

CONTRACT CHANGE NOTE

Contract Change Note Number	02
Contract Reference Number and Title	ECM 51150 Bat Advice Service
Variation Title	[REDACTED]
Number of Pages	28

Whereas the Bat Conservation Trust and the Authority entered into a Contract for the provision of a Bat Advice Service dated 22 December 2017 (the “Original Contract”) and now wish to amend the Original Contract.

It is agreed as follows:

1. With effect from 1 December 2018 the Original Contract ECM_51150 dated the 22 December 2017 shall be amended as set out in this Contract/Framework Change Note:

Change Requestor / Originator	[REDACTED]	
Summary of Change	To extend the contract for [REDACTED]	
Reason for Change	Extension to existing contract	
Revised Contract Price	Original Contract Value	[REDACTED]
	Previous Contract Changes	
	Contract Change Note 002	
	New Contract Value	£340,000 exc VAT
Revised Payment Schedule	See attached (Appendix 2)	
Revised Specification (see Annex A)	See attached (Appendix 1)	
Revised Contract Period	[REDACTED]	
Change in Contract Manager(s)	[REDACTED]	
Other Changes	N/A	

2. Save as herein amended all other terms and conditions of the Original Contract shall remain in full force and effect.

Execution of the Contract Change Note is carried out in accordance with EU Directive 99/93 (Community framework for electronic signatures) and the Electronic Communications Act 2000. The revised Contract is formed on the date on which both Parties communicate acceptance of its terms on the Authority’s electronic contract management system (“Bravo”).

TECHNICAL SPECIFICATION FOR NATURAL ENGLAND BAT ADVICE SERVICE

1. BACKGROUND TO THE NATURAL ENGLAND WORK AREA / EXECUTIVE SUMMARY

1.1 Regulation affects a number of areas relating to the natural environment and Natural England's approach is set out in our Regulatory Strategy. We are implementing the Government's regulatory reform agenda to provide a simpler and better regulatory service to our customers.

The wildlife element within Natural England provides advice on and issues licences for activities that affect protected species. Our web pages give a full run down of our work and the extent of the legislation we work within. We manage the outsourced delivery of specialist advice on bats to householders and others, like churches. This is in support of Natural England's statutory obligations under Section 10(5) of the Wildlife & Countryside Act (1981) and Regulation 53 of the Conservation of Habitats and Species Regulations 2010 (as amended). The contract will involve co-ordination of specialist advice (provided by Natural England Volunteer Bat Roost Visitors) to avoid harming bats. It includes cases where disturbance to bats or their roosts is proposed and comprises telephone helpline and advice visits and will operate for all regions in England.

2. REQUIREMENT

Scope

2.1 Bats and their roosts are protected under Schedule 5 of the Wildlife and Countryside Act 1981 and Regulation 41 of the Conservation of Habitats and Species Regulations 2010 (as amended). The legislation places obligations on both individuals and public bodies that are aimed at ensuring that the conservation status of bats is maintained. The United Kingdom is party to a number of international treaties focused on conservation (Rio, Bern and Bonn Conventions).

2.2 The service provides specialist advice, primarily to householders (see paragraph 3.17 for details), through a telephone service and, when necessary, through visits carried out by Natural England's network of over 750 licensed Volunteer Bat Roost Visitors. Without this dedicated, unpaid, work force this service would not be possible and for this reason a good relationship between the contractor and the volunteers is essential. The main purpose of visits is to protect bats by reassuring people affected (or distressed) by them, to advise on timing (avoidance) and methods for building maintenance works (such as timber treatment, re-roofing but not development) and to reduce the likelihood of exclusions (and consequent threat to bat conservation and licence requirement). However, there will be a small number of cases where exclusion is justified, and a licensing route is available for these cases.

2.3 Enquiry numbers are approximately 6000 each financial year. The key outcome is to balance householder requirements with bat protection requirements.

Objectives and milestones

2.4 The aim of the service is to:

- Persuade people to live with bats and to save threatened roosts whilst working within legislation requirements
- Improve public awareness/appreciation of bats and attitudes to nature conservation
- By providing advice that protects bats and their roosts contribute to England biodiversity action plan targets.

