of both Sustrans and external funders.

Used at both pre and post intervention stages, these surveys provide important results on attitudes to and impact of our work.

Typically, these surveys involve:

- Undertaking household surveys to help Sustrans understand the impact of active travel projects within communities
- Sustrans surveys are typically designed to be completed in around 10 minutes and primarily consist of quantitative questions, with a small number of open text questions - questionnaires will be provided by Sustrans when requesting a quote
- Sustrans will also provide a project brief and information slip for each survey commissioned
- We may require representative samples of neighbourhoods and city boroughs/wards and/or specifically seek to over sample underrepresented groups. Suppliers should be able to demonstrate they can do both.
- Bounds of the research area will be provided along with the target sample size. These may need to be carried out face-to-face or by telephone.
- MRS trained interviewers
- Mix of interviewing shifts on weekdays and weekends, prioritising afternoon and early evening on weekdays to ensure we capture the views of individuals who may be out at work during the day
- Paper surveys can be used but we are moving to online surveys and will require accurate and timely output submitted digitally for all surveys i.e. via Snap Survey Software
- Daily progress updates
- Upon completion of the data collection, all questionnaires should be quality checked, validated, and entered into the Excel templated provided by Sustrans. The Excel data should also be checked for data entry errors and inconsistencies

Lot 4 – Qualitative Work

Qualitative research methods such as workshops, focus groups (face-to-face and online), depth interviews (face-to-face, telephone and online) people panels; observation exercises (eg activity/dwell time), mystery visits and journal/diary keeping are all features of Sustrans' Research and Monitoring Unit (RMU) work. These methods can be applied across the UK, as part of monitoring to meet the aims and objectives of both Sustrans and external funders.

Used at both pre and post intervention stages, these methods can provide important results on behaviour, attitudes and perceptions of impact of our work.

Sustrans may seek support with all or some of the following:

- Recruiting interview and focus group participants often with specific characteristics and from specific locations
- Developing and designing interview and focus group materials including, information sheets, disclaimers, questions and topic guides
- Convening and running interviews and focus groups face to face, online, or by telephone depending on project needs
- Scheduling interviews and focus groups at a range of times to offer participants choice and to increase accessibility
- Arranging and distributing gift incentives/thank you vouchers for participants
- Transcribing interviews and focus groups, distinguishing between individual speakers
- Analysing and reporting themes from interviews and focus groups, using either inductive approaches or deductive coding using a provided coding framework

Tender Requirements

Timescales

| Date | Activity |
|---------------------------------|---|
| 17/05/2021 | Publication of invitation to tender by Sustrans |
| 31/05/2021 12 Noon | Clarification deadline |
| 07/06/2021 12 Noon | Deadline for bids |
| 10/06/2022 | Review of applications & short listing |
| 16/06/2022 or 17/06/2022 | Potential Supplier interviews |
| 21/06/2022 | Decision |
| 01/07/2022 | Standstill period |
| 01/07/2022 | Contract award |
| 01/07/2022 | Framework start |
| 30/06/2026 | Framework end |

Tender submission

Your submission, including all responses and supporting documentation, must be completed in English. Where a word limit has been indicated for a specific response, please do not exceed this limit. Any words exceeding the number stated in the question will not be read and therefore will not be evaluated.

Tenders will be made up of:

- 1 Standard supplier questionnaire
 - 2 Data protection due diligence questionnaire
 - 3 Technical questions
 - 4 Scenario pricing
-

If applying for more than one lot, you will be required to submit multiple responses to the technical questions and complete the relevant scenarios

Tenders that have passed the standard requirements will be evaluated to determine the **most economically advantageous tender(s)** by applying the following award criteria:

Quality criteria will form 70% of the overall evaluation.

Price criteria will form 30% of the overall evaluation.

The suppliers with the highest final overall scores (when all elements of the evaluation of the tenders have been completed) will be deemed to be the most economically advantageous and awarded a place on the framework.

Depending on the number/ quality/ geographic spread of responses, it is anticipated that each lot will be made up of 4-6 suppliers for the duration of the framework period.

