



**INVITATION TO TENDER**

**DEVELOPMENT OF GUIDANCE TO SUPPORT  
BEHAVIOUR CHANGE SIGNAGE AND HAZARD  
COMMUNICATION**

A contract for the supply of:

Evidence based guidance to inform and improve appropriate and effective behaviour change hazard communication and other messaging using signage and other forms of communication

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# **1. Introduction**

## **1.1 Visitor Safety Group**

The Visitor Safety Group (VSG), formerly the Visitor Safety in the Countryside Group, was set up in May 1997. Since then, the group has been meeting regularly to exchange information and develop ideas. In particular we have looked at how to create safe access to the countryside in ways that do not spoil the landscape and heritage or lessen the visitor's sense of exploration and adventure.

VSG members own extensive land and property and encourage public access. All are committed to protecting and enhancing the environment. Our management group has day to day experience of visitor management and includes specialist safety advisers.

### 1.1.1 Disclaimer

Every care has been taken in preparing this Invitation to Tender (ITT). However, no responsibility or liability will be accepted by the VSG or its members as to the accuracy or completeness of the documentation contained herein. Any liability however arising is expressly disclaimed. It is the responsibility of all tenderers to satisfy themselves with the terms of this ITT prior to submitting their response.

### 1.1.2. The Challenge

Understanding and influencing visitor behaviours is a key element in ensuring safety. The VSG recognises that traditional approaches often start on the site and are based around signage, with the drivers weighted toward liability reduction. Whilst this approach may be productive in liability reduction, what is questionable is the true effect on visitor behaviours; for example, anecdotal and case study evidence shows little to no effect of signage on behaviours (such as rip currents as a hidden water safety hazard), whilst in some settings the intervention becomes a focus for vandalism and undesirable behaviours.

The VSG wishes to better understand the conceptual framework, evidence, and good practice whilst seeking to develop a 'how to' approach in order to more effectively influence visitor behaviours. Members are interested in improving the effectiveness of hazard communication and positively influencing visitors to respond to safety messaging in ways which conditions them toward safety and reduces inappropriate high-risk behaviour. In line with [VSG Guiding Principles](#), the guidance produced should be placed within the context that members should not rely solely on signage; acknowledging that there are other effective ways to influence visitor behaviours and manage risk.

## 1.2 About This Document

### 1.2.1 Document Purpose

The purpose of this ITT is to invite proposals from suppliers for delivery of behaviour change guidance to assist landowners and land managers in the development, deployment, and management of safety messaging, primarily in the form of signage and other hazard information communication systems.

The guidance developed must be legally compliant in the United Kingdom, The Republic of Ireland, The Channel Islands, and the Isle of Man.

The guidance developed must adhere to the VSG's guiding principles as outlined in the VSG's publications '[Managing Visitor Safety in the Countryside](#)' and '[Managing Visitor Safety in the Historic Built Environment](#)'. Full copies of both publications will be made available to the successful bidder.

### 1.2.2 Document Audience

Potential suppliers, the VSG membership and other stakeholders interested in visitor safety.

### 1.2.3 Tender Enquiries

Potential suppliers may raise queries on the tender documentation or seek clarifications if needed. The closing date for receipt of any queries is **midday on Thursday 11<sup>th</sup> March 2021**.

All enquiries relating to this tender should be addressed via email, in the first instance, to the VSG Secretariat at [e.rogers@outdoorrecreationni.com](mailto:e.rogers@outdoorrecreationni.com).

Please note that any queries raised, and the corresponding answers, will be made known to all applicants via the VSG website at <https://www.visitorsafety.group/invitation-to-tender-vsg-2021/>.

### 1.2.4 Return Conditions

The proposal must be delivered no later than **midday on Monday 15<sup>th</sup> March 2021**, and distributed in the following manner:

One copy in electronic format (PDF) to the VSG Secretariat:

Dr Elizabeth Rogers  
[e.rogers@outdoorrecreationni.com](mailto:e.rogers@outdoorrecreationni.com)  
Outdoor Recreation Northern Ireland

It is the responsibility of the potential suppliers to ensure the proposal is delivered on time.

### **1.3 Tender Response**

The proposal should be valid for no less than 120 days from the date of submission. A response to the ITT does not commit VSG to any course of action resulting from its receipt.

Potential suppliers must accept that the VSG may at its discretion:

- Reject a submission
- Reject any proposal that does not conform to the instructions and specifications contained herein
- Accept a proposal after the final submission date (in exceptional circumstances)
- Accept a proposal in part, or enter post tender negotiations with the successful supplier
- Enter into contract discussions with a preferred bidder

The potential supplier will be responsible for all costs incurred in the preparation and submission of a tender response to this ITT, and for all costs incurred in subsequent presentations and negotiations (if any) with the VSG.

The VSG is not obliged to accept the lowest or any tender submitted in response to this ITT. The VSG will provide feedback to unsuccessful tenderers if desired.

