**INVITATION TO TENDER
Dynamic Dunescapes DuneLIFE**

**Evaluation Consultant**
(LIFE 17 NAT/UK/000570; HG-16-08643)

Date: 8/9/2023

Dear Sir or Madam,

**INVITATION TO TENDER FOR EVALUATION CONSULTANT**

You are invited to tender in competition with others to provide the goods and/or services specified above to Plantlife.

This pack contains the documentation Plantlife requires you to complete in order to be considered for the work.

Your response should be emailed to rachel.jones@plantlife.org.uk by 18:00 on 9/10/2023.

**Please include the project name and reference numbers on all documentation (Dynamic Dunescapes (DuneLIFE) LIFE 17 NAT/UK/000570; HG-16-08643)**

To discuss any of the elements of this contract please contact Rachel Jones, Rachel.jones@plantlife.org.uk. If you are intending to submit a tender and would like to receive any responses to questions and clarifications please register your interest by email to Rachel Jones by 2/10/2023.

Only tenders submitted in accordance with Plantlife’s Terms and Conditions will be considered. Any tenders that are incomplete or received after the time indicated may be disregarded.

If you do not wish to tender on this occasion please let us know, but do not forward the documents to another contractor as their tender would not be accepted.

Yours faithfully

Rachel Jones

Learning Lead, Plantlife

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| Icon  Description automatically generated | **PART A****ABOUT PLANTLIFE** |

Plantlife is the international conservation charity working to secure a world rich in wild plants and fungi. Founded in 1989, Plantlife has 15,000 members and supporters.

Wild plants and fungi are the foundation of all life on Earth. Plantlife enhances, restores, protects and celebrates our natural heritage through working with landowners, other conservation organisations, public and private bodies and the wider public.

Plantlife owns 23 nature reserves covering nearly 4,500 acres across England, Scotland and Wales. We were instrumental in the creation of the Global Strategy for Plant Conservation, the Important Plant Area network and we are a member of Planta Europa, a pan-European network of over 60 wild plant conservation organisations.

We are governed by a board of 12 trustees and have around 70 staff, located across the UK. We also support a team of 1500 volunteers who work in the field, at events and in our offices.

A registered charity, Plantlife is funded by donations from its members and supporters, through grants and charitable trusts and through its pioneering land management advice and projects.

For more information please visit our website: [www.plantlife.org.uk](http://www.plantlife.org.uk/).  You will also find information there about our trustees, our policies and projects, as well as our annual reports and accounts.

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| Icon  Description automatically generated | **PART B****THE PROJECT** |

Dynamic Dunescapes is restoring sand dunes across England and Wales for the benefit of people, communities and wildlife. Sand dunes are a sanctuary for endangered plants and animals but they are under threat. They are becoming more and more densely covered by grass and scrub while our wildlife needs areas of open sand to thrive. Healthy sand dunes need to move and be dynamic.

The Dynamic Dunescapes project is big and ambitious – targeting some of the most important sand dune systems across England and Wales. We have worked with schools and local groups, volunteers and visitors of all ages and abilities to create more bare sand which will breathe life into the dunes and allow the threatened wildlife to flourish.

This project has not only instigated urgently needed conservation interventions, but has fundamentally changed and developed the thinking and perceptions about how sand dune systems need to be managed. And, just as importantly, it has improved the way local communities and visitors engage with sand dunes.

Funded by EU LIFE and the National Lottery Heritage Fund, the Dynamic Dunescapes Project is an innovative 4 year partnership. Natural England, National Trust, Plantlife, The Wildlife Trusts and Natural Resources Wales have worked with local coastal communities to conserve and restore up to 7000ha in nine areas across England and Wales.

