**INVITATION TO**

**TENDER TO CARRY OUT**

**Low Carbon Lake District**

**–** **Provision of a benefits realisation assessments for the Keswick to Threlkeld multi-user trail**

**(1 Year Contract)**

**Date 25/8/21**

# INFORMATION AND INSTRUCTIONS TO TENDERERS

### Introduction and background to the project

There is a wealth of potential in the Lake District to offer attractive and sustainable means of moving people around and travelling between different attractions and destinations without reliance on the private vehicle. Some of this potential has already been realised, but there is a vast amount still untapped.

We have illustrated our intentions for how visitor movement will function in the future using a series of Visitor Movement Maps <https://www.lakedistrict.gov.uk/caringfor/smarter-travel> and based on these a number of programmes have been taken forward to influence how people travel into and around the Lake District.

These interventions will enable residents and visitors to reduce the need for car by either parking all day in one location and use this new infrastructure.

Over the last three years the Lake District National Authority working in partnership with other stakeholders has secured significant EU Funding (European Regional Development Fund and European Structural and Investment Funds (ERDF and ESIF), Growth Deal from the Cumbria LEP and Highways England.

Under Low Carbon Lake District - 5km of the Keswick to Threlkeld multi-user trail, has been reinstated after significant sections of path were destroyed in 2015 during Storm Desmond and improvements to increase accessibility and future flood resilience have been delivered.

The trail has been subject to an economic impact assessment before opening. This has defined the key outputs and outcomes and a process of measuring the benefits that should be delivered.

You are invited to tender to deliver our benefits realisation assessment process over the next year.

This work will need to be delivered in a format to meet EU funding requirements and those stipulated by other external funding partners.

It should measure the strategy’s success with identified target audiences, focus our resources where they will provide the most beneficial insights to lever external funding and positively influence regional and national policy.

The Benefits Realisation Assessments for the Keswick to Threlkeld multi-user trail contract is for 1 year.

Subject to funding, we hope to re-tender for further contractual analysis work on this trail, and other potential new routes delivered under Low Carbon Lake District II.

### Tender Objective

You are invited to submit a proposal to manage and deliver the provision of a benefits realisation assessments for the Keswick to Threlkeld multi-user trail.

### The benefits realisation assessment will conform to processes and guidance contained in our Outputs Strategy and Summative Assessment Plan. Please see the Summative Assessment Plan for Keswick to Threlkeld multi-user trail Please see Appendix 1.

The objective of the benefits realisation assessments is to collect and quantify the following delivery outputs;

1. economic benefits
2. carbon savings
3. health and wellbeing benefits
4. And to inform future management of the trail.

The pre-opening initial business surveys, economic assessments and online survey will be provided and we have been collecting counts data since the trail opened in December 2020. Details are to be found in Appendix 2.

We will require you to undertake follow on user surveys, business survey and data analysis to produce a first report based on these outputs by November 30 2021. This is to provide evidence for the Summative Assessment. We will then require you to produce a final report based on these outputs in August 2022.

**Procurement Package - Keswick to Threlkeld multi-user trail**

**We need to establish the following in relation to this trail;**

* **Economic benefits.**
* **Carbon Emission Savings = 169 tonnes CO² per annum.**
* **Health and wellbeing benefits.**
* **Inform future management of the trail.**

**To deliver this we will provide you with (see Appendix 2);**

* Local Business Survey form to circulate.
* You will be supplied with data resulting from the people counters (in situ for at least 24 months from the opening of the trail) and online and intercept surveys (see below) for comparisons and cross referencing with quantitative data.
* An online survey form.
* Intercept survey form.

**You need to submit a cost to deliver the following**

Please notethe survey processes listed below will each need to be repeated twice during the contract. The first time to provide the evidence for a first report required by the 30 November 2021. And then repeated during the summer months to provide evidence for the final report produced in August 2022. We will require where necessary Interim reports to be provided including all raw data.

