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Request for Quotation

**Heathland Connections Audience Data Investigation, in the west Surrey Hills AONB**

## Request for Quotation

**Heathland Connections Audience Data Investigation, in the west Surrey Hills AONB**

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 **midday on Monday 17th July 2023**

* Email: Victoria.hawkins@naturalengland.org.uk
* Date: Monday 17th July 2023
* Time: Midday

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**

Victoria Hawkins 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 | 30-Jun-2023 at 17:30 GMT |
| Deadline for clarifications questions | 12-Jul-2023 at 17:30 GMT |
| Deadline for receipt of Quotation | 17-Jul-2023 at 12:00 GMT |
| Intended date of Contract Award | 21-Jul-2023 |
| Intended Contract Start Date | 21-Jul-2023 |
| Intended Delivery Date / Contract Duration | 21-Jul-2023 to 31-March-2024 |

### 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 RFQ 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. All mandatory requirements are set out in Bravo.

#### 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

The [Condensed Terms and Conditions](https://www.gov.uk/government/organisations/natural-england/about/procurement) will be included in any contract awarded as a result of this RFQ process. The Authority will not accept any material changes to these terms and conditions proposed by a supplier.

#### 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](http://www.naturalengland.org.uk/).

**Heathland Connections Audience Data Investigation, in the west Surrey Hills AONB**

1. **Background to Natural England** 
   1. Natural England is the government’s advisor on the natural environment. We provide practical advice, grounded in science, on how best to safeguard England’s natural wealth for the benefit of everyone.
   2. Natural England aims for a well-managed Nature Recovery Network across land, water and sea, which creates and protects resilient ecosystems rich in wildlife and natural beauty, enjoyed by people and widely benefiting society.
   3. Through our core programmes, we aim to achieve resilient landscapes and seas, sustainable development, and greener farming and fisheries with an emphasis on connecting people with nature for their own and society’s wellbeing, enjoyment and prosperity.
   4. For us, nature encompasses natural beauty, wildlife and the geology that underpins landscape character. Hence, a key part of our work relates to supporting the conservation, enhancement, understanding and enjoyment of England's protected landscapes - National Parks and Areas of Outstanding Natural Beauty. These areas are designated for the exceptional scenic quality of their landscapes, which are the result of centuries of interaction between people and nature.
   5. We work with farmers and land managers; business and industry; planners and developers; national and local government; interest groups and local communities to help them improve their local environment.
2. **Background to this work** 
   1. Defra and Natural England are investing over £2.4 million in 12 landscape-scale nature recovery projects across the country, working with partners to conserve and restore nature and adapt to climate change.
   2. These multi-partnership projects take forward the objectives of the Nature Recovery Network (NRN) at scale, including delivering habitat creation and restoration, species recovery, carbon sequestration, clean air and water, and improved access.
   3. These projects are led by Natural England’s area teams, working collaboratively with local partners, and supported nationally. They provide a focal point for nature’s recovery in the chosen areas. They build on and complement other large-scale nature recovery projects, such as those at Purbeck in Dorset, and Wigan Flashes in Greater Manchester.
   4. The projects will help improve our landscape’s resilience to climate change, enabling species to thrive while supporting livelihoods and the local economy. They will provide natural solutions to reduce carbon emissions, and manage flood risk and enable people to enjoy and connect with nature where they live, work and play – benefiting people’s health and wellbeing.
   5. The projects will demonstrate national delivery of the international commitment to protect at least 30% of land by 2030 (30by30) and help to achieve the Environment Act’s new, legally binding target to halt the decline in species abundance by 2030.
   6. The Heathland Connections project aims to enhance and create habitat, manage sustainable recreation alongside other objectives, so people can connect to nature more responsibly whilst safeguarding the future of these unique habitats.
   7. Heathland Connections is the NRP in Natural England’s Thames Solent area. It is an ambitious partnership of landowners and farmers across over 16,000ha of the western most section of the Surrey Hills AONB (Area of Outstanding Natural Beauty). The project will enhance, restore, and create wildlife-rich habitat across the landscape, with large areas already designated as Thursley, Hankley and Frensham Commons SPA (Special Protection Area). The SPA is surrounded by heathlands owned by partners, who are keen to work closer together. Currently attracting 30 million visitors annually, aided by its proximity to London and other significant urban areas, the project will also produce and deliver a ‘gold standard’ sustainable recreation plan, not only to encourage active travel and improve access and connection to nature, but also to find innovative solutions to associated management challenges, such as habitat degradation, disturbance to ground nesting birds, and the emerging threat of more frequent and more devastating wildfires.
   8. As part of Heathland Connections, partners are keen to understand the distribution, motivations and numbers of visitors accessing the reserves within the project area. In order to carefully manage the balance between people accessing nature and safeguarding the integrity of our protected sites, the partnership needs a baseline from which to work from.
   9. Anecdotal evidence suggests that visitor numbers across all the reserves in the project area have increased and those walking with dogs (including professional dog walkers) have also increased. Numerous bodies of work exist which provide an evidence base that visitor numbers can adversely affect populations of ground nesting birds through disturbance and an increase in people may also lead to an increase in wildfire risk. These two major threats are key objectives to tackle in the Heathland Connections project.
   10. Balance needs to be struck between nature and people and this conflict is not an easy challenge to resolve. Identifying and understanding the trends and behaviours within the project area will help the partnership address it, whilst ensuring that the wider benefits to people through accessing nature are also delivered.
   11. The main aim of this project is to build the evidence base needed to inform a sustainable recreation plan across the partnership to manage visitor access and to mitigate disturbance to wildlife.
   12. The objectives are:

* To collate existing data from surveys of this nature undertaken previously in this landscape as a baseline comparison to track trends. This data may not be available from all designated sites in the landscapes. Methodology of existing survey data should be incorporated to allow for comparison, but enhanced methodology should be used to gather new data where this is not in existence but will support the aims of this project.
* To design and conduct visitor surveys to understand the current trends of use within the landscape. The following themes are suggested but are not limited and we will take guidance on best methodology/survey format to follow:
  + Number of visitors and demographics of the users, including age of house they live in/how long been in the area (to ascertain where pressure is coming from in terms of development)
  + Motivations of visitors accessing sites – potential to rank the sites they use? E.g., Peaceful site, safe to have dog off lead, wildlife etc. Interesting to get understanding on motivations and if they consistently trump wildlife, but we don’t want to limit or bias responses.
  + Recreational activities carried out whilst on site
  + Frequency of visits to the sites (daily, weekly, monthly, for an event/special time of year to see wildlife (e.g., dragonfly season) etc)
  + Method of transport to sites
  + Distance travelled to sites (home postcodes collected)
  + Alternative sites visitors use and the frequency of these visits.
  + Why a particular site was chosen that day and why other sites were not. What attracts people to this site and what puts them off other sites? How did they hear about this site and where do they go for their information about the site?
  + Professional dog walkers and dog breed club meet ups
  + Visitor perception/understanding/knowledge of the sites – value to users and the value of the ecosystem/wildlife. Are heathlands seen as waste land or is the ecological value understood?
  + What knowledge do they have about the sites? Can they recognise species that these sites are important for?
  + Monitor disturbance effects on ground nesting birds – we appreciate this may be a whole separate project to get meaningful and useable results but would like to discuss options around the feasibility of this.
* To design and conduct off-site surveys to capture information from a wider demographic and those that may not necessarily access these sites.
* Prepare a heat map of hotspots
* Prepare a map of popular routes if this falls within the available budget
* Conduct a local community questionnaire to capture data on those who might not be accessing these sites and reasons why. This is a nice to have if it can be delivered in budget set out but not essential at this stage in the investigation if time and budget doesn’t allow for it.

1. **Project Scope**

**Phase 1: Desk Study –**

* 1. The first phase of the project involves a high-level, desk-based study to gain an overview of the project area as a whole in terms of existing data and reports on visitor numbers that can form a baseline to track the trends in use of the protected sites.
  2. The desk-based study should include identification, collation and analysis of relevant existing data and literature which can inform the methodology in this investigation to ensure replicable and comparable datasets.

**Phase 2: Site-specific studies –**

* 1. The methodology and design of the survey is left to the contractor to determine best practice, but it is anticipated that at least site surveys and exit questionnaires are carried out, and potential use of GPS technology or HUQ data (budget depending) to map popular routes and gather heatmap data.
  2. In discussion with the project board, sites for surveying should be selected but the ambition is to cover all designated sites within the project area.
     + Thursley NNR (National Nature Reserve)
     + Farnham Heath
     + Devil’s Punchbowl
     + Puttenham Common
     + Crooksbury Common
     + Frensham Great Pond
     + Frensham Little Pond
     + Hankley Common (subject to MOD approval for access)
     + The Flashes/Churt Common
     + Mare Hill
     + Rodborough Common
     + Milford and Witley Common
     + Elstead Group of Commons (Royal, Ockley, Elstead and Bagmoor)
  3. Each site survey should include the main themes as listed above and agreed in the initial project scoping meeting.
  4. The aspiration is that pulse surveys are undertaken during periods of high-pressure e.g., the summer months where risk of disturbance to ground nesting birds and increase risk of wildfire is at its height, but also periods outside of these times such as early Autumn period to understand both seasonal usage and regular everyday users.
  5. While the number of areas to be surveyed is to be agreed with the steering group, **bids should give an estimation of the number of sites / areas that can reasonably be subject to detailed surveys within the project budget**.

