



Department
for Environment
Food & Rural Affairs

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Appendix 2 – Call-Off Procedure:

for The Research, Development and Evidence Framework 1

Tender Reference: C17392

Date: 26 May 2023

Revised: 6 September 2023 (Final Contract including clarifications)

1.0 Request for Proposal

- 1.1 The following document is to be used as a Call-Off template to be sent to all Contractors on a sub-lot by the Project Manager of the Contracting Authority for completion and return in accordance with the Call-Off procedures detailed in the Form of Agreement.

Research, Development and Evidence Framework				
REQUEST FOR PROPOSAL				
Project title:		Water Environment Improvement Fund: Surveying and Monitoring		
Call off Reference:		RDE284		
Atamis project ref:		C17392		
Date:		26 May 2023		
Contracting Authority (Defra and its arms-length bodies etc)	Environment Agency (EA)			
Project Manager:		Phone number:		
Authorised by:		Email:	@environment-agency.gov.uk	
Commercial Contact (if applicable):				
Project Start Date		01/09/2023		
Project Completion Date		31/01/2024		
For any projects over the direct award threshold, full competition is required (i.e., all contractors on the Sub-Lot are invited to quote).	Direct Award		Mini-comp	Yes

Call off from Sub-Lot number (please tick)	5.2 – R&D for water quality, water resources and coastal erosion risk management
Proposal return date:	20 June 2023 15:00

Evaluation criteria		
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.		
Quality	Weighting	60%
Price	Weighting	40%
Quality Sub-Criteria Weightings: (Indicative only)		
Approach & Methodology A minimum score threshold of 50 will be applied to this question	Please set out in detail each element of the methodology you propose to deliver this work, including the approach, design, survey and analytical strategy. Outline how you will: a) Develop a data collection methodology that: <ul style="list-style-type: none"> Is aligned to Physical Health of Habitats Monitoring Framework. Uses suitable measures for habitat health (e.g., Biodiversity Net Gain). Uses primary and secondary data to capture a wide range of benefits. Can be replicated by the Authority and partner organisation to improve data collection for river restoration projects in the future. Methodology should be presented in suitable format to enable this. b) Apply methodology to a number of catchments which have been subject to WEIF interventions in the past decade, including survey against baseline. c) Outline any input required from the Authority, as well as the approach to dissemination, review and reporting of the findings to the Authority project team.	40%

<p>Proposed Staff (inc Pen Portraits) and Contractor's experience/accreditations.</p> <p>A minimum score threshold of 50 will be applied to this question</p>	<p>Please provide details of proposed project team and team structure you intend to use to deliver this project, including any sub-contractors and/or associates. Your reply must evidence:</p> <ul style="list-style-type: none"> • Experience of delivering the practical survey work required for this project. • Experience and knowledge of delivering Biodiversity Net Gain, Natural Capital and Ecosystem Services monitoring and reporting. • Experience of developing data collection methodology and protocols. • Robust project management and reporting skills. <p>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.</p> <p>Include pen portraits for key members of staff (max 250 words per person) setting out their experience, qualifications and expertise relevant to the project.</p>	<p>20%</p>
<p>Project Management (including project plan)</p> <p>A minimum score threshold of 20 will be applied to this question.</p>	<p>Please set out your proposed project management arrangements including day to day working for the project, quality assurance, timetable for the project, risk management and a Gantt chart presenting milestones, deliverables, timelines and inter-dependencies</p>	<p>10%</p>
<p>Risk:</p> <p>A minimum score threshold of 20 will be applied to this question.</p>	<p>Please provide a risk register to identify the key risks associated with the project, including H&S risks associated with in river survey.</p> <p>Your reply should include proposed risk ownership, how you propose to mitigate the risks and manage the residual risks.</p>	<p>10%</p>
<p>Health & Safety</p> <p>A minimum score threshold of 20 will be applied to this question.</p>	<p>Please advise how you will manage the Health and Safety (H&S) risks associated with the surveys required for this project, including staff training and field working protocols. Do not attached copies of H&S Manuals or similar documents to your reply as they will not be considered.</p>	<p>10%</p>
<p>Sustainability</p>	<p>The Authority has set itself challenging commitments and targets to improve the</p>	<p>10%</p>