* Any minor amendments to the survey forms above
* To establish the number of jobs created and the increase turn over gross value. This will be established by using our existing Local Business Survey form. You will need to manage the questionnaire distribution and receive responses from at least 30 of local businesses, undertake data entry and analysis. Please factor in the cost of follow up phone calls if there is a low return rate.
* Distribution and analysing a minimum of 300 online surveys amongst users and potential to evaluate how the reopening of the trail has impacted on people’s travel and leisure behaviours. People counters will be used to compare insights from the survey and to measure the total number of users, this will include the number of trips by bike.
* We need to establish health and absenteeism benefits. This will be established from the above online surveys amongst users and potential users (to be undertaken once) post completion to evaluate how the reopening of the trail has impacted on people’s travel and leisure behaviours. People counters will be used to compare insights from the survey and to measure the total number of users, this will include the number of trips by bike.
* To monitor user experience and maintenance requirements. To be established from a minimum of 300 Intercept surveys, these will be undertaken on a face to face basis during off peak and peak visitor period to monitor user experience. Then undertake data entry and analysis on the findings.
* Interim reports to be provided including all raw data, a summary of the findings after 2 months, and a final report quantifying all of the above four outcomes to be provided within 8 weeks of the completion of the contract.

### Required Experience/Skills/Competencies (E = essential; D = desirable)

|  |  |
| --- | --- |
| * Relevant professional experience and qualifications * Evidence based assessment skills | E  E |
| * Marketing research delivery and analysis | E |
| * Logical, coherent presentation * Production of strategic reports * Data storage and GDPR compliance delivery * Delivery against EU funding requirements | E  E  E  D |
| * Public sector experience and knowledge * Local knowledge and experience | D  D |
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### Costs and Timescales

Please provide an itemised cost for all stages of the proposal excluding VAT.

We expect a table breaking down all costs including for each separate procurement package:

1. Staff names, day or hour rate and time expected in the project.
2. Additional staff required to undertake the survey work
3. Undertaking survey work
4. Producing interim results and reports
5. Travel and subsistence.
6. Any other project costs.

Please produce a simple programme Gantt chart for each the package so we can view your proposed timeline and scheduling.

Therefore structure your tender to reflect the costs to the Authority, including employing any or cost associated with data entry and analysis of the findings or report production.

Please itemise the work packages and break down the costs within these work packages in your tender submission.

Please note that we will provide contacts for you to arrange meetings considered necessary with stakeholders, any site visits, and also ensure that meeting room facilities are available.

**Delays in completion of the study will result in a penalty deduction of 1% of the total contract price net of VAT per week.**

### Submission of the tender documents

**Tenders should be uploaded to The Chest by 1200 noon on 10 September 2021.**

Tender documents received late, i.e. after the specified date and time, will not be considered.

**How to return the tender**

The tender must be uploaded to ‘The Chest’ and must be a Word document and saved as: your company, tender and the month (for example the file name for acme consultancy would be: - (ACME.BR.AUG). Please do not submit any other brochures or supporting documentation at this stage unless specifically asked for. If we receive additional documentation, if your tender is not saved correctly, or if it is saved in the wrong format we may not be able to review and evaluate your tender.

We will not consider any documentation that is late. We often receive documents uploaded onto The Chest that are on the borderline. We would encourage you to submit our tender well in advance of the deadline. It is important to remember it takes time to upload documents onto The Chest, if you encounter technical difficulties, please contact Due North (The Chest software provider) who will be able to offer assistance.

These measures ensure there is consistency in the way that questions are presented, making the process fair for all applicants.

**Contact and information**

If you have any questions that you wish to ask the LDNPA, you must submit them via The Chest. Where responses give information that could be advantageous to all tendering the answer will be made available to all parties.

