

# Greater Wellington Bus Services



## Part 2a – Instruction Booklet

Tenderer specific quality proposal

## Overview - Part 2a: Tenderer Specific Quality Proposal

This Part 2a Instruction Booklet provides guidance on how to complete the Part 2a Response Template. Tenderers are required to use the Response Template to record their response to Returnable Part 2a.

The Part 2a Response Template is available from the Data Room.

*Do not complete or include this Part 2a Instruction Booklet when submitting your Tender.  
Instead use the Part 2a Response Template.*

The response to Returnable Part 2a is specific to each Tenderer and is required to be submitted only once.

No pricing information is to be included in the response to this Returnable.

Using the Returnable Part 2a Response Template:

- The Response Template provides the basic structure of the Returnable and the tables to be submitted
- Each numbered section in this Part 2a Instruction Booklet corresponds with the same numbered section in the Part 2a Response Template
- Tenderers must respond to every question in the order that the questions are set out in the Response Template
- Tenderers can tailor the Part 2a Response Template according to their corporate style, but in accordance with the requirements of the RFT (eg, the document formatting conventions)
- Every subsection must start on a new page
- The response to this Returnable 2a must be clearly labelled (in the footer and the file name) in accordance with the electronic file naming convention – so that the Greater Wellington Regional Council (GWRC) can identify which tenderer each Returnable relates to. The file naming convention is:  
  
Part 2a-[Tenderer name]  
  
Eg, 'Part 2a-Bus Co Ltd'
- When responding to Part 2a, wherever possible, please provide relevant and specific examples to illustrate your response.

Capitalised terms used in this Returnable have the meaning given to them in the: Greater Wellington Bus Services Request for Tender issued by GWRC.

The Returnable Part 2a Response Template collects information that will be evaluated as part of the quality component of this Request for Tender (RFT). Quality accounts for 40% of the total RFT score.

The attributes that contribute to quality are:

Quality attributes	Sub-attributes	Returnable reference and question number	Percentage allocation of Quality	
Confidence in service delivery	Relevant experience	Part 2a – 3.1 and/or 6.1	55%	
	Operator performance	Part 2a – 3.2 and/or 6.2		
	Innovation (organisational approach)	Part 2a – 3.3 and/or 6.3		
	Organisation	Part 2b – 1.1		
	Transition experience	Part 2b – 1.2		
	Transition plan	Part 2b – 1.3		
	Approach to service delivery and plans	Part 2a – 3.4 and/or 6.4		
Approach to fleet management	Part 2a – 3.5 and/or 6.5			
Partnering and corporate culture	Approach to partnering	Part 2a - 2.1	15%	
	Corporate culture	Part 2a - 2.2		
	Recruitment and training	Part 2a - 4.1 and/or 7.1		
	Health and safety	Part 2a - 2.3		
Customer service and patronage growth	Customer service	Part 2a – 5.1 and/or 8.1	30%	
	Patronage growth	Part 2a – 5.2 and/or 8.2		
	Managing service disruptions	Part 2a – 5.3 and/or 8.3		
			Total	100% (of 40%)

### **Urban versus regional Bus Units**

Recognising the differences in characteristics between GWRC's urban Bus Units and the regional Bus Units of Kapiti and Wairarapa, Part 2a enables tenderers to tailor their Tender response at a Tenderer level to urban and/or regional Bus Units. Depending on which Bus Units (urban and/or regional) are being tendered for, sections of this Returnable may or may not need to be completed. This is indicated in a box at the top of the relevant sections.

## 1. Executive summary

The executive summary will not contribute to your organisation's quality score; however it will provide useful context to the evaluators and is an opportunity to outline your organisation's offer.

The executive summary should include, but is not limited to:

- A brief overview of your organisation and your future development plans
- A brief outline of how your organisation will work in partnership with GWRC to deliver Bus Services for the Wellington region
- An overview of any requirements and resources your organisation does not currently meet or have, to deliver services and how you will ensure the relevant requirement or resources will be available by the applicable Milestone Dates and the Commencement Date
- The benefits and strengths that your organisation could bring to providing the Services under the Contract
- What sets your organisation apart from other Tenderers.

