



Brief: Mass Transit corridors and Futureproofing for Light Rail

Introduction

Let's Get Wellington Moving (LGWM) is a joint initiative between Wellington City Council (WCC), Greater Wellington Regional Council (GWRC) and the NZ Transport Agency. It is taking a fresh look at the transport system to ensure it supports how we want our city to look, feel and function. Further details on the programme are available at:

<http://www.getwellymoving.co.nz/about/>

This brief sets out the work required to test the current assumptions for the mass transit route through the central city and determine the steps that would be needed to futureproof a route for a possible upgrade to light rail transit (LRT) within the Ngauranga to Airport corridor, as part of the LGWM initiative.

Background

The [Wellington Public Transport Spine Study](#) (PTSS) was completed in 2013. It investigated the feasibility of a large number of different routes and modes for creating a high-quality 'PT spine' between the Railway Station and Newtown/Kilbirnie, and arrived at a short-list of three options: bus priority, bus rapid transit (BRT) and LRT.

The PTSS concluded that the preferred PT Spine route should run from the Railway Station to the Basin Reserve via the Golden Mile, with branches to Kilbirnie town centre and the Regional Hospital. It also identified BRT as the preferred mode on the PT Spine route.

Following community consultation, the Regional Transport Committee (RTC) agreed in March 2014 to progress BRT detailed planning and design. In doing so, the RTC also agreed that physical infrastructure along the core spine corridor should, where practical, be designed in a manner that does not prohibit the future transport development of the corridor, including for LRT.

GWRC, WCC and the Transport Agency agreed to work together to develop an Indicative Business Case (IBC) for BRT to provide clarity on the option to be taken forward for detailed design. The IBC was completed in July 2015. It considered a range of options for BRT, focusing on the physical infrastructure (road space and intersection priority, and stop/station infrastructure). The economic case concluded that two options had the best economic performance (bus lanes in targeted locations, 24/7; and bus lanes along the entire route, 24/7). The recommendation from the IBC was that these options be carried forward to a detailed business case (DBC).

That further work is now being undertaken as part of LGWM. This has included an assessment of possible treatment options for BRT on the PT spine, under low, medium and high levels of BRT treatment. This work is also considering the potential future convertibility of BRT to LRT on the PT spine, and the steps that would be needed to futureproof the route for that possibility.

Some stakeholders have questioned whether futureproofing should be confined to the PT spine route, and whether the PT Spine route determined in the PTSS is the best route for LRT.

In 2018 the bus network will be changed to deliver a simpler, more frequent and flexible service. Details of the changes are outlined on the following webpages:

<https://www.metlink.org.nz/greater-transport-greater-wellington/2018-a-new-bus-network-for-wellington-city/>

Outcomes sought

LGWM is seeking consultancy assistance to:

1. Review the assumptions and criteria used to evaluate the route options within the PTSS. Consider whether they are still fit for purpose and recommend any changes.
2. Taking any changes from item 1 into account, re-assess the preferred corridor for a mass transit spine. If an alternative route(s) to the PTSS spine is preferred, identify this in a concept plan.
3. If LRT was introduced as a new mode through central Wellington at some point in the future, consider whether this would alter the mass-transit route preferred in item 2. If necessary, consider any consequential implications for bus-based PT routes from the potential introduction of LRT.
4. Taking into account the Opus technical notes for BRT prepared for LGWM, identify what level of future-proofing would be most appropriate along the preferred route(s), taking into account:
 - The range of possible future options for mass transit along this corridor
 - The testing of scenarios in LGWM
 - The emerging preference for high, medium or low level of service for bus priority measures
 - The indicative cost and timing of any physical future-proofing measures
 - Any planning measures (i.e. designation) that may be required
 - Disruption to existing/future bus services, land uses, and utilities from conversion at a later date
 - Whether any proposed interventions in LGWM would foreclose or impede future mass transit options.
5. Provide technical advice to input to the LGWM scenario testing, to assist in calculating the future demand for mass transit along the preferred route(s) and considering this against the capacity of the proposed bus system. Provide advice on any potential additional measures to increase capacity (if required).

