SSSI Monitoring Framework Contract Form

PART 1
CONTRACT DETAILS, SPECIFICATION AND EVALUATION CRITERIA

Contract title: Upland Breeding Bird surveys – Upper Teesdale SSSI

Contract Manager:	[redacted]	**Team within Natural England:**	**Northumbria Area Team**
Contract Manager's email/phone:		**Date:**	**20/03/2024**
Budget holder Name:		**Cost centre code:** **Objective code (if applicable):**	
Framework Number:	**SMEF-L1BRD-24-16**	**SME Contract Number (if applicable):**	
Atamis number (if applicable):		**Commercial Contact (if applicable):**	

SME Approver & Date	
[redacted]	20/03/2024
Project Start Date	01/04/2024
Project Completion Date	01/11/2024
Type of contract	Mini Comp
Lot number	1
Proposal return date: ***(no less than 10 working days from current date)***	26/03/2024

Evaluation criteria: (for mini-competitions project managers need to prepare and complete an evaluation model on receipt of tender submissions) **Please note price and quality weightings are fixed. Quality thresholds are also fixed and must be used.**

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**	**40%**
Quality	**Weighting**	**60%**
Quality Sub-Criteria Weightings:		
1. Technical experience in the specified methods (include CVs with relevant information only, contractors experience and accreditations) Knowledge of the SSSI may also be included *(Minimum score threshold 70 will apply)*	**Weighting is fixed**	50%
2. Capacity, schedule of works, contingency Please confirm you have the resource available and provide a proposal of your visits. Please address risks to the project (excluding H&S) and how you will mitigate against them (e.g., resource)	**Weighting is fixed**	30%

(Minimum score threshold 50 will apply)		
3. Sustainability Considerations (distance from the SSSI/s, total mileage) Local suppliers will score more highly. Please do not include sustainability policies in your answer. *(Minimum score threshold 20 will apply)*	**Weighting is fixed**	20%

Specification *Note* – *the contractor's proposal will be limited to a maximum of **6 pages*** unless otherwise indicated in your specification.*
**Page limits should take into account the amount of information being requested and be sufficient for the Contractor to provide the level of detail you need to undertake a comprehensive evaluation.*

1. Description of work required – overall purpose & scope (including reporting requirements).

All projects will involve recording pressures, climate impacts and providing comments on Monitoring Specifications unless stated otherwise.

Aims

The purpose of this contract is to:

- Determine and describe the location(s) and quality of:
  - Assemblages of breeding birds – Upland moorland and grassland with water bodies
  - Aggregation of breeding birds – Golden Plover
  - Aggregation of breeding birds – Dunlin
  - Aggregation of breeding birds – Redshank
  - Aggregation of breeding birds – Snipe
  - Aggregation of breeding birds – Lapwing
  - Aggregation of breeding birds – Curlew
  - Aggregation of breeding birds – Merlin
  - Aggregation of breeding birds – Peregrine
  - Aggregation of breeding birds – Short eared owl

- at the following sites:
  - Upper Teesdale SSSI (Map annex 1)
- Make an overall condition assessment of the feature using standardised survey methods.
- Record details of any 'pressures' observed at the site which may impact on the condition of the monitored feature(s)
- Suggest where current management is working and, where it is not, why that might that be.
- Make comments on the monitoring specification

<u>Upper Teesdale SSSI – Background Information</u>

Upper Teesdale SSSI is outstandingly important for its extensive upland habitats and their associated species. The site includes enclosed northern hay meadows and pastures, as well as large tracts of mountain and moorland with varied and extensive mires and flushes, and outcrops of sugar limestone. The calcareous grasslands and flushes support unique plant communities that contain many rare species. Other valued habitats present include the River Tees itself with its associated river shingles, an upland water body, cliffs and screes of varying chemistry and the largest stands of Juniper in England. The fauna is especially diverse with a very significant assemblage of invertebrates.

Avifaunal assemblages typical of moorland allotments and streamsides are present. Particularly notable are moorland breeding waders; including, high densities of golden plover, dunlin, redshank, snipe, lapwing and curlew. There are also populations of raptors, including merlin, peregrine and short-eared owl and the strongest population of Black grouse in England.

The Upper Teesdale SSSI is broken in to 88 management units with the interest features of the site occurring across multiple units.

