



THE ASSOCIATION OF BIKEABILITY SCHEMES
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Bikeability Contracts - Procurement Guidance

1.0 Introduction

This document is intended as a guide to help local authority commissioning officers when working with their procurement team to secure high-quality cycle training from external Bikeability providers, as effectively and efficiently as possible.

It has been produced by a 'Task and Finish' Group co-ordinated by TABS comprising of Bikeability schemes and local authority officers. If you have any comments or suggestions for the content of this document please contact: info@tabs-uk.org.uk

There are several overarching issues that are worth drawing attention to upfront, whilst further detail is provided in following sections:

- Firstly, even if a local authority contracts out all its Bikeability delivery the local authority itself still needs to be Bikeability registered. The process of registering as a local authority which contracts out is much less detailed than as one delivering in-house. Local authorities are required to provide details of those they are contracting out to, provide a copy of the Service Level Agreement, and provide information on how they will ensure quality assurance of the contracted delivery by providing information on their internal quality assurance arrangements.
- All delivery of Bikeability training must be consistent with Bikeability standards, as outlined in the *Bikeability Delivery Guide* (<https://professionals.bikeability.org.uk/documents/>) - in particular course time and instructor: trainee ratios (page 7).
- Thirdly, it is crucial to ensure that the quality of delivery is not compromised by placing too much weighting on the cost of any bid. This might incentivise bidders, in order to win the contract, to 'cut corners'.



2.0 Outsourcing versus in-house delivery

Outsourcing your cycle training has some advantages, as it can enable you to:

- Cope with large scale programmes
- Set minimum delivery standards
- Ensure there should be no extra costs beyond what is in your tender
- Allow you to hire a professional cycle training organisation, which has a team of National Standard Instructors

3.0 Engaging with your procurement team

- Meet with the procurement team to foster a good understanding of what Bikeability is, as cycle training will not be part of their day to day business. Establish a good rapport with them and ensure everyone has a clear understanding of each others' roles.
- It is worth having a very early conversation with your procurement team. The tender process can take many months and a late tender that results in a late starting contract may mean that targets either can't be achieved, or are more difficult to achieve.
- Be proactive in follow-up with your procurement team as they will likely be busy overseeing multiple procurements.

4.0 Setting up the tender

- When setting a tender, be very clear and specific with all your requirements. It is important to mention that the standards given in the Bikeability Delivery Guide are the minimum standards expected. The guide is available for download from the Bikeability website: <https://professionals.bikeability.org.uk/documents/>.
- Contracts for Bikeability delivery can only be awarded to registered Bikeability schemes, therefore it is essential to ensure that bidders are properly registered with Bikeability. If a scheme is using subcontractors all providers must be registered.
- The following items should be pre-requisites for a bid to be accepted:
 - i. Public liability insurance e.g. provide certificate or some other form of proof
 - ii. Employer's liability insurance e.g. provide certificate or some other form of proof
 - iii. Evidence of a Child & Vulnerable Adult protection policy
 - iv. Confirmation that instructors are members of an ITO
 - v. First aid qualification for the instructors
 - vi. Evidence of CPD of instructors

- vii. Bikeability registration scheme number
- viii. Evidence of previous delivery
- Interviewing short-listed candidates does offer an opportunity to clarify any areas of uncertainty, and confirm the bidder's ability to deliver the contract. However it does add cost to the process – both for bidders to prepare and attend, and to local authorities to manage. Creating a decent brief, with a sound evaluation approach is especially important if interviews aren't part of the selection process.
- Visiting a prospective provider to see the instructors' processes and procedures in action can provide a good insight into a scheme's capacities. Of course this will add cost and time to the process but equally, can help ensure you make the right selection.