The project’s 5 key objectives were designed to deliver these aspirations:

1. Conservation Deliver evidence-based management and interventions on project sites that will make a demonstrable and sustainable improvement for the conditions and processes needed to support dune habitats and species

2. Communication Build an understanding and appreciation of sand dunes as a naturally dynamic habitat requiring conservation interventions

3. Engagement Ensure more people and a wider range of people are involved with sand dunes and through their involvement learn about, enjoy and value sand dunes

4. Skills Development Develop the skills of individuals and organisations to better manage dunes both now and in the future

5. Collaboration Establish strong networks so that lessons learnt from the project (both conservation and people engagement) are shared and disseminated building a lasting legacy for sand dunes.

The principal activities are outlined in the specification and outputs which are outlined below. The Evaluation Consultant will be required to liaise directly with the project team which comprises Rachel Jones, Learning Lead (Plantlife), and Verity Pitts, Dynamic Dunescapes Project Manager (Natural England).

**CONTRACT MANAGEMENT**

The evaluation of the Dynamic Dunescapes project is led by Plantlife. The Evaluation Consultant will be managed as a contract supervised by Plantlife who will maintain frequent contact to facilitate and monitor the contract.

We will work with the contractor to develop a schedule of phased payments.

All outputs need to be complete by end April 2024.

**BUDGET**

Maximum budget:

* £14,000 (inclusive of VAT) which should include any travel and subsistence.

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| Icon  Description automatically generated | **PART C****SPECIFICATION** |

Plantlife is seeking a contractor or group of contractors that can deliver the goods or services listed below. This information is a statement of minimum requirements and is not intended to limit creative or original thinking in the preparation of proposals.

The Dynamic Dunescapes project is a large-scale national multi-partner project now entering its final phase. On behalf of the partnership, Plantlife are seeking an Evaluation Consultant with significant experience of evaluating complex and innovative, multi-outcome, multi-partner projects in a time-pressured environment.

The project has produced ongoing reports on its activity for the funders, including two mid-term summary reports. Evaluation has taken place for activities within the project, for example the project conference. This contract is therefore for an analysing and finalising role to bring everything together in an overall report.

The Evaluation Consultant will provide technical expertise and guidance to the project team, as well as collecting additional independent data, analysing existing and new data, and synthesizing all of this to create a robust yet useable set of evaluation outputs - including an end-of-project evaluation report. We require an Evaluation Consultant with a high-level of skill in assessing and evidencing outcomes (rather than reporting delivery and outputs) and experience of major innovative multi-partner, multi-location projects. Experience of reporting to the National Lottery Heritage Fund and LIFE are an advantage.

The contract outlined in this specification will be undertaken over a 6-month period commencing in October/November 2023 by negotiation.

1. **Requirements.**

The Evaluation Consultant will support the project team in aspects of project evaluation including but not limited to:

1. **Overall evaluation of each of the 5 main project objectives (listed page 1), the key evaluation questions (in development but available to the appointed Evaluation Consultant), and National Lottery Heritage Fund objectives:**
* Did the project produce or contribute to the intended outcomes in the short, medium, and long term? For whom, in what ways and in what circumstances?
* Were there any other factors at play?
* Were there any unintended outcomes (positive or negative)?
* What were the features of the project that made a difference?
1. **Follow-up with sample of key audiences in order to answer evaluation questions and produce case studies answering:**
* Do beneficiaries report benefits including: skills, health and well-being, knowledge, enjoyment?
* Do beneficiaries show evidence of sustained involvement and multiple engagements with project e.g. through volunteering, citizen science, school partnership
* What difference did it make having such an investment in engagement alongside the conservation works, with Engagement Officers at each of the sites?

Key audiences include:

* Site managers
* Next Generation of Conservationists: bursary students/placements/apprentices
* Schools
* Elderly/people with dementia and their carers
* Dog walkers
* Volunteers
* Targeted participants to collect further info on well-being outcomes
* Targeted participants to collect further info on nature connectedness outcomes
* Communities – can we demonstrate how building capacity in local communities increases awareness of, and inspire people to take action for, their dunes.