*Page limit: Three (3) pages*

## 2. Partnering and corporate culture

### 2.1 Approach to partnering

Describe your organisation's proposed approach to partnering under the Contract?

Your response should include, but is not limited to:

- How your organisation will establish, develop and foster a partnering relationship with GWRC, taking into account the Contract and the Partnering Principles
- The assumptions and expectations your organisation has of GWRC in the partnering relationship
- An overview of your organisation's issue resolution process
- The strategy your organisation has to foster a cooperative and non-adversarial approach to issue resolution
- How your organisation plans to establish and maintain collaborative relationships with other PTOM operators and the array of other partners and stakeholders (including the community) that your organisation will work with during the term of the contract
- How your organisation will anticipate, respond to and accommodate the reasonable expectations of stakeholders and the community
- How your referees would describe your partnering approach.

*Page limit: Five (5) pages*

### 2.2 Corporate culture

#### 2.2.1 Tell us about your organisation's corporate culture.

Your response should include, but is not limited to:

- A brief overview of the key elements of your culture
- How your employees would describe your organisational culture if we spoke with them
- How your organisation complies with the 'good employer' principles and overarching employment policy, including good faith and other requirements, of the Employment Relations Act 2000 (or similar legislation if in another jurisdiction)
- How you analyse staff engagement and set targets to support a long-term vision
- How your organisation retains staff

- Your organisation’s approach to engagement with unions and maintaining effective working relations
- Your organisation’s approach to change management
- An outline of the key staffing challenges facing bus operators and how your organisation will meet these challenges.

*Page limit: four (4) pages*

2.2.2 Provide the average annual absenteeism rate for each of the last three financial years, using the formula below.

*Note: For the purpose of calculating the average annual absenteeism rate, absenteeism is defined as unplanned (or unscheduled) absenteeism, measured in days per annum. This excludes planned holidays and other forms of leave that are approved in advance by the employer and employee (e.g. sabbaticals, parental leave, leave for planned surgery etc). It includes sick leave (unpaid or paid), domestic leave (if offered to employees for the illness or injury of dependents), bereavement leave, time off of work in receipt of ACC compensation and/or any other time off not authorised in advance by the employer.*

$$\frac{\text{Total number of work days lost due to unplanned (or unscheduled) absenteeism}}{\text{Total number work days rostered (for all employees)}} \times 100$$

## 2.3 Health and safety

- 2.3.1 Describe the core elements or foundations that symbolise your organisation’s approach to health & safety.
- 2.3.2 How would your referees describe your organisation’s health & safety culture?
- 2.3.3 Outline the leading indicators of safety performance (ie, pre-emptive rather than post incident) that your organisation uses to drive safety improvement.
- 2.3.4 Provide the following metrics for the last three financial years:

a.	The annual frequency of Lost Time Injuries (LTI)
b.	The number of LTI per 100,000 hours worked, caused by work-related events
c.	The total number of notifiable events – sometimes called serious incidents) that have occurred in the last 3 years, by category. A notifiable event is: defined in Schedule 1 ( <i>Definitions and interpretation</i> ) of the Contract and

includes: death, notifiable illness or injury, or a notifiable incident.

- 2.3.5 Describe how the LTI outlined above were managed and any changes you made as a result of the incidents.

*Page limit for all of section 2.3: Five (5) pages*

Complete section 3 only if your organisation is tendering for any of the following Bus Units:  
North South Spine, Khandallah, Brooklyn/Owhiro, Lower Hutt, Upper Hutt, Wainuiomata, Porirua.

### 3. Confidence in service delivery

#### 3.1 Relevant experience

3.1.1 Identify your organisation's (including each Consortium Member's) relevant recent experience in providing bus services, similar to those that your organisation is tendering for here. Outline the number, size and location of bus service contracts your organisation has held within the last five years – use the table below.

Client	Jurisdiction	Contract value	PVR	Start date	End date

3.1.2 What is the relevance of this previous experience to the urban Bus Units your organisation is tendering for and how will this experience be applied to this Contract?