Notes:

- The focus of this study is the Wellington central railway station to the eastern suburbs of Wellington and the Airport
- Stakeholder groups are to be involved in the assessment in 2 ways: (a) through initial contact to understand their views and potential alternative route options: (b) through informal feedback updates on progress with the assessment
- In determining the preferred mass transit route(s) consideration should be given to the potential to achieve key outcomes such as reliability, capacity, and customer attractiveness, and to stimulate urban re-development (and value uplift) in adjacent land areas, and recently updated growth projections
- A concurrent review of the Regional Public Transport Plan (in particular, the demand/capacity forecasts for the heavy rail network) is proposed to be undertaken by GWRC. Appropriate connections to this work will be required to ensure consistency and enable shared learnings.

Outputs

The outputs of this work should be:

- Technical notes and a summary report outlining the investigations undertaken and the recommendations.
- Technical advice to the LGWM team.

Timescale

This work is to be completed by 31 August 2017.

Skills Required

- A lead consultant with suitable qualifications and a high level of experience in public transport planning
- Specific experience in planning and delivery of LRT and BRT schemes
- No previous involvement in the PTSS study or other conflict of interest

Instructions for your tender:

1. General

- 1.1 Tenders to be submitted by email to the Client's Nominated Person ^{9(2)(a)} by 4pm Friday 26 May 2017.
- 1.2 Contract form will be NZTA's short form contract as per attached.
- 1.3 All communications to be by e-mail and raised with Client's Nominated Person as soon as possible but not later than 4pm Wednesday 24 May 2017. Where the Client considers it necessary and/or appropriate, they will endeavour to respond to any enquiries within 24 hours of receiving them.
- 1.4 Where the Client considers it necessary and/or appropriate, the answers to any questions will be made in writing to all who have been sent this briefing note and will subsequently be annexed to, and form part of, the Contract Documents. Answers to commercial in confidence queries will be made in writing, and will subsequently be annexed to, and form part of, the Contract Documents.
- 1.5 This is a client nominated price contract, with a nominated Price of: ^{9(2)(b)(ii)}

2. Conflict of Interest, Risk of Bias or Collusion

- 2.1 Tenderers are required to declare, at the commencement, as soon as practicable after uplifting the tender documents, or as they become aware of them, any actual or potential conflicts of interest or risk of bias during the tender process, relating to any individual or company involved in the Tenderer's bid. This includes individuals and companies engaged in any sub-consultant, subcontractor or other supply arrangement. The Tenderer must advise the Client of the means that they intend to use to remove or mitigate such conflicts of interest or risk of bias.
- 2.2 Tenderers are required to warrant that their tender has not been prepared with any consultation, communication, contract, arrangement or understanding with any competitor, other than where:
1. Joint venture arrangements exist between the Tenderer and a competitor;
 2. The Tenderer has communicated with a competitor for the purpose of subcontracting a portion of the tender, and where the communication with the competitor is limited to the information required to facilitate that particular subcontract; and/or
 3. The Tenderer and a competitor have an agreement that has been authorised by the Commerce Commission.
- 2.3 Any Tenderer that is uncertain as to what would be considered by the Client to be collusive or anti-competitive behaviour is encouraged to proactively discuss potential or perceived collusive behaviour with the Client, in advance to preparing their Tender. In such circumstances the Tenderer may be required to disclose to the

Client the name of the competitor and the extent of any arrangements or agreements with them.