**Phase 3: Off-site surveys –**

* 1. The methodology and design of the survey questionnaire is left to the contractor to determine, but it is anticipated that a series of surveys will be carried out away from the sites to understand the barriers some people have to accessing the heathlands. This element will allow us to capture data from a wider demographic of people and will help inform the project aim of connecting people to nature for those that may not already engage with it.
  2. A similar set of survey questions as above with one or two extras to capture the relevant information
  3. We will take advice on best locations to carry out off-site surveys but envisage it being local town centres and supermarkets where there is heavy footfall.
  4. We understand that this may be outside the scope and budget of this initial investigation and may require a separate tender. If this is the case, we will go out to tender through the open competition process in the next financial year once budget has been allocated and approved. There is no guarantee that the same contractor will be awarded any follow-on work.

1. **Project Requirements** 
   1. Natural England would like to commission consultants to deliver a report detailing the following:

* Methodology and findings of the desk-based study of pre-existing data/results.
* Methodology and findings of the site-specific surveys including:
  + Analysis of trends with pre-existing data where available
  + Summary of current results from all sites
  + Heat map of popular sites across project area
  + Map of popular routes within each designated site investigated
  1. All data collected during the project will need to be provided in full, including raw data, GIS (Geographical Information System) shapefiles and metadata (to be formatted in Natural England’s standard metadata templates (template provided)). Data collected during this project will be owned by Natural England and published under the Open Government Licence1.
  2. It is anticipated this contract will combine desk-based and fieldwork, with each site selected for detailed study to be visited at least once. Meetings will generally be virtual, and it is expected that the successful consultants will make regular contact with the project manager and wider steering group, where appropriate.
  3. It is expected the consultants will hold/attend the following meetings:
  + An inception meeting with the project manager and steering group to finalise the scope of the project, agree milestones, sites for investigation and methodology. The frequency of project updates will also be agreed.
  + Regular update meetings during the survey period – every six weeks or as required
  + A steering group meeting after completion of the analysis and report to present results.

**5. Timetable**

5.1 **PLEASE NOTE –** It is anticipated that this contract will run from **10th July 2023** **to 31st March 2024 only to end no later than 31st March 2024**. A timetable is set out below in section 5.2. 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.

5.2 Quotations should be received by 1**7th July 2023** so that the contract period for preparation of the work can commence as soon as possible thereafter. We would like consultants to set out a draft timetable in their quotation, for delivering the outputs in paragraphs 4 and 5, that will be agreed at the initial meeting with the working group. The below timetable sets out suggested

timings.

|  |  |
| --- | --- |
| Initial meeting with consultants and steering group to agree scope of work | July 2023, date to be confirmed once appointed |
| Regular meetings between consultants and steering group to agree content, direction and progress | As specified in brief and decided at initial meeting |
| Final meeting with project team | By end of March 2024 |

1. **Plan format** 
   1. Maps, plans, illustrations, matrices and photographs must be full colour where original material is in colour or where colour is essential to preparation of new, illustrative material.
2. **Standards of Work**
   1. Consultants should note that unsatisfactory work which does not follow the brief (or any variation agreed with the client or Natural England) or which is not submitted according to the above timetable and/or output requirement may compromise the client’s eligibility for grant aid. The client is responsible for monitoring the work of the consultant, in terms of time spent and cost incurred, to ensure that the plan is delivered on schedule and within budget. The contract is between the consultant and the applicant, not between the consultant and Defra. Natural England must be alerted as soon as unforeseen cost or delays are predicted
3. **Tender documents**
   * It is strongly recommended that tender documents are received from independent, experienced consultants who have a wide and proven knowledge and experience of conducting visitor survey investigations, as well as a very good understanding of recreational use of designated sites, particularly relating to lowland heathland. To enable a full appraisal of the tenders, the following information is required from the consultant(s);
     1. Range of professional skills offered;
     2. Evidence of successful completion of similar projects demonstrating the qualities listed above
     3. Names and CV’s of individuals who will prepare the plan;
     4. Details of any sub-contractors;
     5. Total cost + VAT which should be broken down to show; a) Day rates for each member of the consultant’s team; b) Travel and related expenses; c) A separate rate for additional meetings beyond those identified in the brief; d) Other expenses; e) Plan report production costs; (Please note that day rates and expenses should be included in the total overall cost as there will be no allowance for adding in these costs later). Where relevant, information should also be included on health and safety policy, risk assessments, professional indemnity insurance, public liability insurance and employer’s liability insurance.
     6. To satisfy Natural England’s Risk Assessment of this work, please also provide a copy of your Health & Safety Policy as relevant to the activities being undertaken in this contract.