For feedback on your submission please contact Emma Moody, [emma.moody@lakedistrict.gov.uk](mailto:emma.moody@lakedistrict.gov.uk)

Lake District National Park Authority, Murley Moss Business Park, Oxenholme Road, Kendal, Cumbria, LA9 7RL

**What you need to do**

Please limit your submission to no more than 10 pages and detail your costs on a separate sheet.

Your submission should include:

* Your understanding of the key issues and proposals for how you would carry out research and investigation.
* A firm price for completion of all the work (i.e. a price that is not subject to variation). Please include a breakdown of price based on the number of sites to be assessed.
* Brief CV of the consultants who will be undertaking the work.
* The input you will require from the Authority, if any.
* Relevant experience.
* An example of one piece of similar work you have completed.
* One reference (sheet enclosed).
* Declaration of non-collusion (sheet enclosed to be signed).

**Tenders must be received by 12 noon on 10th September 2021** Tender documents received late, i.e. after the specified date and time, will not be considered.

**Opening of tenders**

Tender documents will remain unopened until after the closing date, after which time they will be opened in accordance with the controlled processes used on the Chest by independent officers of the Authority. All tenders submitted will be verified to ensure that the information requested has been provided. Once tender documents have been opened and signed they are then passed to the originating department for evaluation.

**Timetable for this project**

Our timetable for this project is:

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| --- | --- |
| **Date** | **Activity** |
| 17th September 2021 | Tenders submission deadline |
| 22th September 2021 | Tender evaluation and notification to successful consultant |
| 25th September 2021 | Contract award and start date |
| 30th November 2021 | Interim current usage mapping report |
| August 2022 | Final Report Completion and Submission |

### Evaluation of tenders

**Tender Evaluation**

Only tender responses which include information and evidence that meet all pass criteria will be scored in terms of quality and price.

Quality and price scoring are based on the following criteria:

* *Quality Score (50%)*
  + Quality will be evaluated against pre-determined criteria with weightings as set below. Scoring will be applied by evaluators as set out below.
* *Price Score (50%)*
  + Pricing will be evaluated to ensure all relevant costs are visible and comparable, including sensitivity analysis where determined appropriate.
* The final ranking, a balance of the quality score (50%) and the price score (50%) will be determined as set out below:

**Quality Score**

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| --- | --- | --- |
| **Assessment** | **Score** | **Quality Scoring Gauge** |
| Excellent | 5 | Exceeds requirement. Exceptional demonstration of the relevant ability, understanding, experience, skills, resources, and quality measures required to provide the supplies / services, with evidence to support the response. |
| Good | 4 | Satisfies the requirement with minor additional benefits. Above average demonstration of the relevant ability, understanding, experience, skills, resource & quality measures required to provide the supplies/services. Response identifies factors that will offer potential added value, with evidence to support the response. |
| Acceptable | 3 | Satisfies the requirement. Demonstration of the relevant ability, understanding, experience, skills, resources & quality measures required to provide the supplies / services, with evidence to support the response. |
| Minor Reservations | 2 | Satisfies the requirement with some minor reservations of the relevant ability, understanding, experience, skills, resource & quality measures required to provide the supplies / services, with little or no evidence to support the response. |
| Serious Reservations | 1 | Satisfies the requirement with major reservations of the relevant ability, understanding, experience, skills, resource & quality measures required to provide the supplies/services, with little or no evidence to support the response. |
| Unacceptable | 0 | Does not meet the requirement and/or insufficient information provided to demonstrate that the has the ability, understanding, experience, skills, resource & quality measures required to provide the supplies/services, with little or no evidence to support the response. |

