



Department  
for Environment  
Food & Rural Affairs

[www.gov.uk/Defra](http://www.gov.uk/Defra)

## **Appendix 2 – Call-Off Procedure:**

**for The Research, Development and Evidence Framework 1**

### **Tender Reference: RDE Lot 4 (LIT 58468)**

**Project No: 37281**

**ITT No: 10713**

**Contract No: Ecm\_66219**

**Date: 23<sup>rd</sup> September 2022**

## 1.0 Request for Proposal

- 1.1 The following document is to be used as a Call-Off template to be sent to all Contractors on a sub-lot by the Project Manager of the Contracting Authority for completion and return in accordance with the Call-Off procedures detailed in the Form of Agreement.

Research, Development and Evidence Framework				
REQUEST FOR PROPOSAL				
<b>Project title:</b>		Establishing the Influence of Nature Connectedness on Agri-Environment Scheme Uptake and Delivery in England		
<b>Call off Reference:</b>		RDE073		
<b>Bravo project ref (if applicable):</b>		Project_37281 ITT_10713		
<b>Date:</b>		23 <sup>rd</sup> September 2022		
<b>Contracting Authority (Defra and its arms-length bodies etc)</b>	Natural England			
<b>Project Managers:</b>	██████████ ██████████████████ ██████████████████ ██████████████	<b>Phone number:</b>	██████████ ██████████	
<b>Authorized by:</b>	██████████	<b>Email:</b>	████████████████████ ██████████	
<b>Commercial Contact (if applicable):</b>	██████████ ██████████████████			
<b>Project Start Date</b>		Wed 3 <sup>rd</sup> November 2022		
<b>Project Completion Date</b>		Friday 31 <sup>st</sup> March 2023		
<b>For any projects over the direct award threshold, full competition is required (i.e. all contractors on the Sub-Lot are invited to quote).</b>		<b>Direct Award</b>		<b>Mini-comp</b>
				X

**Proposal return date: (no less than 10 working days from current date)**

14<sup>th</sup> October 2022

**Evaluation criteria:**

**Contractors:** Failure to meet any minimum score threshold stated will result in the bid being removed from the process with no further evaluation regardless of other quality or price scores.

<b>Quality</b>	<b>Weighting</b>	<b>60%</b>
----------------	------------------	------------

<b>Price</b>	<b>Weighting</b>	<b>40%</b>
--------------	------------------	------------

**Quality Sub-Criteria Weightings: (Indicative only)**

<b>1. Approach &amp; Methodology</b>	<ul style="list-style-type: none"> <li>Confirmation that your quotation proposal meets our specification, and a viable methodology is suggested. Please highlight any differences or provide alternatives with reasons/benefits of using those alternatives. Please ensure your response is clear and well presented.</li> <li>Clearly set out the proposed approach and methodology for delivering the full scope of each of the main components of the work with supporting literature references and exemplars, as relevant. Justify the proposed approach by explaining why the methods proposed are the most suitable.</li> <li>Demonstrate an understanding of what Natural England is trying to achieve through this contract.</li> <li>Details of any ethical or data protection issues relevant to the proposal and how these will be addressed.</li> <li>All content to be considered must be in the document itself - no links/references to other documents will be considered.</li> </ul> <p><b>The response must be a maximum of 6 sides of A4, font size 11.</b></p>	<b>30%</b>
--------------------------------------	---	------------

<b>2. Proposed Staff (inc. Pen Portraits) and Contractor's experience/accreditations.</b>	<p>Experience and expertise of key staff in relation to evaluation:</p> <ul style="list-style-type: none"> <li>Demonstrate a clear understanding of the requirements in the specification and the services we are seeking.</li> <li>Demonstrate previous experience of related work and knowledge of Agri-Environmental Schemes, Nature Connection, Relational Values and associated or similar socio-psychological constructs.</li> </ul>	<b>25%</b>
---	--	------------