The framework will increase capacity while offering value for money and ensuring quality. Requests for services can come at short notice.

Sustrans can cancel the tender process at any point and will not incur any liabilities.

Clarifications should be sent to monitoring@sustrans.org.uk. Please note any clarifications may be circulated to all tenderers. We intend to answer clarifications within 5 working days.

Sustrans may invite tenderers to interview.

It is expected suppliers will be signed up to the MRS Code of Conduct, IQCS (Interviewer Quality Control Scheme) or other relevant codes/standards depending on the lot bid for.

Sustrans is a Real Living Wage recognised employer, all colleagues working under the framework will need to be paid the real living wage.

1 Standard supplier questionnaire

This questionnaire is set up to collect your standard company information and ensure suppliers can pass the necessary requirements. These are Pass/Fail or for information. We will only require copies of documents as requested, please include the number of the question in the file title of any attachment.

It is made up of:

- 5 Tenderers information
- 6 Exclusion grounds
- 7 Policies and certification
- 8 Contract referees
- 9 Insurance
- 10 Economic and financial standing
- 11 Declaration, terms and conditions, and form of tender (signature by company director required, as named on companies' house – electronic acceptable)

2 Data protection due diligence questionnaire

Pass – If you have provided information that demonstrates your organisation can provide 'sufficient guarantees' that the requirements of the UK_GDPR and the Data Protection Act 2018 will be met and that the rights of data subjects will be properly protected.

Fail – If you have not provided information that demonstrates your organisation can provide 'sufficient guarantees' that the requirements of the UK_GDPR and the Data Protection Act 2018 will be met and that the rights of data subjects will be properly protected.

Providing details of breaches under 8m will not necessarily result in a 'fail'. Each situation will be considered on its merits and discussed with our Information Rights Team as required.

3 Technical questions

Please provide your response to the technical questions in a separate document. There are word limits set out. Please use arial size 10 font. Images and diagrams are allowed however text in tables will count towards the word limit.

4 Pricing scenarios

Lot 1

Costing scenario

A **Route User Intercept Survey (RUIS)** is a key monitoring tool for Sustrans, esp. in terms of pre and post intervention monitoring ie, pre-monitoring to establish a baseline on usage at a particular route, and post-monitoring to understand usage following an intervention (an example of an 'intervention' being a new or improved path). In layman's terms a RUIS is a form of face-to-face interview.

Combined with RUIS we often conduct **manual counts** on our routes (again pre and post intervention) in order to understand the number and profile of route users ie gender, approx. age; transport mode (walking, wheeling, cycling). The manual count involves using a form to observe and record the key characteristics outlined above ie by keeping a simple tally.

We would like you to provide costs for conducting a pre-intervention RUIS and manual count. Please use the information below to consider your costs and add these to the table provided. Please also note any key questions and address these in the space provided after the table.

Background

- Survey period: Late August/September 2022
- Description of survey:
 1. The questionnaire contains approx. 35 questions (30 closed, 5 open)
 2. Closed questions include single code Yes/No responses, longer multi-code lists, and grid type questions ie using Likert scales
 3. The 35 questions include a number of demographic questions on gender; age; working status; and ethnicity
- On average the survey takes 8 minutes to complete per respondent
- The questionnaire has been designed using Snap Survey Software and a Snap file will be provided so that interviewers can complete the survey using a hand-held tablet (via a Snap App)
 1. For reference, the questionnaire can be provided in Word format, but it is our preference that the survey be completed using tablet technology

Survey Requirements

- Tablet technology to be provided by supplier
- Specific days in two different ways:
 1. 3 term-time week days (Tue/Wed/Thu) and 1 term-time weekend day (Sat);