Key requirements

- Below is a list of some of the key requirements for the procurement team to include when compiling the standard documentation.
 - i. **A page limit for the tender submission** – this will help to ensure that the bidder's focus remains on what's important and officers spend less time reading information that's not relevant. For instance, a maximum of 20 pages, focused on the key information that will enable the selection of the best quality training provider. As well as ensuring that neither bidder nor assessor spends unnecessary time (and therefore cost) preparing or reviewing a bid. It is advisable to have a word count for each question.
 - ii. **A stated price -** It can be helpful to get a breakdown of what this includes, to get a clear picture of what resources are being committed, and how.
 - iii. **Conditions of payment** – It is important to achieve a balance between having reasonable targets (possibly linked to financial incentives) for the successful bidder to meet, to ensure optimum delivery. But equally not to set unrealistic targets that could encourage the deliverer to cut corners, or focus on a particular aspect of delivery to the detriment of other areas. It can be helpful to have a level of tolerance (e.g. 5%) to allow for unforeseen issues affecting take-up levels that are out of the control of the deliverer. It is worth considering having a payment amount per head for all trainees attending on a monthly or termly basis, based on clear evidence of delivery, rather than simply on the basis of pass rates.
 - iv. **The total number of schools** that will receive Bikeability training. As outlined in *point iii* above, it may be useful to set clear targets and/or incentives. It is worth outlining how engagement with the schools will be conducted. For example, an initial letter from the local authority to introduce the provider, after which the provider liaises directly with the school. The total number of trainees who

will receive training, and how many trainees will receive training at each of the Bikeability levels.

- v. **The minimum hours of training** that will be provided for Level 1, 2 and 3 courses, including the minimum number of hours of on-road training for Level 2 and 3, ie. between 2-6 hours depending on the instructor:trainee ratios. For details of these minimum standards refer to the Bikeability Delivery Guide – page 7 (*Fig 1 below*).
- vi. **The instructor/trainee ratios**, which should be linked to course delivery times, as set out in the Bikeability Delivery Guide – page 7 (*Fig 1 below*).
- vii. **Monitoring and feedback data** The provider should expect to keep a record of key data including the number of schools contacted, the number of schools offering Bikeability, the number of pupils receiving Bikeability at different levels and when the training took place, and be able to report on these figures, as required. Ask the contractor to provide this data in a format which is consistent with what's in the Bikeability monitoring tool, to ensure that completion by the grant recipient is as quick and easy as possible.

It is worth considering if you would like to collect more qualitative feedback from schools, pupils or parents about their Bikeability experiences as well. Such feedback can help provide a fuller picture of how valuable the training was, in the direct opinions of both parents and children. Qualitative feedback of this nature may also bring out personal reactions to the training that may not otherwise be captured. It can be a powerful 'tool' to help promote Bikeability too – for instance in briefing documents to councillors, or for local press articles.

- viii. **A quality-cost ratio**, e.g. 80:20. Clearly it is important to ensure that the quality of delivery is not compromised by encouraging tenderers to bid low. Contractors need sufficient funding to deliver the service as per the minimum requirements set out in the Bikeability Delivery Guide (***Fig 1 below***). Equally, you may find that some schemes just won't bother bidding if they feel that they can't deliver effectively for the budget on offer. At the same time, it is fair to expect that, particularly given current local authority budgetary constraints, that some grant recipients will legitimately use a proportion of the funding to manage the programme, if the other option is simply for them not to apply for grant funding at all. It may be that a decision needs to be taken on how many places can realistically be delivered, in order to maintain quality and reduce that figure if necessary. Bidders should be asked what they can provide for the £40/head grant, if there is any added value provided, and if so, to give examples of this.
- ix. **Reports and meetings with contractor**- outline the frequency and content. For example, it would be reasonable to expect a monthly overview on the delivery statistics, accompanied by a simple progress report for review at a monthly meeting. Whether these meetings are face-to-face or by phone, where located and how long

they last will need to be decided based on local circumstances/availability. Providing a reporting template might be useful.

At the end of the contract a fuller evaluation report, including feedback from the contractor will provide a useful review document/lessons learnt.

- x. **A cancellation policy** – ask for a clear explanation of the circumstances that would make a scheme cancel a session at short notice, how this decision is made, and how and what notification is then given to the school. Details should be provided about what the procedures are if a school wants to cancel or postpone either an individual training session or a whole course – how these are defined, how much notice must be given and what flexibility there is to re-book. Ask for details about what the refund or charging policy is in different circumstances, including when a refund is not available. For instance, if the cancellation for either a course or a session is less than a week before the start of the first training day.