	<ul style="list-style-type: none"> <li>• Demonstrate delivery of at least two previous, relevant, good quality products, to time and on budget completed in the last five years.</li> <li>• Demonstrate good project planning and management skills.</li> <li>• Confirmation of adequate staff resources devoted to the project and with appropriate expertise: <ul style="list-style-type: none"> <li>○ The project will require knowledge and experience of work related to working with the concepts and communities identified, conducting evidence reviews, evaluation, project management, social science data collection and analysis and technical report writing.</li> <li>○ Please show the structure of the project team; clearly identifying which key staff will be assigned to each of the tasks and outputs of the project and the number of days each will provide.</li> </ul> </li> </ul> <p><b>The response to provide CVs of key staff who will work on the project – maximum 2 A4 pages each, font size 11.</b></p> <p><b>All content to be considered must be in the document itself - no links/references to other documents will be considered.</b></p>	
<b>3. Project Management, Ability to Deliver</b>	<ul style="list-style-type: none"> <li>• Details provided of the project timeline, quality assurance measures (including internal monitoring and review processes), project management techniques and reporting and support systems.</li> <li>• All content to be considered must be in the document itself - no links/references to other documents will be considered.</li> </ul> <p><b>The response must be a maximum of 4 sides of A4, font size 11.</b></p>	<b>25%</b>
<b>4. Risk</b>	<ul style="list-style-type: none"> <li>• Include project-specific risk matrix – quantify likelihood and impact of risk and dependencies and outline mitigation measures including contingency in the event of delays, staff absences etc.)</li> </ul>	<b>10%</b>

	<ul style="list-style-type: none"> <li>Extra Information on Risk: The successful contractor will be required to work directly with the Rural Payments Agency (RPA) to obtain scheme holder contact details and information, with Natural England Area Team Staff and with the Natural England's Ethics Committee. Although procedures will be in place to enable these contacts to take place, situations beyond the control of Natural England and the RPA may occur.</li> </ul> <p>Natural England has tried to address any potential issues before the start of the contract, but both the successful contractor and Natural England will be required to work collaboratively and flexibly to overcome any issues that arise, ensuring the satisfactory completion of the contract.</p> <p>The contractor must also consider all issues relating to GDPR and ensure full compliance with this and any associated legislation or Governmental guidance.</p> <p>All contact with Natural England Staff, RPA Staff and Agri-Environment Agreement Holders will take place virtually via MS Teams or on the telephone and/or via email. This should avoid any issues related to Covid 19 during the winter months.</p>	
<b>5. Health &amp; Safety</b>	Supplier to provide a copy of their Health and Safety policy (including provision for lone working) describing how it is ensured that staff are aware of the policy and adhere to it.	<b>5%</b>
<b>6. Sustainability</b>	<p>The Authority has set itself challenging commitments and targets to improve the environmental economic and social impacts of its estate management, operation, and procurement. These support the Government's green commitments. The policies are included in the Authority's sustainable procurement policy statement published at:  <a href="https://www.gov.uk/government/publications/defra-s-sustainable-procurement-policy-statement">https://www.gov.uk/government/publications/defra-s-sustainable-procurement-policy-statement</a></p> <p>Within this context, please briefly explain your approach to delivering the services and how you intend to reduce negative sustainability impacts. Please discuss the methods that you will employ to demonstrate and monitor the effectiveness of your organization's approach for this requirement.</p>	<b>5%</b>

## **Specification Summary (please see accompanying full specification for further details)**

### **1. Description of work required – overall purpose & scope (including reporting requirements)**

The work (as detailed in the attached specification) will test the psychological construct of Nature Connection and that of Relational Values with land managers to enable Natural England to:

1. Understand whether (either or both of) these concepts and associated measurement tools are effective for understanding and measuring the relationship farmers, specifically Agri-Environment agreement holders, have with nature.
2. Whether variation in (either or both of) these measures, across the sample population, is associated with land manager ambition for supporting nature and pro-nature conservation behaviours, within the context of planning and delivering their Agri-Environment Scheme agreements.

This project is being commissioned through Natural England and Defra's Agri-Environment Evidence Programme.

Consortium bids that combine experience and expertise in different elements and requirements of the work, e.g., understanding of the policy area and evidence base and expertise in related methods, are welcomed given suitable arrangements for the management of the consortium.