<p>A minimum score threshold of 20 will be applied to this question.</p>	<p>environmental economic and social impacts of its estate management, operation, and procurement. These support the Government's green commitments. The policies are included in the Authority's sustainable procurement policy statement published at: https://www.gov.uk/government/publications/defra-s-sustainable-procurement-policy-statement</p> <p>Within this context, please briefly explain your approach to delivering the services and how you intend to reduce negative sustainability impacts. Please discuss the methods that you will employ to demonstrate and monitor the effectiveness of your organisation's approach for this requirement.</p> <p>Your reply should also include an outline of the measures you will apply to manage the biosecurity risks associated with land access and surveying rivers for this project.</p>	
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Specification
<p>1. Description of work required – overall purpose & scope (including reporting requirements)</p>
<p>The Water Environment Improvement Fund (WEIF) is designed to bring about Water Framework Directive (WFD) objectives by addressing WFD issues that do not fall within the remit of other organisations under the 'polluter pays' principle, such as historical river modifications. WEIF funding was significantly reduced in the 2021 spending review.</p> <p>We are conducting an evaluation which seeks to broaden WEIF's WFD centric lens, considering the multiple benefits released by WEIF projects at a catchment level and across many time horizons. The evaluation will take a holistic natural capital approach to:</p> <ul style="list-style-type: none"> • Ensure the full range of outcomes arising from WEIF projects is understood, captured, and aligned to the Environmental Improvement Plan 2023, Environment Act, and other government priorities. • Investigate the impact of WEIF funding reduction on current and future delivery against WFD targets and other government priorities. • Consider if the current funding model is the most efficient and effective way to deliver the required outcomes. <p>This evaluation is closely aligned with the Physical Health of Habitats programme of work (see 'Habitats Monitoring Framework' in Appendix A). Outputs from surveys conducted as part of this evaluation will be entered into the Physical Health of Habitats Effectiveness Inventory, increasing our evidence base.</p> <p>What we want the contractors to do?</p> <p>As part of this evaluation we are looking for a contractor to survey river reaches in catchments that have been subject to multiple WEIF interventions in the past decade. The catchments and specific rivers are to be identified by the Authority and agreed with contractors.</p>

The contractor will develop a data collection methodology for the surveying work:

- Is aligned to Physical Health of Habitats Monitoring Framework
- Uses suitable measures for habitat health (e.g., Biodiversity Net Gain)
- Uses Defra Natural Capital Metrics
- Uses primary and/or secondary data to capture a wide range of benefits
- Is replicable by the Authority

Contractors should be innovative in their survey approach, using data from Earth Observation and Citizen Science sources to good effect.

Survey outputs will be compared with a baseline, developed by the contractor from data provided by the Authority and compiled from open data sources. Contractors will identify suitable data sources and measures that can be used to develop baseline data for future projects.

We are looking for the contractor to develop an innovative and replicable approach to capturing baseline conditions and benefits of WEIF projects. Your description of benefits should align with the Physical Health of Habitats Monitoring Framework, the Benefits Management approach and Defra Natural Capital Metrics.

Contractors will then compare the current state of the river to the baseline, drawing conclusions on the extent to which the WEIF interventions have contributed to any change in river condition, ecosystem services and natural capital. Your report will measure and highlight the impact of continuous investment over time and at a catchment scale. We want you to be bold in your assessment of the extent to which projects have led to habitat changes; your work should include uncertainty matrices and point to any significant changes in the catchment outside of our projects which may have contributed to changes (e.g., urban development).). You should also acknowledge 'trade offs'; are there areas in which environmental gains have come at the cost of deterioration in another area?

The surveying and report should consider an appropriate scale; how do outputs and uncertainties change when looking at project, river, catchment, and landscape scale? You should consider why the benefit has been realised in this area; are there particular landscape, geomorphological or demographic features which have made the interventions work in this area and perhaps not work in another?

