Dear Supplier,

Mini Competition for software to support booking and scheduling of Ring and Ride services operating around the West Midlands area (ref: xxxx-xxxxx).

As a qualified supplier to Lot 1 (technology platform) of the WMCA's Bus Demand Responsive Transport Network Framework Agreement you are invited to submit a response to this mini competition focused on the West Midlands.

The Specification is as detailed in **Appendix A** and the Terms and Conditions that shall apply to the call-off contract formed between TfWM (Transport for West Midlands), part of the West Midlands Combined Authority, and the successful Supplier are as per the original Framework Agreement (Schedule 5 – Call-off).

Bids must be submitted using the attached Pricing Form (**Appendix B**) which is to be completed and uploaded to the XX.

Bid Return Procedure

You are required to submit your Bid by XX, responses should be submitted via the XX portal.

If you have any clarification questions in relation to this opportunity, please submit them in **writing** via the message facility of the XX portal by the closing date of 1200 noon on Friday 11th February 2022. Where appropriate, and for the purposes of transparency, we will share clarification details with all suppliers invited to take part in this procurement exercise. We would be looking to appoint the successful supplier(s) as soon as possible during week commencing XX.

Please note that late Bids will not be considered.

The Bid must be valid for acceptance for a minimum period of 90 days from the closing date for receipt of Bids.

You are advised that the WMCA (West Midlands Combined Authority) does not bind itself to accept any Bid submitted in response to this Mini Competition.

Nothing herein or in any other communication made between the WMCA and any other party, or any part thereof, shall be taken as constituting a contract, agreement, or representation between the WMCA and any other party, save for a formal award of Contract made in writing by the WMCA and in the form of an Official Purchase Order.

The WMCA accepts no liability to pay for any costs and expenses which may be incurred by you, or any party involved in preparing for or participating in any part of this procurement process.

Evaluation of Response

The following weightings will apply:

Quality (60%)
Price (40%)

Bidders responding to this Mini Competition exercise should respond to the following questions within their written response. Please ensure that you read the Specification at **Appendix A** before responding to the below questions. Please upload your response within the attachment area provided within the XX.

Criteria: Future Mobility Zone Programme Behaviour Nudge

Criteria	Weighting	Guidance	Covered under sections	Max points available
Quality Assessment (60% of total weighting				
Proposal – Detail your proposed solution to delivering the service required and the steps you would take at regular intervals to ensure it was fit for purpose and achieving desired outcomes. Examples of previous, equivalent deployments is highly desired.	**10**		Sections 2 and 3	10
Customer Interface Usability & Functionality Describe how a customer would book a journey demonstrating an intuitive, user-friendly, accessible interface, meeting all the requirements of the specification	**20**		2.3 2.4 2.5	10
Combined Authority and Operator Interface Usability & Functionality Demonstrate an interface that meets the functional requirements of the specification, explaining the core product offer, how the system efficiently schedules journeys, configurability options and analytics tools available.	**35**		2.2 2.3 2.4 2.6 2.8 2.9 3.1 3.2 3.3	10
Partnership working Explain how you will work in partnership with the Combined Authority and vehicle providers on an ongoing basis to support continuous service improvement. Demonstrate measures and evidence of working successfully to provide similar services with other authorities	**20**		2.8 3.3	10
Integration Ability Clearly articulate the measures in place that will enable the system to integrate with other systems as	**10**		2.6 2.7	10

outlined in the specification. This should include integration with fleet provider systems as well as other TfWM systems and demonstrate successful applications in other cities both with individual and multiple fleet providers.				
Mobilisation Outline how you will work with TfWM to effectively mobilise the new software, including system set-up, transition of customer database, training of staff and drivers and any customer engagement.	5		2.3 2.9	10

*Scoring guidance

Where questions are scored, individual weightings are provided within the body of the question. Unless a Pass/Fail question, all quality questions will be scored out of a maximum of 10. The following guidelines will be applied when allocating scoring:

Score	Meaning	Assessed as
0	No response (complete non-compliance)	No response at all or insufficient information provided in the response such that the Method Statement is totally non-assessable and/or incomprehensible.
1-2	Unsatisfactory response (potential for some compliance but very major areas of weakness)	Substantially unacceptable response which fails in several significant areas to set out a Method Statement that addresses and meets the requirements: Little or no detail has been provided to support and demonstrate that the Bidder will be able to provide the Services and/or considerable reservations as to the Bidder's proposals in respect of relevant ability, understanding, expertise, skills and/or resources to deliver the requirements. Would represent a very high risk for the Authority.
3-4	Partially acceptable response (one or more areas of major weakness)	Weak response which does not set out a Method Statement that fully addresses and meets the requirements: Response may be basic/ minimal with little or no detail provided to support and demonstrate that the Bidder will be able to provide the Services and/or some reservations in respect of relevant ability, understanding, expertise, skills and/or resources to deliver the requirements. May represent a high risk for the Authority.
5-6	Satisfactory and acceptable response (substantial compliance with no major concerns)	Response sets out a Method Statement that largely addresses and meets the requirements, with some detail provided to support the proposal; minor reservations or weakness in a few areas of the proposal in respect of relevant ability, understanding, expertise, skills and/or resources to deliver the requirements. Medium, acceptable risk to the Authority.
7-8	Fully satisfactory /very good response (fully compliant with requirements).	Response sets out a Method Statement that fully addresses and meets the requirements, with full details provided to support the proposal; provides full confidence as to the relevant ability, understanding, expertise, skills and/or resources to deliver the requirements. Low/no risk for the Authority.

9-10	Outstanding response (fully compliant, with some areas exceeding requirements)	Response sets out a robust Method Statement (as for a 7-8 score) and, in addition, provides or proposes additional value and/or elements of the proposal which exceed the requirements in substance and outcomes in a manner acceptable to the Authority; provides full confidence as to the relevant ability, understanding, expertise, skills and/or resources not only to deliver the requirements, but also exceed it as described. Low/no risk for the Authority.

Current high-level procurement and key deliverable timescales are as follows:

Submission deadline for Bids	
Decision to appoint	
Mobilisation of new system	

The above timescales may be subject to changes.

The proposed contract length is three calendar years with the option for two one-year extensions, exercisable by WMCA.

Yours faithfully,

Procurement Lead Officer (Projects)

Enclosures

1.   Appendix A – Specification
2.   Appendix B – Pricing Form

Appendix A - Specification

This section sets out TfWM's Ring and Ride requirements for the Services required.

1.0 Background to TfWM Ring and Ride

Ring and Ride is the non-statutory door-to-door transport service for any registered users who lives in the urban areas of the West Midlands who find it difficult or impossible to use standard public transport (https://ringandride.org). Until April 2021 the service was operated in full by National Express Accessible Transport (NEAT) in return for an annual grant from TfWM. NEAT managed the registration process, took bookings, scheduled trips, and undertook the journeys using their fleet of accessible minibuses in line with operational criteria agreed with TfWM.

In April 2021 TfWM took the strategic decision to take over the management of customer contact and scheduling activities and so the NEAT staff previously undertaking these activities transferred to TfWM through a TUPE process. This was to enable TfWM to build closer relationships with customers, better understand and manage demand and better align the service with wider TfWM transport delivery activities. NEAT continue to operate the fleet and fulfil the journeys.

In the longer term, TfWM recognises the potential opportunity to expand the remit of Ring and Ride into new markets, perhaps to provide services for the general public where access by public transport is poor, or better integration with constituent Councils' statutory provision. TfWM may also look to allocate journeys to a range of providers, not just NEAT.

Prior to TfWM taking over these activities, booking and scheduling was undertaken by NEAT using an Ecolane system and in the absence of any other system TfWM has continued to use this. However, Ecolane's contract lies with NEAT and therefore TfWM are seeking an alternative provider with whom to enter a direct contractual arrangement to end reliance on a third-party provider and ensure a system and relationships are in place that aligns with the strategic ambition for the service.