#### **The project consists of:**

- A rapid evidence review to summarise the existing evidence in relation to the application of these concepts to the target audience and to identify appropriate methodologies for the primary research phase.
- Primary testing and research with Agri-Environment Agreement holders and Natural England's Farm Advice Staff.
- Production of recommendations relating to how we can operationalise the knowledge obtained to effect positive change within the policy area.
- The recruitment of participant land managers who would be willing to take part in follow on case studies that will be completed outside of this contract i.e., only permissions and contact details need to be provided as part of this contract.

As part of the quotation, potential contractors will outline how they propose to address each of the above project elements.

A pre-contract engagement session will allow for further elaboration on available existing data, available staff resource and access to agreement holders for recruitment purposes that will be made available to the successful contractor. There will also be opportunity to ask questions about the project parameters etc.

#### **The outcomes of the project are:**

1. A summary of the evidence pertaining to NC and RV in relation to land management and land managers and the robust methodological approaches to testing these concepts with such groups.
2. A reproducible methodology which is coherent with the theoretical framing and the research questions. This should include relevant social indicators (Appendix B of attached

Specification) from the Natural England, Defra and Environment Agency 2020 research to better understand whether the inclusion of NC and/or RV could improve the predictive power of the suite of social indicators overall. It should also consider reproducibility by Natural England Farm Advice and Social Science staff. Recommendations to include options for refining and adapting the methods for future research/application.

3. Natural England has an improved understanding of whether the concepts of NC and RV are effective for understanding and measuring the relationship farmers, specifically, Agri-Environment agreement holders, have with nature and whether this is measurably related to ambition for nature and conservation behaviours.
4. Natural England has a workable methodology for monitoring NC and/or RV over the lifetime of an agreement to better understand social outcomes from engagement and how these relate to environmental outcomes.
5. Natural England has workable suggestions for improving agreement holder relationships with nature via Agri-Environment Schemes (design, communication and delivery), should the findings show that the concepts being tested adequately capture this relationship and are measurable.

#### **Reporting Requirements:**

The successful contractor will appoint a Project Leader who must have sufficient experience, authority to act on behalf of the contractor and time allocated to manage the project effectively. The contractor's Project Leader will be responsible for the management and delivery of the project and will act as the liaison point, particularly liaison between members of any consortium and with the Natural England Project Managers. The Contractor's Project Leader will provide a short (no more than 1-page A4), written monthly progress note. The form of these updates will be agreed in the inception meeting.

This project will be overseen by a Project Steering Group made up of Natural England and Defra staff. An initial project meeting between the Steering Group and members of the successful contractor's team will be required at the start of the project. This will focus on defining the questions and scope of the evidence review.

The Contractor's Project Leader will speak to the Natural England Project Managers at least fortnightly throughout the course of the project, plus organise and run two further detailed meetings with the Steering Group (in addition to the initial meeting). The Contractor's Project Leader will be responsible for setting up these meetings and meetings will occur via MS Teams.

Secretariat and production of minutes from meetings is the responsibility of the Contractor's Project Leader, who will share meeting minutes with the Natural England Project Managers.

#### **2. Required skills / experience from the contractor and staff.** Include any essential qualifications or accreditations required to undertake the work.

- Demonstrate a clear understanding of the requirements in the specification and the services we are seeking.
- Demonstrate previous experience of related work and knowledge of Agri-Environmental Schemes, Nature Connection, Relational Values and associated or similar socio-psychological constructs.

- Demonstrate delivery of at least two previous, relevant, good quality products, to time and on budget completed in the last five years.
- Demonstrate good project planning and management skills.
- Confirmation of adequate staff resources devoted to the project and with appropriate expertise:
  - The project will require knowledge and experience of work related to working with the concepts and communities identified, conducting evidence reviews, evaluation, project management, social science data collection and analysis and technical report writing.
  - **Please show the structure of the project team; clearly identifying which key staff will be assigned to each of the tasks and outputs of the project and the number of days each will provide.**
  - Please provide CVs of key staff who will work on the project – maximum 2 A4 pages each, font size 11.
- All content to be considered must be in the document itself - no links/references to other documents will be considered.