1. **Cross partnership questionnaire looking at:**
* Partnership working
* Organisational impact: intra-organisational learning. Are organisations more resilient?
* Project strengths and weaknesses

Evaluation consultant to support the Dynamic Dunescapes team to develop the survey, evaluate results and follow up areas that require further investigation with focus groups.

1. **An Outcomes panel**:

A group of key stakeholders and peers who come together to review, discuss, and validate findings as well as input into next steps as part of legacy planning.

**OUTPUTS**

The main output from the evaluation will be an evaluation report which can be submitted to NLHF and other funders. We plan that much of this content will be accessible via our website.

However, the partners also intend to extend the project’s learning through a legacy of improved sand dune management and interpretation more widely across England and Wales and further afield to Scotland and Northern Ireland. We therefore wish to ensure the findings and lessons learnt are easily accessible and will use knowledge sharing events and our website to achieve this.

All outputs need to be complete by end April 2024.

**Outputs from the end-of-project evaluation process:**

* Overall evaluation report which includes:
	+ Lessons learnt for site managers
	+ Lessons learnt for communications
	+ Lessons learnt for engagement
	+ Lessons learnt for skills development
	+ Lessons learnt for partnership working
* Case studies to illustrate/evidence the above.

**Internal works (delivered by the project team) and data available to feed into above:**

We have already collected data to evidence our outcomes including surveys from a range of selection of stakeholders; ecological monitoring data; a partner reflective practice session; photographic evidence; up-to-date monitoring of outputs. We have also already written-up a number of the areas of work into case studies, reports and tools such as a Sand Dune Handbook. These are accessible via our website https://dynamicdunescapes.co.uk/ However the majority of this is not analysed and we are actively working to fill identified gaps in this. Activity in progress includes:

* Internal evaluation of project communications
* Internal evaluation of bursaries
* Final site reports (habitat works; engagement activity; management & maintenance plans; monitoring report & plan; and legacy)
* Cross partnership questionnaire
* Socio-economic study
* Ecosystem services study

Key learning and impact from the above will feed into the final evaluation report.

The contractor should detail in their tender how their knowledge and experience will enable successful delivery of these outputs.

1. **Evaluation Criteria.**

Successful candidates will be selected based on the following criteria:

* The competitiveness of the price quoted.
* The acceptability of the Supplier's legal and financial standing.
* Amount of relevant experience.
* The level to which the proposed response meets the specification.

Tenders that fail to meet essential requirements may be excluded from consideration.

1. **Timeline.**

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| Invitation to Tender document sent out | 8/9/23 |
| Deadline for questions and clarifications | 2/10/23 |
| Responses to queries released | 4/10/23 |
| Tender documents to be returned  | 18:00 9/10/23 |
| Award of contract | 16/10/23 |
| Commencement of services / orders for goods | Oct/Nov 2023 by negotiation |
| End of contract | April 2024 |

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| Icon  Description automatically generated | **PART D****TENDER DOCUMENTATION** |

The following information must be included in your tender submission.