See section 1.1 for standard text on pressures, climate change and monitoring specification comments.

Targets

Assemblage Upland moorland and grassland without water bodies: maintain the above 75% of assemblage score at notification (35) for SSSI. Note Lapwing is not included in scoring list but is considered an important species for the site as such please record information for it in the same method as the scoring species.

Aggregation of breeding birds

Golden Plover – maintain the population above the 75% of the baseline value (=452 pairs). Baseline survey taken from the 2006-07 SPA survey. At this time there were 602 pairs in the SSSI.

Dunlin – maintain the population above the 75% of the baseline value (=27 pairs). Baseline survey taken from the 2006-07 SPA survey. At this time there were 35 pairs in the SSSI, using units 3,8,10,12,50,16,18,75,83,95.

Redshank - maintain the population above the 75% of the baseline value (= 72 pairs). Baseline survey taken from the 2006-07 SPA survey. At this time there were 96 pairs in the SSSI.

Snipe - maintain the population above the 75% of the baseline value (= 134 pairs). Baseline survey taken from the 2006-07 SPA survey. At this time there were 178 pairs in the SSSI.

Lapwing – maintain the population above the 75% of the baseline value (=640 pairs). Baseline survey taken from the 2006-07 SPA survey. At this time there were 853 pairs in the SSSI.

Curlew – maintain the population above 75% of the baseline value (=367 pairs). Baseline survey taken from the 2006-07 SPA survey. At this time there were 489 pairs in the SSSI.

Merlin, Falco columbarius: Maintain the population above 75% of the baseline value (=8 pairs). Baseline data for merlin are taken from the records of the Durham Raptor Group. There are (up to) 10 breeding pairs of merlin on the SSSI spread across 8 site units (1,2,10,17,41.75,82 and 85).

Peregrine – maintain a population of at least one breeding pair. Peregrines breed only occasionally within the SSSI. They usually choose a core group of central SSSI units with most typical nesting habitat (units 75, 79 and 82) and may breed facultatively elsewhere (units 8, 69 and 83). Of the attributes used to measure condition, habitat usage away from the breeding site is wide; habitat extent cannot thus be considered limiting, and therefore, is not considered. Disturbance is however, an important attribute affecting favourable status and like hen-harrier, there should be a target to prevent disturbance affecting attempts to breed.

Short eared owl - maintain a population of at least one breeding pair.

Hen harrier - Unlike peregrine, hen harrier was neither included in the SSSI bird assemblage at the time of notification, nor present in the SSSI at the time of SPA classification. However, the factor limiting its distribution in large parts of the SPA, including Upper Teesdale SSSI, is considered to be disturbance. As breeding and foraging habitat within the SSSI is considered to be suitable (almost any of the moorland site-units and several of the others could support a pair), the SSSI should be considered at least as potential territory for this species. In view of this, whilst no population target has been set, a target for disturbance recognises that prospecting birds will not respect the boundaries of the constituent parts of the North Pennines SPA. 'Disturbance' attribute: target is to prevent disturbance affecting attempts to breed.

Methodology

Breeding Bird Assemblages and Non-Merlin Aggregrations

A CSM assessment of the status of the breeding bird assemblage features require evidence of possible/probable/confirmed breeding for each species that score towards the assemblage using standard BTO Bird Breeding Status Codes (Annex 3). The list with scoring species is provided in Annex 3. The list was taken from the 1989 guidance as that is the guidance closest to the year of the SSSI designation. Each species listed is able to score towards the assemblage, the score is given by the rank number. An estimate of total numbers of breeding territories and other bird population abundance measures are required for all probable/confirmed scoring species as well as for merlin, peregrine and short-eared owl.