Other information:

- It is expected open access sites will be selected for site surveys. It is not anticipated access permissions will be required.
- There are no specific survey windows that need to be considered when planning site surveys into the programme.
- The contractor shall provide project updates bi-weekly by email to the Authority's Project Manager.
- The contractor shall allow for a contract start-up meeting, 6 virtual review meetings with the Authority PM and project team and a presentation of the draft final report.

Required Contractor outputs

The outputs of this work will be:

- A replicable methodology for data collection against the Physical Health of Habitats Monitoring Framework
- A replicable methodology for developing baseline data
- Survey data entered onto the Physical Health of Habitats Effectiveness Inventory

- A written report and presentation setting out any change in the identified catchments and the extent to which these may be attributable to WEIF interventions.

2. Required skills / experience from the contractor and staff. Include any essential qualifications or accreditations required to undertake the work.

- Experience of delivering the practical survey work required for this project
- Experience and knowledge of delivering Biodiversity Net Gain, Natural Capital and Ecosystem Services monitoring and reporting
- Experience of developing data collection methodology and protocols
- Robust project management skills
- Data analysis and reporting

3. Proposed programme of work and payment table (Detailing specific tasks, key milestones, deliverables & completion date where appropriate)

Task no.	Task and deliverable	Completion date	Payment schedule
1	Develop survey and baseline methodology	September 2023	20%
2	Deliver surveys and upload survey data to effectiveness inventory	October 2023	50%
3	Deliver presentation and final report	January 2024	30%

Contractors to provide their own milestones based on the 'Contractor output' requirements detailed above.

4. Risk

Risks identified by the Authority:

- Unable to attribute observed changes to WEIF projects
- Unable to obtain sufficient baseline data
- Health and Safety risks related to working in and around waterbodies, including biosecurity

5. Health and Safety Requirements

Your proposal should set out how risks related to undertaking field surveys working in and around waterbodies are to be managed.

The contractor will be responsible for ensuring that any on site survey work is carried out in a safe manner and at suitable sites. Your approach to on site survey work should be agreed with the Authority Project Manager before work is carried out.

Proposals should set out the competency of relevant staff to conduct safe survey work and how you will produce and manage risk assessments and methods statements, with a particular focus on work conducted in and around waterbodies.

If you propose the use of sub-contractors, you should outline their competency to conduct safe survey work and how you will ensure that risk assessments and methods statements are in place and managed.

Any incidents or near misses must be reported to the Authority's Project Manager in line with

RIDDOR reporting timescales.

6. Further Sustainability Considerations

The Authority has set itself challenging commitments and targets to improve the environmental economic and social impacts of its estate management, operation, and procurement. These support the Government's green commitments. The policies are included in the Authority's sustainable procurement policy statement published at:

<https://www.gov.uk/government/publications/defra-s-sustainable-procurement-policy-statement>

Within this context, please briefly explain your approach to delivering the services and how you intend to reduce negative sustainability impacts. Please discuss the methods that you will employ to demonstrate and monitor the effectiveness of your organisation's approach for this requirement.

