

FRAMEWORK AGREEMENT SCHEDULE 4

ORDER FORM/ WORK PACKAGE ORDER

FROM

Authority	Secretary of State for Environment, Food and Rural Affairs
Address	Defra Group Commercial 3 rd Floor, Mallard House 1-2 Peasholme Green York YO1 7PX
Contact Ref:	Phone: [REDACTED] Email: [REDACTED]
Order Number	Ref: ecm_53431
Order Date	29/10/2018

TO

Contractor	British Trust for Ornithology
For attention of:	Name: [REDACTED] Phone: [REDACTED] E-mail: applications@bto.org
Address	The Nunnery Thetford Norfolk IP24 2PU

1. SERVICES REQUIREMENTS

(1.1) Services and deliverables required:

Background

Reversing the decline in woodland bird populations was a targeted outcome of the England Woodland Grant Scheme (EWGS) and its successor, the current Agri-environment scheme (AES) - Countryside Stewardship (CS). This reflects the fact that the state of woodland birds is an impact indicator for AES at an EU level, and that woodland bird populations are used as an indicator of progress with the England Biodiversity Strategy Biodiversity 2020. As a result, monitoring the response of woodland birds fits within the aims and objectives of the Defra/NE AES Monitoring and Evaluation Plan 2014- 2020.

Evaluating the effectiveness of AES woodland creation options, such as those in CS, is challenging because these options are slow to mature, so ultimate effects cannot be measured on the timescales of standard AES monitoring projects. Hence, monitoring such longer-term changes is likely to rely upon comparison with existing data sets, but woodland in the English landscape tends to be found in patches that are too small to be surveyed effectively (in

detail) by the Breeding Bird Survey. Therefore, the exploitation of any relevant historical data sets as baselines against which to measure change is valuable, provided that the historical management of monitored sites is relevant to the present-day AES context.

Project Objectives

- To evaluate the extent to which farm woodlands (established under FWS/FWPS) have contributed to enhancing communities and populations of bird species over a period of twenty years since establishment.
- To explain how any observed effects on bird population trends relate to landscape characteristics, thus providing the evidence base to inform future woodland creation activities for increasing biodiversity and contributing to climate change mitigation.

Project Requirement

This tender is for services to conduct a resurvey, in 2019, of the 69 sites originally surveyed in 1999 to enable an evaluation over a single season of the extent to which farm woodlands (established under FWS/FWPS) have contributed to enhancing communities and populations of bird species since establishment.

In 1999, a volunteer survey was conducted, funded by MAFF of new farm woodlands that had been established under the Farm Woodland Scheme (FWS) from 1988 and the Farm Woodland Premium Scheme (FWPS) from 1992. These will now have matured to become patches of good scrub and young woodland habitat and the earlier survey provides an excellent baseline from which to investigate colonization of these new habitats, i.e. the efficacy of the habitat creation option (HC9, HC10, HC17, WD1, WD8), and how this efficacy has been affected by landscape context. A further survey is therefore timely. Results in respect of population changes in key woodland species will inform how option success depends on factors such as location with respect to other woodland and hotspots for species abundance, and therefore will be relevant to habitat creation and the boosting of connectivity, as recommended by climate change mitigation discussions such as the Lawton Review.

Working from a total of c. 30,000ha of new FWS and FWPS woodlands, the original survey covered a random selection (by region) of 69 sites, drawn from a list of 128 candidate sites that had been supplied by MAFF. The results showed that these young woods were characterized mostly by species not generally associated with woodland, such as meadow pipit and yellowhammer. This indicates that, as well as the clear value of conducting an explicit

comparison of bird populations then and now in the 69 previous sites, monitoring of additional woods from the original 128 sites or 30,000ha can be informative, especially for “true woodland” species whose abundance can be assumed to have been zero in 1999.

Tasks

This tender comprises two phases. The tasks for each phase are as follows:

Phase One (October 2018 – March 2019)

1. Make pre-survey arrangements for the 2019 resurvey
 - a) Establish location of the original 69 sites (site location to be supplied). Make contact with current owners and secure access permissions.
 - b) Transfer the original baseline survey data (to be supplied) into a GIS dataset, including attribution such as plot location, breeding bird location, and habitat data to facilitate data analysis following collection of repeat survey information in phase two.