- The survey method should follow Brown and Shepherd (1993) and use 2006-07 North Pennines SPA survey (Shepherd, 2007) as a baseline where possible.
- As per the 2006/07 survey all open areas of within the SSSI, following the same approach as the 2006/07 SPA survey. Forest, woodland, copses, hedgerows and extensive areas of scrub should not be surveyed (see SPA map).
- To allow for differences in detection rates between early and late breeding species, two visits should be conducted to all areas surveyed;
    - 1st 1 April – 17 May
    - 2nd 18 May - 27 June.
- Fieldwork should be undertaken between 0800-1800 hrs and only in good visibility (>500m), light winds (Beaufort Scale force 0-4) and dry weather.
- Disturbance should be kept to a minimum, do not visit nests. If your presence disturbs a bird, withdraw immediately and observe from a distance.
- The survey should cover ground systematically with a constant search effort. Walk routes should follow raised ground to ensure all areas are clearly visible, all points should be approached to within 125m. Between 20-25 minutes should be spent within each half km-square (500m x 500m), proportionately less in boundary part squares. Surveyors should pause at regular intervals to scan and listen for calling and singing birds.
- The location and activity of birds should be recorded on to 1:25,000 scale maps using standard British Trust for Ornithology (BTO) codes (Marchant 1983). Careful attention should be given to recording behaviour indicative of breeding (see below).
- When individuals or pairs of birds are encountered, efforts should be made to establish whether birds were different from those previously encountered. This will involve careful attention to the whereabouts and movements of birds, together with birds' sex and plumage characteristics. Where necessary, surveyors can retrace steps to check the continued presence of previously recorded birds.
- A point location should be given for all registrations, recorded at the first point the bird was detected or, if breeding behaviour is observed, at the first point breeding behaviour is observed. Birds merely flying over and showing no signs of breeding behaviour or attachment to the area should be ignored.
- At the end of each visit, a summary map should be compiled showing the location of each identified territory or breeding pair. The following observations of breeding behaviour should be considered diagnostic:
    - Song, courtship or territorial display
    - Territorial dispute
    - Nest building and hole excavation
    - Agitated behaviour by adult bird(s) indicating the presence of a nearby nest or young (e.g. repetitive alarm calling, distraction display)
    - Adult(s) carrying food
    - Presence of newly fledged young
    - Adult(s) removing a faecal sac.

- Where a number of breeding individuals are present and it is not possible to determine the number of breeding pairs, registrations of individual birds were deemed to represent discrete breeding territories/pairs

if the distance between them is more than 500m (200m in the case of dunlin). Whilst it is recognised that these distances are arbitrary and that territory size varies both inter- and intra-specifically, this approach produces a standardised index of abundance based on the distance that members of a breeding pair are likely to move during each visit. In cases where two individuals are considered to constitute a pair of birds, the location of the pair should be placed centrally.

- Population estimates should be derived by comparing the summary maps for the two visits. Territories plotted during each visit are considered to be separate from one another if they are located more than 1km apart (500m for dunlin). Again, these distances are chosen arbitrarily to reflect the distances birds could plausibly move between visits. The location of territories mapped in both visits should be plotted centrally.

Merlin Aggregation (Please provide costings for the surveys with and without the Merlin visits)

- To be carried out on Widdybank Fell (centre NY830300) and West Common (centre NY800330) - to the south of the B6277, and the north side of Mickle Fell (centre NY 810260). These areas have not been covered by the Durham Upland Bird Study Group. For the rest of the SSSI they will provide population estimates for Merlin.
- At least four visits, one each month (April-July), with follow-up visits where necessary to confirm breeding ·
- These surveys can be conducted at any time of day·
- Avoid surveying in wet or windy conditions (winds above Beaufort force 4)·
- Areas of heather moorland or bracken, young plantations with small trees and heather cover, plantation edges, including the edges of open areas within afforested blocks and the edges of rides within 100m of the plantation/moorland boundary and open woodland usually below 600m altitude.
- The following habitats can be excluded from the survey: towns and villages, enclosed in-bye pastures, arable farmland, areas of grassy moorland which lack trees, bushes, crags, stream banks and land above 600m (Unless merlins are known or suspected to nest)
- Disturbance should be kept to a minimum, do not visit nests. If your presence disturbs a bird, withdraw immediately and observe from a distance.
- The first visit in April:
    - Get within 500m of every spot in the survey site
    - Map all those areas that are unsuitable as potential nest-sites so that these areas can be excluded from further searching
    - Locate all crows' nest as these may be used by nesting merlins
    - Search for merlin activity and signs of merlins.
- In May, June and July
    - Search all suitable areas, recording all merlin observations and attempt to confirm breeding at all potential nesting sites
- Alternate the direction the route is travelled between visits. On each visit to the site the following search methods should be used:
    - Moorland habitat, check along fence-lines and around crags, steep stream banks, rocks, grouse butts, stone walls/dykes, hummocks, recently burned areas, isolated trees and other perches for whitewash (faeces), prey remains, pellets and moulted merlin feathers. Check old crows' nests
    - Open birch, pine or alder woods, tree-lined gorges and rivers, search the woodland for crows' nests and check for birds leaving the site as you approach
    - At sites with forest edge and open areas within afforested blocks, inspect fence posts, etc, for feathers and whitewash. Check plantation edges along rides for about 100m from the plantation/moorland boundary. Check perches such as boulders and walls in moorland near the forest edge. · On the May-June visits, alternate searching with watching from a vantage point
- If you find Merlin's on the first (April) visit, note the location and retreat to a safe distance to watch. No further searching is required within a 1km radius of that location. On subsequent visits, return to watch form a vantage point to establish breeding.
- Signs of merlin presence such as moulted merlin feathers, prey remains and pellets can only be taken as indicating presence
- You can confirm occupation of a new site and count the observations as evidence of a probable breeding pair if you see or hear at least one merlin or find fresh signs on two visits separated by one week or more.
- You can confirm breeding if you see an adult returning to a nest, if you find eggs or young, if the adults are repeatedly alarm calling at the appropriate time or if the signs of occurrence indicate that a pair has probably bred