- 2.4 In the event that no such disclosure is made, the Tenderer warrants that their tender has not been prepared with any consultation, communication, contact, arrangement or understanding with any competitor.
- 2.5 The Client reserves the right, at its discretion, to report suspected collusive or anti-competitive conduct by Tenderers to the appropriate authority(s), and to provide them with any relevant information, including their Tender Submission.
- 2.6 Similarly, the Client may refer any actual or potential conflicts of interest or any risk of bias that it becomes aware of, to the appropriate authority, and decide the appropriate action to remove or mitigate any potential conflicts of interest or risk of bias.
- 2.7 The Client reserves the right to decline the tender of any Tenderer that
- Has been found to contravene their warrant and / or
 - cannot satisfactorily remove or mitigate a conflict of interest or risk of bias that, in the opinion of the Client, creates an unfair advantage or impropriety in the tender process.

3. Tender Submission Programme

- 3.1 The following programme is proposed for the submission, evaluation and award of tenders as follows:

	DATE
Tenders close	4pm, Friday 26 May 2017
Tender evaluation period	By 2 June 2017
Preletting meeting(s)	6 June 2017
Target date for contract award	9 June 2017

4. Tender Format

- 4.1 Tenders shall be developed and written in accordance with the requirements of this document.

4.2 The following information shall be submitted:

DESCRIPTION OF DOCUMENTS / INFORMATION	PAGE LIMIT (A4 UNLESS SHOWN OTHERWISE)
Covering letter (will not be considered as part of the tender evaluation)	1
Title page	1
Index or contents page	1
Tender non-price attribute submission (including responses on each non-price attribute and other information as required)	8 (double sided, each side shall be counted as one page)
Outline Consultants programme	2 x A3 (legible font)
CVs (for each key person offered in the proposal)	2 (double sided)
A Time and Resource schedule (bar chart) detailing for all personnel, hours proposed to be expended and work focus on a monthly basis for the period of the contract. For non-key personnel summary information by resource type is acceptable. The total proposed hours is to be shown for each of the key personnel or resource, (Ref. clause Relevant Skills)	1 x A3 (legible font)
Tender Tag Statement	Unlimited

4.3 Tenders shall be concise and shall not exceed the above stated page limit (including tables and charts). A3 pages that are included in the non-price attribute submission, will be counted as two A4 pages. Should the allowable number of pages be exceeded, the information on the excess pages, i.e. any pages following after the prescribed number of pages, will not be included in the assessment of the tender.

4.4 Pages not included in the non-price attribute submission shall not contain information other than that required for the stated purpose and will not be included in the assessment of the tender, or the tender may be deemed to be non-conforming.

4.5 The submission typeface shall be no smaller than Times New Roman 12 point or equivalent unless otherwise stated above, with full line spacing unless otherwise specified. The font type applies to all tables and graphics used throughout the tender submission

4.6 The tender submission should be structured in an easy to follow manner.

4.7 To some extent, the tender submission itself will be taken, by the Tender Evaluation Team, to be an example of the standard of report/document one could expect of that Consultant. It demonstrates an ability to provide a clearly laid out, concise, accurate, professional and effective document which meets set requirements.

5. Non-Price Attributes – Relevant Experience

- 5.1 Tenderers are required to nominate a total of two projects for Relevant Experience, that illustrate the consultant's ability as a company to provide the technical and non-technical (e.g. consultation and liaison) expertise required to successfully complete this contract to the Client's expectations.
- 5.2 Should Tenderers nominate less than the required number of projects this will be taken as a deficiency in the attributes for Relevant Experience, and will be scored accordingly. Where more than the required number of projects are submitted, only the first nominated projects for Relevant Experience will be considered.
- 5.3 Tenderers should only identify projects that are complete or for which at least one phase is complete, or that have been held by the Tenderer for at least two years and that they cover the requirements of the project for which they are tendering.
- 5.4 Tenderers must provide the same information for their key sub-consultants, detailing successfully completed projects of a similar nature. The scoring for a project will be based on the Tenderer's overall performance as judged by the TET derived from:
- The knowledge of the TET.
- 5.5 Provide the following details for each project nominated:
1. Project name, location, and brief description of the work carried out.
 2. The names, company(s) and current contact telephone numbers of two persons to act as referees, for each project being:
 - The Project Client's Representative's, and/or
 - The Client's agent, and

who must have been directly responsible for supervising or overseeing the nominated projects. Providing inadequate contact information or non-applicable referees, may result in downgraded scoring.
 3. Contract value (professional services commission and physical works if applicable).
 4. Identify any of the nominated projects were joint ventures. Identify the Joint Venture partner(s) and the proportion and nature of the work undertaken by the Tenderer.
 5. Identify which major portions of the project (i.e. greater than 10% of the contract value) were carried out by sub-consultants.
- 5.6 Tenderers must provide the following details for each project nominated for Relevant Experience:

Relevance	<p>Tenderers shall:</p> <ul style="list-style-type: none"> • Amplify on the relevance of each nominated project to this project; • Provide details of relevant experience relating to the critical factors from each nominated project and describe why they are relevant to this project; • Include key personnel and their focus for the nominated project; • Provide details of the percentage of work carried out by
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	the Tenderer, and the percentage undertaken by any sub-consultant.
Currency	Provide detail of the start date and period over which each project was undertaken, or the percentage complete if under construction.
Scale	Provide the dollar value of the work carried out (fees and/or fees and physical works as appropriate), or the value of work complete if the project is ongoing.

- 5.7 Newly formed consultancies or sub-consultants shall state the name of the company for which the experience is claimed.

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6. Non-Price Attributes – Relevant Skills

- 6.1 The Tenderer shall nominate one or more person(s) for each of the personnel listed in the “Relevant Skills Tender Evaluation Form”.
- 6.2 All personnel nominated in the Personnel Schedule and any others, including sub-consultants, the Tenderer wishes to have recognised, shall be identified with supporting amplification/description and comments in terms of their position in the project team and the following attributes:

Qualifications and Training	Formal qualifications and training in the development of technical and/or management skills shall be described, together with their particular relevance to the position for which they are nominated;
Practical Experience	The length of experience in equivalent full-time years relative to the position for which they are nominated. The experience of the Team Leader and/or Deputy Team Leader in Client liaison and reporting shall be described. Achievements in previous projects shall be stated; and
Focus and Commitment	The Tenderer shall state the focus and commitment of each person nominated to the project. Their tasks and responsibilities shall be described and an indicative estimate of their time commitment to each of the project phases shall be provided in hours and also as a percentage of their time. A histogram for each of the stages of the project showing for each month the estimated level of commitment (in hours) to the contract services shall be provided.

- 6.3 Personnel nominated in the Personnel Schedule must be available to provide the services for the contract as required. The preformatted Personnel Schedule provided with this document, shall be completed and submitted with the tender as an appendix.
- 6.4 Attach CVs for each person nominated for a role on the Relevant Skills Tender Evaluation Form or for the key positions identified in the Personnel Schedule. CVs need to demonstrate specific experience relevant to the position and should differentiate between technical and managerial skills where relevant to the position. CVs shall be bound as an appendix to the submission, and include reference to relevant qualifications and training and state the dates completed.
- 6.5 CVs shall identify technical and management positions held and responsibility carried in relation to consultancy projects. Only one CV for each of the nominated personnel shall be submitted and recognised.
- 6.6 The Team Leader is the person responsible for the day-to-day management of the project and for reporting to the Client.

7. Non-Price Attributes – Methodology

- 7.1 The Tenderer shall provide a comprehensive statement of the proposed methodology. The statement shall focus on all the important steps, processes and procedures that in the opinion of the Tenderer, are necessary to ensure that this project meets all the Client's requirements, is completed in a timely manner, is within budget, and obtains all approvals and support from all interested parties.
- 7.2 **This methodology statement will demonstrate, to the Client, the Tenderer's understanding of the project and the Client's requirements, how these will be achieved including how the Consultant will ensure the specific requirements stipulated by the Client will be achieved.**
- 7.3 The following lists those factors included within the Methodology Tender Evaluation Form, and describes what, as a minimum, should be included in Tenderers responses:

General Items

1. Review the assumptions
2. Re-assess the preferred corridor
3. Identify a preferred route for LRT
4. Identify any future-proofing for the preferred route
5. Advise on future demand for mass transit along the preferred route
6. Consultants Programme: Provide your outline programme in Gantt-chart form including all scope items, deliverables, and other key milestones. The programme should show the resources required at any stage of the contract; and it should detail the critical path, and highlight the risks to achieving the critical path.
7. Management Relationship: Describe your proposed methodology for managing Client relationships, recognising the Client is a group composed of representatives from NZ Transport Agency, Greater Wellington Regional Council and Wellington City Council. Include Client meetings and reporting to meet the requirements of this contract and any additional reports, features of your reports that you consider will be necessary or that will assist the Client's management and control of this project.

8. Tender Evaluation Team

- 8.1 A Tender Evaluation Team (TET) has been nominated to evaluate the tenders. Expert advisors may be requested to support and advise the TET during the evaluation.
- 8.2 The TET for this contract will be:

Tender Evaluation Team (TET)	
	Jo Draper, Principal Transport Planner, Transport Agency (Leader)
9(2)(a)	Transport Planning Manager, Wellington City Council
9(2)(a)	GM Strategy, Greater Wellington Regional Council

- 8.3 Tenderers will be notified in writing of any changes to the TET.
- 8.4 Tenderers who believe there is a conflict of interest or risk of bias with a member of the TET may contact the Client within one week of the tender documents being issued, outlining their concerns so that the appropriate action can be taken.

9. Supplier Selection Method

- 9.1 Tenders will be evaluated in accordance with this document.
- 9.2 Weightings will be given to each of the non-price attributes as follows:
- | | |
|---------------------|-----------|
| Relevant Experience | pass/fail |
| Relevant Skills | pass/fail |
| Methodology | (100%) |
- 9.3 A tender receiving a fail score for any non-price attribute will be rejected.

10. Late Tenders

- 10.1 The Client may at its sole discretion consider any tender received after the time stipulated if the circumstances can be shown to be extreme and beyond the control of the Tenderer.

11. Tender Evaluation Forms

- 11.1 The following Tender Evaluation Forms will be used in the evaluation of tender non-price attributes:
- Form A: Relevant Experience
 - Form B: Relevant Skills
 - Form C: Methodology.
- 11.2 Sub-attribute weightings for the criteria to be assessed in the evaluation of the non-price attributes shall be stated on the forms at the time of tender. If no sub-attribute weightings are shown, the assessment criteria will be evaluated as having equal weightings.

Relevant Experience (Pass/Fail) <i>a Fail is a relevant experience rating <=50</i>				Form A
Project	Relevance ([70]%)	Currency ([20]%) (Years ago or % complete)	Scale ([10]%) (% of Estimate)	
	35 or less: Not related 40, 45: Barely related 50, 55: related 60, 65, 70: Particularly related 75, 80, 85: Very related 90, 95, 100: Extremely related	35 or less: 5+ years or < 50% complete 40, 45: 4-5 years or 50-60% complete 50, 55: 3-4 years or 60-70% complete 60, 65, 70: 2-3 years or 70-80% complete 75, 80, 85: 1-2 years or 80-90% complete 90, 95, 100: 0-1 years or 90-99% complete	35 or less: <35% of estimate 40, 45: 35-50% of Estimate 50, 55: 50-70% of Estimate 60, 65, 70: 70-90% of Estimate 75, 80, 85: 90-100% of Estimate 90, 95, 100: > or = Estimate	
Summary Rating:				
Tenderer:	Relevant Experience Rating:			

Evaluators Comments (Continue on Separate Sheet if Necessary)

Note to TET:

- Relevant experience relates to company not individuals;
- The Team Leader is the person responsible for the day-to-day management of the project and for reporting to the Client;
- Company permanence and commonality of personnel with those nominated in RS are of greater relevance;
- Relevant experience should include relevant experience of key sub-consultants if appropriate;
- Recent experience is more valuable than historic experience (for uncommon or unusual projects older than 5 years, currency is to be assessed more moderately); and
- Can the Tenderer readily adapt existing experience to the type of work being tendered for?
- Where the relevant phase is incomplete or more than 5 years old, the TET may consider downgrading the Project.

