

ORDER FORM
Framework Agreement

FROM

Customer	Transport for London (TfL) Crossrail and the Greater London Authority (GLA) and any its Functional Bodies
Service Address	Windsor House, 42-50 Victoria Street, London SW1H0TL
Invoice Address	Transport for London Accounts Payable 14 Pier Walk, North Greenwich, London SE10 0ES
Contact Ref:	
Order Number	To be quoted on all correspondence relating to this Order: Crown Commercial Services / UK SBS Market Research MR130001 Framework Agreement TfL 92013 CPT - Stakeholders Reputation Research Services Lot 1 - Transport Journalists and Business Leaders
Order Date	12 May 2016

TO

Provider:	Market & Opinion Research International Limited (Trading as Ipsos MORI)
For the attention of: E-mail Telephone number	
Address	3 Thomas Moore Square, London E1W 1YW

1. SERVICES REQUIREMENTS**(1.1) Services [and Deliverables] Required:**

As per the attached Specification and Appendices A and B.

(1.2) Commencement Date: 12 May 2016**(1.3) Price Payable by Customer**

As per the attached IPSOS MORI - Appendix 5 - Lot 1 - Pricing Schedule

(1.4) Completion Date: 11 May 2018**2 ADDITIONAL REQUIREMENTS****(2.1) Supplemental Requirements in addition to Call-Off Terms and Conditions:**

As per the attached Crown Commercial Services / UK SBS Market Research MR130001 Framework Agreement, the attached GLA and TfL's Additional Clauses and the attached Specification and Appendices A and B.

(2.2) Variations to Call-Off Terms and Conditions

The Call-Off Contract period will be for two (2) years from the start date with one optional extension of one (1) year. The maximum duration of the contract will be three (3) years.

3. PERFORMANCE OF THE SERVICES [AND DELIVERABLES]

(3.1) Key Personnel of the Provider to be involved in the Services [and deliverables]:

[REDACTED]

(3.2) Performance Standards

As per the attached Crown Commercial Services / UK SBS Market Research MR130001 Framework Agreement and the attached Specification and Appendices A and B.

(3.3) Location(s) at which the Services are to be provided:

London – England

(3.4) Quality Standards

As per the attached Crown Commercial Services /UK SBS Market Research MR130001 Framework Agreement and the attached Specification and Appendices A and B.

(3.5) Contract Monitoring Arrangements

As per the attached Crown Commercial Services / UK SBS Market Research MR130001 Framework Agreement and the attached Specification and Appendices A and B.

4. CONFIDENTIAL INFORMATION

(4.1) The following information shall be deemed Commercially Sensitive Information or Confidential Information:-

None identified.

(4.2) Duration that the information shall be deemed Commercially Sensitive Information or Confidential Information

BY SIGNING AND RETURNING THIS ORDER FORM THE PROVIDER AGREES to enter a legally binding contract with the Customer to provide the Service specified in this Order Form together with, where completed and applicable, the mini-competition order (additional requirements) set out in section 2 of this Order Form. Incorporating the rights and obligations in the Call-Off Terms and Conditions set out in the Framework Agreement entered into by the Provider and UK SBS on 24.02.2014 and any subsequent signed variations to the terms and conditions.

For and on behalf of the Provider:-

Name and Title	
Signature	
Date	12.5.16

For and on behalf of the Customer:-

Name and Title	
Signature	
Date	12.5.16

Volume 2
The Specification
TfL 92013 CPT - Stakeholder Research
Services Specification
Lot 1 – Transport Journalists and Business
Leaders



Project No : TfL 92013 – Lot 1

Internal Reference Number: TfL 92013 – Lot 1

Version: V 3

Date: February 2016

Transport for London

16th Floor Windsor House,
42-50 Victoria Street,
London
SW1H0TL

Copyright on the whole and every part of this document is owned by Transport for London. No reproduction of the whole or any part of this document is to be made without the authority of Transport for London.

NOTES

Confidentiality:

All information supplied with this brief and associated appendix is to benefit agencies in writing comprehensive and informed proposals. The provision of this background data is made in confidence and should not be passed on to any third party without the prior knowledge and agreement of TfL Procurement.

Copyright:

All Rights Reserved. No part of this publication may be reproduced or transmitted in any form (including photocopying or recording) without the express prior written permission of TfL Procurement.

The information contained in this report was collected for internal purposes and TfL cannot give any warranty as to its suitability for any other purpose. TfL has sought to ensure the information is accurate and complete, but accepts no liability or responsibility for any errors or omissions or for any damage or loss arising to any person acting or refraining from action as a result of it.

Contractual requirements:

'The Call-Off contract will be let subject to Crown Commercial Services UK SBS Market Research MR130001 Framework Agreement and the GLA and TfL's Additional Clauses.