Phase Two (March 2019 – March 2020)

1. Conduct resurvey fieldwork during March 2019 to June 2019 of the original 69 sites using the bird survey methodology described in the MAFF report (see link above) to enable comparison of breeding survey results with the 1999 survey. A few modifications to the methodology are outlined below (it may also help to read the description of the methodology in the Agriculture, Ecosystems & Environment journal article, link above):
 - a. The original 1999 survey included four site visits split between the winter (x2) and the breeding season (x2), but the resurvey will require a minimum of four visits during the breeding season only, to bring it more in line with an adapted Common Bird Census methodology.
 - b. The 1999 survey methodology included two levels of survey described as ‘intensive’ (carried out on 12 sites) and ‘extensive’ (on the remaining 57 sites), but the differences between the bird survey methodologies relate mainly to the extent of the assessment rather than its intensity. On the 57 ‘extensive’ sites only the new woodland funded under the FWS/FWPS schemes was surveyed and on the 12 ‘intensive’ sites the new woodland was surveyed in the same way but the wider farm was also

included. These two levels of survey and the split between sites should be retained, along with the contextual habitat/management information that was collected as part of the bird surveys on all sites. However, the detailed NVC quadrat surveys and invertebrate surveys that were carried out in addition on the 12 sites in 1999 need not be repeated for this project.

- c. It is noted that the journal article refers to 65 sites rather than 69 so it seems that a few sites were excluded from the analysis, but please quote on the basis of 69 sites.
3. Conduct a data analysis using the results of the 2019 field survey (task 2) and compare with the baseline survey data to evaluate the extent to which farm woodlands (established under FWS/FWPS) have contributed to enhancing communities and populations of bird species over a period of twenty years since establishment and to determine if there any associations between observed effects on bird population trends and landscape characteristics.

Outputs

1. All data and metadata collected during the survey to be provided in digital format. It will also include the detailed bird species survey given as GIS layers.
2. A final written project report (to include an executive summary) which addresses the project objectives listed. Conclusions will be drawn on the impact of new farm woodlands as they become fully established (over a 20-year period) and the responses of woodland birds will be evaluated in context. Impacts of woodland creation activities on objectives such as enhanced landscape character, climate change mitigation and increased biodiversity will also be evaluated.
3. A 2-page summary note detailing key outcomes and conclusions of the project, to be produced using the standard template provided under the AESME Framework.
4. A presentation of final results to key Natural England, Forestry Commission and Defra staff (providing an opportunity to discuss the key findings)

Duration

29 October 2018 – 31 March 2020.

The first phase of the project (completion of task 1), is to be completed by 28th February 2019. The second phase will be subject to confirmation of available funding and successful delivery of the first phase. The second phase shall involve carrying out tasks 2 -3.

Confirmation of the second phase will be communicated to the Contractor before March 2019 and confirmed by both parties via a change control note. The Contractor should be aware that any work undertaken before an electronically approved CCN is approved by both the Customer and the Contractor is undertaken at the Contractors own risk.

Reporting and Milestones

1. A brief, interim report summarising progress with the pre-survey element of the project (task 1) will be provided to Natural England by 28th February 2019.
2. A draft final report (with an accompanying draft 2-page summary) will be provided to Natural England by 31 January 2020 and a meeting to present/discuss the results will be arranged soon afterwards.
3. The finalised, peer-reviewed report, and accompanying final 2-page summary, will be provided to Natural England by 31 March 2020.

Natural England/Forestry Commission requires the opportunity to comment on draft Final Reports. The appointed contractor will be responsible for ensuring both the quality of the work as well as the presentation of the material (e.g. proof reading, ensuring clear English). The appointed Contractor is also to be aware that Natural England/Forestry Commission requests acknowledgement in the publication (including oral presentations) of its funded research, and that the project manager is notified at least two weeks prior to publication. All reports should be provided in MS Word and PDF format.

The final report will be externally peer-reviewed (note: the contractor will be responsible for arranging peer-review by two appropriate reviewers, to be agreed with the Natural England/Forestry Commission project officers) and be suitable for publication as a Defra science report. Tenderers should be aware that Natural England and Defra will publish final reports. The final report will be structured in a format that, if appropriate, facilitates rapid conversion into one (or more) papers suitable for submission to an appropriate peer-reviewed scientific journal.