The following objectives will be used to measure delivery success.

Objectives Code	Objective Description For standards and delivery definitions see paragraph 3.10 to 3.27
Obj1	To manage a bat advice service to resolve householder's (and others see paragraph 3.17 – 3.20) bat problems, meeting demand and delivery standards within available resource, and applying the most appropriate delivery mechanism
Obj2	To deliver advice visits through experienced licensed Volunteer Bat Roost Visitors with advice provided and documented (through bat roost visit reports and advice letters) meeting agreed standards (85% of cases completed within the 30 day deadline).
Obj3	To endeavour that exclusions do not exceed 10% of enquiries with roosts, being only recommended in 'last resort cases', and that roosts under threat are saved as a result of advice given
Obj4	To provide support to volunteers to maintain the capacity and safety of the network and to work with Natural England to build the skills and knowledge of individuals within the network.
Obj5	To ensure where exclusion licence applications are unavoidable Volunteer Bat Roost Visitors assist householders with the licensing process (see paragraph 3.25)
Obj6	To suggest innovation during the life of the contract seeking new ways to deliver the service and to reduce the overall cost

2.5 To measure delivery success three Key Performance Indicators (KPI) have been identified and the milestones below show how and when these will be measured. These will be finalised at the contract award stage.

Key performance indicators (KPIs)

- The advice service ensures that bat exclusion represents less than 10% of enquiries with roosts
- The appropriate advice mechanism is provided and service delivery meets demand, within available resource and on time. The agreed service level will be 85% of cases being dealt with within a 30 day time period.
- Service standards are met and over 90% of customers and volunteers rate satisfaction with service and relationship with contractor respectively as good or better.

Milestone Code	Description For standards and delivery definitions see paragraph 3.10 to 3.27	Delivery Date (see section 9)
M1	Delivery meets demand for the service with bat problems resolved using the most appropriate delivery mechanism for the type of enquiry. See template in Appendix A (ii).	Each quarter (December and March)
M2	Delivery meets agreed service standards (e.g. response times, sustainability targets are met)	Six weekly teleconference updates
M3	Quality standards are met (success will be measured in terms of problem resolution (i.e. analysis of outcomes from advice data), support to Natural England with volunteer activity and evidence from customer and volunteer satisfaction surveys). See template in Appendix A (iii).	Each quarter
M4	Sharing data with NBN which others can access (see section 3.15 and 3.23) as well as the bat groups.	Each quarter (December and March)

2.6 To record outcomes contractors will have to keep adequate records to report against these KPIs. Appendix A includes an example of the data records that need to be reported upon on a quarterly basis. Other records include electronic copies of telephone frequently asked questions, decision trees, guidance, advice letters and roost visit reports.

Exclusions

2.7 A number of items are not included in the contract.

Exclusion	Exclusion Description
E1	Volunteer travel and subsistence and equipment will continue to be funded directly from Natural England budgets
E2	Additional training and support to that specified in paragraph 3.29 will be provided to volunteers by locally based Natural England Advisors.

E3*	Paid advice visits carried out by the contractor or other consultant, helping applicants or their consultants with planning applications or European Protected Species (EPS) and development licence applications
E4*	Excludes bat welfare problems such as sick, or grounded/ injured bats (except in case involving potential illegal activity). Transfer caller to Bat Conservation Trust (BCT) helpline [0345 1300228] www.bats.org.uk or local bat group. Grounded bats unless (based on local knowledge and information gathered by the contractor over the telephone) it is reasonably anticipated that a <u>roost is present and is about to be affected by some action.</u>
E5*	Excludes encouraging interested householders, giving walks/talks or promoting other services for consultancies and bat groups.
E6**	Advice relating to any development (as opposed to building maintenance), regardless of whether planning permission is required. Works such as loft conversions and extensions are considered developments, and hence are not included in the contract. Work to listed dwelling places where roost presence is unknown.

* In these cases the contractor should refer callers on to the relevant organisation, bat group, Local Planning Authority, CIEEM for ecological consultant or to Natural England licensing web pages etc.