Agencies shall comply with the requirements of all relevant EU Directives and UK law. Without limitation of the foregoing, the Agency shall pay particular regard to the Health and Safety at Work etc. Act 1974, and any Statutory Instrument, Order or any other regulation or bye-law made under the Act or other applicable Acts and Regulations.

The Agency will also be required to comply with all relevant TfL policies.

In particular, it should be noted that TfL has a strict policy that does not permit the use of alcohol during working hours. This applies equally to interviewers, moderators and participants in focus groups and all qualitative research.

Costings:

Costings should be in the format specified to allow comparisons between bids and it should also be noted that remuneration of all employee carrying out services on behalf of TfL must be in accordance with the provisions of the London Living Wage.

TABLE OF CONTENTS

NOTES.....	2
0. ORGANISATIONAL OVERVIEW.....	4
0.1 Transport for London (TfL).....	4
0.2 Business Unit.....	5
1. INTRODUCTION	6
1.1 Background.....	6
1.2 Objectives.....	7
2. SCOPE	10
2.1 General Requirement.....	10
3. SERVICE LEVEL AGREEMENTS (SLAS)/KEY PERFORMANCE INDICATORS (KPIS)	12
Transport Journalists / Business Leaders.....	12
4. APPENDICES	13
Appendix A. TfL Story.....	13
Appendix B. TfL's Customer Model	13

0. ORGANISATIONAL OVERVIEW

0.1 Transport for London (TfL)

1.1 Transport for London – Overview

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>

Further information can be found on the following website, and TfL expects that you will review the publicly available material relating to various aspects of this procurement.

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

The 'TfL Story' (see Appendix A) gives a good overview of what we are here to do, and how we are going to get there.

TfL bases its business objectives on the Mayor's Transport Strategy, which can also be found at <https://tfl.gov.uk/about-tfl> page.

0.2 Business Unit

TfL's Customer and Employee Insight team (C&EI)

The Customer & Employee Insight team (C&EI) is responsible for managing and implementing customer, stakeholder and employee insight and research across TfL, and sits within the Customer Experience Marketing & Communications directorate.

The team objective is to be a centre of excellence for customer, stakeholder and staff insight; making insight indispensable to TfL's decision making.

The team have a key role in developing our customer strategy and monitoring the associated Customer Metrics for the Customer Pillar. Consequently we can measure progress in improving our reputation among Londoners, as well as other stakeholders such as businesses and transport Journalists.

The team is organised around key business areas and activities as follows:

- Surface Transport (roads, buses, rivers etc)
- Rail & Underground
- Performance Monitoring
- Staff and Stakeholders

The Staff and Stakeholder team will have overall responsibility and management of this contract and therefore maintain the relationship with the Service Provider.

In the vast majority of cases, projects will be commissioned and managed by C&EI. However there may be some projects which will be commissioned and managed by a different team (such as the Crossrail research team), but C&EI will still have an oversight of the work being undertaken.

1. INTRODUCTION

1.1 Background

TfL has an ongoing requirement to develop, manage and provide research data and insight for its stakeholder research programmes.

The current contract for Stakeholder Research Services will expire in April 2016.

The Contract is to be let for three years (from 2016) with an option for TfL to extend this for a further one year subject to the Service Provider's performance. The decision to extend the Contract will be taken during the third year. The Contract will be subject to annual review by TfL.

TfL reserves the right to occasionally tender work to other suppliers as required. This may sometimes be done to manage extra research during busy periods, but also to meet requirements for specialist expertise or previous experience of a project on the part of other suppliers.

Survey Delivery

TfL's customer model (see Appendix B) describes five core areas of reputation: What TfL stands for, Experience, Value, Progress & Innovation, and Trust.

Currently, the existing surveys with Business Leaders and Transport Journalists measure these five core areas in conjunction with ratings of specific attributes of each transport type, which are aligned with business objectives. Many of the measures have trend data going back several years, and the Service Provider will need to maintain consistency with these measures going forward. The surveys also explore perceptions of TfL's communications as well as stakeholders' views on various policy and investment issues.

The surveys have a range of internal clients and stakeholders across TfL. Alongside TfL's project manager, the Service Provider will, on occasions, be required to liaise with these internal clients and stakeholders. Whilst the TfL project manager will be the key point of contact with these internal clients and stakeholders, the Service Provider will need strong communication skills in delivering research and insight that achieve universal buy-in. The Service Provider will therefore need to have an excellent grasp of the key issues around transport, the economy and the business market in order to gain the confidence of the key TfL stakeholders that they come into contact with.