As of December 2021, there are around 12,000 registered users making around 2,500 trips each week, but this has been impacted by the covid-19 pandemic prior to which there were around 12,000 trips a week. To meet the current demand levels there are 47 vehicles providing the service. Prior to the pandemic there were 112 vehicles operating and it should be assumed that at some stage the service will recover back to these levels.

2.0   Area of Operation:

Ring and Ride offers a pre-bookable door-to-door service for residents who find it difficult to use regular public transport. Typical journeys are for shopping trips, medical appointments, visiting friends, day centres, lunch clubs and other social activities. It currently operates across the whole West Midlands Area except for the rural area between Coventry and Solihull (the 'Meriden gap'), however the proposed solution should enable provision across the entire region as shown. The service operates for pick up and set down within the red boundary.
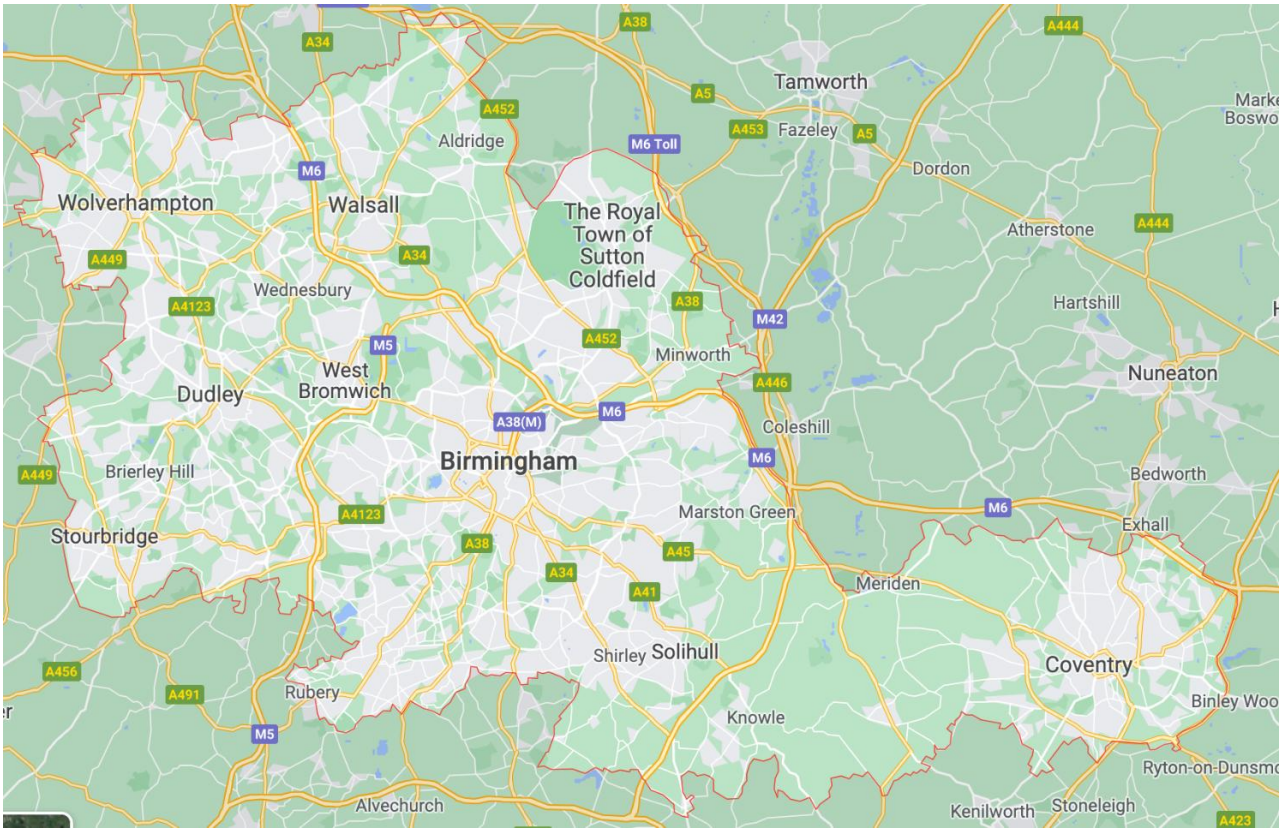
Whilst the service operates across the whole area there are eight operating areas with journeys being allocated to one of the eight depots depending on where the customer lives. Whilst customers cannot travel outside of their local area, vehicles can be moved between operating areas as required to help match supply and demand.