**The Evaluation Criteria and associated weightings to be applied in the evaluation are:**

|  |  |  |
| --- | --- | --- |
| **Evaluation Criteria** | | **Weighting (%)** |
| Has provided evidence to show that personnel performing the survey and evaluation work have a high level of understanding and experience of devising and using both quantitative and qualitative methodologies, data collection, and data analysis; statistical software packages; reporting complex information to both technical and non-technical stakeholders; and assessing the reliability and validity of studies. | | 20% |
| Has provided evidence to show that personnel performing the evaluation work have an understanding and experience of evaluating public sector funded programmes / projects / initiatives. | | 10% |
| References provided from at least two referees regarding evaluation work performed for them by the tendering organisation. | | 5% |
| Has provided details of how the tendering organisation manages its environmental impacts. | | 5% |
| Has provided details of how the tendering organisation manages equality and diversity. | | 5% |
| Has provided details of how the tendering organisation manages the quality of the services it delivers. | | 5% |
| Has provided a method statement stating how the requirements for the evaluation as set out in the specification are addressed. | | 15% |
| Has provided evidence to show that personnel performing the survey and evaluation work are qualified and trained in market research delivery. Have professional standards and structures and systems in place to be to comply in areas such as GDPR legislation, codes of conduct, ePrivacy, FOIA. Have an understanding and experience of gathering evidence and evaluating projects aimed at assessing a benefits realisation outcome. | | 25% |
| Has provided evidence to show that personnel performing the evaluation work have a high standard of report creation. | | 10% |
| **Total** | **100%** |

*(Tenders’ overall quality scores (from a total of 100% as set out above) will be multiplied by 50%)*

**Price Score**

The lowest tendered price will be awarded 50%. All the other returned tender prices will be given a % score relative to this, by dividing the lowest tendered price by the firm’s tendered price, multiplying by 100 and then multiplying the product by 50%.

**Questions on tender submissions**

If tenderers have any questions they wish to ask the Authority, they must submit them to the Authority via the Chest. Any questions received will be made anonymous and responses sent to all tenderers.

**Award of tender**

The Authority will decide to whom the contract shall be awarded based on the evaluation criteria outline above. The Authority does not bind itself to accept the lowest or any tender/quotation and reserves the right to accept the whole or parts of tenders/quotations. The Authority will notify acceptance of the tender to the successful tenderer as soon as is reasonably practicable.

### TENDER INFORMATION

**Confidentiality**

The details of these documents and all associated documents are to be treated as private and confidential for use only in connection with the Tender process.

**Freedom of Information**

The Authority is committed to meeting its legal responsibilities under the Freedom of Information Act 2000. Accordingly all information submitted to the Authority may need to be disclosed in response to a request under the Act. If you consider that any of the information included in your tender is commercially sensitive, please identify it and explain (in broad terms) what harm may result from disclosure if a request is received, and the time period applicable to that sensitivity. You should be aware that, even where you have indicated that information is commercially sensitive, we may be required to disclose it under the Act if a request is received. Please also note that the receipt of any material marked ‘confidential’ or equivalent by the public authority should not be taken to mean that the public authority accepts any duty of confidence by virtue of that marking. If a request is received, we may also be required to disclose details of unsuccessful tenders.

**Anti Fraud and Corruption Policy**

The Authority has an Anti Fraud and Corruption Strategy which sets out the responsibilities of officers and action to be taken in cases of theft, corruption, irregularity, or when damage is suspected. The Confidential Reporting Code, (Whistle Blowing Policy), forms part of this Strategy which provides a mechanism for staff to report suspected wrong doings confidentially.  In the event of such an issue, an investigation would be carried out and action taken as necessary.

**Costs and expenses**

The Authority will not be responsible for, or pay for, expenses or losses which may be incurred by a tenderer in the preparation of their tender. The Authority does not bind itself to accept any of the tenders as a result of the tendering process including the lowest tender.

**Preparation of Tenders**

For the preparation of their tender and entering into a contract with the Authority, tenderers must ensure that they have all the information required and must satisfy themselves of the correct interpretation of terminology used in these documents.

**Queries on the tenders**

If any points in these tender documents are considered by the tenderer as unclear, the tenderer should address their queries in writing to obtain an explanation before sending their tender. They must address their query to the person identified in the covering letter. Their query will be responded to, but it shall not be construed in a way that adds to, modifies or takes away from the meaning and intent of the contract and/or the obligations and liabilities of the contract.