** Exception, E6, does not apply to cases on the Isles of Scilly.

The service

Calls (case type 1): Enquiries not requiring a visit by a Volunteer Bat Roost Visitor

2.9 In all cases the contractor provides the first point of contact for receiving enquiries about bats and operations affecting bats and their roosts (by telephone, letter, fax and email) from the general public and others, see paragraph 3.17 – 3.20. A telephone service will be available during normal office hours (09.00 – 17.30) throughout the year, with ‘out-of-hours’ (message/remote) service as required during peak times (July to September). Answer machine messages should state when the contractor is available, when the caller can expect a response and useful contact numbers for other relevant organisations. Some contact with local Volunteer Bat Roost Visitors may be necessary on a case by case basis outside normal office hours.

210 Telephone calls should be dealt with by appropriately experienced staff with the necessary expertise and guidance to provide advice and to determine if a visit by a volunteer bat worker is necessary and appropriate. Any seasonal employees must be adequately trained. This expertise will avoid unnecessary call outs (by dealing with enquiries appropriately) and make sure Volunteer Bat Roost Visitors get the necessary information prior to a visit. Helpline advice must be sufficiently detailed and consistent with bat protection legislation. Good use should be made of web or signposting to other organisations to source relevant information and to reduce carbon footprint and printing/postage costs. It is estimated that in future most enquiries will be dealt with as calls (Type 1) cases, although actual proportions will vary with location, predominance of and pressures on roosts and species involved. Potential suppliers will need to show how they will achieve this when answering the evaluation questions. Bids should also indicate what use will be made of the web and e-signposting.

2.11 All calls within the remit of the service (see 3.13 below) should be recorded on the contractors database. From this data is extracted into a spreadsheet. This includes dates, the action taken and outcomes etc. Documented frequently asked questions and decisions trees for helpline staff also need to be maintained and made available, electronically, on request to Natural England.

2.12 Calls should cover the following situations (see also contract exclusions in paragraph 3.7):

- Where reporting the presence of roosting bats, but where the caller is not proposing to affect or disturb the roost, exclude or otherwise interfere with.
- Where the householder is assessed (by the contractor) as having the necessary confidence and competence to follow detailed verbal advice given regarding the bat presence and a visit by a Volunteer Bat Roost Visitor is not required. All verbal advice should be documented in database (see above).
- Where factual information or reassurance is required regarding bat roosts, signposting to reports or other organisations, survey methods & information leaflets, local bat group contacts, licence application forms etc.
- Where requesting factual information on building maintenance, timber treatment, re-roofing work etc where the contractor assesses that the activity will not harm bats or require a Volunteer Bat Roost Visitor visit.

2.13 Call documentation: Where a visit is not required, leaflets or advice notes can be provided or online copies signposted, supporting the telephone advice already given. Details are kept in an electronic database (see Appendix A (i)). Information letters or emails where substantive advice is required should be sent to customers and to the Natural England Contract Manager (electronically) to enable them to refer to written information in future. These will be signed by the contractor acting on Natural England's behalf. An example of letter template A is included in Appendix B. It's important that case reference numbers are included on all correspondence. See paragraph 3.27 for response times.

Visits (case type 2): Enquires requiring on-site advice by a Volunteer Bat Roost Visitor

2.14 Contractors should determine the category (Type 1 or Type 2) on a case-by-case basis. In all cases experience and discretion should be used to determine the necessity for a visit; however visits are typically where a householder wishes to take some action that may affect bats or a bat roost. All visits within the remit of the service (see below) must be recorded on the contractor's database and reported to Natural England as a spreadsheet, an example of which is included in Appendix A(i).

Call types for which visits can be undertaken:

2.15 Householders with bats in properties.

This includes:

- Nuisance situations within a dwelling house e.g. problems with droppings, noise, phobia, bats repeatedly accessing living spaces.
- Minor repair works to the existing dwelling structure, including:
 - Replacement of missing slates/tiles, repairing small areas of damage to roof, replacement of soffits, fascia boards and barge boards, guttering, chimney repair, attaching/removing solar panels
 - Timber treatment, re-pointing of masonry, replacing windows
 - Installing insulation, eg within a loft or cavity walls
 - Pest control, eg treating clusterfly infestations in loft spaces, proofing against birds.
- Planned or imminent building maintenance not requiring planning permission or other controls (e.g. listed buildings) where timing may cause disturbance to bats and/or their roost and where it is thought a visit could persuade the enquirer to stop or avoid works or time of any disturbing activity to when bats are absent
- Requests to exclude/remove bats
- Multiple bats in a living area
- Baby bat found (which could indicate likelihood of roost)