Relevant Skills (Pass/Fail) a Fail is a relevant skills rating <=50

Form B

Personnel	Qualification and Training ([30]%)	Practical Experience ([60]%)	Focus and Commitment ([10]%)
	35 or less: Barely adequate 40, 45: Adequate 50, 55: Meets requirements 60, 65, 70: Related 75, 80, 85: Very Related 90, 95, 100: Directly Applicable	35 or less: Poor 40, 45: Below Average 50, 55: Average 60, 65, 70: Above Average 75, 80, 85: Good 90, 95, 100: Excellent	35 or less: Poor 40, 45: Below Average 50, 55: Average 60, 65, 70: Above Average 75, 80, 85: Good 90, 95, 100: Excellent
Team Leader (40%)			
Public Transport Planner LRT (30%)			
Other supporting expertise (30%)			
Summary Rating:			
Tenderer:	Relevant Skills Rating:		

Evaluators Comments: (Continue on Separate Sheet if Necessary)

Note to TET:

- Relevant Skills relates to individuals not company, and should include relevant skills of key sub-consultants, if the positions listed are to be filled by sub-consultants
- The Team Leader is the person responsible for the day-to-day management and leadership of the project team and its outcomes and for reporting to the Client. The client expects the Team Leader to be capable of independently representing the client and project team.
- Public Transport Planner LRT is the specialist planner with the relevant expertise in LRT.
- Up to two roles can be nominated for other supporting expertise and these will be evaluated as a group.

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Methodology (Weighting 100%)		Form C
Factor		Standard (100%)
Review the assumptions	(15%)	
Re-assess the preferred corridor	(30%)	
Identify a preferred route for LRT	(15%)	
Identify any future-proofing for the preferred route	(15%)	
Advise on future demand for mass transit along the preferred route	(5%)	
Consultant's programme	(10%)	
Management relationship	(10%)	
Summary Rating:		
Tenderer:		Methodology Rating:

Evaluators Comments: (Continue on Separate Sheet if Necessary)

Note to TET:

- Methodology relates to the proposed method of carrying out the professional services, and should include methodology and company systems of key sub-consultants if services are to be carried out by sub-consultants;
- This attribute also evaluates procedures the Tenderer proposes to use to achieve the specified end result;

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12. Contract Pricing Schedule

Item	Description	Unit	Rate	Amount
1	Review the assumptions	L.S.		
2	Re-assess the preferred corridor	L.S.		
3	Identify a preferred route for LRT	L.S.		
4	Identify any future-proofing for the preferred route	L.S.		
5	Advise on future demand for mass transit along the preferred route	L.S.		
6	Project management and client liaison	L.S.		
7	Disbursements	L.S.		

TOTAL TENDERED SUM (Items 1-7) (excluding GST)

9(2)(b)(ii)

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13. Additional Services Schedule

Tenderers shall complete the Additional Services Schedule and submit with their tender to provide unit rates for any variations to the Contract Scope that may be agreed with the Client.

Additional services may be broken down into personnel, computing time and vehicle running for the project. Each item has been assigned an arbitrary number of hours or kilometres for which the Tenderer shall provide rates. These rates shall apply for any Additional Services or Provisional Sum items of work, irrespective of the number of hours .

"Other Personnel" may be grouped into similar occupational groupings (eg. Overseers, Designers, Accounts Officers, etc.), and an average Hourly Rate for each grouping specified.

Item	Description	Unit	Rate
1	Team Leader	Hours	
2	Public Transport Planner LRT	Hours	
3	Design Engineer/ Costings	Hours	
4	Resource Management Planner	Hours	
5	Other(s)	Hours	

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