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| **1** |  | **Response to the Specified Requirements** |
|  | 1.1 | A short statement on how you intend to work with the project team and any problems you forsee. |
|  | 1.2 | Evidence of your understanding of NLHF evaluation requirements and 3-examples of previous complex projects for which you have supported evaluation.  |
|  | 1.3 | References to support the above  |
|  | 1.4 | An overview of the experience your team or you have to undertake this work  |
|  | 1.5 | A fixed fee quotation for the cost of the work including any out of pocket expenses such as travel, incentives etc but not including graphic design (which will come from a separate internal project budget). The quotation should exclude VAT and you should indicate whether you are VAT registered.  |
|  | 1.6 | An estimated invoice schedule |
|  | 1.7 | Confirmation of professional indemnity insurance, public liability insurance and employer’s liability insurance of all those who will be delivering the work.  |
|  | 1.8 | Evidence of GDPR compliance. |
| **2** |  | **Company Information** |
|  | 2.1 | Registered name and trading name (if different) |
|  | 2.2 | Registered office address |
|  | 2.3 | Correspondence details for the person applying on behalf of the company  |
|  | 2.4 | Company registration number |
|  | 2.5 | VAT registration number or confirmation of non-registration |
|  | 2.6 | Date company was founded (if a limited company, date of incorporation) |
|  | 2.7 | Company structure and nature of company:Outline the nature of the company, whether it is a partnership, sole trader, plc etc. Is the company proposed as party to the contract part of a larger organisation? If so please explain the relationship between the various parts of the organisation, up to the ultimate holding company.What is the current number of full time equivalent staff currently employed by the company (not larger parent company) |
|  | 2.8 | Accreditation by / Membership of Trade Association(s): Please provide details of registrations with any industry accreditation bodies. Please provide details of membership of any professional bodies or other relevant associations. |
|  | 2.9 | Quality Assurance: Please give details of any Quality Assurance certification your company holds |
|  | 2.10 | Has your company (or any project you have undertaken) won any awards, accolades or recognition? |
| **3** |  | **Financial & Business Probity** |
|  | 3.1 | Are there any judgements, claims or suits pending or outstanding against your company? If yes, please provide full details.Has your company ever failed to complete a contract? If yes, please provide full details. |
|  | 3.2 | Please include answers to those of the following questions that apply to your Company’s circumstances:  |
|  |  | a) being a company, no resolution has been passed or Order of the Court made for the company’s winding up otherwise than for the purposes of bona fide reconstruction or amalgamation, nor has a receiver, manager or administrator on behalf of a creditor been appointed in respect of the company’s business or any part thereof, nor is it the subject of any proceedings for any of the above procedures, nor is it the subject of similar procedures under the law of any other state.b) being a partnership, it has not granted a trust deed or become otherwise apparently insolvent, or it is not the subject of a petition presented for sequestration of its estate.c) being an individual, you are not bankrupt, or have not had a receiving order or administration order made against you, or have not made a composition or arrangement or trust deed with or for the benefit of your creditors, or have not made any conveyance or assignment for the benefit of your creditors, or have not had a petition presented for sequestration of your estate or do not appear to be able to pay or to have no reasonable prospect of being able to pay a debt within the meaning of the Insolvency Act or any similar procedure under the law of any EC member state.d) no Directors, Partners, Associates or the Company Secretary have been involved in any Company which has been liquidated or gone into receivership.e) none of the Directors, Partners, Associates or the Company Secretary have been convicted of a criminal offence relating to the conduct of their business or profession.f) neither the Company nor any of the Directors, Partners, Associates or Company Secretary has committed an act of grave misconduct in the course of their business or profession.g) all obligations relating to the payment of taxes under the law of any part of the United Kingdom or the EC member state in which the Company is established has been fulfilledh) all obligations relating to the payment of social security contributions under the law of any part of the United Kingdom or the EC member state in which the Company is established have been fulfilled.If you cannot answer an applicable question in the affirmative, please supply further detail. |
|  | 3.3 | a) Please list the names of any Director, Partner, Associate or Company Secretary who has been employed by, or is a trustee of, Plantlife, giving dates.b) Please give details of any Director, Partner, Associate or Company Secretary who has a relative who is employed by Plantlife at a senior level, or is a trustee of Plantlifec) Please list the names of any Director, Partner, Associate or Company Secretary who has any involvement in other Companies who provide services to Plantlifed) Is any work being undertaken or likely to be undertaken during the next three years by the Company or staff within it which could give rise to a conflict of interest through acting for third parties or otherwise? If yes, please explain the actual or likely circumstances and how such potential conflicts of interest would be handled. |
|  | 3.4 | Please provide the name of your insurer, policy number, cover value and expiry date for the following Insurance policies, and supply a scanned copy of each certificate.* Employers Liability
* Public Liability
* Professional Indemnity
* All Risks (if applicable)
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| **4** |  | **Health & Safety, Environment and Society** |
|  |  | Please answer the following questions, providing full details where applicable |
|  | 4.1 | Has your company been served with any enforcement or prohibition notices or been prosecuted in the past 5 years for breaches of health & safety legislation? |
|  | 4.2 | Has your company been served with any enforcement or prohibition notices or been prosecuted in the past 5 years for breaches of environmental legislation? |
|  | 4.3 | Has your company been served with any enforcement or prohibition notices or been prosecuted in the past 5 years for breaches of data protection legislation? |
|  | 4.4 | Have any restrictive clauses in relation to your company’s Employer’s Liability, Public Liability or Professional Indemnity Insurance policies been enforced in the last 5 years due to past Health & Safety performance? |
|  | 4.5 | What efforts are your company making to minimise its impact on the environment?  |
|  | 4.6 | How is your company encouraging inclusion and diversity in its working practices? |
|  | 4.7 | Please include a copy of your ethical trade and modern slavery statements  |
| **5** |  | **References** |
|  |  | Suppliers are requested to provide details of three references from their existing clientele, supplying full name, address, telephone number, email address, contact name, nature of the work done, period of contract and the estimated annual value of the contract. In supplying this information, Suppliers shall have granted Plantlife permission to seek such information as deemed necessary, in relation to the Suppliers performance with their nominated references. |