- Produce a summary map that includes the habitat searched, the habitat excluded, the locations of all breeding pairs (with suspected nest site also marked) and the locations of any other registrations.
- Please record all probable and confirmed breeding records on a separate Excel spreadsheet of coordinates. Include within this numbers of individuals, pairs, number of nests, number of chicks or fledged young seen. Note nest site with relevant code: “G” ground site, “T” tree site or “C” crag site. Only enter “C” if the crag site is inaccessible to foxes, if not enter “G”
- See Rare Breeding Birds panel guidance for more information

Indicative Survey Locations

If the area is not well known to the contractor pre-survey reconnaissance of the indicative survey locations should be carried out to determine the general nature and extent of the habitat/terrain and to confirm suitable locations for survey transects. It is estimated that a preliminary walk-over assessment of all the proposed survey location would take no longer than 4 days. Following the initial reconnaissance proposed transects will need to be sent to the project officer for review.

Habitat

The broad habitat should be noted, with clear and concise recommendations for management to benefit individual species or groups of birds. Along with any negative impacts of current management or environment are having on the assessed species (pressures). This should be made for each unit the species is found within.

Analysis and reporting outputs

Primary Outputs

- A concise fortnightly update to Natural England detailing progress with surveys and any issues faced.
- An Excel spreadsheet should be included showing the six-figure x:y co-ordinates of the start and end points of the transect routes and the locations of registrations of confirmed/probable breeding bird species from the assemblage or specific species for aggregations.
- All copies of annotated Maps and GIS shapefiles.
- A written survey report (word and PDF)

Reporting and presentation of data:

A report will be produced to include introduction, methods, limitations, results and discussion, together with maps showing the locations of transect routes. Precise locations of rare and sensitive species should not be included in the report. Such information should be provided in a separate password-protected version of the report with GIS location data provided in password-protected files.

- Introduction – including information about the site and feature(s)
- Methods, including any limitations
- Results, including:
  - Calculation of the breeding bird assemblage score on the SSSI
  - Species listings alongside Breeding Bird Status Codes (estimates should be made of the number of territories of the probable and confirmed breeding species)
  - Habitat description and mapping (Using Phase 1 methodology)
  - Comparison of the current habitat extent to that at the time of notification.
- Discussion, including:
  - Maps showing the locations of transect routes.

- Maps of territories and location of nests
- Additional descriptive sections in the report relating to any bird species of conservation interest and concern that are additional to the assemblage scoring species (e.g., if any newly colonising species were recorded)
- A general description of the habitat should be included, with clear and concise recommendations for management to benefit individual species or groups of birds.
- Additional individual maps and summaries of results for each unit on the SSSI
- As described in the data format section above, an Excel spreadsheet should be included showing the six-figure x: y co-ordinates of the start and end points of the transect routes and the locations of registrations of confirmed/probable breeding bird species from the assemblage.