The following situations are **not** covered by the bat advice contract:

- Any works requiring planning permission, or works to listed dwelling places where unknown if a bat roost.
- Extensions, including small 'permitted developments' such as porches.
- Loft conversions.
- Conversion of uninhabited buildings into dwellings.

With additional training and the introduction of the class licensing system, volunteers may be able to take on additional cases involving minor works that cause low level disturbance to bats.

2.16 Bats in churches

Visits can be provided for churches in many situations. However, following an initial visit by a Volunteer Bat Roost Visitor, the case may need to be passed to a consultant if it falls outside the remit of the contract. The bat advice contract does not cover works that involve a number of surveys and/or involvement beyond what is normally expected of a volunteer and/or where a roost will be significantly affected and a mitigation licence will likely be required. Due to the specialist knowledge required for church visits, there may be times or places in the country where no appropriately experienced Volunteer Bat Roost Visitors are available.

Situations covered by the contract and where a visit can be made:

- Nuisance situations within a church e.g. problems with droppings and urine, damage to furniture and fittings or artifacts, noise, phobias, health and safety concerns and where bats repeatedly accessing church during services.
- Roofing works, flashing repairs, other minor repairs where disturbance can be avoided through timing of works and where CEF is maintained.
- Pest control.

There are some situations that are not generally covered by the bat advice contract with respect to churches. In these situations an initial visit may be arranged at the discretion of the contractor if there is obvious benefit in doing so. These include:

- Significant development of the church building that will affect the roost structure or conditions (likely need a licence and often also subject to planning permission).
- Complex re-pointing where further surveys would be required to establish the presence/absence of bats in crevices and possible licence.
- Where bats have been found during reroofing works when surveys are not possible and NE have recommended that works can only continue under full supervision of a licensed Volunteer Bat Roost Visitor.
- Where bats are causing a nuisance to the extent that the church wishes to exclude them, or significantly alter the roost using a mitigation licence.

2.17 **Other public buildings such as schools and hospitals, with bats, where a nuisance is reported**

Nuisance problems would typically be associated with droppings and urine spotting. Please note that householder exclusion licences to deal with issues such as smell and phobia are **only** available for dwelling houses.

2.18 **General points**

Please note that the above lists are not exhaustive.

If at any stage it becomes apparent that the proposed works is likely to result in offences being committed, then the caller will be directed to an ecological consultant for further survey work and to consider the need for a licence.

Even if a licence is not considered necessary, there may be situations where the extent and complexity of the work proposed is beyond that which the advice service can be reasonably expected to deal with. In such situations the caller will be referred to an ecological consultant.

2.19 To manage demand, within available resource, the calls that meet the above criteria (paragraph 2.14), may need to be prioritised for visits. The following three are of most priority, with the highest first:

1. Householders with bats in properties
2. Churches, with bats, where a nuisance or minor repair works proposed/in progress
3. Other 'public owned' buildings, such as schools and hospitals, with bats, where a nuisance is identified.

Tree works in gardens and graveyards are low priority as more likely to be dealt with through a call and signposting and sometimes needs specific expertise not available through volunteers. Note: these also may need a [licence](#) before a proposed action can occur, and in such cases are not dealt with under the contract.

2.20. In **all cases** the contractor is to advise the caller that the service is staffed by experienced volunteers rather than paid staff and explain that timing of the visit will depend upon the availability of Volunteer Bat Roost Visitors. Callers are to be advised that employing a consultant might allow an earlier visit.