*Page limit for 3.1.2: Two (2) pages*

3.1.3 Provide further details for three of the contracts identified above to be used as reference sites. If possible, provide a range of different jurisdictions and/or clients. In providing these referees, you give permission for GWRC to contact the nominated personnel for the purposes of undertaking reference checks as part of the evaluation of this RFT.

<b>Contract one/two/three: 1/2/3:</b> [Insert client name here]
a. Jurisdiction
b. Contract start date
c. Contract end date
d. City/town/region the services were/are operated in
e. Key market characteristics
f. Number of peak vehicles required (PVR)
g. Fleet type
h. Annual contract value
i. Gross cost or net cost contract

<b>Referee 1 details for contract one/two/three</b>	
	Full legal name
	Name of key contact
	Key contact phone number
	Services provided to referee
	Dates service provided
<b>Referee 2 details for contract one/two/three</b>	
	Full legal name
	Name of key contact:
	Key contact phone number
	Services provided to referee
	Dates service provided

3.1.4 Key subcontractor referee details (if applicable)

<b>Key subcontractor name:</b> Insert here	
<b>Key subcontractor role:</b> Insert here	
<b>Referee 1</b>	
	Full legal name
	Name of key contact
	Key contact phone number
	Services provided to referee
	Dates service provided
<b>Referee 2</b>	
	Full legal name
	Name of key contact

Key contact phone number
Services provided to referee
Dates service provided

- 3.1.5 List any bus contracts (including all Consortium Members'), previously held by the Tenderer or Tenderers parent company/companies and Related Companies that have been cancelled prior to expiry or a performance-based extension has not been granted for performance reasons.

Contract details (include client name)	Reason for cancellation of contract

## 3.2 Operator performance

- 3.2.1 For the three contracts listed in 3.1.3 describe your organisation's (including each Consortium Member's) previous and/or current performance as a bus operator.

Your response must include, but is not limited to:

- Any aspects of performance that have been the subject of performance discussions with clients requiring improvement (or cure) plans and the outcomes of these
- Approach to, and performance in, responding to service changes and disruptions
- Approach to, and performance in, responding to emergency situations
- How your referees would describe your organisation's performance in delivering to the requirements of the respective contract and your organisation's overall approach to service delivery and service improvement.

Provide relevant and specific examples to highlight your organisation's performance, including examples of compliance with contract terms and operational requirements, and customer satisfaction and service experience.

*Page limit: Five (5) pages*

- 3.2.2 Provide the following metrics for each of the contracts outlined in 3.1.3.
- a. Performance against key performance indicators, including punctuality and reliability
  - b. Performance comparison with other operators in each jurisdiction.

### 3.3 Innovation

Describe your organisation's approach to innovation. What innovations have previously been implemented by your organisation? Explain the approach to them, including how your organisation collaborates with stakeholders, the relative success of the innovations, the lessons learned and continuance of initiatives. Your response may include, but is not limited to:

- Experience implementing new technologies – including implementation of new motive power technologies
- Customer service innovation
- Other initiatives – including change to process, reporting, data collection etc.

*Page limit: Two (2) pages*

### 3.4 Approach to service delivery and plans

- 3.4.1 Describe how your organisation proposes to approach service delivery under the Contract.

Your response must include, but is not limited to:

- The provision of passenger services and scheduling
- The specific challenges for service delivery under GWRC's Contract
- Service delivery innovation
- Risk management
- Emergency management
- Environmental and sustainability
- Business continuity
- Preparation and delivery of business and operational plans.

Provide any relevant examples of where your organisation currently uses any of the proposed approach outlined.

*Page limit: Five (5) pages*

- 3.4.2 Provide a draft Revenue Protection Plan. Your response needs to outline the challenges of revenue collection in the Wellington region and how, given the current legislation and systems currently available, your organisation will ensure that revenue is being collected.

Your response must include how your organisation will:

- Monitor and check that revenue is being collected
- Provide training that encourages drivers to ensure all revenue is collected
- Undertake other revenue protection measures and action if required.

