

822503 ECOLOGICAL SERVICES FRAMEWORK CONTRACT 3 PROJECT FORM

Part 1 – to be completed by Environment Agency Project Manager

Project title:

EcoSF3 River Thames Scheme - Bat Suitability and Emergence Surveys (Trees and Buildings)

Bravo Ref. 30786

Date: 16 Oct 2020

Environment Agency
Project Manager:

Budget holder:

Procurement Contact (if
over £50k):

Project Start Date

07 December 2020

Project Completion Date

31 December 2021

For any projects over £10k, full competition is
required (i.e. all suppliers on the Lot invited to
quote). Please tickDirect
Award

No

Mini-comp

X

Lot number 1/2/3/4

3

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

6 November 2020

Notes

Any extensions, or amendments to existing orders need to be discussed with the contract manager first and the table in section 6 completed to authorise the change to the contractor.

A **Prior Rights Schedule** to record data being shared between parties and a **GDPR Schedule** (if personal data is being handled as part of the project) must be completed with the successful contractor at contract start up and updated throughout the project and held as part of the contract record.

Evaluation criteria: (for work over £10k project managers need to prepare and complete an evaluation model on receipt of tender submissions – see [Ecosf pages](#) on Easinet for for template). Please note price and quality weightings are fixed (although you may alter the quality sub-criteria weightings).

Optional: If a minimum score threshold is set for any criteria this must be stated in the table. If not used, please delete the wording.

Consultants: Failure to meet the 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.

Price	Weighting	50%
Quality	Weighting	50%

Quality Sub-Criteria Weightings:

Please demonstrate how you will deliver the works detailed within the Specification. This should include, but not be limited to:

Approach & Methodology

- How you will ensure the agreed methodology meets the requirements of the specification and the different stages of surveys will be managed effectively
(minimum score threshold 4 will apply)

30

Health & Safety

- The key health & safety risks associated with the works, and how this will be managed and mitigated effectively
(minimum score threshold 4 will apply)

15

<p>Quality Assurance, Quality Control</p> <ul style="list-style-type: none"> - How you will ensure that high quality outputs are provided for each of the surveys stages within the timescales specified and how do you ensure monitoring and control <p><i>(minimum score threshold 4 will apply)</i></p>		15
<p>Proposed Staff, Qualification and Experience (in Pen portraits)</p> <ul style="list-style-type: none"> - Please demonstrate that your proposed staff have the relevant skills, experience and qualifications to deliver the works, meeting the required skills / experience in section 2 <p><i>(minimum score threshold 4 will apply)</i></p>		25
<p>Project Management (including outlined programme and communication), Sustainability Considerations (Travel management & reduction of carbon footprint)</p> <p>Please demonstrate your approach to project managing this requirement, and how it will add value and ensure effective and efficient delivery. Your response shall demonstrate how and when your objectives will be achieved including monitoring and controlling, risk/issue management, programme and communication</p> <p>Please also demonstrate how sustainability shall be maximised in delivering this work, including achievable innovations for travel management and carbon footprint reduction.</p> <p><i>(minimum score threshold 4 will apply)</i></p>		15

Specification (Details to be provided by the Environment Agency project manager. **Note** – the contractor's proposal will be limited to **8 pages** (excluding costs) unless otherwise indicated in your specification.

1. Description of work required – overall purpose & cost

River Thames Scheme Background

The River Thames Scheme (RTS) is a major FCRM scheme that will protect homes and businesses including significant local infrastructure such as roads, sewerage networks and power supplies near to the River Thames. The project is aimed to reduce the flood risk to parts of the lower Thames region and the current plan is for the Environment Agency to build a new flood channel alongside the River Thames in two sections. This would create hydraulic connections between several water bodies (lakes and watercourses) and the River Thames.

The new channel will pass through a number of artificial lakes (gravel pits), undisturbed grounds (semi-natural habitats including woodland), landfill sites (filled gravel pits) and intersects a number of existing River Thames tributaries before reconnecting with the River Thames. It will also pass through, or close to, several designations notably Water Framework Directive waterbodies, Special Protection Areas and supporting lakes, Sites of Special Scientific Interest and locally designated sites including Sites of Nature Conservation Importance and LNR. Many of the lakes are notable amenity sites for angling or water sports.

Ecological appraisals, including background data searches for historic species records and Phase 1 habitat mapping, identified the need for further targeted ecological surveys and assessment in respect of Bats.

Collection of survey data is required in order to inform the environmental impact assessment (EIA) including avoidance, mitigation and compensation requirements in line with legislative and policy drivers.

Due to the noted complexity and sensitivity of the scheme, expertise in the scoping and collection of the required survey data is thus being sought, as per this invitation to tender, with the Contractor required to help assess and define risks in light of the proposals and the granting of required permissions.

Overall Objective

The priority is for the collection of timely and robust survey data for the scheme so as to appropriately assess the impacts on the specified receptors in order to inform and support the EIA submission programmed for 2023. Please note that due to the size, location and complexity of the scheme, the project is anticipated to require a Development Consent Order (and associated cross examination) and therefore sufficient and robust data collection, collation and assessment is essential.

Certain areas of the scheme were surveyed in 2017, with some additional surveys in 2018 and 2019. In order to provide complete and up to date baseline information, updated bat surveys are proposed in 2021.

All bat habitats (including trees, buildings, culverts and foraging areas) that are to be removed or disturbed during construction of the scheme (this excludes areas that are within the red line boundary but are not directly affected by construction) need to be included in the scope for the ground-based tree assessments and preliminary roost assessments. The Contractor shall assume that there are 3,426 trees (within 34 different areas) and 11 buildings will need to be surveyed. The results of these initial surveys will inform the need for further tree climbing surveys, dusk emergence / dawn re-entry surveys and transect surveys.

Survey costs should be provided for each survey step as outlined in the cost section below. The costs should be based on several assumptions including an estimated number of trees to be assessed, an estimated number of trees with suitability and an estimated number of surveyors. However, to keep consistency, the indicative cost for dusk emergence / dawn re-entry surveys needs to be based on 5%, 33% and 50% of a total number of trees to be surveyed.

Specific Objective:

1. Collect full and robust survey information to current best practice on the presence / absence and / or distribution / status of Bats within the study area and an appropriate zone of influence;
2. Production and approval of RAMS document for the works will need to proceed surveys with Method Statement, Risk Assessment, Biosecurity Statement and delivery plan included along with any other required supporting information / documentation;
3. Collation and assessment, to industry best practice, of the data against the most up to date scheme design; and
4. Survey outputs and reporting to industry standards, including a summary report, to support and inform the scheme’s EIA – to be completed by December 2021

Tasks:

The Contractor shall undertake ecological survey and reporting to industry best practice for the receptors as identified in the objectives section of this document, and within the attached scope (EcoSF Bat Surveys Scope), and within an appropriate study area / zone of influence. The principal tasks are therefore:

- Comprehensive baseline of bat activity (based on BCT guidelines) along the route of the proposed flood channel areas is required to understand the risk of impact to bats and their roosts
- Ground-based tree assessments and preliminary roost assessments of buildings will need to be undertaken in all areas where bat habitats (including trees, buildings, culverts and foraging areas) are to be removed or disturbed during construction of the scheme. The Contractor shall ensure that these suitability surveys will identify the need for further bat surveys which may include tree climbing surveys, dusk emergence/dawn re-entry surveys or transect surveys. All bat surveys will need to follow published best practice guidelines produced by the Bat Conservation Trust (BCT)
- To work with the Environment Agency to agree the methods used to undertake the surveys. It is expected that this will be a formalisation of methods discussed at the tender stage
- To secure approvals, from appropriate statutory consultees, of all proposed survey methodology
- To plan and complete delivery of identified survey work by suitably qualified, and experienced personnel to inform and support the ecology chapter of the EIA. Provide an outlined programme for the proposed work at the tender stage. More detailed programme will be requested upon award of the work
- Site access. The relevant permissions required at each site in order to undertake survey visits, as required, will be sought by the Environment Agency’s Land Agent, and will not be the responsibility of the Contractor. However, the Contractor is expected to provide necessary information at least four weeks prior to surveys start order for eh land access to be organised and meet the agreed survey programme including method statements to enable permissions to be granted.
- To provide reporting to industry best practice to inform and support the planning submission and the ecology chapter of the EIA. This includes interpretation of survey data and submission of raw data sets in electronic format as agreed by the Environment Agency

Survey	Key Tasks	Requirements / Considerations
Bat Surveys	Survey and reporting	Survey and reporting to industry best practice. Survey areas as identified / informed by, but not limited to, the Bat Scoping Survey and as scoped in / out by The Contractor’s verification / technical expertise and assessment process, which must consider the whole of the project footprint

Survey Requirement:

The Contractor will be expected to maintain at least weekly regular communication with the Environment Agency's Project Manager, providing regular progress updates by email etc., throughout the duration of the contract. The Environment Agency's Project Manager and / or other local Environment Agency staff associated with the RTS may visit sites with the Contractor, to observe survey methods in practice and must be accommodated as far as is practicable (following Covid-19 guidelines).

Species Survey

The intended start date for this work is January-February 2021 for suitability surveys (ground-based tree assessments and preliminary roost assessments of buildings) followed by tree climbing surveys (if required) in March 2021 and emergence (Dusk/dawn) surveys and transect surveys (if required) between May-August 2021. Final report and the project completion is required by 31 December 2021.

Points to note:

1. The Contractor will plan and organise their field programme so as to minimise travel and accommodation (if necessary) costs. This will be assessed in the tender evaluation under 'methodology'
2. The Contractor must have appropriate RAMS and management in place for field work, prior to the start of the contract, and these procedures must conform to the Environment Agency's own Health and Safety standards. Health and safety procedures specific to this project must be provided. This will need to include working from the shore, boat work and the use of compressed air. In addition, specific details of ways of working around Covid-19 restrictions must be documented and approved by EA Project Manager prior to work commencing, including appropriate PPE as necessary
3. The Environment Agency requires the Contractor to demonstrate at the tender stage that they have an appropriate level of survey and analytical quality control in place to ensure data quality
4. Invasive, non-native species – Contractors must take all necessary precautions to avoid the spread of invasive non-native species between survey sites. Evidence of biological control and decontamination procedures must be supplied / included within the required RAMS documentation
5. Where existing agreements are not in place, the Contractor will be responsible for checking for / identifying the need and obtaining any necessary permissions and licences required for working on designated conservation sites and surveying sensitive species.
6. The Contractor will be responsible for complying with current protected species / protected site legislation, with personnel appropriately qualified, experienced and licenced as required
7. The Contractor shall facilitate attendance by, and work with, the Environment Agency's project manager and local ecology staff in the field on occasion

Outputs:

1. Copies of field records, including digital photographs (in electronic format) to be provided to the Environment Agency's project manager
2. Raise weekly progress updates and "flagging" for potential delays to survey work and recommendations for amelioration of impact. This will be by telephone or teleconference
3. Raw survey data in an excel spreadsheet, in a format that can be edited, to be provided to the Environment Agency's project manager; and
4. Reporting (interim / final reporting), appropriate to support and inform an EIA, including interpretation of data, to industry best practice.

Cost

The Contractor is requested to provide cost including surveys, project management, reporting, site access, resources on a fixed price basis, based on the assumptions within this Specification and supporting scope document. Any additional work required outside of the Specification and/or scope is to be instructed at the Agency's discretion as a Variation to the Contract. Date/hourly rates to apply in the event of such Variation. Should there be any reduction of the Specification and/or scope a reduction in the price is to be applied.

The Contractor shall provide a separate cost spreadsheet including a breakdown of cost for each survey stage and different scenarios, date and hourly rates.

The Contract will be awarded for Tasks 1a-1c. Tasks 2-8 may be instructed at the Environment Agency's discretion, as a Variation to the Contract under Clause 10.2, using the sums in section 6.i) of this Specification. In the event of changes to the listed assumptions, these shall be managed as a Variation to the Contract under Clause 10.2, using the rates in section 6.ii) of this Specification.

Ground-based tree assessment and Preliminary Roost Assessments and Hibernation Surveys of Culverts and Buildings

The Contractor shall assume that the 3,426 trees (within 34 different areas) (shown in the shapefiles) across the RTS project area will need to be visited and assessed. The cost to be based on this information. Cost for the buildings to be based on 11 Preliminary Roost Assessments (PRAs) including one hibernation survey. The Contractor shall assume the inclusion of 3 culverts to be surveyed, with associated confined space working.

A systematic search of each building, both externally and internally (provided access is granted) will need to be undertaken, noting all potential PRFs. Appropriate H&S guidelines working at heights will need to be adhered to.

Tree Climbing Surveys

The Contractor shall provide a cost based on the three scenarios in the table below assuming a certain number of days would be spent on tree climbing to cover a different number of survey areas. It is not anticipated that every tree will need to be climbed. These scenarios assume that 1 site would be able to be climbed in 1 day.

Scenario	Number of areas where tree surveys required to be undertaken	Assumption
Scenario 1	1	1 day of climbing would be the minimum
Scenario 2	15	15 days of climbing
Scenario 3	34	33 days of climbing

Dusk Emergence / Dawn Re-entry Surveys

The Contractor shall provide a cost based on the three scenarios below assuming a certain number of trees and buildings/culverts are to be included in the scope of these surveys. It is not anticipated that every tree will need to be surveyed. These scenarios have made an assumption about the suitability of the trees and buildings/culverts to be surveyed. Costs to be provided for each scenario.

Trees

Scenario	% of trees to be surveyed	Total number of trees to be surveyed	Assumed suitability of trees
Scenario 1	5%	170	44 high 29 moderate 97 low
Scenario 2	33%	1,130	294 high 192 moderate 644 low
Scenario 3	50%	1,713	445 high 292 moderate 976 low

Buildings/Culverts

Scenario	Number of buildings/culverts to be surveyed	Suitability Assumption
Scenario 1	11	5 high 1 moderate 5 low
Scenario 2	11	5 high 5 moderate 1 low
Scenario 3	11	9 high 1 moderate 1 low

Project management

The project will be monitored by the Environment Agency's Project Manager and the Ecological Services Framework Contract Manager. The Contractor shall demonstrate their approach to project managing this project including how and when the project objectives will be achieved including monitoring and controlling, risk/issue management, programme and communication

Tender Responses Requirements

Tenderers should ensure their responses provide sufficient detail for the Environment Agency to make an assessment of their suitability to meet the requirement stated.

Even if you have previously, or are currently supplying services to the Environment Agency, you must not assume that the evaluation panel is aware of your organisations abilities and therefore please ensure that you provide full and complete answers to all questions. The evaluation panel will only assess your organisation based on the information you provide in your submission and no prior information about your organisation will be considered.

Key Documents supplied by Environment Agency

1. Scope of Bat Surveys
2. Bat trees and buildings shapefiles

Responses must be provided in the space provided or clearly appended.

Please limit your proposal to 8 pages (excl. cost sheet)

Past reports will be available to the successful contractor.

2. Required skills / experience from the Framework contractor

1. Extensive technical experience of undertaking protected / notable species surveys including licenced / accredited personnel as necessary
2. Proven record of similar project work experience will be assessed
3. All surveys must be undertaken by suitably experienced ecologists and must be conducted throughout the optimum survey season.
4. Tree climbing survey undertaken by an experienced ecologist with suitable climbing experience and the necessary qualifications
5. Demonstrable track record of working on large, complex schemes including, but not limited to, linear infrastructure schemes
6. Data must be collected within the framework of a suitable QA / QC procedure, (covering both survey, data identification and reporting). Details of this must be supplied at the tender stage and will cover QA of both survey work, surveyor competency / skills and reporting
7. Data handling, analysis and reporting – ability to work with large data sets to ensure data are accurately transposed from field data forms to the specified data format required by the Environment Agency
8. Sustainability – Supplier must work in a sustainable manner as far as is reasonably possible; and
9. Biosecurity risks must be identified and carefully managed as part of the project delivery.

3. Proposed programme of work and payment table (Detailing specific tasks, deliverables & completion date where appropriate) Payment schedule should detail the % amount that will be paid after delivery of each task (We always hold back a minimum of 30% until the project is complete)

Task no.	Task and deliverable	Completion date	Payment schedule
1	Surveys – Suitability surveys	28 Feb 2021	
1a	Data Analysis/Reporting	31 Mar 2021	
1b	EA Review	31 Mar 2021	
1c	Final Report	31 Mar 2021	
2	Tree climbing (if required)	31 Mar 2021	
3	Surveys – Emergence surveys Trees	31 Aug 2021	
4	Surveys – Emergence surveys Buildings/Culverts	31 Aug 2021	
5	Surveys – Transect surveys (optional at EA discretion)	31 Aug 2021	
6	Data Analysis/Reporting	19 Nov 2021	
7	EA Review	03 Dec 2021	
8	Final Report	31 Dec 2021	

6.i) Proposal cost: please provide fixed prices in the table below. Please provide a separate Excel cost spreadsheet including a breakdown of cost for each survey stage and different scenarios (use date/hourly rates, including any applicable discounts, as agreed under the framework contract.)

Task No.	Task Description	Cost (£)
1a.	Ground-based Tree Assessments (incl. reports)	
1b.	PRA and hibernation surveys of culverts and buildings (incl. reports)	
1c.	All other associated costs to deliver 1a. & 1b.	
2	Tree Climbing Surveys (incl. reports)	
2a.	- Scenario 1	
2b.	- Scenario 2	
2c.	- Scenario 3	
3	Dusk Emergence / Dawn Re-entry Tree Surveys (incl. reports)	
3a.	- Scenario 1	
3b.	- Scenario 2	
3c.	- Scenario 3	
4	Dusk Emergence / Dawn Re-entry Buildings/Culverts Surveys (incl. reports)	
4a.	- Scenario 1	
4b.	- Scenario 2	
4c.	- Scenario 3	
5	Transect Surveys – optional (11x OFAs) (incl. reports)	
6-8	All other associated costs to deliver the Specification	
Total cost for evaluation (Task No. 1-8 inclusive)		
Total cost for award* (Task No. 1a – 1c inclusive)		

* Tasks 2-7 may be instructed at the Environment Agency's discretion, as a Variation to the Contract under Clause 10.2, using the sums in section 6.i) of this Specification.

6.ii) Variation costs: Please use date/hourly rates, including any applicable discounts, as agreed under the framework contract.

Task No.	Consultant name	Framework grade	Day rate	No. of Days or part thereof	Cost (£)

5.-Terms & Conditions

Note to contractor – All call off contracts under the Ecological Services Framework are subject to the terms and conditions issued with the framework, including the Prior Rights Schedule and GDPR Schedule completed at award of the call-off contract.

Contractor's required Limitation of Liability:

Public Liability Min. Cover £5,000,000

Professional Indemnity Min. Cover £2,000,000

Notes

You must have a purchase order number from the EA project manager before you start any work in connection with this proposal.

If you have carried out a protected species survey, data collected must be uploaded onto the [NBN network](#). Please take account of this in your quote.

Contractor Project Manager:

Signature:

Date:

6. Proposal Acceptance