2.2   Operating Parameters

Current operating hours are Monday to Saturday 8am to 6pm and Sundays 8am until 1.30pm. Booking lines are open on Monday to Saturday from 9.30am to 2:30pm and customers must book on the day before they wish to travel (Friday for travel on Saturday or Sunday, and Saturday for travel on Monday). Each customer is also entitled six 'advance' bookings a year to accommodate important appointments. This model of operation is long-standing custom and practice, but TfWM would expect to work with the successful supplier to review whether this model provides the framework for an efficient, customer focussed service based on ongoing review of data and experience of operations in other locations.

Currently, all bookings are primarily made by telephone, and a small number by email. The new software should enable customers to make bookings directly either via smartphone app or web interface and this should be available 24 hours a day. However, maintaining a call centre is important for many customers who do not have access to technology for self-service and so any solution must also enable TfWM's customer service operatives to book journeys on behalf of customers who phone in. Once a booking is received by the call centre operative the journey is scheduled using the booking and scheduling system.

Services pick up and set down at the locations provided by the users and any other approved locations. One end of the journey is more often the not the customer's residential address or an accessible location nearby. The system requires the capability of clearly advising drivers where the pick-up and set-down points agreed with customers are.

2.3   Customer Registration

All users require registering. A customer account should be created for each user which includes basic details such as name and address but also any disabilities, impairments or specific requirements of any kind that may impact on the type of vehicle that is sent or that the driver needs to be aware of. The customer should also have the option to remove this information if no longer applicable or add specific requirements for individual journeys only. Existing user profiles exist for all customers and the supplier will be required to transfer these details to the new system during the mobilisation period. All data storage must be fully GDPR compliant.

Provision should also be included for customers to register themselves through the customer interface.

2.4   Customer Payment

Ring and Ride is a paid service. Currently, all payments by customers are made by cash to the driver. However, the new system should enable provision for customers to pay at time of booking via a range of channels including Debit/Credit Cards and the West Midlands public transport smart ticketing system 'Swift.' It will also be necessary to provide customer refunds if journeys are cancelled. The system must have the ability for users to store their preferred payment type and details such that these do not need entering in full for each booking.   Any data must be managed securely, safeguarding customer details and minimising the risk of fraud. Drivers must be advised whether users have paid in advance or whether cash payment is necessary. The system should also have the functionality to enable drivers to accept alternative forms of payment such as Swift and any other concessionary passes. It is recognised that all the above payment functionality may not be achievable from the commencement date of the new system, however suppliers should provide a plan, explaining how and when new payment options will be implemented.

2.5   Customer Interface

Customers should be able to book their journey using an app or web browser with appropriate agreed TfWM Ring and Ride branding. Interface should be intuitive and remember customer preferences such as previous and most travelled to locations and other saved destinations. It should also offer them the option of return journeys and the option of travelling with an additional person/s who may be charged different rates. Users are able to travel with companions who may not be registered users themselves.

An interface should be supplied that enables customers to track their vehicles in real time, both tracking the vehicle to the pick-up point and during the journey. Automatic alerts should be sent to customers in real time to notify them of any status updates to their journey such as delays and changes to estimated arrival times. The customer should also be able to rate their journey and leave any feedback which feeds into the management system. Customers should also be able to cancel booked journeys via the interface. The app should enable customers to input their reason for the trip such as medical appointment, shopping trip, social trip etc so operator can use it for analysis and generating accurate reports and also reasons for cancellations.