1. **Prices**

Prices must be submitted in £ sterling, inclusive of VAT.

**11 Bid format – pricing schedule**

11.1 **Include a pricing schedule** ensuring that costs can clearly be seen against personnel, travel and subsistence, materials, other identified costs, and that these link to core activities/tasks. Example below (adapt as appropriate)

11.2 VAT – please confirm whether your business is VAT registered.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Activity | Individual | Number of days | Daily rate excluding VAT | Additional costs incl T&S (please specify) | Total excluding VAT |
| 1. |  |  |  |  |  |
| 2. |  |  |  |  |  |
| 3. |  |  |  |  |  |
| 4. |  |  |  |  |  |
| Final total excluding VAT |  |  |  |  |  |
| Final total including VAT (if relevant) |  |  |  |  |  |

**12. Evaluation criteria**

12.1 We will award this contract in line with the most economically advantageous tender (MEAT) and on quality criteria (highlighted below in 10.2)

Price – 50%

Quality-50%

12.2 The following quality criteria is weighted in accordance with the importance and relevance attached to each one.

|  |  |  |
| --- | --- | --- |
| **Quality Criteria** | **Weighting (%)** | **To include:** |
| 1**. Method** What is your proposed methodology to deliver the outlined tasks?  Understanding of the key aims and requirements of the project, tasks and intended outputs | 20 | An initial outline of what material/expertise is to be used and how evidence will be collected, and findings presented  Identification of key tasks, with a proposed timeline and milestones.  Clear stakeholder engagement plan |
| **2.Staff and skills.**  Evidence of previous research skills, knowledge, and experience  Key Personnel, their roles, and contributions to the project | 25 | Refer to section 4  CVs and a minimum of two relevant examples of work including names and contact details for these clients/referees  The team structure and projected time allocations for all individuals in days, set against your identified main tasks.  Link to pricing schedule. (See 11.1) |
| **3. Understanding of Risk/Constraints** | 5 | Identify risks and how they will be mitigated |

**13. Sustainability**

The successful contractor is expected to pursue sustainability in their operations, thereby ensuring Natural England is not contracting with a supplier whose operational outputs run contrary to Natural England’s objectives. The successful contractor will need to approach the project with a focus on the entire life cycle of the project. The successful contractor is likely to be able to provide a copy of their environmental policy and any environmental accreditation schemes such as ISO 14001 or EMAS which they have been awarded or are working towards.

1. a. Operational Sustainability - Explain to Natural England what your organisation is doing to incorporate sustainability within its operations. This may include any details you are able to provide in relation to steps you may be taking to reduce your carbon footprint.
2. b. Environmental Management - Detail what you will do to assess the environmental impact of completing this project and provide mitigations. Examples may include operational measures to reduce emissions and noise impacts, efficient energy use, minimising the environmental impact of transport in delivery, efficient use of raw materials and minimisation of waste where possible.

Criteria 1 to 3 will be scored as follows:

|  |  |
| --- | --- |
| Score | Justification |
| For a score of hundred (100): | Excellent - Response is completely relevant and excellent overall.  The response is comprehensive, unambiguous and demonstrates a thorough understanding of the requirement and provides details of how the requirement will be met in full. |
| For a score of seventy (70): | Good - Response is relevant and good.  The response demonstrates a good understanding and provides details on how the requirements will be fulfilled. |
| For a score of fifty (50): | Acceptable - Response is relevant and acceptable.  The response provides sufficient evidence to fulfil basic requirements. |
| For a score of twenty (20): | Poor - Response is partially relevant and/or poor.  The response addresses some elements of the requirements but contains insufficient / limited detail or explanation to demonstrate how the requirement will be fulfilled. |
| For a score of zero (0): | Unacceptable - Nil or inadequate response.  Fails to demonstrate an ability to meet the requirement. |

**14. Quote/Tender & Contract Timescales**

|  |  |
| --- | --- |
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**Contract Management**

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

* Victoria Hawkins, Senior Advisor Heathland Connections Project, Thames Solent Area Team, Natural England
* [victoria.hawkins@naturalengland.org.uk](mailto:victoria.hawkins@naturalengland.org.uk)
* Telephone: 07392 282978

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

Please invoice Natural England 50% by end of September 2023 and the remaining 50%, after the work is complete at end of March 2024.

### 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.

**End**

**Appendix One**

Shapefiles can be downloaded of the following:

1. The Heathland Connections project boundary
2. The 5km buffer around the Heathland Connections project boundary
3. The Heathland Connections project boundary with a 5km buffer