2. two weekdays and two weekends normally Wed (term), Sat (term), Wed (holiday), Sat (holiday)
- Interviews to cover a 12 hour period (0700-1900 each day)
 1. Please highlight how you will meet this requirement whilst considering staff welfare and maintaining interview standards
 - One location ie 1 x interviewer to be provided
 - All passers-by to be approached for interview ie pedestrians, runners, cyclists, wheelers
 1. Please highlight how you will endeavour to include all types of route users in the interview process
 - Interviews with route users aged 18+ only
 - Aim of a maximised response rate over the 4 days of interviewing. response rate over the 4 days of interviewing.
 1. Please highlight how you will maximise the survey response rate
 - All interviews to be conducted in accordance with a relevant code of conduct
 1. Please highlight how you will ensure all interviews are conducted politely and professionally
 - Interview data to be quality assured before shared with Sustrans
 1. Please highlight the quality assurance processes you would use in completing this fieldwork

Background

- Survey period: August 2022
- Description of manual count:
 1. A manual count form will be provided in electronic form
 2. The 'form' requires the counter to observe and record key characteristics of route users
 3. Key characteristics include gender, approx. age, mode of transport (pedestrian, wheeling, cycling) as well as direction of travel ie East/West
- The manual count form has been designed using Snap Survey Software and a Snap file will be provided so that counters can complete the form using a hand-held tablet (via a Snap App)

1. For reference, the form can be provided in Word format, but it is our preference that the count be completed using tablet technology

Manual Count Requirements

- Tablet technology to be provided by supplier
- Specific days in two different ways:
 1. 3 term-time week days (Tue/Wed/Thu) and 1 term-time weekend day (Sat);
 2. two w two weekdays and two weekends normally Wed (term), Sat (term), Wed (holiday), Sat (holiday)
- Counts to cover a 12 hour period ie 0700-1900 each day.
 1. Please highlight how you will meet this requirement whilst considering staff welfare and maintaining count accuracy
- One locations ie 1 x counter, to be provided
- Aim of a full count ie 100% of route users over the 4 days of counting
 1. Please highlight how you will ensure a full count over the 4 day period
- Aim of an accurate count of route users over the 4 days of counting ie on gender, age etc.
 1. Please highlight how you will ensure accuracy over the 4 day period

Costing assumptions

For costing purposes, please assume the following:

- You have no travel or accommodation costs ie your interviewers and counters live a short walk from the interview location
- The route is in an urban location ie a local park, with nearby amenities such as parking, toilets, shelter and eateries
- Sustrans will advise the best locations for interviewers and counters to stand (interviewer and counters will likely stand close to one another)
- Assume that the route in question receives approx. 500 visitors per day
- Assume that Snap survey costs are borne by Sustrans (NB: each submitted survey generates a small 'unit' cost).
- [Linked to above] Assume Sustrans will securely send you the raw data for any QA purposes

- A risk assessment for fieldwork is already in place
-

Lot 2

TSV Costing scenario

A **Traffic speed and volume survey** (TSV) is a key monitoring tool for Sustrans, esp. in terms of pre and post intervention monitoring i.e. pre-monitoring to establish a baseline on vehicle usage at a particular route, and post-monitoring to understand usage following an intervention (an example of an 'intervention' being a new or improved path).

A TSV records traffic volume i.e. the number of vehicles crossing a chosen point in the road. Vehicles are categorised into classes. The speed of each vehicle is recorded. Data is collected either with pneumatic tubes or radar sensor.

We would like you to provide costs for conducting a pre-intervention TSV. Please use the information below to consider your costs and add these to the table provided. Please also note any key questions and address these in the space provided after the table.

Background

- Survey period: Late August/September 2022
- Description of TSV:
 1. A TSV data entry spreadsheet will be provided. In this spreadsheet, we would like the data to be provided in a vehicle-by-vehicle format i.e. one row of the data entry spreadsheet for each occurrence of a vehicle crossing the pneumatic tubes. The data entry spreadsheet will record: date, time, direction of travel, speed, vehicle class.
 2. Alongside the data entry spreadsheet, we would also like the standard TSV output that is normally provided

Requirements

- Specific days: 7 consecutive term-time days
 - Counts to cover 24 hours per day
-

- One location
- Data sent to Sustrans in two formats: the vehicle by vehicle format provided in our data entry spreadsheet and the standard format
- Mitigation for technical problems with the counting device:
 1. Please highlight how you will ensure a full count ie avoiding/addressing any technical problems during the count.