2.21 For visits the contractor will (see paragraph 3.27 for response times):

- Co-ordinate a roost visit by the most appropriate Volunteer Bat Roost Visitor from Natural England's volunteer database. The contractor should only direct Volunteer Bat Roost Visitors to visits relating to the above criteria (paragraphs 3.16 – 3.20). It will be important to

demonstrate when answering questions in section B how you will allocate visits, ensuring they are fairly attributed to volunteers based on their skills, availability and their proximity (see also section 6) to the roost site. For all calls regarding bat surveys for developments the contractor will advise the enquirer to contact the services of an ecological consultant (see contract exclusions paragraph 3.7). The contractor must not recommend any specific consultant, including themselves, as this would constitute a service conflict of interest (see question 9 in section B).

- Ensure all necessary information regarding the visit is provided to the Volunteer Bat Roost Visitor, including any information regarding what works are proposed and their timing, sightings of bats or the nature of calls regarding fear/dislike of bats (including the attitude of the caller), likelihood of exclusion request and any specific health and safety information to ensure they are able to respond appropriately. Call details will be recorded onto the contractor database from which a standard electronic record sheet (Appendix A (i)) will be extracted and provided to Natural England within 5 days at the end of each quarter.
- Receive a roost report from the Volunteer Bat Roost Visitor following the visit. This may be by post, fax or email, however the contractor should encourage the volunteer to send the form via email. Where necessary, the contractor should liaise with the Volunteer Bat Roost Visitor to seek clarification of the information provided on the form. An example blank roost visit report form is included in Appendix B. Any updates on format, from Natural England, will be supplied to the contractor for dissemination to the Volunteer Bat Roost Visitors. The Natural England Contract Manager will receive a copy of this report along with the advice letter.
- Formulate an appropriate advice letter (based on standard templates – see Appendix B) and send this to the enquirer (electronically wherever possible). Letters should be sent in all cases where advice needs to be confirmed after the visit. In particular any advice relating to exclusions, building repairs or timber treatment. These will be signed and sent by the contractor where standard advice has been given (see example A in Appendix B). Tailor made advice, including all cases proposing licensed exclusion, will be signed by the contractor and sent to the enquirer (except for an exclusion method statement which would go to NE). These non-standard letters will be provided to Natural England on request for quality assurance purposes. It's important that case reference numbers are included in all correspondence. A customer questionnaire should be attached to the letter to assess customer satisfaction (see an example in Appendix B). See paragraph 3.25 for more guidance on process where exclusion is proposed. In all cases the contractor is to keep a copy of these letters for the life of the contract and to provide a copy (electronic wherever possible) to the relevant Volunteer Bat Roost Visitor.
- Where a bat roost is found, the contractor will provide details of the bat roost (quarterly) to the NBN. The contractor will record a 2 letter, eight figure grid reference.

2.22 For all cases regarding timber treatment advice should be provided regarding the appropriate timing of works and the use of chemicals least likely to be harmful to bats. The contractor should ensure they provide this over the phone or where a visit that all Volunteer Bat Roost Visitors are aware of the requirement to provide this advice. Advice letters should include this information. A list of approved timber treatments is available from Natural England's website.

Exclusion of bats (visit suffix A)

2.23 Where exclusion of bats is proposed, all other options should first be considered. Information regarding the various options should be included in the advice letters and in the verbal advice given by Volunteer Bat Roost Visitor. For more details on the process where exclusion licensing is required see Appendix C. Contractors will need to be sensitive to the fact that not all volunteers wish to get involved in the licensing process and helping householders to exclude bats and need to take account of this when assigning visits (question 2, section B).

Potentially sensitive cases which might require Natural England input (visit suffix B)

2.24 The contractor will undertake to inform Natural England of any instance that may lead to legal action.

The Contractor must ensure that the Volunteers follow the guidance in the Batline Newsletter Edition 11 and in particular have a duty to notify us of any cases where offences are threatened / found to have been committed.

Also, the contractor will undertake to inform the local Natural England Technical Adviser of any instance that may require specialist advice.

- Cases involving any sites which have a statutory designation, e.g. Sites of Scientific Interest (SSSIs), regardless of whether or not bats are a special feature of interest for which the site was notified.
- Cases involving the following bat roosts:

Greater and Lesser horseshoe bats: All maternity and hibernation roosts.

Barbastelle, Bechstein's: All maternity and hibernation roosts.

Grey long eared bats

Leisler's bats: Any exceptionally large colonies with a long history of usage of a particular site.