**Alterations**

None of these documents may be altered by the tenderer. If the tenderer wishes to propose modifications to any of the documents (which they may consider would provide a better way to achieve the contracts objectives) they must provide details in a separate letter accompanying the tender response.

**Prices**

All prices must be net and, where applicable, carriage paid with all cash and trade discounts allowed for.

**VAT**

All prices and/or rates shall be exclusive of Value Added Tax.

**Validity of tenders**

Tenders shall be valid for a minimum of three calendar months from the closing date for receipt of tenders.

**Sub-contractors**

The names and addresses of any sub-contractors the tenderer proposes to employ must be provided with the tender.

**Quality of goods / services**

Tenderers must possess relevant professional qualifications and experience.

**Conflict of Interest**

The Authority requires all tenderers to confirm whether any actual or potential conflicts of interest that exist which may prevent them undertaking this work, and a description of measures they would adopt if a potential conflict of interest arose during or following completion of this work.

**Treatment of tender**

The acknowledgement of receipt of any submitted tender shall not constitute any actual or implied agreement between the Authority and the tenderer.

**Debriefing**

All unsuccessful bidders will be offered the opportunity to be given a debriefing. Requests for debriefing are to be made in writing.

**The Authority’s use of the report / work**

The Authority may wish to publicly quote the consultants report or work they have undertaken. Tenders are requested to confirm that the Authority may (at the Authority’s own discretion) do so without restriction.

**Ownership**

The intellectual property rights rests with the Authority, not the tenderer.

**DECLARATION OF NON-COLLUSION**

To: Lake District National Park Authority

The essence of selective tendering is that the Authority shall receive bona fide competitive tenders from all firms tendering. In recognition of this principle, I/We certify that this is a bona fide tender, intended to be competitive and that I/We have not and will not (either personally or by anyone on my/our behalf):-

1. Fix or adjust the amount of the tender (or the rate and prices quoted) by agreement with any other person.
2. Communicate to anyone, other than the person calling for this tenders, the amount or approximate amount or terms of the proposed tender (except other than in confidence, where essential to obtain professional advice or insurance premium quotations required for the preparation of the tender).
3. Enter into any agreement or arrangement with any other person that he shall refrain from tendering or as to the amount or terms of any tenders to be submitted.
4. Canvass or solicit any member, officer or other employee of the Authority in connection with the award of this or any other Authority contract or tender.
5. Offer, give or agree to give any inducement or reward in respect of this or any other Authority contract or tender.

|  |  |
| --- | --- |
| Signed (as in Tenders) duly authorised to sign | ………………………………………………………………………… |
| For and behalf of | ………………………………………….…………………………….. |
| Date | ………………………………………….…………………………….. |

**REFERENCES**

Potential suppliers are required to submit details of one organisation with which contracts are currently held for the provision of your services. This is so that references may be obtained. If you are currently supplying to other Local Authorities, please include these. The Authority will wish to obtain an email/telephone reference for the successful tenderer prior to the award of the contract.

**Reference 1 Comments**

|  |  |  |
| --- | --- | --- |
| Organisation Name |  |  |
| Contact Name |  |
| Address |  |
| Telephone Number |  |
| Fax Number |  |
| Estimated contract sum | £ |
| E Mail address |  |

PLEASE NOTE THAT ALL INFORMATION WILL BE TREATED IN THE STRICTEST CONFIDENCE AND WILL BE USED PURELY AS A MEANS OF OBTAINING REFERENCES.

**Appendix 1**

‘The findings, statistical data, results, maps, photographs, drawings, plans and reports contained in the appendix section are the copyright of the Lake District National Park Authority’

See associated files on the Chest

**Appendix 2**

‘The findings, statistical data, results, maps, photographs, drawings, plans and reports contained in the appendix section are the copyright of the Lake District National Park Authority’

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