### **1.4 Tender Format**

All tenders should adhere to the following structure:

- Executive Summary Introduction (1 page)
- Design approach and methodology (2 pages)
- Timeline, key milestones, and project deliverables
- Cost and schedule of rates
- Project risk register (a summary and rating of the key risks to successful delivery of the project)
- Relevant experience of the potential supplier (2 examples of work within the past 5 years) and the assembled team (2 page CVs of the identified project team)
- Commercial information (see schedule three for the information required in this section)

Potential suppliers may add additional sections or sub-sections, as long as the structure outlined above is present.

### **1.5 Supplier Presentation**

If shortlisted, the potential supplier will be expected to present on an agreed date post tender closure. The presentation should cover the main elements of the potential supplier's response to this ITT. The presentation is to include an explanation of the potential supplier's proposals, followed by a question-and-answer time with the selection panel. Further details will be shared with those shortlisted for interview. Presentations will be made via Microsoft Teams meeting.

## 1.6 Best and Final Offer

The price range for this project is £32,000 to £40,000. Potential suppliers are advised that an award may be made without additional discussion and should present their best offer in the application as cost is strongly weighted in the evaluation criteria. A resource plan should be provided in section 3.2. including day rates.

## 1.7 Evaluation Criteria

### 1.7.1 Criteria Coverage

The ITT response will be evaluated using the following criteria:

Criteria	Weighting
Development methodology, project plan, timescales, and proposed deliverables	30%
Recent relevant experience including behaviour change and communication (organisational & personal)	30%
Understanding of the VSG's requirement	5%
Cost	30%
Overall quality of the submission	5%

## 2. Requirements and Timescales

### 2.1 Introduction

This ITT for guidance development is issued by the Management Board of the VSG.

The key output is clear guidance on how to communicate effectively to influence visitor behaviour in an outdoor recreation setting.

VSG members are seeking guidance on how to develop content and design for effective signage or other communication means that stimulates a positive response from visitors. How are visitors influenced to behave in ways which are consistent with the safety messages being communicated?

It will update and supplement existing guidance provided to our membership on the use of signage. Signage is one of the most prevalent and sometimes contentious control measures. It is used to promote, advise, warn, prohibit activity, and otherwise tell visitors about things that will impact their visit.

The VSG is interested in developing a better understanding of the motivations and triggers influencing the behaviours of individuals and groups in order to improve the selection of modes and content in the development of safety/information signage and alternative mediums for communication.

Currently there is only limited VSG guidance on signage and behaviour change in our publications. We want to be able to add clear advice that will increase the effectiveness of signage and other hazard communication on visitor behaviour.

## 2.2 Key Requirements

### 2.2.1 Background

The VSG has a reputation for producing best practice guidance. Advice produced should be regarded as definitive. It should be well-founded. We anticipate that it would achieve endorsement from the Health and Safety Executive in a similar manner to other previous guidance created and issued by the VSG.

### 2.2.2 Method

We envisage the following programme of work to meet these aims and objectives, although potential suppliers are invited to propose alternatives.

#### Stage 1

- Design a survey and host a workshop to draw out information on situations and hazards where safety messages are currently used by member organisations and for members to share key concerns, lessons learnt, and issues identified. Key organisations will be asked in advance of the workshop to provide relevant examples. The VSG Secretariat and Board will support in conducting the survey and identifying suitable organisations for the workshop.
- Review and take forward (into stage 2 outputs) learning from a library of academic resources the VSG hold including several relevant literature reviews, as part of a rapid evidence review.
- Identify applicable international standards for safety signage and include specific examples of best practice from around the world.

#### Stage 2

- Establish best practice evaluation and message **principles** for effective communication throughout the various stages of the visitor journey. At every point, these interventions would be targeted to promote positive engagement of health and safety, advisory and other messaging by diverse user groups.
- Provide a simple framework to help VSG members to understand visitor behaviours and motivational beliefs before starting messaging.
- Create a short, user friendly and practical guide detailing recommendations on the effective **application** and **management** of signage once it is deployed. The audience for this guide would be staff actively involved in day-to-day site management.

#### Stage 3

- Provide a detailed report to the VSG Management Board.
- Work with the VSG Management Board and website content editor to draft advice to form additional content suitable for use in VSG publications.

## 2.3 Timescales and Deliverables

This section outlines the indicative timescales and deliverables; we anticipate agreeing these in full with the successful supplier. The key outputs for this project are:

### 2.3.1 Deliverable 1

- Design survey and host workshop to learn from members and their sites about the effectiveness of interventions to influence visitor behaviour.
- Document that reconciles feedback from the survey and workshop, and identifies the top 10 areas of concern to VSG members.
- Document that consolidates literature review to identify the key areas of understanding used in developing the safety message principles.

### 2.3.2 Deliverable 2

- Provide relevant case studies/examples for VSG membership as examples of good and bad sign effectiveness.
- Guidance on the evaluation of visitor motivation and site context to inform design of signage and messaging, including framework for understanding visitor behaviour and motivations.
- Guidance on the drafting, design, and application of content to achieve best possible effectiveness of communication and messaging, and guidance on the application and management of signs.
- Provide principles to enable VSG membership to monitor and evaluate the effectiveness of their safety interventions

### 2.3.3 Deliverable 3

- Provide a final report consolidating learning and examples on safety messaging and hazard communication effectiveness
- Provide a draft chapter summarising the research and recommendations contained in the main report which is suitable for publication by VSG as an extension to existing advice in its publications or as digital resource.