Natural England/Forestry Commission is happy to encourage widespread publication and welcomes the use of appropriate trade press, peer-reviewed journals, sector-specific journals and appropriate use of social media. Given a suitable platform, the results of the project should also be presented at relevant scientific fora. Note: If the findings of the work are deemed suitable, the contractor will aim to submit a manuscript to a peer-reviewed journal as soon as possible after completion of the report, co-authored by staff from the contractor and Natural England/Forestry Commission, as appropriate. A

proposed timetable for submission of manuscript and publication timeline will be agreed with Natural England.

Project Management

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 (CPL) 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, with the Forestry Commission project manager (FCPM). The CPL will provide a short (no more than one 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 FC, NE, Defra, and wider stakeholders as necessary. An initial face-to-face 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 scope of the project.

The CPL will speak to the FCPM at least monthly throughout the course of the project, and organise tele calls/one further final face to face meeting with the steering group (in addition to the initial meeting), to be agreed with the FCPM. The CPL will be responsible for setting up these meetings, which will occur in NE/Defra offices.

Secretariat and production of minutes from meetings is the responsibility of the CPL, who will share meeting minutes with the FCPM.

IPR and data sharing

For the avoidance of doubt, all material and intellectual property rights existing prior to or in spite of the work carried out under this contract (including, but not limited to, any pre-existing data) shall remain the property of the originator.

It has been agreed that, for the purposes of this project and Work Package Order only, in reference to clause 21 of Framework Agreement, Natural England hereby agrees to joint ownership of Intellectual Property Rights of the field data that will be produced as part of the Services supplied under this Work Package Order.

All other data resulting from this project, project documents and other materials will be the property of Natural England.

All agreement information provided to the contractor for the purposes of this project shall be kept securely, confidentially and disposed of at the end of the

project. It must not be used elsewhere without prior consent. The supplier will be required to follow Natural England's data protection policy and only act on information provided under our instruction.

Any data collected will be made openly and publicly available, as per Natural England's Access to Information statement

(<http://publications.naturalengland.org.uk/publication/6430783876628480?category=5927398087327744>)

References

MAFF (1999) Final Report: *The environmental benefits of farm woodlands planted under the Farm Woodland Scheme and Farm Woodland Premium Scheme*. Project Code: WD0121.

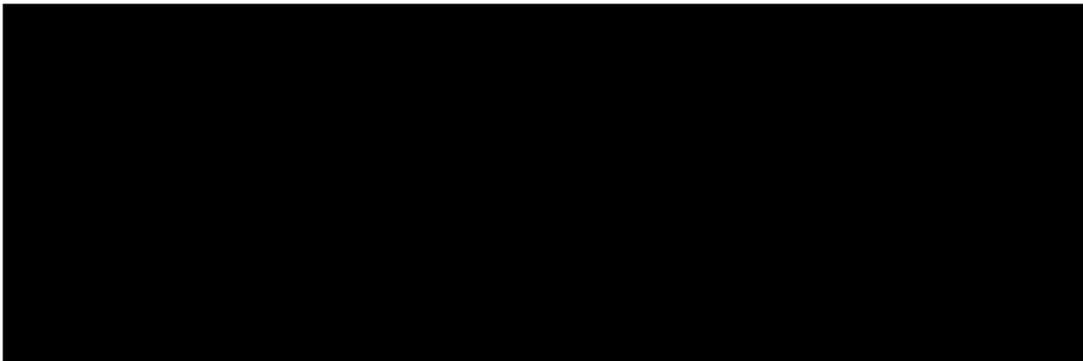
Vanhinsbergh, D., Gough, S., Fuller, R.J., Brierley, E.D.R. 2002. *Summer and winter bird communities in recently established farm woodlands in lowland England*. Agriculture, Ecosystems & Environment. Volume 92, Issues 2–3, November 2002, Pages 123-136

(1.2) Commencement Date: 29 October 2018

(1.4) Completion Date: 31 March 2020

2. PERFORMANCE OF THE SERVICES AND DELIVERABLES

(2.1) Key Personnel of the Contractor to be involved in the Supply of the Services



(2.2) Performance Standards

The report will be peer-reviewed as required in the specification provided as part of the Request for Quotation document.