### 3. Proposed program of work and payment table (Detailing specific tasks, key milestones, deliverables & completion date where appropriate)

Task no.	Task and deliverable	Completion date	Payment schedule
1	Production of the rapid evidence summary report.	30/11/2022	0%
2	Production of draft methodology for the Project Steering Group for comment before work commences.	30/11/2022	0%
3	Final methodology agreed with the Project Steering Group (to include identification of appropriate second conceptual framework if appropriate) to include requirements from Natural England for data, access to staff etc. allowing primary research to commence.	30/11/2022	0%
4	Primary research	1/12/2022 – 28/2/2023	0%
5	Fortnightly MS Teams meetings with Natural England Project Manager reporting on progress and risks.	Throughout contract period	0%
6	<b>Milestone 1</b> - Delivery of final report - draft in Word format for comment.	28/2/2023	50%
7	Address and incorporate comments and submit final report and executive summary, including recommendations.	31/3/2023	0%
8	Recruiting and gaining permissions for a minimum of 10 future case studies.	31/3/2023	0%
9	Production of presentation/webinar and slide pack – and delivery of 2 presentations (delivery can take place in April/May 2023 if needed).	31/3/2023	0%
10	<b>Milestone 2</b> - Provision of a two-page summary of the whole project using official template.	31/3/2023	0%
11	Procure two external peer-reviews for the final reports from the three stages (estimate one day for each of the two reviewers) and carry out reviews and address any issues by altering final report.	31/3/2023	0%



12	Obtain copyright permission for use of any figures etc. within reporting	31/3/2023	0%
13	All tasks completed.	31/3/2023	50%

#### 4. Risk

**Note:** This section is to be used to detail any risks or key elements relevant to the project i.e. Programme deliverable dates, workshops or external requirements, data, consultees, stakeholders etc that could impact the success of the project if they are not managed.

The successful contractor will be required to work directly with the Rural Payments Agency (RPA) to obtain scheme holder contact details and information, with Natural England Area Team Staff and with the Natural England's Ethics Committee. Although procedures will be in place to enable these contacts to take place, situations beyond the control of Natural England and the RPA may occur.

Natural England has tried to address any potential issues before the start of the contract, but both the successful contractor and Natural England will be required to work collaboratively and flexibly to overcome any issues that arise, ensuring the satisfactory completion of the contract.

The contractor must also consider all issues relating to GDPR and ensure full compliance with this and any associated legislation or Governmental guidance.

All contact with Natural England Staff, RPA Staff and Agri-Environment Agreement Holders will take place virtually via MS Teams or on the telephone and/or via email. This should avoid any issues related to Covid 19 during the winter months.

#### 5. Health and Safety Requirements

**Note:** Only include if high risk activities being undertaken e.g. working at height, near or over water). Do not request RAMS or similar risk assessments are returned with submissions. These should only be requested at contract award.

Supplier to provide a copy of their Health and Safety policy (including provision for lone working) describing how it is ensured that staff are aware of the policy and adhere to it.

#### 6. Further Sustainability Considerations



The Authority has set itself challenging commitments and targets to improve the environmental economic and social impacts of its estate management, operation, and procurement. These support the Government's green commitments. The policies are included in the Authority's sustainable procurement policy statement published at:

<https://www.gov.uk/government/publications/defra-s-sustainable-procurement-policy-statement>

Within this context, please briefly explain your approach to delivering the services and how you intend to reduce negative sustainability impacts. Please discuss the methods that you will employ to demonstrate and monitor the effectiveness of your organisation's approach for this requirement.

## 2.0 Proposal

- 2.1 The following document is to be used as a Call-Off template to be sent to all Contractors on a sub-lot for completion and return in accordance with the Call-Off procedures detailed in the Form of Agreement.

