**22503 ECOLOGICAL SERVICES FRAMEWORK 3 (EcoSF3)**

**SCHEDULE B PROJECT FORM AND CONFIRMATION OF INSTRUCTIONS**
**PART 1**
**PROJECT DETAILS, SPECIFICATION AND EVALUATION CRITERIA**

[redacted]

**Project title:** Breeding Bird Surveys East Nidderdale

**Project ref (if applicable): C15659**

**Date: 30th January 2023**

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|---|---|---|---|
| **Contracting Authority (Environment Agency; Natural England; Defra etc)** | Natural England | | |
| **Project Manager:** | [redacted] | **Phone number:** | |
| **Budget holder:** | [redacted] | **Cost code:** | [redacted] |
| **Commercial Contact (if applicable):** | [redacted] | **Email:** | [redacted] |
| **Project Start Date** | | 27th February 2023 | |
| **Project Completion Date** | | 29th December 2023 (potential for one-month contract extension to 31st January 2024). This will be at the discretion of the Authority | |
| [redacted] | | **Direct Award** | | **Mini-comp** | Yes |

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| **Call off from Lot number (please tick)** | 1 | | 2 | | 3 | x | 4 | |

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| **Proposal return date:** ***(no less than 10 working days from current date)*** | 12:00 noon on 13th February 2023 |

**Specification**

[redacted]

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|---|---|---|
| **Price** | **Weighting** | **50%** |
| **Quality** | **Weighting** | **50%** |
| **Quality Sub-Criteria Weightings:** | | **Threshold** |
| Question E01 - Approach & Methodology | | **30%** |
| Question E02 - Proposed Staff (inc Pen Portraits) and Contractor's experience/accreditations. | | **40%** |
| Question E03 - Project Management | | **30%** |
| | | |

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

The East Nidderdale Moors (Flamstone Pin – High Ruckles) SSSI is notified in part for its breeding bird assemblage characteristic of the upland moorland and grassland without waterbodies. It is additionally designated for its nationally significant aggregation of Merlin *Falco columbarius.*

The aim of this contract is:

- To undertake a breeding bird survey on the SSSIs to determine the breeding status of all bird species within the relevant habitats for which the SSSI is listed
- Determine the approximate locations of confirmed and probable breeding scoring assemblage species (scoring list will be provided)
- Determine population estimates and number of territories for all probable and confirmed assemblage species
- Determine the counts or estimates of numbers of breeding Merlin, including the number of individuals, pairs or calling males, occupied breeding sites or occupied territories.
- Provide a habitat description and its condition, suggesting where current management is working for the breeding bird assemblage species/ Merlin and where it is not, why might that be
- Calculate the score for the breeding assemblage currently on site, using the scoring system in place at time of notification.
- Compare current breeding bird assemblage score to that at notification
- Compare current habitat extent to that of time of notification
- Produce a phase 1 habitat map of the SSSI
- Assess current and future climate change impacts

The results will allow Natural England to undertake a Common Standards Monitoring (CSM) (JNCC, 2004) assessment of the condition of the mixed breeding bird assemblage and aggregation at the SSSI and also help with advising on future management of the SSSI.

East Nidderdale – Background Information

The East Nidderdale Moors (Flamstone Pin – High Ruckles) SSSI is a large site spanning 10,776.97 ha, located within the Nidderdale Area of Outstanding Natural Beauty in Yorkshire. The site is characterised by gently rolling moorland, dominated by dry heath on the low plateau slopes, which grades into wet heath and blanket bog on the deep peat overlying the flat summit overlooking Nidderdale. The site forms part of the North Pennine Moors, which hold international importance for their blanket bog and heather moorland communities and breeding bird populations, several of which are listed on Annex 1 of the EU Birds Directive. A nationally important assemblage of moorland birds resides within the site, including Merlin *Falco columbarius*, Golden Plover *Pluvialis apricaria*, Snipe *Gallinago gallinago*, Curlew *Numenius arquata*, Redshank *Tringa totanus*, Short-eared Owl *Asio flammeus* and Peregrine *Falco peregrinus*. A minimum of 18 pairs of Merlin has been recorded, which represents 3% of the national breeding population. The Moor is also regarded as the best grouse moor in Northern England. In addition to its extensive ornithological value, the SSSI supports diverse and extensive upland plant communities.

Methodology:
A CSM assessment of the status of the breeding bird assemblage features require evidence of possible/probable/confirmed breeding for each species that score towards the assemblage (this will be provided), using standard Bird Breeding Status Codes. An estimate of total numbers of breeding territories and other bird population abundance measures are required for all probable/confirmed scoring species and Merlin.

Targets:
Assemblage Upland moorland and grassland without water bodies: Assemblage score at notification 31.5 for SSSI. Note Lapwing is not included in scoring list but is considered an important species for the site as such please record information for it in the same method as the scoring species.

Aggregation of breeding birds - Merlin, Falco columbarius: Population at notification 15 pairs according to North Pennine Moors pSPA Departmental Brief or 'a minimum of 18 pairs' on the SSSI Citation. A decline of more than 25% is deemed 'Unfavourable'

Habitat: Extent of all habitats* used by the feature should be maintained - losses of 5% or more of any relevant habitat type unacceptable. * (Upland Heath Bogs Additional minor habitats including Acid Grassland and Flush)

Field Work:
To determine the condition of the breeding bird assemblage, only probable or confirmed breeding species count towards the score for the site. Therefore, the surveys should aim to collect as high a level of breeding evidence as possible for each

species encountered. This will necessitate taking time to watch for birds leaving or entering nest sites or feeding young, for example.

Detailed Methodology for the breeding bird assemblage survey:

- A minimum of two visits, early April to late June: first visit early April to mid-May; second visit mid-May to late June; between 0830 to 1800 BST. Fieldwork should only be undertaken in good visibility (>500m), light winds (Beaufort Scale force 0-4) and dry weather.
- The method is based on a constant effort survey: 20-25 minutes in each 500x500 m quadrat of open land.
- Large sites will require a team of surveyors covering adjacent quadrats, thus reducing the chances of double-counting between quadrats. A predetermined route through each square should be followed to ensure that all parts of the quadrat are approached to within at least 100 m. It is important to cover all areas equally. If possible, walk in the opposite direction through the quadrat on the second visit.
- Scan round in every direction at regular intervals – at least every 100 m – and also listen for calls and songs. If necessary, scan from high points to get a better view. As each individual or pair is encountered, decide as far as possible whether these are new birds. However, it may still be necessary to retrace your steps to check on the continued presence of any birds previously located.
- Record the location and activities of all species seen using the standard British Trust for Ornithology (BTO) symbols. A point location should be given for all registrations, recorded at the first point the bird is detected or, if breeding behaviour is observed, at the first point such behaviour was seen. These should include information such as time of the observation, the behaviour and flight line of the birds. The route taken by the surveyor during the survey should also be marked.
- At the end of each visit, all observers should get together and put all their registrations on a final visit map – duplicate registrations of the same bird made by different surveyors can be discounted at this stage. Birds can be said to be breeding if any of the following are observed:
  displaying or singing
  -nests, eggs or young
  -adults repeatedly alarm calling
  -distraction displays
  -adults carrying food or removing faecal sacs
  -territorial disputes
- Where a number of breeding individuals are present and it is not possible to determine the number of breeding pairs, registrations of individual birds are deemed to represent discrete breeding territories/pairs if the distance between them is more than 500m (200m in the case of Dunlin and passerines). In cases where two individuals are considered to constitute a pair of birds, the location of the pair should be placed centrally.
- Territories plotted during each visit are considered to be separate from one another if they are located more than 1km apart (500m for Dunlin, 200m for passerines). Again, the location of territories mapped in both visits should be plotted centrally.
- See Gilbert et al (1998) Bird Monitoring Methods, RSPB, for further information

Detailed methodology for the Merlin survey – Visits to be combined with both methodologies

- At least four visits, one each month (April-July), with follow-up visits where necessary to confirm breeding
- These surveys can be conducted at any time of day
- Avoid surveying in wet or windy conditions (winds above Beaufort force 4)
- Areas of heather moorland or bracken, young plantations with small trees and heather cover, plantation edges, including the edges of open areas within afforested blocks and the edges of rides within 100m of the plantation/moorland boundary and open woodland usually below 600m altitude.
- The following habitats can be excluded from the survey: towns and villages, enclosed in-bye pastures, arable farmland, areas of grassy moorland which lack trees, bushes, crags, stream banks and land above 600m (Unless merlins are known or suspected to nest)
- Disturbance should be kept to a minimum, do not visit nests. If your presence disturbs a bird, withdraw immediately and observe from a distance.
- The first visit in April:
  - Get within 500m of every spot in the survey site
  - map all those areas that are unsuitable as potential nest-sites so that these areas can be excluded from further searching
  - locate all crows' nest as these may be used by nesting merlins
  - search for merlin activity and signs of merlins.
- In May, June and July

    - Search all suitable areas, recording all merlin observations and attempt to confirm breeding at all potential nesting sites
- Alternate the direction the route is travelled between visits. On each visit to the site the following search methods should be used:
    - Moorland habitat, check along fence-lines and around crags, steep stream banks, rocks, grouse butts, stone walls/dykes, hummocks, recently burned areas, isolated trees and other perches for whitewash (faeces), prey remains, pellets and moulted merlin feathers. Check old crows' nests
    - Open birch, pine or alder woods, tree-lined gorges and rivers, search the woodland for crows' nests and check for birds leaving the site as you approach
    - At sites with forest edge and open areas within afforested blocks, inspect fence posts, etc, for feathers and whitewash. Check plantation edges along rides for about 100m from the plantation/moorland boundary. Check perches such as boulders and walls in moorland near the forest edge.
- On the May-June visits, alternate searching with watching from a vantage point
- If you find merlins on the first (April) visit, note the location and retreat to a safe distance to watch. No further searching is required within a 1km radius of that location. On subsequent visits, return to watch form a vantage point to establish breeding.
- Signs of merlin presence such as moulted merlin feathers, prey remains, and pellets can only be taken as indicating presence
- You can confirm occupation of a new site and count the observations as evidence of a probable breeding pair if you see or hear at least one merlin or find fresh signs on two visits separated by one week or more.
- You can confirm breeding if you see an adult returning to a nest, if you find eggs or young, if the adults are repeatedly alarm calling at the appropriate time or if the signs of occurrence indicate that a pair has probably bred
- Produce a summary map that includes the habitat searched, the habitat excluded, the locations of all breeding pairs (with suspected nest site also marked) and the locations of any other registrations.
- Please record all probable and confirmed breeding records on a separate Excel spreadsheet of coordinates. Include within this numbers of individuals, pairs, number of nests, number of chicks or fledged young seen. Note nest site with relevant code: "G" ground site, "T" tree site or "C" crag site. Only enter "C" if the crag site is inaccessible to foxes, if not enter "G"
- See Rare Breeding Birds panel guidance for more information

Indicative Survey Locations:
If the area is not well known to the successful Contractor pre-survey reconnaissance of the indicative survey locations should be carried out to determine the general nature and extent of the habitat/terrain and to confirm suitable locations for survey transects. It is estimated that a preliminary walk-over assessment of all the proposed survey location would take no longer than 4 days. Following the initial reconnaissance proposed transects will need to be sent to the project officer for review.

Phase 1 Habitat Map

A Phase 1 Habitat survey map should be completed following standard methodology Handbook for Phase 1 habitat survey (jncc.gov.uk)

If previous Phase 1 maps are available these will be provided after the contract has been awarded.
**This contract does not require a full Phase 1 report.**
A general description of the habitats should be included, with clear and concise recommendations for management to benefit individual species or groups of birds. Along with any negative impacts of current management or environment are having on the assessed species.

Climate Change Impacts

Please provide a description of the current and future impacts of climate change on the site's bird features and associated relevant habitat(s). Using professional judgement please infer how climate-based future alterations, such as potential range shifts of both current scoring species and other nationally and internationally scarce species, may influence the site and its bird feature(s). Suggesting any potential management mitigations or changes in designation that may be appropriate based on projections.

Access to land

Natural England will initially obtain landowner/manager permission in advance of the surveys providing approximate timings of site visits.

If Land managers request to be contacted prior to visits, contact details will be securely supplied to the successful Contractor at the start of contract by Natural England. The successful Contractor will then liaise directly with landowners and occupiers to arrange specific dates and times for access. Permissions must be obtained at least 48 hours prior to monitoring, with any refusals or other issues notified to the Natural England project officer within 3 working days.

Analysis and Reporting

GPS data formats:
It is important to be able to geolocate the survey effort so that geospatial cross-referencing with other data sources can take place.

The location of the start and end points of all transect routes should be provided in six figure 'x' and 'y' co-ordinates format, entered in an Excel spreadsheet.

In addition, the location of registrations of the confirmed/probable breeding species from the assemblage should be provided using the same six figure x:y co-ordinates format, entered in an Excel spreadsheet. These registrations are combined from all visits (not for each separately).

A map showing the transect routes should be provided as part of the contract outputs.

Indicative mapped routes can be provided as part of the tender process, but it is at the discretion of the bidder.

Reporting and presentation of data:

- A report will be produced to include introduction, methods, limitations, results and discussion, together with maps showing the locations of transect routes.
- The results section will include the calculation of the breeding bird assemblage on the SSSI. This is calculated using the score at the time of notification and then compared to the threshold for favourable condition. These figures will be provided when the contract is awarded and discussed in the inception meeting prior to any surveys.
- The results section will also describe the habitat (see Phase 1 section above) and compare the current habitat extent to that at the time of notification (information will be provided).
- As described in the data format section above, an Excel spreadsheet should be included showing the six-figure x: y co-ordinates of the start and end points of the transect routes and the locations of registrations of confirmed/probable breeding bird species from the assemblage.
- A section describing the bird interest across the SSSI should be included, including a tabulated list of possible, probable and confirmed breeding birds for the SSSI, defined according to the Bird Breeding Status Codes. Estimates should be made of the number of territories of the probable and confirmed breeding species.
- Additional descriptive sections in the report relating to any bird species of conservation interest and concern that are additional to the assemblage scoring species (e.g. if any newly colonising species were recorded)
- A general description of the habitat should be included, with clear and concise recommendations for management to benefit individual species or groups of birds.
- Additional individual maps and summaries of results for each unit on the SSSI

Maps:

Provide maps showing the location or each recorded probable or confirmed breeding record for each target species and provide separate x:y grid references and species codes in an excel spreadsheet. Precise locations of rare and sensitive species should not be included if the report is for wider circulation – such information should be provided separately, ideally in a confidential, password-protected annex.

Provide maps showing the location of any transects, point counts and survey routes in the report or in a GIS file compatible with ArcMap.

The following maps should be provided **for each SSSI:**

- Maps showing areas surveyed and transect routes
- Maps showing location of confirmed / probable breeding species
- Phase 1 maps showing the habitat found on the SSSI

A copy of maps should be provided in jpg or pdf format and as GIS layers, in or compatible with ESRI ArcGIS format. Information and guidance on requesting baseline digital geographical data from Natural England can be found on our website at Geographical Information for contractors and partners.

Health & Safety / Known Hazards

Risks associated with field-based work need to be considered.

The Health and Safety at Work Act 1974 is to be fully complied with at all times.

If successful a risk assessment will need to be provided.

If any incidents occur on site, these should be reported to the Project Officer within 3 working days.

**Information to be returned by the Contractor**

**Question E01 - Approach and Methodology (weighting 30%)**

Please include details of how the area will be surveyed considering the methodology proposed, species, habitats present and the SSSI in question (e.g. terrain). Please explain how the visits will be organised in terms of personnel and timescales.
Include details of availability given the timescales provided and a proposed outline schedule or timetable of works. This should include clear rationale for the estimated number of days for field work. Please use your professional judgement to estimate how long a single visit will take, taking into account the terrain of the site/s.
Include details of capability for field survey work with a clear rationale for the estimated number of days for field work.
Please demonstrate your intended approach to health and safety on this project and how you ensure the requirements of legislation are met (including coronavirus and avian flu).

**Question E02 - Required skills / experience from the contractor and staff (weighting 40%)**
Include any essential qualifications or accreditations required to undertake the work. Please provide details for any sub-contractors being used.

Your submission must include the following information and supporting evidence:

Previous contracts for undertaking breeding bird surveys for site evaluations and Site Condition Monitoring on SSSI sites.

Experience of undertaking Phase 1 surveys.

Qualifications, technical merit, and experience of key staff engaged on the contract e.g. previous breeding bird survey / contracts, technical qualifications.

Particular reference should be made to experience of breeding bird surveying of the habitats within the SSSIs with experience surveying Merlin highly desired.

**Question E03 - Project and risk management, resources allocated and quality assurance (weighting 30%)**

Details of personnel, support systems, organisational and management skills to deliver all aspects of the requirement in full.
This must include an assessment of the risks to project delivery and mitigation (including contingency in the event of delays), evidence of quality control measures and project management procedures
Include details of availability given the timescales provided and a proposed outline schedule or timetable of works.

**Proposed programme of work and payment table (Detailing specific tasks, key milestones, deliverables & completion date where appropriate) Payment schedule should detail the % amount that will be paid after delivery of each task**

Day rates and numbers of days for key staff should be provided. Costs should be broken down to show the time allocated to each part of the project. Please itemise other costs including material / equipment costs. Please detail any assumptions made when pricing for any aspects of this tender.

| Task no. | Task and deliverable | Completion date | Payment schedule |
|---|---|---|---|
| 1 | Project management meetings | | |
| 2 | Pre-survey reconnaissance | March | |
| 3 | Field surveys | July | 20% after completion of half the surveys 20% after completion of all surveys |
| 4 | Collation and analysis of results | | |
| 5 | Draft report | 9th October | 20% |
| 6 | Final report | 1st November | 40% |