(2.3) Location(s) at which Services are to be provided:

British Trust for Ornithology
The Nunnery

Thetford
Norfolk
IP24 2PU

(2.4) Standards:

Natural England's Access to Information statement:
(<http://publications.naturalengland.org.uk/publication/6430783876628480?category=5927398087327744>)

(2.5) Contract Monitoring Arrangements

For the avoidance of doubt the services required are being provided under Framework Agreement 22707

3. PRICE AND PAYMENTS

(3.1) Contract Price payable by the Authority excluding VAT, payment profile and method of payment (e.g. Government Procurement Card (GPC) or BACS))

£71,611.75

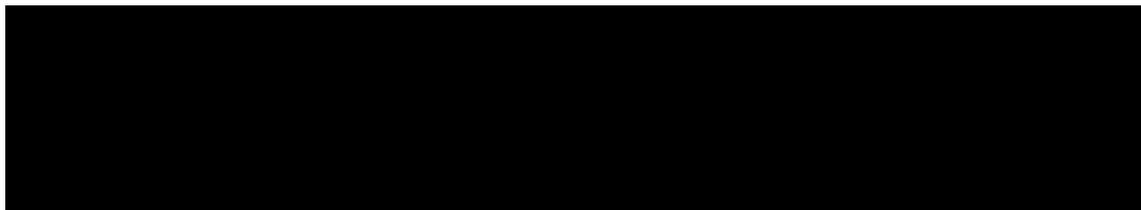
For full pricing schedule, see Annex 1

Payable by BACS

(3.2) Invoicing and Payment

This project will be paid by achievement of milestones. However, not all milestones need to be associated with payment; and it may be appropriate to include additional milestones that are not related to payment but are used to indicate progress within the project. The frequency of milestone payments should be determined by the Supplier, however, we request that they are appropriate and not at a frequency greater than every month.

The Supplier shall issue electronic invoices in arrears following completion of the following milestones:



4. Invoicing Requirements

All invoices should be sent, quoting a valid purchase order number (PO Number), to: Accounts-Payable.neg@sscl.gov.uk or Shared Services Connected Limited, PO Box 790, Phoenix House, Celtic Springs Business Park, Newport, Gwent, NP10 8FZ. Within 10 Working Days of receipt of your acceptance of this letter via Bravo, we will send you a unique PO Number. You must be in receipt of a valid PO Number before submitting an invoice.

To avoid delay in payment it is important that the invoice is compliant and that it includes a valid PO Number, PO Number item number (if applicable) and the details (name and telephone number) of your Customer contact (i.e. Contract Manager). Non-compliant invoices will be sent back to you, which may lead to a delay in payment. If you have a query regarding an outstanding payment please contact our Accounts Payable section either by email to Accounts-Payable.neg@sscl.gov.uk or by telephone 0845 603 7262 between 09:00-17:00 Monday to Friday.

BY APPROVING THIS ORDER FORM THE CONTRACTOR AGREES to enter a legally binding contract with the Authority to provide to the Authority and natural England the Services specified in this Order Form, incorporating the rights and obligations in the Call-Off Contract that are set out in the Framework Agreement entered into by the Contractor and Defra on 01 June 2018.

Electronic Signature

Acceptance of the award of this Contract will be made by electronic signature carried out in accordance with the 1999 EU Directive 99/93 (Community framework for electronic signatures) and the UK Electronic Communications Act 2000. Acceptance of the offer comprised in this Contract must be made within 7 days and the Agreement is formed on the date on which the Contractor communicates acceptance on the Customer's electronic contract management system ("Bravo"). No other form of acknowledgement will be accepted.

Annex 1: Full pricing schedule

No.	Item		Staff Grade	Day £ rate	No. of days	Total price (ex. VAT) £
1	Task 1	Previous data collation and site locations	Technical / Specialist			
		Protocol development	Technical / Specialist			
		Volunteer liaison and permissions	Technical / Specialist			
		Online site selection tool	Technical / Specialist			
		Management and reporting	Senior Project Manager			
2	Task 2	Volunteer liaison	Technical / Specialist			
		Data inputting	Technical / Project Support			
		Data processing	Technical / Specialist			
		Management	Senior Project Manager			
3	Task 3	Data analysis	Technical / Specialist			
		Management	Senior Project Manager			
4	Final report write-up	Reporting	Technical / Specialist			
		Management	Senior Project Manager			
5	Travel & Subsistence					
6	Any other costs					
7	Total exc VAT					£71,611.75