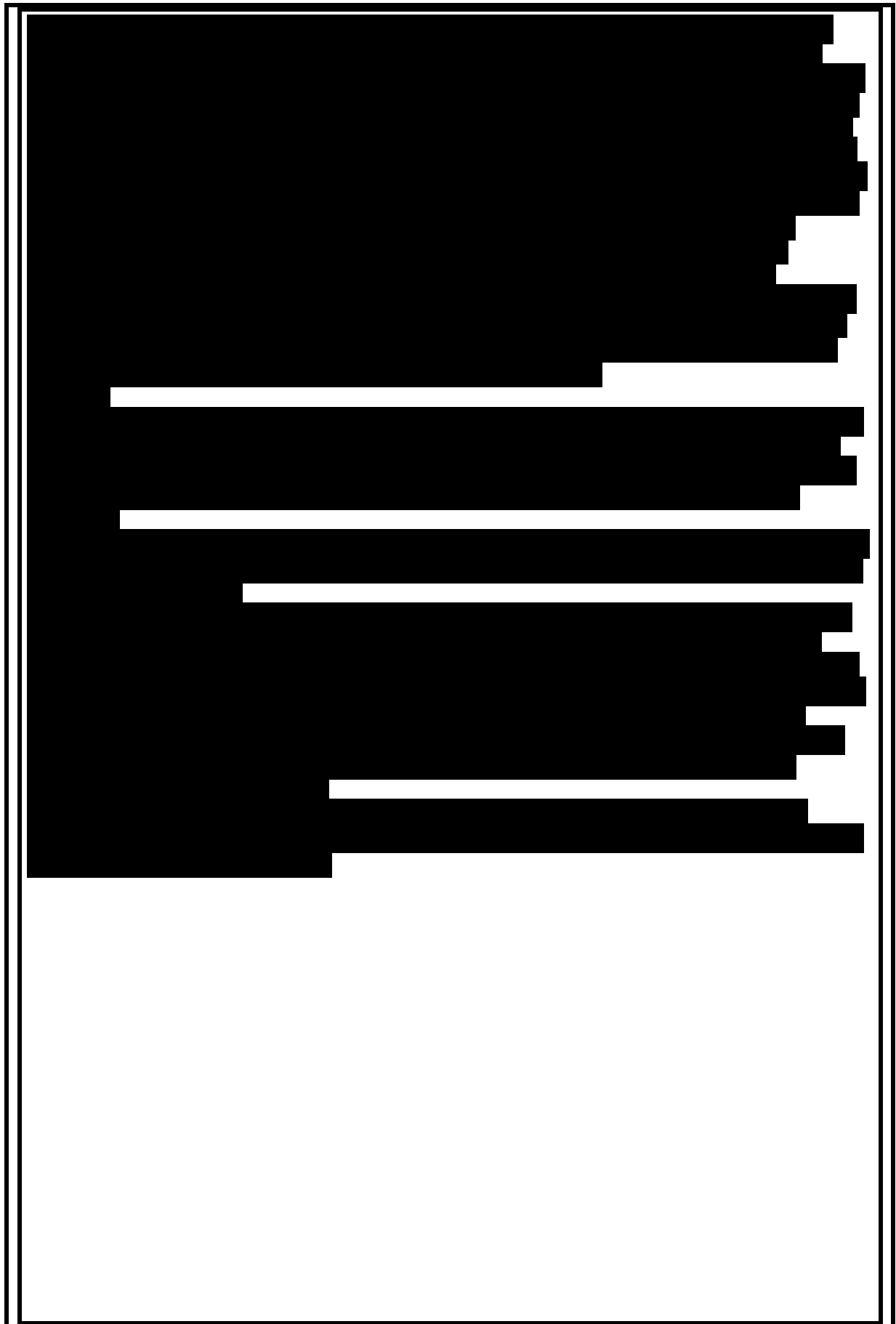
Proposals should set out how you will economise travel between sites to minimise the Carbon Footprint of the project. Proposal should also include an outline of the measures you will apply to manage the biosecurity risks associated with land access and surveying rivers required for this project.

Any environmental incidents related to field surveys that occur should be reported to the Authority's Project Manager as soon as is reasonably practicable within 30 days of occurrence.

