



Request for Quotation

Request for Quotation: Invertebrate Assemblage Survey, Upper Teesdale SSSI

You are invited, to submit a quotation for the requirement described in the specification below.

Please confirm, by email, receipt of these documents and whether you intend to submit a quote.

Your response should be returned to the following email address by:

Email: beth.mather@naturalengland.org.uk

Date: 03/02/2023

Ensure you state the reference number and 'Final Submission' in the subject field to make it clear that it is your response.

Contact Details and Timeline

Emma Bacchus will be your contact for any questions linked to the content of the quote pack or the process. Please submit any questions by email and note that, unless commercially sensitive, both the question and the response will be circulated to all tenderers.

Action	Date
Date of issue of RFQ	16/01/2023
Deadline for receipt of Quotation	03/02/2023
Intended date of Contract Award	17/02/2023
Intended date of inception meeting	w/c 27/02/2023
Intended Contract Start Date	27/03/2023

Contract Duration	8 months
Draft Report to be submitted to project officer	20/10/2023
Draft Report to be Submitted to Contractor with Natural England Comments	10/11/2023
Final report submission date	24/11/2023

Glossary

Unless the context otherwise requires the following words and expressions used within this Request for Quotation shall have the following meanings (to be interpreted in the singular or plural as the context requires):

“Authority”	Means the Department for Environment, Food and Rural Affairs acting as part of Natural England
“RFQ”	Means this Request for Quotation and all related documents published by the Authority and made available to suppliers
“Contract”	Means the contract to be entered into by the Authority and the successful supplier.

Conditions applying to the RFQ

You should examine your response to the RFQ and related documents ensuring it is complete prior to submitting your completed quotation.

Your quotation must contain sufficient information to enable the Authority to evaluate it fairly and effectively. You should ensure that you have prepared your quotation fully and accurately and that prices quoted are arithmetically correct for the units stated.

The supplier by submitting a quotation is deemed to accept the terms and conditions in the RFQ. Failure to comply with the instructions set out in the RTQ may result in the supplier’s exclusion from this procurement.

Acceptance of Quotations

By issuing this RFQ the Authority does not bind itself to accept any quotation and reserves the right not to award a contract to any supplier who submits a quotation.

Costs

The Authority will not reimburse you for any costs and expenses which you incur preparing and submitting your quotation, even if the Authority amends or terminates the procurement process.

Mandatory Requirements

The RFQ includes mandatory requirements and, if you do not comply with them, your quotation will not be evaluated.

Clarifications

The Authority reserves the right to discuss, confidentially, any aspect of your quotation with you prior to any award of Contract to clarify matters.

Amendments

The Authority may amend the RFQ at any time prior to the deadline for receipt. If it amends the RFQ the Authority will notify you in writing and may extend the deadline for receipt in order to give you a reasonable time in which to take the amendment into account.

Conditions of Contract

Natural England's general Terms and Condition can be found [here](#).

Specification

The Authority is Natural England. The Authority's priorities are to secure a healthy natural environment; a sustainable, low-carbon economy; a thriving farming sector and a sustainable, healthy and secure food supply. Further information about the Authority can be found at: [Natural England](#)

1. Background

Upper Teesdale SSSI is a 14365ha site approximately 29km from the Lakeland town of Penrith. Upper Teesdale is an extensive upland area within the North Pennines which contains a number of nationally rare habitat types as well as a rich variety of representative habitats and associated plant and animal communities. Some 10 nationally rare and endangered or vulnerable invertebrate species are known from Upper Teesdale as well as over 60 nationally scarce species, including the northern dart and slender striped rustic moths.

The site is designated, in part, for the invertebrate assemblage F221 montane & upland.

The size and location of the site is shown in Annex 1.

2. Aim

The aim of this contract is:

- To undertake a baseline invertebrate survey on the SSSI to assess the current state of the invertebrate assemblage using a combination of free-ranging searches and standardised survey methods.
- Determination of the area and quality of the core habitats.
- Undertake proxy assemblage monitoring assessments of each sample point (please see section 3.4 for further information).
- Provide a habitat description and its condition, suggesting where current management is working and where it is not, why might that be.

The results will allow Natural England to undertake a Common Standards Monitoring (CSM). (JNCC, 2008) assessment of the condition of invertebrate assemblages at the site and help with advising on future management to conserve the species.