Costing assumptions

For costing purposes, please assume the following:

- You have no travel or accommodation costs i.e. you have a base with necessary equipment and staff to install it a short journey from the site
- The site is in an urban location i.e. a residential street, with nearby amenities such as parking, toilets, shelter and eateries
- Sustrans will advise the location for counting equipment to be placed
- Assume that the route in question is used by approx. 2,000 vehicles per day
- A risk assessment for fieldwork is already in place.

VMC Costing scenario

A **Video Manual Count** (VMC) is a key monitoring tool for Sustrans, esp. in terms of pre and post intervention monitoring i.e. pre-monitoring to establish a baseline on usage at a particular route, and post-monitoring to understand usage following an intervention (an example of an 'intervention' being a new or improved path).

A VMC entails a count of the number and profile of route users i.e. gender, approx. age, transport mode (walking, wheeling, cycling). A VMC differs from a **manual count** in that the count is taken from video footage collected from a camera overlooking the route, rather than manually using human observers.

We would like you to provide costs for conducting a pre-intervention VMC. Please use the information below to consider your costs and add these to the table provided. Please also note any key questions and address these in the space provided after the table.

Background

- Survey period: Late August/September 2022

- Description of VMC:
 1. A VMC data entry spreadsheet will be provided and should be used to record the key characteristics of route users including gender, approx. age, mode of transport (pedestrian, wheeling, cycling) as well as direction of travel i.e. East/West

Requirements

- Specific days: 7 consecutive term-time days
- Counts to cover a 12 hour period i.e. 0700-1900 each day.
- One location i.e. 1 x video camera, to be provided
- Aim of a full count i.e. 100% of route users over the 7 days of counting
- Please highlight how you will ensure a full count over the 7 day period
- Aim of an accurate count of route users over the 7 days of counting i.e. on gender, age etc...
 1. Please highlight how you will ensure accuracy over the 7 day period

Costing assumptions

For costing purposes, please assume the following:

- You have no travel or accommodation costs i.e. you have a base with video camera equipment and staff to install it a short journey from the site
- The site is in an urban location i.e. a residential street, with nearby amenities such as parking, toilets, shelter and eateries
- Sustrans will advise the best locations for the video cameras to be mounted to
- Assume that the route in question receives approx. 500 visitors per day
- A risk assessment for fieldwork is already in place

Lot 3

Costing scenario

Household surveys face-to-face and online are of increasing importance for Sustrans to understand who is not using our projects. These methods can be applied across the UK, as part of our evaluation to meet the aims and objectives.

We would like you to provide costs for conducting Household surveys. Please use the information below to consider your costs and add these to the table provided. Please also note any key questions and address these in the space provided after the table.

Background

- Survey period: Late August/September 2022

Requirements

- Survey 10 quantitative questions and 2 open text questions (please specify if you charge by line for matrix questions or if a matrix question is one question)
- We would like to survey the population in the city of Birmingham who live within one mile of the canal network. Please specify
 1. How you would define this population
 2. What you would recommend as the sample size for a representative sample
 3. How you would ensure you oversample to a large enough proportion of people from minority ethnic groups to allow us to report on their views with confidence
- MRS trained interviewers
- Interviewing on weekdays and weekends, prioritising afternoon and early evening on weekdays to ensure we capture the views of individuals who may be out at work during the day

Costing

- Please provide costs for the most appropriate data collection method from your perspective and outline why you have chosen that method (online, phone, face-to-face etc)
- Please assume you have no travel or accommodation costs i.e. you have a base nearby and staff live locally.

Lot 4

Costing scenario

Qualitative research methods such as workshops, focus groups (face-to-face and online), depth interviews (face-to-face, telephone and online) people panels; observation exercises (eg activity/dwell time), mystery visits and journal/diary keeping are all features of Sustrans' Research and Monitoring Unit (RMU) work. These methods can be applied across the UK, as part of monitoring to meet the aims and objectives of both Sustrans and external funders.

We would like you to provide costs for conducting a Interviews and a focus group.