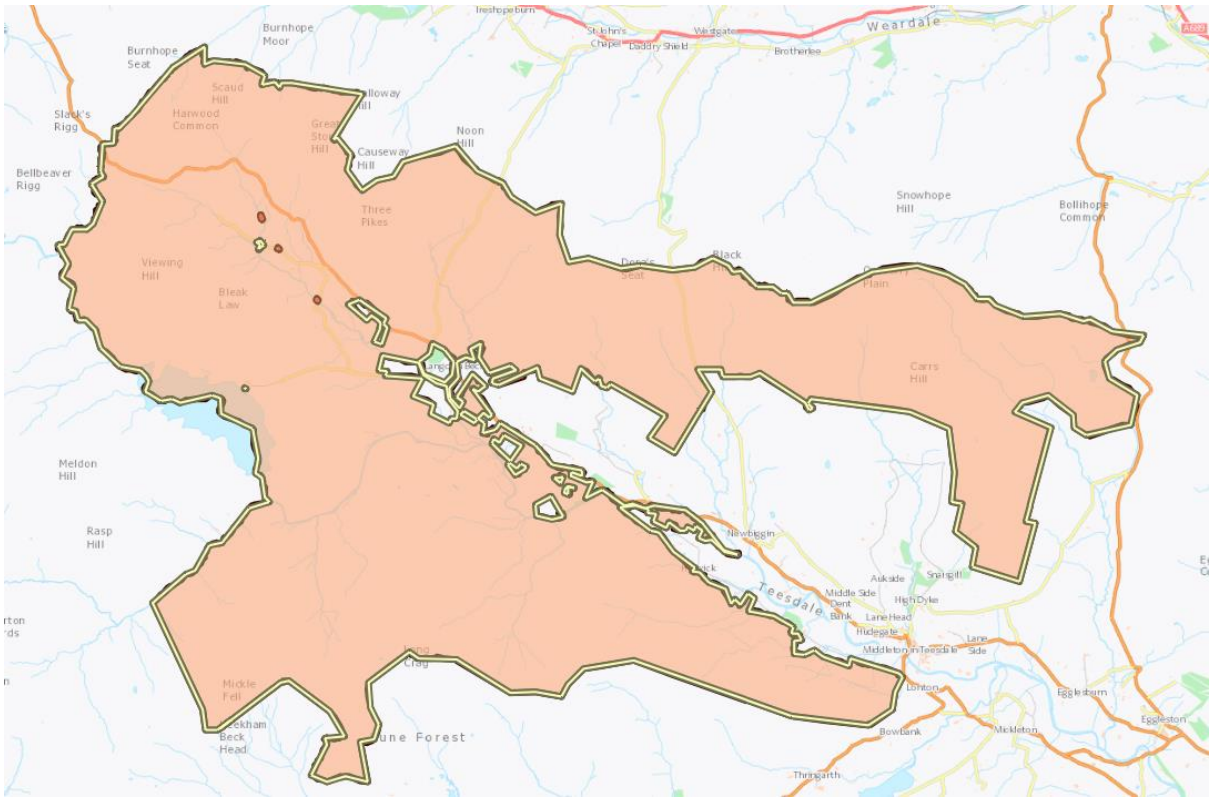
a) Issues with the Monitoring Specification.