2.6   Driver Interface

The driver interface should provide a full itinerary for the driver, displaying real time route details and journey time estimates. Drivers should be provided with full details to enable them to meet requirements of customers in a professional and courteous way, displaying any additional information which the passenger has requested the driver should be aware of. The software itself should be capable of being compatible with any Android and iOS device using 3G or 4G connectivity. The driver must be able to confirm the pick-up and drop-off of a customer and have the ability to report any issues (e.g., passengers not present) via the driver interface.

2.7   Other Integration requirements

As well as full integration with the Swift smart ticketing system, MaaS (Mobility as a Service) capability is currently being developed and it is desired that by 2025 all services are capable of being part of a West Midlands MaaS portfolio. This would require API integration with other related services. There should also be capability for integration with wider customer management systems at no additional cost to the Authority, this includes 8x8, CRM and single sign-on for operatives. In addition, it must be possible to view and modify user accounts through a secure API to allow WMCA to integrate further with its own systems and strive for a single view of its customers. Administrative and operational access to the system must have the ability to integrate to a Single Sign On (SSO) provider. A future aim of WMCA/TfWM is for customers to also use a Single Sign On system.

Recognising that this integration may not all be achievable from system launch, details should be provided as to how the supplier will work with the Authority to deliver these requirement and anticipated timescales.

Given the operation of the vehicles is undertaken by a third party(ies), as well as technological integration there will need to be a robust system management integration in place to ensure that vehicle providers have access to appropriate systems and management tools to enable a seamless service for customers.

2.8   Service Management

Management tools and data analysis software should be provided to give a comprehensive overview of booking demand, successful journeys, cancellations, refusals, and any other relevant statistics. The successful bidder will be expected to work closely with TfWM on an ongoing basis, developing tools as required and interpreting the data collected by the system and use this to recommend measures needed to improve service delivery and efficiency. It is the intention that the relationship will be a partnership and the supplier will work proactively with TfWM to develop and improve the service based on operational data and experience of the supplier in providing similar services in other locations.

2.9   Training

The successful bidder should provide comprehensive training to all telephone operatives, schedulers, and drivers during the mobilisation period. The supplier should also support TfWM with wider customer engagement when promoting self-service solutions and help

support any necessary customer communications during the mobilisation period where they may be impacted by any transitional activity.

2.10   Delivery Timescales

The new system should be fully operational, enabling customers and operatives to book and schedule journeys and the operator to fulfil journeys within three months of the award of contract. The bid should provide a full implementation plan and make it clear any activities TfWM will be required to resource during the mobilisation period and what activity will be undertaken by the supplier. Whilst a fully operational system is required at launch, it is recognised there may be certain aspects of functionality that require development work and will not be available initially. Where this is the case, this should be made clear in the bid and a project plan proposed that enables all specification requirements to be met within a realistic period.

The aspiration is to have an operational system in place for the beginning of May 20XX, when the contract with the existing supplier ends.

3.0   Performance

3.1   Service Availability

The Ring and Ride service supports some of the region's most vulnerable residents and therefore a reliable service is essential. The availability of software systems provided through this contract should be above 99.98%

3.2   In and out of hours technical support and protocols

Given that Ring and Ride is currently delivered by two separate organisations (TfWM and NEAT), both will require technical support on the new system. This is the case with other customer systems that are currently utilised within the business. Support will be required both in and out of current hours of operation (as whilst trips are made between Monday to Saturday 8am to 6pm for example, NEAT depots work beyond these times when scheduling drivers and vehicles around the West Midlands). TfWM and the provider will need to agree protocols in place including level of support required, service level agreement(s), points of contact, preferred contact method and escalation process (in the event of system outage for example).

3.3   Scheduling Efficiency

The system provided should schedule vehicles and journeys as efficiently as possible within criteria agreed with TfWM. Such criteria will include how far customers are able to book in advance, how closely times of travel offered match times requested and circumstances under which scheduled journeys can be revised, either by TfWM or the customer. It is recognised that there will be a balance to strike between efficient operation and matching customer requests as closely as possible. The ability to easily reconfigure systems and periodically review and improve criteria to best strike this balance is therefore a key factor.

Appendix B – Pricing Form

Price (40%)

This section sets out how the WMCA requires the Bidder to price the Services required.

The WMCA require a fixed price to deliver the requirements set out within the Specification. Fixed prices should include any expenses and overheads. Please provide your fixed price within the XX which contains a table based on the pricing area below. Within your returned response, please also provide a breakdown of how you arrived at your fixed price.

Note the figures provided here will be used for the purposes of commercial evaluation.

TfWM is aware that Bidders may price things differently and so the costing template has been built to allow for this. If Bidders leave cells blank it will be assumed that there is no cost for that item although Bidders may want to add a nil or n/a against these costs to be more explicit.

TfWM has provided 3 possible vehicle levels which may be in operation on a daily basis over the 3 years. Bidders are asked to provide costs against each of these 3 scenarios (in columns C-E) even if the costs are not impacted by the number of vehicles in service. If the number of vehicles in operation is irrelevant to the cost, please put the same cost into each of the 3 columns. In the Comments column, please make it explicit whether the cost is per vehicle or the total cost for up to x vehicles.

Weighting for each vehicle range is shown in row 12. The costs for each column will be multiplied by the weighting attributed to each vehicle range.

Any initial development costs should be provided under the heading One-off set-up costs (note A). Any ongoing cost is to be provided under the Ongoing Cost section. A row has been included for both Annual Cost and a Monthly Cost to make it easier for Bidders to complete. If Bidders charge an Annual Fee, please insert that in Section B. If Bidders charge a Monthly Fee, please insert that in Section C. Bidders should only complete both rows if TfWM will need to pay an annual fee in addition to a monthly one.

TfWM does not anticipate any significant development beyond the initial Go Live. However, there may be a requirement for additional functionality or adjustments to information provision. Therefore, Section D asks for hourly rates for any further development. If a Bidder's other charges include provision for further development and it does not intend to charge for additional work, it should include £0 in this row and outline this in the Comments section. For comparison purposes, it is assumed that there will be 120 hours of additional development work over the 3 year contract although this may not be the case.

Section E asks for any other fees which the Bidder proposes to charge, 3 cost lines have been included here as follows:

Additional Licences - it is assumed that the solution will be available for up to x members of staff. If your solution limits the number of licences which TfWM can have and TfWM will need to pay for additional licences above this point, or at a certain number of users above

this point, the Bidder should provide costs, adding in the comments at what number of users the cost will increase. It is assumed that any licence costs for the base number of staff will be included in either sections A, B or C.

Additional Training - it is assumed that the package will be straightforward to use, that training will be provided to users in advance of Go Live and will form part of the cost of the offer. If further functionality is provided over the course of the 3 years or fixes have to be undertaken which would change the nature of the way in which the software is operated, it is assumed that this cost will be part of the rollout. If this is not the case and a Bidder intends to charge any further costs, these should be included on row 20, with an explanation of what the additional cost represents and what level of training it provides.

Other Fees - if a Bidder intends to charge TfWM for any cost which is not included in any of the other sections, it should be included here, explaining in the Comments section what the cost represents.

The price of the Bids will be assessed using the following equation:

$$\frac{Lowest\ Quoted\ Price}{Quoter's\ Price} \times 100$$

Using the above equation the Bidder that submits the lowest pricing will score full marks, a Bidder that submits pricing that is twice as expensive as the lowest pricing submitted will score 50% of the maximum available score for price and a Bidder that submits pricing that is 10% more expensive than the lowest pricing submitted will score 90.9% of the maximum available score for price.

	Weighting	45%	40%	15%	
Section		0-100 Vehicles	100-200 Vehicles	200+ Vehicles	Comments
		£	£	£	
A	One-off setup cost				
	Ongoing Cost				
B	Annual Fee				
C	Monthly Fee				
D	Hourly Rate for Further Development				
E	Other Fees				
	Additional Licenses				
	Additional Training- per training package				
	Other Fees				