*Page limit: Five (5) pages*

*Note: The draft Revenue Protection Plan in 3.4.2 and the draft Transition Plan in Part 2b will both contribute to the evaluation of your organisation's capability to develop plans.*

### **3.5 Approach to fleet management**

Tell us about your organisation's approach to fleet management including spares. Your response must include, but is not limited to:

- How the proposed approach under the Contract is different to, or consistent with, your fleet management approach in the reference sites outlined in 3.1.3 and how you will adapt your approach to meet GWRC's requirements
- Your organisation's approach to fleet security, spares, procurement, maintenance (planned and unplanned), cleaning and refurbishment of vehicles
- The challenges of fleet selection, procurement and maintenance in the Wellington region and your approach to addressing these
- An overview of the key elements of the planned driver pre-trip inspection plan and checklist, and what process will be in place to ensure the plan remains current
- How your referees would describe your approach to fleet management.

*Page limit: Five (5) pages*

Complete section 4 only if your organisation is tendering for any of the following Bus Units:  
North South Spine, Khandallah, Brooklyn/Owhiro, Lower Hutt, Upper Hutt, Wainuiomata, Porirua.

## 4. Partnering and corporate culture

### 4.1 Recruitment and training

Tell us about your organisation's approach to recruitment and training and how you ensure staff skills keep up with changing requirements and new technology. Your response must include, but is not limited to:

- The value proposition to attract potential staff to join your organisation
- Recruitment strategies and approach including the key attributes or competencies your organisation selects for in drivers and how these are tested
- Vetting and induction process particularly of new drivers
- The challenges of recruiting staff
- What training is provided for new drivers
- How drivers are trained on new routes
- What ongoing training is provided for drivers
- How your referees would describe the quality of your drivers and your approach to recruitment
- How the need for training is identified
- Any other staff training, including training in equipment and systems
- Any examples of where specific training has improved performance.

*Note: This response relates to ongoing business as usual requirements. Recruitment and training for transition into the new Contract is covered in Part 2b draft Transition Plan.*

*Page limit: Four (4) pages*

Complete section 5 only if your organisation is tendering for any of the following Bus Units:  
North South Spine, Khandallah, Brooklyn/Owhiro, Lower Hutt, Upper Hutt, Wainuiomata, Porirua.

## 5. Customer service and patronage growth

### 5.1 Customer service

Provide details of how your organisation will approach customer service under the Contract. Include what your organisation believes is important to customers and your approach to meeting customer expectations. Your response must include, but is not limited to:

- Your existing customer charter and how your organisation will achieve and go beyond this charter
- What customers will experience during their journey
- The process for handling complaints and compliments
- The communications approach used to keep customers informed
- With GWRC having responsibility under the Metlink banner for primary customer communications, outline what this means for the relationships between Operators and GWRC
- Any processes and systems that will be used for monitoring, reviewing and improving the approach to customers
- Any incentives offered to staff to deliver excellent customer service.

Where relevant, provide specific examples that demonstrate your organisation's ability to provide a high-level of customer service, referencing the contracts in 3.1.3.

*Page limit: Five (5) pages*

### 5.2 Patronage growth

How does your organisation intend to increase patronage? Your response must include, but is not limited to:

- Your organisations understanding of patronage growth drivers
- Your ideas for innovation and approach to growing patronage and commerciality of the Wellington region's bus services
- Outline your organisation's experience in growing patronage, referencing the contracts in 3.1.3.

*Page limit: Five (5) pages*

### 5.3 Managing Service Disruptions

Provide details of your organisation's approach to managing Service Disruptions. Your response must include, but is not limited to:

- Your approach to planned and unplanned Service Disruptions
- How, if at all, your current approach will differ under the new Contracts
- How you will manage and communicate Service Disruptions
- Examples of managing Service Disruptions in other jurisdictions
- How your referees would describe your approach to Service Disruptions.

*Page limit: Five (5) pages*

Complete section 6 only if your organisation is tendering for any of the following Bus Units:  
Wairarapa, Kapiti.