- xi. **A bad weather policy** - Ask for details of what procedures there are for adverse weather conditions and how decisions are made. For example, would a course continue in the rain but be cancelled if there are extreme conditions eg. snow, and what arrangements would be made to provide an alternative session. Details should be given on, in the case of adverse weather on what advice is given to mitigate against its impact, eg. warm and waterproof clothing, sun cream, water etc.



There is a set of minimum requirements for the structure of Bikeability training courses.

Course Ratios and Times

All courses can be taught 1:1 with a minimum of 2 hours per session. Many working practices do not allow single instructors to work alone with groups and therefore the ratios below may be multiplied to achieve the correct course size (e.g. 1:6 may be multiplied to 2:12)

For Level 1 and 2 courses the maximum ratio of assistant instructors to instructors is 2:1.

The following guidelines regarding ratios and minimum durations of sessions are the expected delivery standards for courses. Any proposed variations which represent a departure from the guidelines must be approved by the Department for Transport before implementation.

LEVEL 1		
Maximum number of trainees per instructor	15	
Minimum course time	2 hours	
LEVEL 2		
Maximum number of trainees per instructor	6	
Minimum on road ¹ course times vary according to number of trainees per instructor.	Minimum on road course times vary according to number of trainees per instructor.	
	6 trainees per instructor	6 hours
	5 trainees per instructor	6 hours
	4 trainees per instructor	5 hours
	3 trainees per instructor	4 hours
	2 trainees per instructor	2 hours
	1 trainee per instructor	2 hours
Level 2 courses with more than 3 trainees per instructor must be taught in 2 or more sessions and not delivered in a single day.		
LEVEL 3		
Maximum number of trainees per instructor	3	
All courses are based on a 2 hour session but longer times or additional sessions may be needed for groups of 2 or 3. When training 1:3 it is recommended that at least 2 instructors are present.		

¹ These times are the minimum that must be spent delivering training on road. Time required to prepare the trainees for going out including the assessment of level 1 skills must be additional to the minimum on road training time.

Fig 1 – Extract from the Bikeability Guide – minimum standards (page 7)

5.0 Scoring

- Make your scoring matrix (the points awarded for answers to questions in the tender) clear and easy to understand. (see Fig 2 below for an example of marking guidelines)
- Have a range of scores on your matrix that can cover brief or in-depth answer and include explanations as to why the company was scored that way. This can be used to de-brief losing bidders.

- Set aside a time to score your tenders all together, rather than trying to fit them in as and when, so there is consistency in your evaluation.
- Ensure that all tenderers are offered the opportunity to get feedback on their bid.

Scoring	Marking Guidelines
Score 0 - 10% points in band 10	Fails to satisfy requirement.
	Fails to evidence how targets will be achieved.
	Fails to give confidence in ability to deliver.
Score 10 - 60% points in band 50	Inadequately satisfies requirement.
	Inadequate evidence that only partially demonstrates how targets will be achieved
	Little confidence in ability to deliver
Score 60 - 80% points in band 20	Adequately satisfies requirement.
	Adequate evidence that demonstrates how targets will be achieved
	Good confidence in ability to deliver
Score 80 - 90% points in band 10	Fully satisfies requirement.
	Excellent evidence that demonstrates how targets will be achieved
	High confidence in ability to deliver
Score 90 - 100% points in band 10	Fully satisfies requirement. With Innovation / Added value
	Excellent evidence that demonstrates how targets will be achieved
	High confidence in ability to deliver

Fig 2 – Example of marking guidelines to assist with evaluation of bids

6.0 Communication

- If you are unclear on any content in the tender application check with your procurement team. Ensure that all potential bidders have a chance to ask questions prior to a published cut off point.
- It is common for any communication with the bidders / interested organisations to go via the procurement team. Find out if this is the case and if so, establish a process with the procurement team, where you will be notified and asked to provide advice/comment on any enquiries. To be aware, usually any questions and answers that come as a result of an enquiry are normally made public for other bidders to see.

7.0 Follow up

- In the event that an award is challenged, do not release any confidential information within the bid, i.e. price per hour and/or trainee, without written permission of the bidder.
- Once you have selected your new provider, develop and maintain a professional working relationship with them.

TABS Task and Finish Group

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