Please use the information below to consider your costs and add these to the table provided. Please also note any key questions and address these in the space provided after the table.

Background

- Survey period: Late August/September 2022

Requirements

- Interviews
 1. 5 online / telephone interviews
 2. 30 minutes each
 3. Weekday
- Focus Group
 1. 6-8 participants
 2. 90 minute focus group
 3. Face-to-face
 4. Weekday evening
- Data sent to Sustrans: provided in our data entry spreadsheet and the standard format ie the raw data

Costing

- Please assume you have no travel or accommodation costs i.e. you have a base nearby and staff live locally.
- Individually listing costs for: recruitment, development of topic/question guide, set-up, running, online, face to face, transcribing and inductive/deductive analysis

Tender evaluation criteria

| Questions | Ref Score / Weighting |
|--|-----------------------|
| Standard Selection Questionnaire | |
| 1. organisation info | For info only |
| 2. Exclusion grounds | Pass/Fail |
| 3. Policies and certification | Pass/Fail |
| 4. Contract referees | Pass/Fail |
| 5. Insurance certificates | Pass/Fail |
| 6. Economic & Financial Standing | Pass/Fail |
| 7. Form of Tender/Declaration | Pass/Fail |
| 8. Data protection due diligence questionnaire | Pass/Fail |
| Technical Questions | 70% |
| 9.1 Management | 20% |
| 9.2 Health & Safety | 20% |
| 9.3 Stakeholders | 15% |
| 9.4 Project team | 15% |
| 9.5 Digital Responses | 20% |
| 9.6 Equality, Diversity and inclusion / For Everyone | 10% |
| Pricing | 30% |

Technical Scoring

| Judgement | Score | Performance |
|-----------|-------|--|
| Excellent | 5 | A comprehensive response which provides information that is highly relevant and fully compliant, logical and robust (and has addressed all content as requested in the specification). |

| | | |
|----------------|---|---|
| | | The bidder can deliver all stated requirements with no reservations about the ability to deliver the requirements and the response includes evidence based added value. |
| Good | 4 | A detailed response which provides information that is directly relevant, fully compliant, logical and robust (and has addressed all content as requested in the Specification). It indicates that all stated requirements are met. There are no reservations about the ability to deliver the requirements. |
| Satisfactory | 3 | The response is compliant, logical and of a good standard (and has addressed all content as requested in the Specification). All stated requirements are met; however there is a lack of clarity on some requirements. |
| Unsatisfactory | 2 | A response which provides information that is generally relevant but is only partially compliant and there are shortfalls in the solution offered. This indicates that not all stated requirements would be met and there would be difficulty in delivering the Contract requirements. |
| Poor | 1 | Below expectations. A response which fails to meet a number of stated requirements and relevance. |
| Unacceptable | 0 | A response which does not provide information which is relevant and/or does not answer the question or no response is provided. |

Pricing Scoring

Each lot has a scenario to respond to in order to give a fair representation of potential costs. The grades used in the scenario will be the maximum day rates for individuals at that grade throughout the framework.

Please use the pricing template in the Submission Template to complete your pricing. Please use the same rates in the scenario and the grade table. The grades in the table are for info only and will not be scored.

Separate pricing template should be completed for each lot bidders are applying to.

For each lot, the bidder with the lowest total cost will be awarded full marks (30%). With each subsequent bidder getting a proportion against the lowest total cost. For example:

| Total cost | Weighted score |
|-------------------|--|
| Bidder 1: £10,000 | Bidder 1: scores 30%. |
| Bidder 2: £12,500 | Bidder 2: $10000/12500 \times 30 = 24\%$ |
| Bidder 3: 15,000 | Bidder 3: $10000/15000 \times 30 = 20\%$ |

Submission

Please email the completed tenders to monitoring@sustrans.org.uk by 12 noon on 7th June 2022

If you have any questions about this framework please contact Katherine Oliver using the email address above by 31st May 12 Noon. Responses to any questions will be shared with those invited to tender.

If you are successful in being shortlisted we may invite suppliers to interview via Teams on 16th / 17th June 2022.