### 2.3.4 Timescale

- Initiation meeting – Start of April 2021
- Interim presentation – June 2021
- Final report – September 2021
- Regular monthly scheduled meetings with VSG sub-group to monitor progress.

### 3. Project Management and Cost

#### 3.1 Project Manager

The successful supplier shall appoint a Project Manager/Coordinator from the start of the project who is required to demonstrate experience in implementing similar projects.

All potential suppliers shall provide a full breakdown of costs to meet the full requirement. This include all costs for the Project Manager/Coordinator and all associated administration in support of the tender, within the schedule of costs.

The Project Manager/Coordinator will be responsible for gathering all required information to the agreed specification; working with the VSG project manager and VSG project team to ensure the project meets its stated aims and objectives.

The successful supplier's responsibilities shall include:

- Scoping the work packages required to implement the solution to the VSG's needs.
- Attending relevant VSG project meetings.
- Managing the research.
- Liaison with nominated VSG representatives.
- Liaison with the VSG project manager to ensure the scheduling of resources is appropriate and timely.
- Liaison with VSG staff in the VSG project team during the project.
- Preparation and quality assurance of all research outputs.

Please state if any project management method(s) are used by your organisation, e.g. Prince 2, APMP.

#### 3.2 Cost

It is expected that payment for the research project will be made using agreed milestones contained within the contract, at least 30% of total fees will be retained until final sign off which will occur 1 week following acceptance of the final report and will be subject to satisfactory completion of the research.

The VSG would like to see any final costings to include expenses but exclude VAT. The Schedule of Rates in a potential supplier's tender should clearly show the cost of each phase of the research. Tenders should also outline the day rates of each team member assigned to the work, the number of days they will spend on the project and the total cost of their time. All costs are to be quoted in Pounds Sterling. For each phase of work, this should take the following format:

Name	Role	Number of days	Day rate	Expenses	Total



Please indicate the number of weeks needed to deliver each phase and the proposed duration to complete the project.

In the event that any unanticipated ad hoc work beyond the budget outlined above is required, this can only be commissioned in writing by the VSG's Chairman and is chargeable at agreed day rates.

## 4. Commercial Information

### 4.1 Company Information

Please supply the following information in your tender:

Company information to be provided
Full Company Name
Company Contact Name
Address
Telephone
Fax
Contact email address
Company web site address
Company number
Legal status and the name of the holding company (if a subsidiary)
Year of formation of the trading company
Your current independent credit rating (Dunn and Bradstreet etc)
Copies of all information currently in the public domain relating to any merger or acquisition involving the company

### 4.2 References

Suppliers must provide two references, ideally from customers for whom similar services have been delivered. For each, please provide the details requested below.

Reference 1	
Company Name	
Address	
Contact Person	
Contact Telephone No.	
Summary of work	

Reference 2	
Company Name	
Address	
Contact Person	
Contact Telephone No.	
Summary of work	

The VSG will expect to make its own enquiries with the references provided. The VSG will not contact referees without seeking prior consent.

### **4.3 Confidentiality**

All information contained within this document is confidential to the VSG. The recipient of this document is bound by this document and the information contained within it.

This document may not be disclosed to any third party.

No potential supplier shall, without the written approval of the VSG, reproduce this document in whole or in part.

No potential supplier shall, without the written approval of the VSG, provide information to any third party that relates to any part of the response process.

No potential supplier shall, without the written approval of the VSG, provide information to any third party for the purpose of press releases or information for inclusion in publications. The potential supplier will not reference VSG in any publication.

Any breach of these confidentiality obligations will, without exception, preclude the potential supplier from being considered any further in this tender process.

### **4.4 Intellectual Property Rights**

Copyright to all documented deliverables will pass to the VSG upon payment of final invoice.

### **4.5 General Welfare**

Any person working on a VSG member's property will be required to comply with Health and Safety rules governing each site. The potential supplier must provide a copy of the Health and safety policy and their training certificates.

All accidents must be reported to the VSG's Chairman.

## Appendix A – Document Terms

This ITT does not try to fully define supply and contract conditions.

No contract for the supply of the services between any potential supplier and VSG will exist until VSG's duly authorised representatives have signed a formal written agreement for the supply of the services to the VSG.

The requirements stated in this ITT, along with the successful supplier's proposal or response to this document shall form the basis of the formal written agreement entered into by the VSG with the supplier.

Any subsequent deviation from any representation in the successful supplier's proposal, including but not limited to those on lead times, delivery, performance and service expectations, may result in rejection of the tender and termination of negotiations with the successful supplier.

Neither the issue of this ITT, nor the VSG's acceptance of any response or proposal, nor any subsequent correspondence entered into between VSG and any potential supplier, will constitute an offer to enter into any contract.

It is mandatory that potential suppliers provide the cost information outlined in section 3.2 in their bids.

END  
OF  
INVITATION TO TENDER