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| Icon  Description automatically generated | **PART E****TERMS AND CONDITIONS** |

This tender is not and should not be taken as intent to purchase goods or services. Rather, the vendor is being invited to submit a proposal at the vendor’s expense and volition.

Plantlife accepts no liability for time, property or material cost expended in the provision of a proposal.

Plantlife reserves the right to request its suppliers to comply with its terms and conditions, to the exclusion of a supplier’s terms and conditions.

Plantlife expects all suppliers it works with to adhere to certain ethical and environmental standards. Please download our Responsible Purchasing Policy.

**Confidentiality**

This tender and all related information is confidential and the property of Plantlife. However, we recognise that as part of the tender process, we each may exchange information that is deemed confidential. Accordingly, by us sending you this invitation to tender and your response to it, we each agree to the following commitments regarding confidentiality.

For the purposes of this section, “Confidential Information” shall mean all information, data or materials received by one Party from the other (including, without limitation, drawings, sketches, photographs, computer software, ideas, design, know-how, formulae, processes, copyrights, inventions, techniques, new product details, business plans, financial information) that are marked “confidential” or otherwise stated to be confidential or which by their nature should reasonably be regarded by the receiving Party as confidential and any copies or extracts thereof in any media whatsoever;

Each party undertakes that it shall not disclose to any person any Confidential Information concerning the business, affairs, customers, clients or suppliers of the other party or of any member of the group of companies to which the other party belongs, except as permitted by the following paragraph.

Each party may disclose the other party's Confidential Information:

* to its employees, officers, representatives or advisers who need to know such information for the purposes of exercising the party's rights or carrying out its obligations under or in connection with this invitation to tender. Each party shall ensure that its employees, officers, representatives or advisers to whom it discloses the other party's confidential information comply with this section on confidentiality; and
* as may be required by law, a court of competent jurisdiction or any governmental or regulatory authority.

No party shall use any other party's Confidential Information for any purpose other than to exercise its rights and perform its obligations under or in connection with this tender.