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3. Methodology

3.1 Field Work

Using the methodology below the presence of invertebrates should be mapped on a large OS style map (please see Annex 1) and ideally a standard grid-style survey sheet noting species presence, abundance and habitat information.

Please note, a full invertebrate assemblage survey in line with Common Standards Monitoring has not been undertaken on Upper Teesdale. Therefore, this survey will be treated as a baseline.

3.2. Detailed Methodology

- The survey is to be undertaken in 3 site visits between May and the end of August.
- The visits should be spread through the field season and be at least 4 weeks apart unless a sudden change in weather warrants visits closer together. Precise timings to be decided by contractor.
- If the contractor believes the visits have resulted in sub-optimal data collection (e.g due to poor weather conditions) one further visit can be undertaken. Please ensure a quotation is provided for this.
- This is to include ground searching, suction sampling if equipment can be carried to site and must include pitfall trapping.
- Setting and collecting of these traps should not count as survey visits (unless field survey work is carried out on that day).
- A minimum of 4 sampling points will be required. Contractors are to use their own professional opinion (judging the site/habitat size) to determine the total number of samples.
- Please note the locations of the related units (13, 83 and 95) in Annex 1. Whilst the survey will be concentrated in these units, the survey will follow Natural England's 'Whole Feature Assessment' method.
- If possible, please identify the NVC (JNCC, 2020) type for the location sample based on the dominant species present. Further information can be found [here](#). We do not require a species list.
- Each visit should be completed in the daytime.
- Record as much information as possible including the location of important or rare species and the locations of all sampling points.
- If possible, please record the estimated size of the related habitat and comment on the quality for invertebrates.
- Record the date, start and finish times, observer name and weather conditions for each survey visit.
- No visits in windy conditions (Beaufort scale greater than 5), poor visibility or if the site is subject to unusually high levels of disturbance. Visits are to be ideally taken on warm, sunny days to increase the chance of invertebrate activity.
- General notes on the habitat should also be made and photographs should be taken.

- Please ensure the site unit is noted when commenting on management/making recommendations. Whilst Natural England are following the method of Whole Feature Assessment, unit based feedback enables us to provide detailed feedback to landowners.

3.3 Further information:

Common monitoring methods as described by [Pantheon](#) (Webb et al. 2018)

For a list of habitat target species please see annex 2.

F221 – Montane and Upland - Ground-searching, suction sampling, pitfall traps

3.4 Proxy assemblage monitoring assessment

In addition to recording the above points, contractors will be required to carry out rapid habitat assessments at each survey location. This will involve completing a proxy assemblage monitoring survey, which consists of recording the surrounding habitat mosaic within a 6-metre radius of the survey point's coordinates by identifying the different surface types present i.e. bare ground, very short vegetation, longer or tussocky vegetation, low shrubs, trees. This will give an idea of how intricate and varied the habitat mosaic is. Data collection will take approximately 5 minutes per assessment and a form will be provided for your convenience. At each survey location it is recommended that one proxy assemblage survey should be completed within the survey area. Further guidance on how to complete and record a proxy assemblage monitoring assessment will be provided to the successful contractor through a live or recorded Microsoft Teams meeting.

3.5 Requirements

Survey Data will be entered into Pantheon (<https://www.brc.ac.uk/pantheon/>) and the assemblage scores gained reported on. Sample data should be input at the highest resolution, but combined, where necessary to arrive at assemblage summaries for the key sampling locations. The survey results must, as a minimum, confirm (or otherwise) that the two habitat-associated assemblages meet or exceed their threshold scores.

3.6 Climate Change Impacts

Please provide a description of the current and future impacts of climate change on the sites invertebrate features and associated relevant habitat(s). Using professional judgement please infer how climate based future alterations, such as potential range shifts of invertebrates, may influence the site and its invertebrate feature(s).

Suggesting any potential management mitigations or changes in designation that may be appropriate based on projections.

4. Further information

4.1 Indicative survey locations

If the area is not well known to the contractor pre-survey reconnaissance of the indicative survey locations should be carried out to determine the general nature and extent of the habitats and to confirm suitable locations for survey sampling areas. It is estimated that a preliminary walk-over assessment of all the proposed survey locations would take a maximum of one full day. Following the initial reconnaissance Natural England would welcome any advice or recommendations regarding the locations to be surveyed. For instance, the contractor may wish to recommend a variation of survey location(s) based on their experience. This can be discussed at the inception meeting.