2.0 Proposal

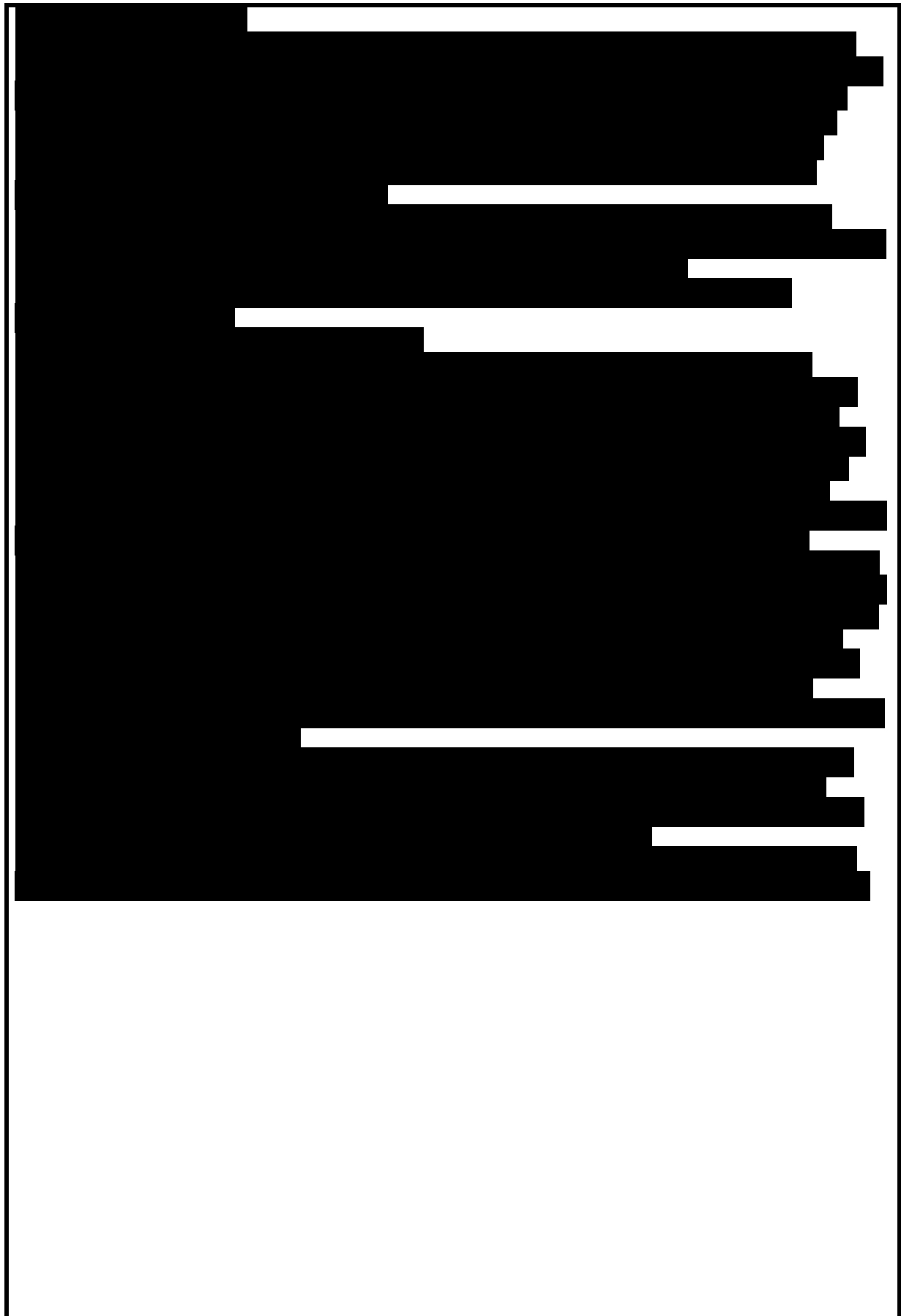
- 2.1 The following document is to be used as a Call-Off template to be sent to all Contractors on a sub-lot for completion and return in accordance with the Call-Off procedures detailed in the Form of Agreement.

Research, Development and Evidence Framework 2
PROPOSAL
To be completed by the Contractor
Contractor's Name: Jeremy Benn Associates Ltd (t/a JBA Consulting) Call off Reference: RDE284 Sub-Lot Number: 5.2 R&D for water quality, water resources and coastal erosion risk management Date: 6 September 2023
Note: Your proposal must not exceed 6 sides of A4 plus the Costs Proposal in Section 4. Attachments must not be included unless requested, with the exception of a programme diagram and full cost schedule if you consider these would support your proposal. Do not make or append Caveats and Assumptions in your proposal – any points of uncertainty must be raised as a clarification point prior to submitting the proposal. Where assumptions are to be made, these will be stated by the Authority's Project Manager.
1. Approach & Methodology





[illegible]