Mixed assemblages: Significant colonies of more than one species:
All hibernacula containing:

- a) four or more species and fifty or more individuals;
- b) three species and one hundred or more individuals; or,
- c) two species and one hundred and fifty more individuals.

Where the species is unknown

- Cases which are particularly difficult, sensitive or are complex because of the proposed timing and/or scale of the work affecting breeding roosts.
- Cases with a long history of involvement.

Standard response times

2.25 On receiving notification, the contractor must contact the enquirer within the following timescales. These must be made clear to the enquirer:

Within 24 working hours

- Building renovation/repairs affecting a bat roost where work is in progress.
- Psychological stress to the owner/occupier of a dwelling as a result of the presence of bats.
- Timber treatment affecting a bat roost where work is in progress.
- Low priority (see prioritisation in 3.21): Tree felling operation currently in progress where bats are likely to be affected or have been discovered (Note: Possible licence requirement before works can take place which is not part of the service).

Within three working days

- Timber treatment or other building renovation/repairs affecting a bat roost where work is planned but not in progress.
- Low priority (see prioritisation in 3.21): Proposed tree felling operation not actually in progress where bats are likely to be affected or have been discovered. (Note: possible licence requirement before works can take place).
- All information such as leaflets, advice notes or written clarification provided through calls must be sent within **three working days** of original enquiry.
- Advice letters are to be forwarded electronically or by post (whichever suits enquirer) within 5 working days of visit and within **30** days of the original enquiry. Letters of complaint regarding the service must be forwarded by email to the Natural England Contract Manager on the same day as receipt and acknowledgement of receipt sent by return.
- In cases that require a Volunteer Bat Roost Visitor visit but where no confirmation of visit arrangement is received from a Volunteer Bat Roost Visitor within 3 working days, the contractor will follow up the case with the Volunteer Bat Roost Visitor. If a visit has not been carried out or an appointment made, the contractor will clarify with the Volunteer Bat Roost Visitor when the visit can be carried out, and, if necessary, contact the enquirer to inform them of when they can expect a visit.
- In urgent cases, which are those involving particularly distressed homeowners or situations where work has been suspended due to the discovery of bats, these should be marked as such and reported to Natural England within one working day of the call or visit.

Relationship with volunteers

2.26 The working relationship with Volunteer Bat Roost Visitors is extremely important and seen as crucial in the smooth running of the contract. It is important that helpline staff organising site visits select the most appropriate Volunteer Bat Roost Visitor in relation to the location and circumstances of call and volunteers experience. Volunteer Bat Roost Visitors need to feel they are acting on Natural England's behalf and will be supported in their advice and decisions.

2.27 The contractor will be expected to identify opportunities to train new Volunteer Bat Roost Visitor recruits to enable them to gain experience and also to provide less active volunteers, opportunities to maintain their skills through shadowing more active Volunteer Bat Roost Visitors.

2.28 Natural England is responsible for supporting the delivery of additional training for existing license holders who wish to become license trainers for new volunteers. Natural England provides ongoing Health & Safety training for registered volunteers and distributes quarterly newsletters to keep them updated regarding H&S, bat conservation and volunteer management issues. Each delivery area has a dedicated volunteer support adviser to deal with general volunteer enquiries. This work is overseen by a national bat work volunteer lead adviser.

Insurance (see also Natural England terms and conditions)

2.29 Natural England 'self-insures' its volunteers and their activities. Accidents and incidents are dealt with on a case-by-case basis in much the same way as for paid members of Natural England staff. This means that provided volunteers have not behaved negligently, have acted in good faith and followed all guidelines or instructions provided by an authorised person, Natural England will endeavour to support them.

2.30 For any cases falling outside of these arrangements, the contractor's Public Liability insurance must cover any claims. Similarly employees must be covered by contractor's insurance –

full details of the contractors cover must be submitted with the tender (see section 5).