4.2. 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 all sampling areas should be provided in ten figure 'x' and 'y' co-ordinates format, entered in an Excel spreadsheet.

In addition, the location of any rare or special invertebrate species should be provided using the same ten figure x:y co-ordinates format, entered in an Excel spreadsheet.

Once agreed with Natural England, a map showing the sampling areas 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 contractor.

4.3. Access to land

Natural England will initially obtain landowner/manager permission in advance of the surveys and provide approximate timings of site visits. Land manager contact details will be provided at the start of the contract by Natural England. The 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. Any refusals or other issues should be notified to the Natural England project officer within 3 working days.

5. Analysis and Reporting

The outputs, unless agreed otherwise in writing by the Project Officer, will be as detailed in this section.

5.1. Reporting and presentation of data

- A report will be produced to include introduction, methods and results together with maps and photographs showing the locations of sampling areas and recorded species. Please include the photographs in an appendix. The images can also be accepted in a separate document.
- As described in the data format section above, an Excel spreadsheet should be included showing the ten-figure x:y co-ordinates of the sample locations. This spreadsheet must only contain binomials in the main species column; if more detailed trinomial, sub-specific, or sensu lato, sensu strictu ascriptions are required then these should be in an "other name" column.
- General description of the habitat should be included, with clear and concise recommendations for management to benefit the assemblage.

5.2. Outputs

A written survey report (word and pdf) will include:

- Basic site details.
- The SATs/BATs sampled.
- The accurate position(s) of the sampling effort on a suitably scaled map (GPS-Derived map references are compulsory and required for obtaining quality data)
- Method(s) used
- Time spent and date
- Results:
 - Species listing (all species including those in the assemblages and others recorded) in an Excel spreadsheet,
 - Grid refs and maps for each sampling area.
 - Summary of species of conservation value, with a map of key areas;
 - Tabulated Pantheon scores for assemblages found, including BAT data.
 - NVC type, if known to the contractor.
 - Proxy assemblage monitoring assessment results
- The assessor's professional opinion of the site for the species e.g. structure of the site, any negative indicators and a view on site condition.
- The site species lists should form an annex in electronic spreadsheet form.
- Digital photographs should be included, either embedded within the report or as an appendix.
- References

5.3. Maps

Provide maps showing the location of each target assemblage and provide separate x:y grid references in an excel spreadsheet or provide locations in a GIS file compatible with ArcMap.

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

The following maps should be provided:

- Maps showing areas surveyed with notes on survey method (e.g. suction sampling, pitfall traps, vane traps)
- Maps showing location of rare or special species recorded.

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.](#)

6. Health & Safety / Known hazards & risks

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.

Please provide a clear and structured proposal to demonstrate your intended approach to health and safety on this project and how you ensure the requirements of legislation are met. **You do not need to submit a site-specific risk assessment with your tender response, if successful you will be expected to do so before commencing any work.**

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

Your quotation for the work should be accompanied by the following Health and Safety documentation required by Natural England:

- Risk assessment: this must take the hazards identified above into account.
- Valid certificates (if appropriate) to be made available on request:
- Employers Liability Compulsory Insurance
- Public Liability Insurance – provide description of level taken out
- Professional Indemnity Insurance – provide description of level taken out

Work shall not commence without Natural England being in possession of appropriate documentation and an agreed safe method of working.

7.Sustainability

Please provide details of your company's sustainability policy/procedures. Companies who are located closer to the survey sites will score higher (see Evaluation Criteria below).

Prices

- i. Prices must be submitted in £ sterling, inclusive of VAT. Please provide quotation for both three and four visit scenarios.
- ii. Please price against the work described in this specification and annexes and complete the pricing template in Annex 3.
- iii. The tenderer should demonstrate how they will cover the survey area and how the visits will be organised in terms of personnel and timescales.
- iv. 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.

It is anticipated that this contract will be awarded for a period of 8 months to end no later than 24/11/2023. Prices will remain fixed for the duration of the contract award period. We may at our sole discretion extend this contract to include related or further work. Any extension shall be agreed in advance of any work commencing and may be subject to further competition.

Suppliers should email invoices to APinvoices-NEG-U@gov.sscl.com or post them to:

Shared Services Connected Limited
Natural England
PO Box 793
Newport
NP10 8FZ

Please ensure that the Purchase Order number is included on the invoice.

Quotation Submission

Your tender should include the following information

- i. Pricing Template (Annex 3) - Please ensure a quotation is provided for both 3 visit and 4 visit scenarios.
- ii. Your proposal outlining how you will meet Natural England's Requirements.
- iii. Methodology including a proposed outline schedule or timetable of works, including a rationale for the estimate of the number of days required for field survey work, how you will cover the survey area, and how the visits will be organised in terms of personnel and timescales.
- iv. Insurance certificates.

- v. Health and Safety Policy.
- vi. Risk Assessment including that for Coronavirus.
- vii. Acceptance of terms and conditions.

We will award this contract in line with the most economically advantageous tender (MEAT) as set out in the following award criteria:

Evaluation Criteria

The contract will be awarded to the tender which best fits the profile of requirements. This will be assessed by the Project Officer in consultation with relevant colleagues using the evaluation criteria detailed below.

As part of the evaluation process a quality threshold will be placed on each scoring criterion identified below. If your tender falls below the threshold then your bid will not be considered.

Your tender should include the following information and supporting evidence.

Evaluation Criteria	Weighting (%)	Threshold score out of 10	Tender Information
Technical expertise and experience – Please provide details of your experience in undertaking: <ul style="list-style-type: none"> • Invertebrate surveys using the methods outlined in this specification. Please provide details of your experience in: <ul style="list-style-type: none"> • Invertebrate surveys generally. • Analysis, presentation and reporting of data generated from surveys. 	20	8	Previous contracts for undertaking Invertebrate surveys for site evaluations and Site Condition Monitoring on SSSI sites. Qualifications, technical merit and experience of key staff engaged on the contract e.g. CVs, previous invertebrate survey / contracts, technical qualifications. Particular reference should be made to experience of invertebrate surveying of the previously mentioned target habitat/assemblage.
Fit with Specification and methodology – Availability: Please provide full details as requested under Tender Information.	15	7	Include details of availability given the timescales page 1/2 and a proposed outline schedule or timetable of works. Include details of capability for field survey work with a clear rationale for the estimated number of days for field work. Please include details of how the

Capability for full delivery of expectation: Please provide full details as requested under Tender Information.			survey area will be covered and how the visits will be organised in terms of personnel and timescales.
Project and risk management, and resources allocated – Please provide full details as requested under Tender Information	15	6	Details of organisational and project 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).
Sustainability	5	7	Company sustainability policy/procedures. Distance from the SSSIs, local suppliers will score more highly.
Financial (value for money)	50	No threshold	Include all costs and VAT clearly itemised.

The scoring quality criteria are listed in Annex 4

Contract Management

This contract shall be managed on behalf of the Authority by:

Beth Mather

Lead Adviser: SSSI Monitoring and Evaluation Team

Please send all correspondence to protectedsites.contracts@naturalengland.org.uk.

Natural England will raise purchase orders to cover the cost of the services and will issue to the awarded supplier following contract award.

Suppliers will be required to invoice after each contract milestone. An invoice schedule will be agreed after the contract is awarded.

Fortnightly updates during the first month then monthly updates thereafter, an e-mail summary of work progress should be sent to the project officer monthly.

Disclosure

All Central Government Departments, their Executive Agencies and Non-Departmental Public Bodies are subject to control and reporting within Government. In particular, they report to the Cabinet Office and HM Treasury for all expenditure. Further the Cabinet Office has a cross-Government role delivering overall Government policy on public procurement, including ensuring value for money and related aspects of good procurement practice.

For these purposes, the Authority may disclose within Government any details contained in your quotation. The information will not be disclosed outside Government during the procurement.

In addition, the Authority is subject to the Freedom of Information Act 2000 and the Environmental Information Regulations 2004, which provide a public right of access to information held by public bodies. In accordance with these two statutes, the Authority may be required to disclose information contained in your quotation to any person who submits a request for information pursuant to those statutes.

By submitting a quotation, you consent to these terms as part of the procurement.

Disclaimers

Whilst the information in this RFQ and any supporting information referred to herein or provided to you by the Authority have been prepared in good faith the Authority does not warrant that this information is comprehensive or that it has been independently verified.

The Authority does not:

- make any representation or warranty (express or implied) as to the accuracy, reasonableness or completeness of the RFQ;
- accept any liability for the information contained in the RFQ or for the fairness, accuracy or completeness of that information; or
- accept any liability for any loss or damage (other than in respect of fraudulent misrepresentation or any other liability which cannot lawfully be excluded) arising as a result of reliance on such information or any subsequent communication.

Any supplier considering entering into contractual relationships with the Authority following receipt of the RFQ should make its own investigations and independent assessment of the Authority and its requirements for the goods and/or services and should seek its own professional financial and legal advice.

Protection of Personal Data

In order to comply with the General Data Protection Regulations 2018 the contractor must agree to the following:

- You must only process any personal data in strict accordance with instructions from the Authority
- You must ensure that all the personal data that we disclose to you or you collect on our behalf under this agreement are kept confidential.

- You must take reasonable steps to ensure the reliability of employees who have access to personal data.
- Only employees who may be required to assist in meeting the obligations under this agreement may have access to the personal data.
- Any disclosure of personal data must be made in confidence and extend only so far as that which is specifically necessary for the purposes of this agreement.
- You must ensure that there are appropriate security measures in place to safeguard against any unauthorised access or unlawful processing or accidental loss, destruction or damage or disclosure of the personal data.
- On termination of this agreement, for whatever reason, the personal data must be returned to us promptly and safely, together with all copies in your possession or control.

General Data Protection Regulations 2018

For the purposes of the Regulations the Authority is the data processor.

The personal information that we have asked you provide on individuals (data subjects) that will be working for you on this contract will be used in compiling the tender list and in assessing your offer. If you are unsuccessful the information will be **held and destroyed within two years** of the award of contracts. If you are awarded a contract it will be retained for the duration of the contract and destroyed within **seven years** of the contract's expiry.

We may monitor the performance of the individuals during the execution of the contract, and the results of our monitoring, together with the information that you have provided, will be used in determining what work is allocated under the contract, and in any renewal of the contract or in the award of future contracts of a similar nature. The information will not be disclosed to anyone outside the Authority without the consent of the data subject, unless the Authority is required by law to make such disclosures.

References.

1. JNCC (2008) **Common Standards Monitoring Guidance for Terrestrial and Freshwater Invertebrates**. [Online] Available from: <www.jncc.gov.uk/our-work/common-standards-monitoring> {Accessed: 04/04/2022}
2. JNCC. (2020) **National Vegetation Classification (NVC)**. [Online]. Available from: <www.jncc.gov.uk/our-work/nvc> {Accessed: 04/04/2022}
3. Webb, J., Heaver, D., Lott, D., Dean, H.J., van Breda, J., Curson, J., Harvey, M.C., Gurney, M., Roy, D.B., van Breda, A., Drake, M., Alexander, K.N.A. and Foster, G. (2018). **Pantheon - database version 3.7.6**

Annexes

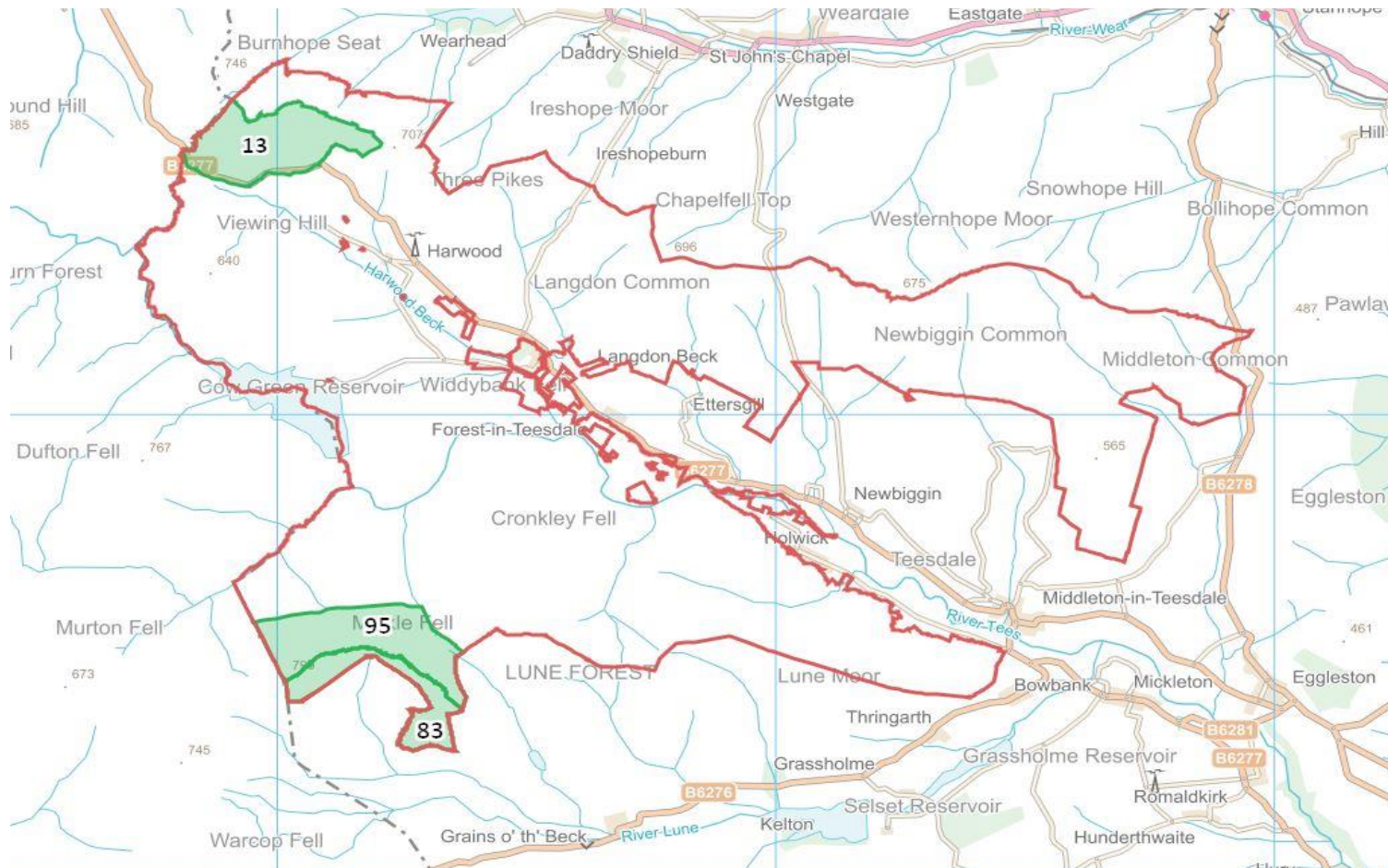
Annex 1: Map showing survey area and focus units

Annex 2: Habitats and target species

Annex 3: Pricing Template

Annex 4: Scoring Criteria

Annex 1: Map showing survey location and focus units (highlighted)



Annex 2: Habitats and target species.

Habitat/SAT	Default Target	Target Group	Methodology
F221 – Montane and Upland	8 species	Coleoptera (40%) Spiders (25%) Diptera (20%) Homoptera (10%) Lepidoptera, Mollusca	Ground searching Suction sampling Pitfall grids

Annex 3: Pricing specification

Item of work/task	Grade of Staff	Day Rate	Number of days	Total Cost
Project management meetings				
Pre-survey reconnaissance				
Bird Surveys				
Phase 1 Survey				
Collation and analysis of results				
Reporting				
Other costs including materials / equipment				
T&S				
Total excl. VAT				

Annex 4: Scoring Criteria

Scoring - Quality Criteria	
Rating of Response	Score
<u>Very Good or Fully Compliant Submission:</u> meeting all requirements and is fully explained in comprehensive detail.	9 - 10
<u>Good or Fully Compliant Submission:</u> meeting all the requirements and is explained in reasonable detail.	7 - 8
<u>Satisfactory or Compliant Submission:</u> meeting the essential requirements and is explained in adequate detail.	5 - 6
<u>Weak or Partially Compliant (Minor issues) Submission:</u> falls short of requirements in some areas and is poorly explained.	3 - 4
<u>Unacceptable or Non-Compliant (Major issues) Submission:</u> fails to meet requirements and is not explained.	1 - 2