H&S Management									

4. Risk Management (inc Risk register)

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Risk		Mitigation	Owner
	Unable to attribute observed changes to WEIF projects		EA/JBA
	Unable to obtain sufficient baseline data		EA
	Health and Safety working in and around waterbodies, including biosecurity		JBA/EA
	Weather/ flow conditions causing delay to surveys		JBA/EA
	Changes to the scope/brief		EA
	Delays in obtaining data from sources		JBA/EA
	Delay in commission and start date of project		EA
	Identification of suitable locations		EA
	Staff availability		JBA

5. Health & Safety management

[REDACTED]

[REDACTED]

[REDACTED]

6. Sustainability - including the measures you will apply to manage the biosecurity risks associated with land access and surveying rivers for this project.

[Redacted text block]

[Redacted text block]

[Redacted text block]

Biosecurity

[Redacted text block]

7. Cost Proposal
Please use day rates, including any applicable discounts, as agreed under the framework contract. A full cost schedule may be attached to your reply to support the costs summarised below.


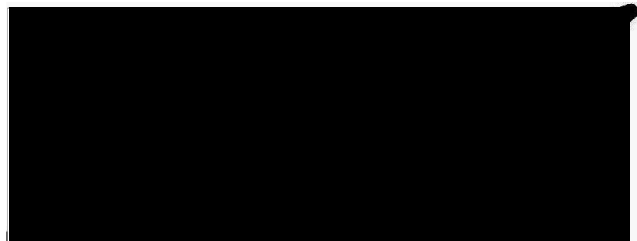
Name	Framework grade	Day rate	No. of Days or part thereof	Cost
[REDACTED]	Director	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	Director	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	Senior Consultant	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	Junior Consultant	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	Senior Consultant	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	Junior Consultant	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	Consultant	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	Director	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	Junior Consultant	[REDACTED]	[REDACTED]	[REDACTED]
Total Staff Costs				£69,602.50
*Expenses (please detail type i.e. travel, accommodation etc.)	Travel Accommodation and subsistence			£405.00 £5,000
Overall Costs				£75,007.50

7. Cost Proposal
Please use day rates, including any applicable discounts, as agreed under the framework contract. A full cost schedule may be attached to your reply to support the costs summarised below.

Task	Name	Framework grade	Day rate	No. of Days or part thereof	Cost
Task 1 (Project management)	[REDACTED]	Director	[REDACTED]	[REDACTED]	[REDACTED]
Task 1	[REDACTED]	Director	[REDACTED]	[REDACTED]	[REDACTED]
Task 1	[REDACTED]	Senior consultant	[REDACTED]	[REDACTED]	[REDACTED]
Task 1	[REDACTED]	Junior consultant	[REDACTED]	[REDACTED]	[REDACTED]
Task 1	[REDACTED]	Senior consultant	[REDACTED]	[REDACTED]	[REDACTED]
Task 1	[REDACTED]	Junior consultant	[REDACTED]	[REDACTED]	[REDACTED]
Task 1	[REDACTED]	Consultant	[REDACTED]	[REDACTED]	[REDACTED]
Task 1	[REDACTED]	Director	[REDACTED]	[REDACTED]	[REDACTED]
Task 1	[REDACTED]	Junior consultant	[REDACTED]	[REDACTED]	[REDACTED]
SUBTOTAL					£5,965.00
Task 2 Method Development	[REDACTED]	Director	[REDACTED]	[REDACTED]	[REDACTED]
Task 2	[REDACTED]	Director	[REDACTED]	[REDACTED]	[REDACTED]
Task 2	[REDACTED]	Senior consultant	[REDACTED]	[REDACTED]	[REDACTED]
Task 2	[REDACTED]	Junior consultant	[REDACTED]	[REDACTED]	[REDACTED]
Task 2	[REDACTED]	Senior consultant	[REDACTED]	[REDACTED]	[REDACTED]
Task 2	[REDACTED]	Junior consultant	[REDACTED]	[REDACTED]	[REDACTED]
Task 2	[REDACTED]	Consultant	[REDACTED]	[REDACTED]	[REDACTED]
Task 2	[REDACTED]	Director	[REDACTED]	[REDACTED]	[REDACTED]
Task 2	[REDACTED]	Junior consultant	[REDACTED]	[REDACTED]	[REDACTED]
SUBTOTAL					£11,835.00
*Task 3 Field surveys	[REDACTED]	Senior consultant	[REDACTED]	[REDACTED]	[REDACTED]
Task 3	[REDACTED]	Junior consultant	[REDACTED]	[REDACTED]	[REDACTED]