## 6. Confidence in service delivery

### 6.1 Relevant experience

- 6.1.1 Identify your organisation's (including each Consortium Member's) relevant recent experience in providing bus services, similar to those that your organisation is tendering for here. Outline the number, size and location of bus service contracts your organisation has held within the last five years – use the table below.

Client	Jurisdiction	Contract value	PVR	Start date	End date

- 6.1.2 What is the relevance of this previous experience to the rural Bus Units your organisation is tendering for and how will this experience be applied to this Contract?

*Page limit for 6.1.2: Two (2) pages*

- 6.1.3 Provide further details for three of the contracts identified above to be used as reference sites. If possible, provide a range of different jurisdictions and/or clients. In providing these referees, you give permission for GWRC to contact the nominated personnel for the purposes of undertaking reference checks as part of the evaluation of this RFT.

<b>Contract one/two/three: 1/2/3:</b> [Insert client name here]
a. Jurisdiction
b. Contract start date
c. Contract end date
d. City/town/region the services were/are operated in
e. Key market characteristics
f. Number of peak vehicles required (PVR)
g. Fleet type
h. Annual contract value
i. Gross cost or net cost contract

j. Referee 1 details for contract one/two/three	
	Full legal name
	Name of key contact
	Key contact phone number
	Services provided to referee
	Dates service provided
k. Referee 2 details for contract one/two/three	
	Full legal name
	Name of key contact:
	Key contact phone number
	Services provided to referee
	Dates service provided

6.1.4 Key subcontractor referee details (if applicable)

<b>Key subcontractor name:</b> Insert here
<b>Key subcontractor role:</b> Insert here
<b>Referee 1</b>
Full legal name
Name of key contact
Key contact phone number
Services provided to referee
Dates service provided

Referee 2	
	Full legal name
	Name of key contact
	Key contact phone number
	Services provided to referee
	Dates service provided

- 6.1.5 List any bus contracts (including all Consortium Members'), previously held by the Tenderer or Tenderers parent company/companies and Related Companies that have been cancelled prior to expiry or a performance-based extension has not been granted for performance reasons.

Contract details (include client name)	Reason for cancellation of contract

## 6.2 Operator performance

- 6.2.1 For the three contracts listed in 6.1.3 describe your organisation's (including each Consortium Member's) previous and/or current performance as a bus operator.

Your response must include, but is not limited to:

- Any aspects of performance that have been the subject of performance discussions with clients requiring improvement (or cure) plans and the outcomes of these
- Approach to, and performance in, responding to service changes and disruptions.
- Approach to, and performance in, responding to emergency situations
- How your referees would describe your organisation's performance in delivering to the requirements of the respective contract and your organisation's overall approach to service delivery and service improvement.

Provide relevant and specific examples to highlight your organisation's performance, including examples of compliance with contract terms and operational requirements, and customer satisfaction and service experience.

*Page limit: Five (5) pages*

- 6.2.2 Provide the following metrics for each of the contracts outlined in 6.1.3.
- a. Performance against key performance indicators, including punctuality and reliability
  - b. Performance comparison with other operators in each jurisdiction.

### 6.3 Innovation

Describe your organisation's approach to innovation. What innovations have previously been implemented by your organisation? Explain the approach to them, including how your organisation collaborates with stakeholders, the relative success of the innovations, the lessons learned and continuance of initiatives

Your response may include, but is not limited to:

- Experience implementing new technologies – including implementation of new motive power technologies
- Customer service innovation
- Other initiatives – including change to process, reporting, data collection etc.

*Page limit: Two (2) pages*

### 6.4 Approach to service delivery and plans

- 6.4.1 Describe how your organisation proposes to approach service delivery under the Contract.

Your response must include, but is not limited to:

- The provision of passenger services and scheduling
- The specific challenges for service delivery under GWRC's Contract
- Service delivery innovation
- Risk management
- Emergency management
- Environmental and sustainability
- Business continuity

- Preparation and delivery of business and operational plans.

Provide any relevant examples of where your organisation currently uses any of the proposed approach outlined.

*Page limit: Five (5) pages*

- 6.4.2 Provide a draft Revenue Protection Plan. Your response needs to outline the challenges of revenue collection in the Wellington region and how, given the current legislation and systems currently available, your organisation will ensure that revenue is being collected.

Your response must include how your organisation will:

- Monitor and check that revenue is being collected
- Provide training that encourages drivers to ensure all revenue is collected
- Undertake other revenue protection measures and action if required.

*Page limit: Five (5) pages*

*Note: The draft Revenue Protection Plan in 6.4.2 and the draft Transition Plan in Part 2b will both contribute to the evaluation of your organisation's capability to develop plans.*

## 6.5 Approach to fleet management

Tell us about your organisation's approach to fleet management including spares. Your response must include, but is not limited to:

- How the proposed approach under the Contract is different to, or consistent with, your fleet management approach in the reference sites outlined in 6.1.3 and how you will adapt your approach to meet GWRC's requirements
- Your organisation's approach to spares, procurement, maintenance (planned and unplanned), cleaning and refurbishment of vehicles
- The challenges of fleet selection, procurement and maintenance in the Wellington region and your approach to addressing these
- An overview of the key elements of the planned driver pre-trip inspection plan and checklist, and what process will be in place to ensure the plan remains current
- How your referees would describe your approach to fleet management.

*Page limit: Five (5) pages*

Complete section 7 only if your organisation is tendering for any of the following Bus Units:  
Wairarapa, Kapiti.

## 7. Partnering and corporate culture

### 7.1 Recruitment and training

Tell us about your organisation's approach to recruitment and training and how you ensure staff skills keep up with changing requirements and new technology. Your response must include, but is not limited to:

- The value proposition to attract potential staff to join your organisation
- Recruitment strategies and approach including the key attributes or competencies your organisation selects for in drivers and how these are tested
- Vetting and induction process particularly of new drivers
- The challenges of recruiting staff
- What training is provided for new drivers
- How drivers are trained on new routes
- What ongoing training is provided for drivers
- How your referees would describe the quality of your drivers and your approach to recruitment and training
- How the need for training is identified
- Describe training provided to other staff including training in equipment and systems
- Any examples of where specific training has improved performance.

*Note: This response relates to ongoing business as usual requirements. Recruitment and training for transition into the new Contract is covered in the Part 2b draft Transition Plan.*

*Page limit: Four (4) pages*

*Complete section 8 only if your organisation is tendering for any of the following Bus Units:  
Wairarapa, Kapiti.*

## **8. Customer service and patronage growth**

### **8.1 Customer service**

Provide details of how your organisation will approach customer service under the Contract. Include what your organisation believes is important to customers and your approach to meeting customer expectations. Your response must include, but is not limited to:

- Your existing customer charter and how your organisation will achieve and go beyond this charter
- What customers will experience during their journey
- The process for handling complaints and compliments
- The communications approach used to keep customers informed
- With GWRC having responsibility under the Metlink banner for primary customer communications, outline what this means for the relationships between Operators and GWRC
- Any processes and systems that will be used for monitoring, reviewing and improving the approach to customers
- Any incentives offered to staff to deliver excellent customer service.

Where relevant, provide specific examples that demonstrate your organisation's ability to provide a high-level of customer service, referencing the contracts in 6.1.3.

*Page limit: Five (5) pages*

### **8.2 Patronage growth**

How does your organisation intend to increase patronage? Your response must include, but is not limited to:

- Your organisations understanding of patronage growth drivers
- Your ideas for innovation and approach to growing patronage and commerciality of the Wellington region's bus services
- Outline your organisation's experience in growing patronage, referencing the contracts in 6.1.3.

*Page limit: Five (5) pages*

### 8.3 Managing Service Disruptions

Provide details of your organisation's approach to managing Service Disruptions. Your response must include, but is not limited to:

- Your approach to planned and unplanned Service Disruptions
- How, if at all, your current approach will differ under the new Contracts
- How you will manage and communicate Service Disruptions
- Examples of managing Service Disruptions in other jurisdictions
- How your referees would describe your approach to Service Disruptions.

*Page limit: Five (5) pages*