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| Icon  Description automatically generated | **PART F****CERTIFICATE OF BONA FIDE OFFER** |

***PLEASE INCLUDE THE FOLLOWING CERTIFICATE IN YOUR TENDER DOCUMENTATION***

We certify that this offer is made in good faith, and that we have not fixed or adjusted the amount of the offer by or under or in accordance with any agreement of arrangement with any other person. We also certify that we have not, and we undertake that we will not:

1 a) communicate to any person other than the person inviting these offers the amount or approximate amount of the offer or proposed offer, except where the disclosure, in confidence, of the approximate amount of the offer was necessary to obtain insurance quotations required for the preparation of the offer;

b) enter into any agreement with any other person that they shall refrain from making an offer or as to the amount of any offer to be submitted;

2 pay, give or offer or agree to pay or to give any sum of money or other valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any offer or proposed offer for the goods/services any act or thing of the sort described in 1 a) or 1 b) above.

We acknowledge that if we acted or shall act in contravention of this certificate, Plantlife will be entitled to cancel the agreement and to recover from ourselves the amount of any loss and expense resulting from such cancellation.

I state that everything in this tender submission is truthful, that if found to be untruthful Plantlife can terminate any agreement between Plantlife and the company formed on the basis of this tender, and we will pay to Plantlife any loss or expenses Plantlife suffers as a result of such untruthfulness, whether an agreement is entered into or not.

In this certificate, the word “person” includes any persons and any body or association, corporate or unincorporated; “any agreement or arrangement” includes any transaction, formal or informal, and whether legally binding or not.

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| Signed  |  |
| On behalf of |  |
| Date |  |

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| Icon  Description automatically generated | **PART G****FURTHER INFORMATION** |

1. All information in this document is provided in good faith and represents Plantlife’s view of the service Plantlife requires. Plantlife reserves the right to amend the specification at any time during the Tender process.
2. Part D of this invitation includes a comprehensive list of the information and documentation required to tender. If you are unable to comply with a request for information or provide the documentation requested then a written account explaining the absence of the information must accompany the return of this tender. Please be aware that the failure to respond to any of the questions, without a written reason, may result in a negative evaluation of that element within the overall evaluation of this document.
3. Suppliers should ensure that their tenders are clear and concise.
4. Suppliers are advised that any approaches to Plantlife following the opening of tenders other than through agreed channels could lead to disqualification.
5. Plantlife may require supplementary information or clarification or further evidence of the information given. If appropriate, Plantlife may wish to visit reference sites given as evidence of relevant experience.
6. Plantlife may request interviews with all or a selection of applicants or none. Applicants will be notified in due course. The ability of suppliers may also be determined by, amongst other factors, references, certification, and site visits.
7. Please answer the questions specifically for your company, NOT for the group if you are part of a group of companies. Please note the term “Company” refers to: Sole proprietor, partnership, incorporated company, co-operative, or voluntary organisation as appropriate.
8. During the term of this agreement and for 1 year thereafter, neither party shall solicit to work for it any person who is or was employed by the other party and who has been involved in the provision of the Services at any time during the preceding 12 months. For the avoidance of doubt, if a person who is or was employed by the other party at the relevant time responds to a publicly advertised recruitment campaign, the recruiting party shall not be deemed to have solicited that person from the other party. If either party is in breach of this it shall pay to the other party an amount equivalent to the gross salary paid by that other party to the relevant employee for the final 12 months of employment.
9. No charge will be made to Plantlife by applicants for any preparation costs accrued during the tender process, whether the applicant was successful or not.
10. You are invited to submit your best offer for the work as detailed above. Plantlife reserves the right to undertake post-tender negotiations.
11. If you require any further information or clarification regarding this tender please contact Rachel Jones by 14:00 on 6/10/2023 by email Rachel.jones@plantlife.org.uk
12. It should be noted that in any formal contract that is subsequently entered into, reference will be made to the detailed information provided in the formal response to this tender document provided by the successful organisation. Answers and information given in your reply will therefore become a binding part of the contractual relationship between yourselves and Plantlife.
13. Plantlife does not bind itself to accept the lowest or any Tender, and reserves the right to accept part only of a Tender. Plantlife reserves the right to procure individual elements of the required solution from one or more supplier if appropriate.