Task 3	■	Senior consultant	■	■	■
Task 3	■	Junior consultant	■	■	■
SUBTOTAL					£27,600.00
Task 4 Natural Capital Assessment	■	Consultant	■	■	■
Task 4	■	Director	■	■	■
Task 4	■	Junior Consultant	■	■	■
SUBTOTAL					£6,600.00
Task 5 Reporting	■	Director	■	■	■
Task 5	■	Director	■	■	■
Task 5	■	Senior consultant	■	■	■
Task 4	■	Junior consultant	■	■	■
Task 5	■	Senior consultant	■	■	■
Task 5	■	Junior consultant	■	■	■
Task 5	■	Consultant	■	■	■
Task 5	■	Director	■	■	■
Task 5	■	Junior consultant	■	■	■
SUBTOTAL					£15,285.00
Task 6 Health and Safety management	■	Director	■	■	■
Task 6	■	Director	■	■	■
Task 6	■	Junior consultant	■	■	■
SUBTOTAL					£2,317.50
Total Staff Costs					£69,602.50
*Expenses (please detail type i.e. travel, accommodation etc.)	All costs listed here are with regards to task 3:				
	Travel Accommodation and subsistence				£405.00
					£5,000.00

Overall Costs	£75,007.50
<p>* Costs for Task 3–Field Surveys and for Travel & Subsistence Expenses in the Tables 7a and 7b above are estimated. Final costs will be agreed with the Authority’s Project Manager following identification and final selection of the sites for survey and the survey method to be used. A Contract Variation will be issued, if required, to correct final agreed costs, using the day rates provided in the table above.</p>	

By signing this form JBA agree to provide the services stated above for the cost set out in your Cost Proposal and in accordance with the Research, Development & Evidence Framework 1 Conditions of Contract.	
Contractor Project Manager:	
Signature:	
Date:	20 th June 2023

3.0 Order Form

- 3.1 The following document is to be completed by the Contracting Authority and sent to the Contractor for counter signature to form a Call-Off contract.

Research, Development and Evidence Framework 2
ORDER FORM
To be completed by Contracting Authority Project Manager and sent to Contractor for countersignature
<p>Project title: Water Environment Improvement Fund: Surveying and Monitoring</p> <p>Call off Reference: RDE284</p> <p>Atamis project ref: C17392</p> <p>Atamis contract ref: C20902 (please quote this reference on all future correspondence)</p> <p>Date: 6 September</p>

THE Contracting Authority: Environment Agency, Horizon House, Deanery Road, Bristol
BS1 5AH

THE CONTRACTOR: Jeremy Benn Associates Ltd (t/a JBA Consulting), 1 Broughton
Place, Old Lane North, Broughton, Skipton

APPLICABLE FRAMEWORK CONTRACT

This Order Form is for the provision of the Call-Off Deliverables and dated 6 September 2023. It's issued under the Research Development & Evidence Framework Agreement reference 30210 for the provision of Water Environment Improvement Fund: Surveying and Monitoring.

CALL-OFF SUB-LOT: 5.2 – R&D for water quality, water resources and coastal erosion risk management

CALL-OFF INCORPORATED TERMS The following documents are incorporated into this Call-Off Contract. Where numbers are missing we are not using those schedules. If the documents conflict, the following order of precedence applies:

1. Defra Framework Terms and Conditions;
2. Request for Proposal;
3. Proposal;

No other Supplier terms are part of the Call-Off Contract. That includes any terms written on the back of, added to this Order Form, or presented at the time of delivery.

CALL-OFF START DATE: 11 September 2023

CALL-OFF EXPIRY DATE: 31 March 2024

CALL-OFF INITIAL PERIOD: 6 months