Research, Development and Evidence Framework 2	
PROPOSAL	
<b>To be completed by the Contractor</b>	
<b>Contractor's Name:</b> ICF Consulting Services Ltd <b>Call off Reference:</b> <b>Sub-Lot Number:</b> 4 <b>Date:</b> 21/10/2022	
<b>Note:</b> Your proposal must not exceed 6 sides of A4 plus the Costs Proposal in Section 4 (unless otherwise indicated in project client's specification above). Attachments must not be included unless requested except for a programme diagram and full cost schedule if you consider these would support your proposal.  Do not make or append Caveats and Assumptions in your proposal – any points of uncertainty must be raised as a clarification point prior to submitting the proposal. Where assumptions are to be made, these will be stated by the Authority's Project Manager.	
<b>1. Approach &amp; Methodology</b>	
	E01 Approach and methodology.docx
<b>2. Proposed Staff who will do the work and briefly state previous relevant qualification/experience. Contractor's experience of undertaking similar projects and accreditations (if requested).</b>	
	E02 Proposed staff and contractor expe
<b>3. Project Management and ability to deliver (inc Project plan). A project plan may be provided as an attachment with your reply (delete if not required)</b>	



E03 Project  
management.docx

#### 4. Risk

**Note:** This section is to be used to detail any risks relevant to the project i.e. Programme deliverable dates, data, consultees etc.



E04 Risk.docx

#### 5. Health & Safety (only complete if requested in defined evaluation criteria)



E05 Health and  
safety.docx


#### 6. Sustainability (only complete if requested in defined evaluation criteria)



E06  
Sustainability.docx

#### 7. Cost Proposal

Please use day rates, including any applicable discounts, as agreed under the framework contract. A full cost schedule may be attached to support the costs summarised below.

Task No.	Name	Framework grade	Day rate	No. of Days or part thereof	Cost
Total Staff Costs					
Expenses (please detail type i.e. travel, accommodation etc.)					
Overall Costs				<div> 7. Cost table.docx <b>£87,775</b></div>	

By signing this form **(Insert Contractors Name)** agree to provide the services stated above

for the cost set out in your Cost Proposal and in accordance with the Research, Development & Evidence Framework 1 Conditions of Contract.	
<b>Contractor Project Manager:</b>	
<b>Signature:</b>	
<b>Date:</b>	

### 3.0 Order Form

- 3.1 The following document is to be completed by the Contracting Authority and sent to the Contractor for counter signature to form a Call-Off contract.

<b>Research, Development and Evidence Framework 2</b>
<b>ORDER FORM</b>
<b>To be completed by Contracting Authority Project Manager and sent to Contractor for countersignature</b>
<p><b>Project title: Establishing the Influence of Nature Connectedness on Agri-Environment Scheme Uptake and Delivery in England</b></p> <p><b>Call off Reference: RDE073</b></p> <p><b>Bravo project ref (if applicable): Project_37281 / ITT_10713 / Contract – Ecm_66219</b></p> <p><b>Date: 02/11/2022</b></p>

THE Contracting Authority: **Natural England, Natural England Mail Hub, County Hall, Spetchley Road, Worcester, WR5 2NP**

THE CONTRACTOR: **ICF Consulting Services Ltd, Riverscape, 10 Queen Street Place, London, EC4R 1BE**

#### APPLICABLE FRAMEWORK CONTRACT

This Order Form is for the provision of the Call-Off Deliverables and dated 02/11/2022. It's issued under the Research Development & Evidence Framework Agreement reference 30210 for the provision of Establishing the Influence of Nature Connectedness on Agri-Environment Scheme Uptake and Delivery in England.

CALL-OFF SUB-LOT: 4.1

**CALL-OFF INCORPORATED TERMS** The following documents are incorporated into this Call-Off Contract. Where numbers are missing we are not using those schedules. If the documents conflict, the following order of precedence applies:

1. Defra Framework Terms and Conditions;
2. Request for Proposal;
3. Proposal;

No other Supplier terms are part of the Call-Off Contract. That includes any terms written on the back of, added to this Order Form, or presented at the time of delivery.

**CALL-OFF START DATE: 03/11/2022**

**CALL-OFF EXPIRY DATE: 31/03/2023**

**CALL-OFF INITIAL PERIOD: 5 months**

For and on behalf of the Supplier:	For and on behalf of the Buyer:
Signature:	Signature:

Name:

Name:

Role:

Role:

Date:

Date: