

C21744 ECOLOGICAL SERVICES FRAMEWORK 4 (EcoSF4)

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

To be completed by Contracting Authority Project Manager

Project title: Waveney Eel Passages

Atamis project ref (if applicable):

Date: 14/11/2024

Name of Contracting Authority (Environment Agency; Natural England)

Environment Agency

Project Manager:

Project manager's phone number:

Budget holder:

Cost code:

ENV7005268R

Commercial Contact (if applicable):

Project manager's email:

environment

Project Start Date

2 December 2024

Project Completion Date

2 May 2025

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

Direct Award

Mini-comp

X

Call off from Lot number (please tick)

1

2

3

4

X

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

10 working days from date of issuing

Evaluation criteria: (for work over £10k project managers need to prepare and complete an evaluation model on receipt of tender submissions). **Please note price and quality weightings are flexible within the following range: Quality 70% - 30% and Price 30% - 70%, and 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.

Contractors: 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

60%

Quality

Weighting

40%

Quality Sub-Criteria Weightings:

Approach & Methodology

These criteria should ask the contractor to set out in detail each element of the methodology and how this will be carried out, including the approach, design, analytical strategy. Any input required from the Authority should be outlined, as well as the approach to dissemination and review of the findings.

60

Proposed Staff (inc Pen Portraits) and Contractor's experience/accreditations.	Contractor should be asked to provide details of the proposed project team and team structure that they intend to use to deliver this project, including any sub-contractors and/or associates. CVs for all staff should be submitted to support the response and include a table showing the staff days expected to be spent on the project per task, this table should match the staff days in the cost proposal	20
Project Management (including project plan)	Contractor should be asked to proposed project management arrangements including day to day working for the project, the proposed timetable for the project, risk log and mitigation actions and A Gantt chart presenting milestones, deliverables, timelines and inter-dependencies	20
Health & Safety	Optional include weightings if applicable	N/A
Sustainability Considerations (e.g. Travel management, reduction of carbon footprint, bio-security etc.)		N/A
Quality Assurance		N/A

Specification	
Note – The contractor's proposal will be limited to a maximum of 6 pages.	
Please detail the Contractor's required Limitation of Liability. If no sum is stated, the Contract Price for the Services performed or to be performed under the Contract or five million pounds whichever is the greater will apply.	
1. Description of work required – overall purpose & scope (including reporting requirements)	
<p>Please refer to Waveney Eel Passages Scope. Please note that we are only covering Phase 1 under this bid (refer to Section 3 on the scope).</p> <p>In terms of reporting, it is expected as a minimum:</p> <ul style="list-style-type: none"> Weekly or bi-weekly catch ups with the client project team to provide updates and discuss any issues or risks as they arise. Final report summarising the work done, key outcomes, considerations and recommendations for the next phase of works. 	

2. Information to be returned by the Contractor and the section of Part 2 the information should be provided in.

- Approach and Methodology
- Proposed Staff (inc Pen Portraits) and Contractor's experience/accreditations.
- Project Management (including programme plan)

2. Required skills / experience from the contractor and staff. Include any essential qualifications or accreditations required to undertake the work. Please provide details for any sub-contractors being used.

- Experience in identification and design of technical fish passage solutions with a track record of innovation and success.
- Detailed knowledge and understanding of Eel Regs 2009 and their practical implications.
- Options development and appraisal, development of outline design and detailed design.
- Stakeholder engagement, consultation with consent granting authorities.
- Project Management skills, including ability to produce realistic budgetary costs and forecasts, and identification of risk.

Information to be returned by the Contractor in Part 2 Section 3

3. 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 (We always hold back a minimum of 30% until the project is complete. Set out how you want the Section 7 cost proposal table broken down (eg. by key task/sub-tasks; deliverable etc).

Task no.	Task and deliverable	Completion date	Payment schedule
	Start-up meeting	08/02/2025	5%
	Desk Based Study	22/02/2025	10%
	Site walk over and preparation	24/02/2025	15%
	Concept designs and options appraisal	21/03/2025	20%
	Development of sketches and stakeholder workshops	07/04/2025	25%
	Appraisal of future consents/permitting requirements	14/04/2025	30%
	Outline design and reporting	18/05/2025	100%

NB: Due to the delay, all dates have been pushed back by a month

**C21744 ECOLOGICAL SERVICES FRAMEWORK 4 (EcoSF4)
SCHEDULE B PROJECT FORM AND CONFIRMATION OF INSTRUCTIONS**

**PART 2
TASK QUOTATION SHEET**

To be completed by Framework Contractor

Framework Contractor name		Stantec	
Contractor Project Manager name		[REDACTED]	
Contractor project manager phone number:	[REDACTED]	Contractor project manager e-mail address:	[REDACTED]

1. Approach & Methodology

Our highly experienced team will deliver the Environment Agency's (EA) aspirations for the provision of the Phase 1: Waveney Eel Passages Options Appraisal stage. Through the successful delivery of this optioneering study it will allow the future Phase 2: Detailed design and Implementation stage to continue with confidence. We have formulated our response for delivering Phase 1, broadly in accordance with your proposed approach. This allows an initial review of all sites (Activity 1) followed by a staggered / parallel approach to developing the outline design appraisal (Activities 2-5) to meet the project programme.

PHASE 1: WAVENEY EEL PASSAGES OPTIONS APPRAISAL

Activity 1: Project Startup, Desk Study and Site Visit.

To develop collaboration and efficient and frequent communication with EA, our Project Lead, **Frances Haine**, will arrange a Project Start-up" meeting (via Microsoft Teams) following award and work with your Project Manager and other relevant EA technical leads. She will work with them to define the project outcomes, key requirements and project expectations to ensure the project is delivered on time, to budget and to quality requirements. Frances will provide regular fortnightly project updates and arrange monthly Teams meetings with key personnel.

The Project Start-up meeting will allow us to review and confirm the EA's aspirations of the project and also identify particular constraints and opportunities that may need to be considered prior to attending the sites. We would seek to confirm any further information that may be available and identify key personnel within the EA (and other bodies) who should be involved and contacted. In addition, we would confirm any specific health and safety requirements prior for site attendance.

Following the meeting we would review and appraise any data that has been provided and therefore complete an initial gap analysis. This will allow us to maximise our understanding of the sites and any particular constraints or items that should be examined.

Frances will complete a review of the anticipated water levels at each site based on available EA data, but we have not allowed for any hydrological appraisal or hydraulic modelling. We have excluded obtaining any further surveys but will identify further information requirements to develop the Phase 2 design during Activity 5.

We will arrange a mutually convenient time to complete the site visits in mid/end January. We have allowed two days for the site visit, allowing half a day at each site. We have assumed that the EA will arrange all site access requirements including liaising with any landowners.

It is noted that the completion of the site visit is critical to the programme, and therefore any delay/variation may result in adjustment to the draft programme.

As the project relates to the provision of eel passage on existing EA assets the visit will be attended by **Haider Ali**, (Asset Management Engineer) and **Jon Ramsey** (Specialist Fish and Eel Consultant). We have also allowed for attendance by **Tom Lyons** (Aquatic ecologist) who will assist with measurements and recording details of each site. We would expect that the key personnel from the EA will attend, likely to include the EA Fisheries and Biodiversity Officer and the Asset Management Officer. This will allow an efficient appraisal and understanding of the sites' operation and allow the opportunities and initial options to be aired and scoped out.

The outcome of the meeting will be threefold:

- to better understand the site and its operation
- Identify 'feasible' shortlist of options which would meet the EA's requirements
- Identify / confirm the additional information required

A summary of the site visit and the key actions will be circulated to the project team within a week of the visit. We will also agree the order by which we will complete the eel pass appraisal (Activities 2-5) as there will be a 1-week staggered delivery for each site. For the purpose of this proposal adopted the following sequence.

- 1) Ellingham Sluice
- 2) Earsham Sluice
- 3) Wainford Sluice
- 4) Bungay Sluice

Activity 2: Options appraisal of shortlist.

For each site we will evaluate three shortlisted options. Each of the options identified during the site visit will be appraised against key objectives and constraints, including compliance with the Eel Regulations 2009, likely costs, operation and maintenance requirements, ecological constraints, security (i.e. from vandalism) etc.

It is noted that the options are being sought to be passive / non-intervention solutions, however noting that in some cases this may not be feasible or may have a detrimental impact on the current operation of the sites, we have therefore allowed for our MEICA specialist (**Tom Westwood**), to provide specialist advice and guide any future solution if required.

The options for each site will be appraised using multi-criteria analysis (MCA) using a weighted appraisal of key criteria. This will allow a comparison of the options and allow a preferred solution to be identified.

Activity 3: Development of Sketches and Stakeholder Workshops

Along with the MCA we will prepare sketches of the options which can be used for consultation with the key stakeholders. To communicate these we will either prepare CAD drawings or hand sketches subject to the available information and base data. These will be completed by our Technician, **Sharthak Rai**.

Critically these will be suitable to communicate the key dimensions, operation approach and compliance with the relevant constraints. Any specific/relevant information from the MCA will also be included on each sketch for ease of reference. In advance of the stakeholder engagement, the options will be presented the Project Team for their agreement. Following this we have allowed for a 2-hour workshop for each site, with key stakeholders. We have assumed that the EA will confirm and arrange the attendance of key stakeholders at this meeting.

Activity 4: Appraisal of future consents/permitting requirements

Following the stakeholder consultation, it is anticipated that a preferred solution will be able to be selected. We will then provide advice on the future consents/permits that may be required. Primarily this will include Fish Pass Approval, and Flood Risk Activity Permit, but may also require consideration for planning if additional works are required. Stantec are able to confidently advise on all aspects of the future consenting/permitting requirements.

Activity 5: Development of Preferred Solution & Phase 1 Outline Design Report

The preferred options will then be developed into a more detailed outline design. This will include a refinement of the preferred option sketch. We have allowed for the production of an Outline Design Summary Report for each site which will provide a foundation for the engagement future stages. This will include work done, key outcomes, considerations and recommendations for the next phase of works. It will include our Designer's Risk Assessment and identify the likely future surveys and information that would be required to allow the detailed design to be progressed. It is assumed that any further surveys and analysis required will be progressed during Phase 2 and therefore have not been included within this submission.

These documents will be used for pre-application engagement with key parties and consenting authorities and allow communication of the proposed solution to landowners.

2. Project Management (inc Project plan).

Creating a collaborative culture with the EA project team will be key in achieving the ambitions for this framework. One of Stantec's core values is 'we are better together', it's an ethos that all our people work by and will shape our approach in delivering this project for you. Our longstanding relationship with the EA brings the reassurance that we already understand your procedures, policies and requirements. We will match to your requirements by applying our robust, tried and tested Management system to everything we do. Our Integrated Management System (IMS), certified to ISO 9001 for Quality, ISO 45001 for Health & Safety, and ISO 14001 for Environmental Management, ensures effective project delivery. Within our IMS, Project Managers undergo accredited training, equipping them to deliver contracts on time and within budget.

Delivering the Project

To ensure that all projects follow a consistent approach and are delivered to the highest standard, projects and PMs will work under the Framework Management umbrella. The Framework Management Team will be a consistent first point of contact for this project from your PM and will set the standards that the project is delivered by Stantec.

Francess Haine, our Framework/Contract Manager and Project Lead, will be your support contact for the project and contract management. She will be supported by **Robert Riddington**, Framework Director, who will provide the overarching governance. At framework commencement Francess and Robert will meet with your project manager and relevant senior officers to agree a shared vision and values.

The Project Team have the capability to cover all areas identified within the scope of works. We have successfully delivered to the EA on numerous projects across the country, as well as delivering fish passage improvements to other clients nationally. The project team comprises of specialist personnel with the skill sets required to deliver this study from inception through to delivery. As well as delivering the PM lead role, Francess will provide the hydraulic modelling/geomorphological lead and will be supported by technical leads, **Jon Ramsey** the Eel Pass Technical Lead and **Haider Ali** Engineering lead.

Within Stantec we are fortunate to be able to draw on support from our wider teams, including MEICA trained individuals, planning and ecology expertise, as well as all engineering consultancy services.

A draft project programme is shown below and attached separately for clarity (Appendix A). This demonstrates the approach that we will deliver to meet the aspiration of the EA. We would seek to review the programme with the Project Team on appointment to confirm that it meets the requirements of the project and to confirm key dates.

 Working Days: Monday, Tuesday, Wednesday, Thursday, Friday
The following is a DRAFT Programme and Stantec will seek to confirm with the Project Team and review on appointment

Code	
PM	
-	
-	
-	
A1	
1.1	
1.2	
A2	
2.1	
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2.3	
2.4	
2.5	
2.6	
A3	
3.1	
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3.5	
3.6	
3.7	
3.8	
A4	
4.1	
4.2	
A5	
5.1	
5.2	
5.3	
5.4	
5.5	

EcoSF4 Project Management approach

When appointed on the project, we will follow our standard PM approach. Effective and efficient project delivery begins with understanding your needs and required outcomes. Following award of the project our PM will arrange a "kick off" meeting and work with your PM and any other relevant parties. Working with them to define the project outcomes, key requirements and project expectations to ensure the project is delivered on time, to budget and to quality requirements. Stantec's Project Management approach can be adapted and developed and defines the approach to (amongst other elements) Health, Safety, Security and Environment (HSSE) risk management, proposal production, quality management, escalation and project change.

The following steps will be followed as part of the team's project management protocol:

- Organisation of an internal start-up meeting to clarify precise roles and responsibilities for all staff, as well as clarifying expectations and requirements for site work and reporting procedures.
- Accurate and effective performance reporting. Key performance indicators will be used to track progress and budget.

- Undertaking internal liaison between the team members detailed below in section 3 to ensure sufficient resources are allocated to the project and that unexpected issues (e.g. staff illness, data provision delays) are addressed efficiently, minimising risk to the project programme.
- Maintaining of a project log where issues and progress are noted to ensure a written record of all key milestones, discussions and decisions, is kept up-to-date.
- Undertaking of efficient communication with the EA addressing potential issues before they become problematic.

Project Plan (PP)

The PP is a live document which provides a comprehensive approach to the management of the project. It provides a crucial reference point for the team and is formed on a project-by-project basis and scaled appropriately.

Stantec's PP would cover the following items:

- The defined and quantified scope at a level appropriate to the project.
- The defined activities, tasks, deliverables, team members and responsibilities.
- Project programme; showing activities, critical path, gateways and milestones.
- Project Communication Plans (PCP), document control, change control, QA, HSSE, etc.
- Project Risk Register and standard templates and examples for guidance that are to be used.

The PP will be maintained for the project's duration and is used to document the schedule for technical deliverables and management controls aligned with your delivery team, value challenge / management, control of scope, benefits management and realisation. Any changes to the scope, through compensation events will be identified and effects recorded. Francess will adapt the PP to provide further project-specific context, risks, and assumptions etc after the initial 'kick-off' meeting. This will form a clear approach by which the project progress and success can be measured and reviewed.

Strategy for communications management and reporting

Within the PP, Francess will create a Project Controls Plan (PCP), defining team structures, responsibilities, progress meetings, and document management procedures. Using a RACI (Responsible, Accountable, Consult & Inform) model, we will align roles with project goals, minimising duplication and fostering collective ownership. Regular team meetings will enable open discussions on emerging risks, opportunities, and improvements.

Strategy for risk management

Risk management is integral to our approach. Throughout the project cycle, we will maintain a live risk register - identifying project, client, and team risks. As potential risks are identified they will be recorded on the risk register and brought to your attention. This will identify the potential impact to time, cost or quality and aim to quantify the impact, were the risk to occur. This will enable us and the Project Team to identify the approach and decide whether to monitor, action or resolve. Francess Haine will develop HSSE Management Plans for projects, detailing risk types across phases, control measures, and roles. Every employee (and sub-contractor) has Stop Work Authority, empowering them to halt work if safety is compromised. Additionally, our works adhere to the Construction (Design & Management) Regulations 2015 (CDM Regulations 2015), with our teams well-versed in their responsibilities.

Escalation process

Via our regular communications we would expect most issues to be identified early such that escalation would not be required, nevertheless the route to escalation and resolution would be through the management governance structure, via the Project Lead in the first instance and on to Robert Riddington, our Framework Director where necessary. In the event of any underperformance being perceived to be due to senior staff the escalation is to the Global Chief Operating Officer. We have an open culture, which focuses on putting things right rather than defending our actions. Through this, you can be assured we will always do our best to work with you to deliver your objectives.

APPENDIX A:

DRAFT PROJECT PROGRAMME

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real life models and assisting in the development of hydraulics structures such as dams, weirs, and culverts. Despite having been at Stantec for only a short period of time, Sharthak is already developing valuable Auto CAD and Civils3D skills which the team are reliant upon.

At Kingston University in London, Sharthak has completed his first year of modules. This has helped to establish a foundation to his role as an apprentice engineer. Relevant modules include but are not limited to Mathematics and Engineering Analytics, Structural Analysis and Design, and Mechanics and Materials.

SELECTED PROJECT EXPERIENCE

South Ormsby, Lincolnshire: Fish and Eel Pass Appraisal & Rock Ramp (South Ormsby Estate)



The South Ormsby estate, Lincolnshire, is located within the Lincolnshire Wolds Area of Outstanding Natural Beauty (AONB) and has generated a number of projects, one of which is the improvement of water quantity and quality within the estate with the aim of improving habitat and ecology, focussing on the park, lake and historic landscape. The lake, constructed in the 1700s, is an artificially impounded watercourse in a chalk stream catchment. As part of the refurbishment of the lake the weir is to be replaced. The existing structure is in a state of disrepair and in danger of compromising the retained body of water and the downstream catchment.

Stantec completed an appraisal of the condition of the structure and a review of the interventions required for the lake refurbishment. The low base flow through the catchment due to the nature of chalk streams, together with high flood conditions meant that a full appraisal of the flow characteristics within the estate was required.

Stantec completed a hydrological appraisal and a hydraulic modelling exercise of the estate, to assess a range of flows. Whilst the lake and weir are on an Ordinary Watercourse, the weir was noted to be a barrier to fish movement. The removal of the weir was not an option as the weir is listed and forms an integral part of the landscape.

Stantec therefore completed a River Habitat Survey and an appraisal of the fish / eels on the watercourse. This identified that a rock ramp would be the preferred option to manage the low flows of the catchment, whilst still maintaining the required lake water levels to retain the historical landscape.

The design has been developed in close liaison with the landscape architect team to retain the character of the area. This included Stantec reviewing historic paintings and maps to determine a design that would be consistent with the historic estate, whilst still providing the fish passage requirements to the watercourse. The design phase was completed in April 2024 and was constructed in Autumn 2024.



Seacourt Stream, Oxfordshire: Naturalised Fish Pass (EA/Thames Water)

Fish passage through Oxford has been impeded by the presence of structures and locks for several centuries due to navigation requirements and the constraints of urban environments.

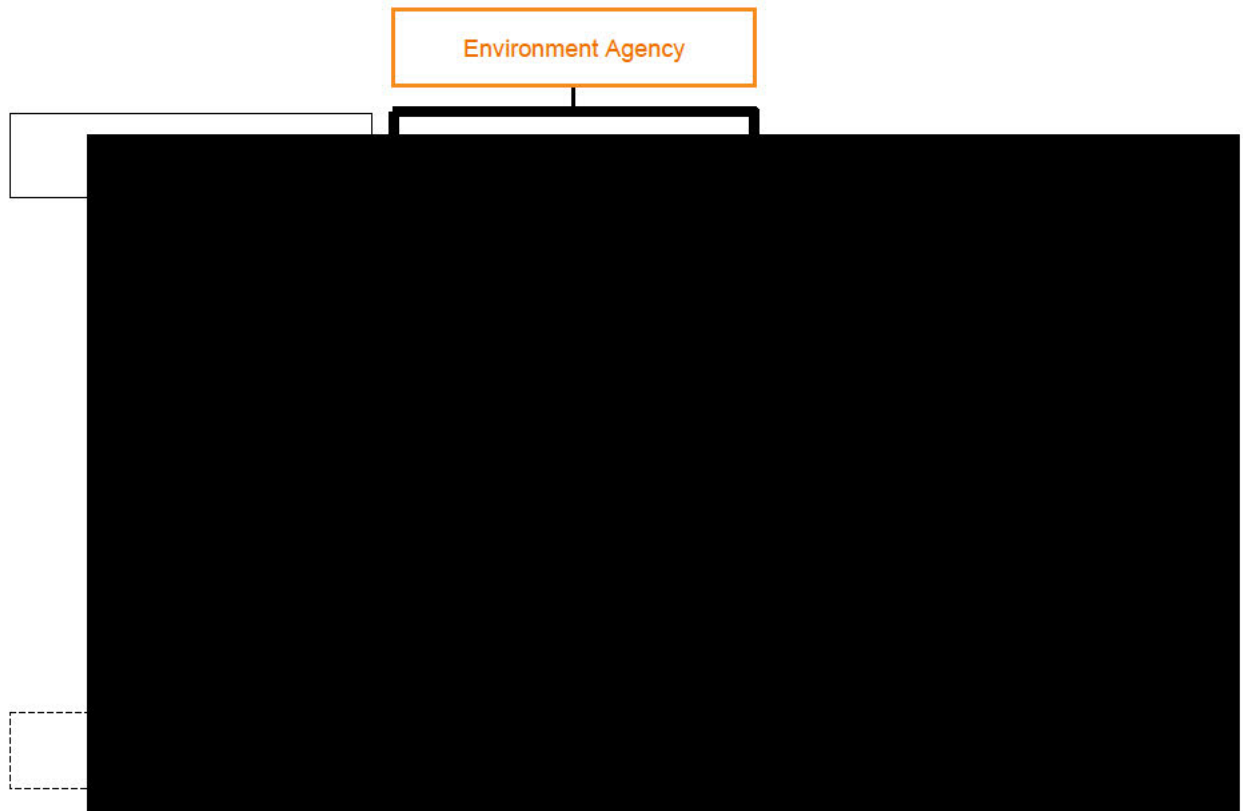
The Seacourt Stream runs parallel to the River Thames at Oxford, bypassing four of the Thames locks Iffley, Osney, Godstow and Kings; however, the offtake from the River Thames is a barrier to fish movement. Thames Water have committed to developing and constructing the Seacourt Stream natural fish pass bypass channel. This would be the first unobstructed channel past Oxford for more than four centuries.

Stantec were originally engaged with the project during a Feasibility Study in 2016. In 2017 Thames Water re-engaged Stantec to develop detailed design and take the project to Construction phase, starting in 2023 and still being undertaken. This was to develop fish passage, delivering the required velocities and flows to the new channel, while also maintaining water levels in the River Thames for navigation and ecological / geomorphological requirements.

Throughout the scheme, we provided services from inception to the current construction stage. The scheme delivers a sympathetic design that takes the local Sites of Special Scientific Interest, archaeology, geotechnical constraints, landowner requirements, the Thames Path, and the future Oxford Flood Alleviation Scheme into consideration. In addition to the provision of fish pass for all species of coarse fish, we have developed a design that will provide spawning habitat for rheophilic species in the form of locally sourced gravels.

Stantec provided all services including outline and detailed design; stakeholder liaison; hydraulic, ecological and engineering design of the channel, access bridge and inlet structure design and approvals; Flood Risk Activity Permits; preparation of tender documents and input into the tender appraisal. The final design creates a new channel that fits into the local environment and delivers ecological enhancement to the area. The scheme gained approval from the EA National Fish Pass Panel and the Local Planning Authority. Due to landowner agreements construction was delayed until 2023. We supplied value engineering support to the contractor during this period. Stantec are currently providing Construction phase design support and are acting as Principal Designer under the Construction Design and Management (CDM) Regulations 2015. Construction is due to be completed in 2024.

APPENDIX B:
DRAFT ORGANOGRAM & CVs



4. Health and Safety
<i>Response not requested – Can be provided on request</i>
5. Sustainability Considerations (e.g. Travel management, reduction of carbon footprint, bio-security etc.)
<i>Response not requested – Can be provided on request</i>
6. Quality Assurance
<i>Response not requested – Can be provided on request</i>

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

Notes

You must have a purchase order number from the Contracting Authority 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.

By signing this form (*Insert Contractors Name*) agree to provide the services stated above for the cost set out in your Cost Proposal and in accordance with the Ecological Services Framework 4 Agreement Terms and additional appendices (if used).

Contractor Project Manager:

Signature:

Date:

9. Confirmation of Instructions (Contracting Authority Project Manager to complete)

Notes

All agreed post submission amendments to scope, proposal, timetable or costs must be updated in the sections above prior to accepting the proposal.

A commission code (also known as an approval reference number) must be obtained from the Framework Manager prior to confirming award and must be quoted on your purchase order.

An Atamis reference should be obtained from Commercial if the project has been issued via Atamis, and quoted on your purchase order.

Authorisation	Name	Signature	Date
Contracting Authority Project Manager			
Authorised Contracting Authority Signature (usually the budget holder)			
DgC Authorised Signature (if required)			
Commission Code (i.e. 'approval reference number')			
Purchase order no.			
Atamis Ref (if applicable)			

The completed Project Form should be returned to the Contractor as authorisation to commence work. A copy

must be provided to the named Commercial Lead if the award has been conducted via Atamis.

**C21744 ECOLOGICAL SERVICES FRAMEWORK 4 (EcoSF4)
SCHEDULE B PROJECT FORM AND CONFIRMATION OF INSTRUCTIONS**

**PART 3
CHANGE CONTROL SCHEDULE**

Notes

To be completed by Contracting Authority Project Manager

Any extensions, price changes or amendments to existing orders need to be discussed with the Framework Manager and Defra group Commercial before being agreed with the Contractor.
Please remember to amend your Purchase Order in SOP if necessary.

The table below should be used to record and authorise the agreed changes throughout the project. A Change Control Notice (CCN) should be completed for substantial changes to the project and a summary provided in the table below.

Send a copy of the revised Project Form and CCN (if used) to the Contractor once the change has been agreed and approved. A copy should also be sent to your Commercial Lead if an Atamis reference has been provided.

10. Change Control

All amendments to project scope, timetable or costs must be submitted to and approved by the Contracting Authority PM prior to implementing the change.

Change Details	CCN Ref. (if applicable)	Revised completion date (if applicable)	Revised Project Cost (if applicable)	Approved by (Contracting Authority's PM) / Date