Health and safety

2.31 Volunteer Bat Roost Visitors, whilst undertaking work on behalf of Natural England, must adhere to best practice and the health and safety advice in the latest [Bat Workers Manual](#). See also Appendix D for a range of standards and some risk assessment examples. Any accidents or incidents (including damage to property, however minor) that occur whilst on Natural England business must be reported to the Natural England volunteer lead adviser immediately by the contractor; who will also ensure that the relevant Natural England accident or incident report form is submitted by the volunteer. Contractors have a responsibility in ensuring that all Health and Safety requirements are met by themselves and the volunteers and that they are aware of any changes which will be reflected through updates from Natural England.

2.32. Natural England is responsible for the general Health and Safety of all registered volunteers. This includes providing them with generic guidance and risk assessments, issuing them with personal protective equipment and delivering appropriate Health and Safety Training.

Volunteer registration, licensing, vaccination and support

2.33 Natural England will continue to [register Volunteer Bat Roost Visitors](#), providing the contractor with updated lists as appropriate. An individual's registration status, where unclear, can be checked with Natural England's Volunteer Support Advisers. It is essential that Volunteer Bat Roost Visitors are registered as Natural England Volunteers. Contractors are unable to pass roost visits on to unregistered Volunteer Bat Roost Visitors.

2.34. Natural England maintains a database of registered volunteers. Access to this is shared with the contractor, who can view records and run reports identifying volunteers holding a current licence and who have provided evidence of up-to-date rabies vaccination. Volunteers may be flagged as inactive on the database if their licence or vaccination information is not valid; or for other reasons. It is the contractors responsibility to ensure that they do not arrange roost visits with volunteers shown as inactive on the volunteer database, or who do not hold a current licence or up-to-date rabies vaccination.

2.35 Natural England also keeps records of the rabies vaccination status of Volunteer Bat Roost Visitors. Volunteer Bat Roost Visitors must be vigilant and ensure their own vaccinations up to date. An individual's vaccination status, where unclear, can be checked with Natural England's Volunteer Support Advisers. Contractors are unable to pass roost visits on to inappropriately vaccinated Volunteer Bat Roost Visitors (Appendix E).

2.36 Natural England will directly reimburse volunteers for expenses incurred attending roost visits carried out under the remit of the contract. Guidance for claiming these is provided when volunteers register with Natural England.

2.37 Any personal Volunteer Bat Roost Visitor information obtained by the contractor is confidential and only for use in this contract (see full details in Natural England's Terms and Conditions).

3. CONTRACT MANAGEMENT AND OUTPUTS

Contract Management

2.1 Natural England will actively manage and monitor the contract by appointing a Contract Manager who will be responsible for all aspects of the Contract and will be a central point of

communication between Natural England and the Contractor. Table 2 illustrates the expected relationship between Natural England and the contractor(s). Exact details will be confirmed at contract award stage to suit both the contractor and Natural England to ensure delivery objectives can be met.

Table 2: Management roles for contractor and Natural England

Level	Natural England	Contractor
Management	Contract manager - budget, - standards - reporting - performance management - Links to national volunteer co-coordinator	Contractor project manager - Project management, - progress and financial reporting - standard setting and quality (performance) management
Delivery	Natural England staff consultation in sensitive cases, advising finance of invoice approval, volunteer training. etc.	Contract co-coordinator - Day to day helpline advice and management - visit co-ordination and liaison with volunteers in the lot - advice and support to helpline staff and volunteers

3.2 The Contractor's project manager will be their point of communication and be authorised to speak on their behalf. The Natural England contract manager must be informed in writing of any changes in manager or their responsibilities.

In addition to the advice letters referred to in section 2 the following outputs will be provided:

Outputs

- Six weekly teleconferences and two meetings per annum, following receipt of Q2 and Q4 quarterly reports.
- Support to Natural England on training volunteers plus email/mail updates on Health & Safety, advice guidance, reminders of licensing, vaccination etc.
- Quarterly (December, March) electronic progress reports for Contract Manager via e-mail, within 5 working days of end of each quarter.

3.3 Any meetings between Natural England and the Contractor will be minuted by the contractor. Dates for the above will be arranged by the Natural England Contract Manager.

3.4 A Contract Management Manual (CMM) stating what's required of the Contractor, will be set up during the contract award phase. This will include templates for reporting, data recording and financial monitoring, which will be reviewed in-year if appropriate.



[REDACTED]