1.2 Objectives

The C&EI team aim to build partnerships with their Service Providers in order to deliver greater insight to the organisation and strengthen understanding of our customers, stakeholders and employees across TfL. With the C&EI team taking an insight focused role and acting as agents for change, it is important that TfL and the appointed Service Provider work closely together. Our experience is that both parties grow and learn from the experience, are able to adapt, listen and thus do more together.

TfL has been developing this way of working for a number of years. It has enabled the in-house team to work alongside the Service Provider 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.

Although the key stakeholders within TfL for this work are the Press Office and Government & Stakeholder Relations team, there are a number of other parts of TfL that will benefit from the intelligence gathered as it enables them to act on the insight provided to drive business actions in their own area. The importance of the data gathered cannot be overstated and will be used for example to support our investment in new and existing services, guide the prioritisation of transport schemes, help to develop TfL policy and ensure that we continue to have excellent communications with these key stakeholders.

During the contract duration the Service provider will go beyond basic interpretation by using their skills at storytelling and bringing the research to life, whilst acknowledging the business context within TfL and the wider transport industry. Consequently a range of outputs will be developed that will connect business actions and influence decision-making at the highest level in TfL.

A single point of contact at the Service Provider is required to act as the Contract Manager although it is to be expected that different individuals/specialist departments 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 Service Provider teams, ensure that all Service Provider staff are briefed about TfL's business, aims, organisation culture and the Service Provider's way of working with TfL
- Ensure good communications between the Service Provider and the TfL contact points.

During the contract duration the Service Provider will be required to ensure that:

- They effectively work together with C&EI as a team.
- The proposed project team will deliver high standard services
- All employees (both from the Service Provider and any sub-contracted supplier) working on the design and management of studies, their seniority, experience, responsibility etc. are appropriate for each task and that any details relating sub-contracted activity (eg. a specialist fieldwork or data processing company), are agreed with TfL. In this instance, the Service Provider must provide details of who the sub-contractor is, how they are to be managed, the length of this arrangement and details of ISO certificates or accreditations the contractor may have.

Research Quality

The quality of all research is an important issue and is driven by the experience and knowledge of the individuals in the chosen research team as well as the technical strength and the processes to deliver high quality research. The Market Research Society (MRS) guidelines act as the base acceptance level of the quality for all surveys. The Service Provider must establish rigorous quality assurance processes at all stages of research including those working on projects to ensure that results are valid, robust and accurate. While interviewers should be fully trained in face-to-face interviewing to a minimum of (Interviewer Quality Control Scheme) IQCS standards, the Service Provider must ensure that interviewers are appropriate for each type of target stakeholder audience.

The Service Provider will deliver quality assurance at all times through administrative, technical, managerial and communication structures and procedures. This includes key stages of the research such as:

- Planning and design, where risks should be assessed and steps built into the survey process to eliminate or minimise risks that could adversely affect the quality of the results. The aim is to proactively design out risks rather than taking remedial action after the data has been collected.
- Project management, where projects need to include at least one research manager in a day to day project management capacity, someone at Research Director level who will have oversight of all projects conducted and a single main point of contact as contract manager. Nevertheless, as mentioned earlier, it is expected that different specialist departments within the Service Provider shall carry out the work. It is important that the Service Provider staff have stakeholder survey experience, as well as influencing and negotiating skills.
- Recruitment and fieldwork, where quality and accuracy are critical to project success.
- Analysis and reporting, and in the case of continuous and repeat surveys the Service Provider will need to be able to set up automatic checking and editing processes. Any inconsistencies will then require investigation and either be validated, corrected or removed from the data set. Reports should be concise, engage the reader, deliver insight and provide clear data interpretation. The content should be meaningful (especially when there is a danger of repetitive information), and ultimately lead to business action. Final versions of reports are made available to all TfL staff on our internal intranet library together with a one page Executive Summary/abstract, and this must be submitted within 8 weeks of the fieldwork ending - the Service Provider shall produce this.

2. SCOPE

2.1 General Requirement

The Service Provider shall provide key insights from the key, hard-to-reach stakeholder groups specified below regarding their favourability, advocacy and familiarity with the services that TfL provide as well what they consider to be key priorities and main transport policy issues. The research is to be conducted with the following:

Transport Journalists –

- Annual survey
- Method – face-to-face interviews
- Questionnaire – mix of pre-coded and open questions, many of which have trend data for several years. The Service Provider shall provide guidance for any new questions.
- Sample - around 60 transport journalists. The sample will be a mix of London, regional and national media, and include both general news and specialist transport. The Service Provider shall provide the sample, though TfL will provide guidance on key journalists/publications to target.
- Timings – to ensure consistency with previous surveys, the following timings must be met:

June – August	Fieldwork
By end of September	Topline results
By end of October	Full report and debrief

Business Leaders –

- Annual survey
- Method – face-to-face interviews
- Questionnaire – mix of pre-coded and open questions, many of which have trend data for several years. The Service Provider shall provide guidance for any new questions.
- Sample - around 100 Business Leaders who are executive board level directors, who work at companies which are all from FTSE 350, top 500 industrial firms by turnover and top 100 financial companies by capital employed, from a range of industry sector and size of business. The Service Provider shall provide the sample.
- Timings – to ensure consistency with previous surveys, the following timings must be met:

September - December	Fieldwork
By end of December	Topline results
By end of January	Full report and debrief

For both surveys, the Service Provider shall produce the following deliverables:

- Text summary of key findings (topline)
- Topline tables of all results
- Full tables including all relevant cross-breaks
- Verbatim responses from any open-ended questions
- Report in Powerpoint (with objectives, text commentary on key headlines with visuals to communicate results, commentary on trend data where applicable, summary of recommendations, and brief description of sample and method)
- Face-to-face debriefs – usually a pre-debrief with the C&EI team where changes to reporting will be suggested, followed by a debrief with the end client
- A one page summary of the research to be submitted to the TfL research library, using an existing template

While the surveys listed in this Lot provide an overview of the type of research currently undertaken by TfL, the contract is not limited to this list and TfL reserves the right to add in further surveys as may be required.

Cross Rail Requirements

Crossrail seeks to undertake a programme of research to monitor the reputational standing, opinions and awareness of the project and its activities with Transport Journalists. Face-to-face interviews will be conducted with Journalists from national and regional press who specialise in the transport and the rail sectors between June to August.

3. SERVICE LEVEL AGREEMENTS (SLAS)/KEY PERFORMANCE INDICATORS (KPIs)

Transport Journalists

Description	Service Level	Default Threshold
Fieldwork	June – August	100%
Final versions of reports are made available to all TfL staff on our internal intranet library together with a one page Executive Summary/abstract	within 8 weeks of the fieldwork ending	100%
Topline results	By end of September	100%
Full report and debrief	By end of October	100%

Business Leaders

Description	Service Level	Default Threshold
Fieldwork	September - December	100%
Final versions of reports are made available to all TfL staff on our internal intranet library together with a one page Executive Summary/abstract	within 8 weeks of the fieldwork ending	100%
Topline results	By end of December	100%
Full report and debrief	By end of January	100%

4. APPENDICES

Appendix A. TfL Story

Appendix B. TfL's Customer Model

APPENDIX A



The Transport for London story

Our goal

To keep London working and growing and make life in London better. We will deliver a transport system that secures London's position as a world-leading city and the engine of the UK economy. Our services will ensure that those who live and work in and visit London can access all the Capital has to offer in terms of jobs, leisure, health and education.

Our strategy

This has four pillars:

- **Our customers and users** – we will demonstrate that every journey matters, putting customers and users at the centre of everything we do
- **Our people** – we will be accountable, actively seek solutions to problems, and work with other people, directly, fairly and consistently
- **Our delivery** – every day we will deliver safe, reliable, clean, sustainable and accessible transport. We will introduce new assets without any disruption to services, and we will deliver our major investment programmes efficiently, getting them right first time, every time
- **Value for money** – we will continually ask 'can we do this better, simpler, or cheaper?' and we will deliver clear value for fare and tax payers' money, helping us to secure funding for major improvements to our transport infrastructure

Our priorities

- Deliver high and consistently improving standards of operational performance and service to customers and users across the full range of our responsibilities, building on the success of our delivery during the 2012 Games
- Deliver our investment programme on time and to budget, with the upgrade and capital renewal of our Tube, rail and road networks, plus Crossrail, at its core
- Continually strive to be collaborative, innovative, lean and integrated

Our organisation

We are a single, fully integrated authority which exists to serve London, and which our people are proud to represent. We work together as a team to ensure that we deliver for, and listen to, our customers, businesses, users and stakeholders and that they find us easy to do business with. We will work together with high levels of personal accountability, proactivity and collaboration and continually strive to be more innovative, lean and integrated.

APPENDIX B

APPENDIX A

Stakeholder Strategy

The basics To build stakeholders into advocates:

- a) Explain what we do
- b) Get everyday engagement right and explain our decisions
- c) Support our stakeholders to deliver their objectives
- d) Demonstrate we are delivering benefits and making savings (the 'most productive spender of public money')

Our goal We need to:

- a) Secure the right policy and legislative environment
- b) Manage political transition effectively
- c) Make a compelling case for investment as part of a national infrastructure plan
- d) Secure consensus on long-term financing for transport investment

TfL Reputation model