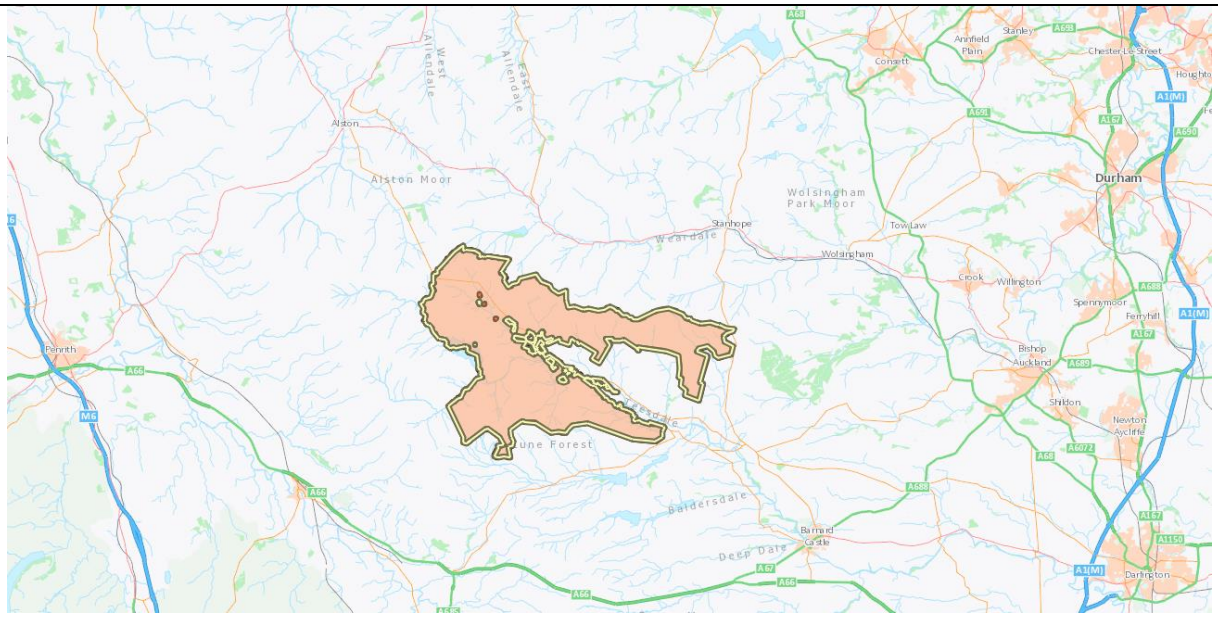
- None

b) Previous information that will be available to contractors upon contract award

- Raptor group Merlin data

Annex 1: Site maps





Annex 2: Species scoring list

Upland moorland and Grassland with Water Bodies (1989 scores)

Black-throated Diver	4	Golden Plover	2
Red-throated Diver	3	Temminck's Stint	6
Greylag Goose (non-feral)	4	Dunlin	3
Wigeon	4	Snipe	2
Teal	3	Curlew	2
Pintail	5	Whimbrel	4
Scaup	6	Redshank	2
Common Scoter	5	Greenshank	3
Goldeneye	5	Wood Sandpiper	6
Red-breasted Merganser	3	Common Sandpiper	2
Goosander	3.5	Red-necked Phalarope	5
Red Grouse	1	Great Skua	3
Black Grouse	3	Arctic Skua	3
Little Grebe	2.5	Snowy Owl	6
Slavonian Grebe	5	Short-eared Owl	3
Hen Harrier	4	Grey Wagtail	2
Buzzard	3	Dipper	2
Golden Eagle	4	Raven	3
Osprey	5	Chough	4
Merlin	4	Ring Ouzel	2.5
Peregrine Falcon	4	Whinchat	2
Twite	2	Stonechat	2
Wheatear	2		

Threshold site-index values: 34

Annex 3: Breeding bird status codes

Breeding Status Codes

Non-breeding	
F	**F**lying over
M	Species observed but suspected to be still on **M**igration
U	Species observed but suspected to be s**U**mmering non-breeder
Possible breeder	
H	Species observed in breeding season in suitable nesting **H**abitat
S	**S**inging male present (or breeding calls heard) in breeding season in suitable breeding habitat
Probable breeding	
P	**P**air observed in suitable nesting habitat in breeding season
T	Permanent **T**erritory presumed through registration of territorial behaviour (song etc) on at least two different days a week or more part at the same place or many individuals on one day
D	Courtship and **D**isplay (judged to be in or near potential breeding habitat; be cautious with wildfowl)
N	Visiting probable **N**est site
A	**A**gitated behaviour or anxiety calls from adults, suggesting probable presence of nest or young nearby
I	Brood patch on adult examined in the hand, suggesting **I**ncubation
B	Nest **B**uilding or excavating nest-hole
Confirmed breeding	
DD	**D**istraction-**D**isplay or injury feigning
UN	**U**sed **N**est or eggshells found (occupied or laid within period of survey)
FL	Recently **FL**edged young (nidicolous species) or downy young (nidifugous species). Careful consideration should be given to the likely provenance of any fledged juvenile capable of significant geographical movement. Evidence of dependency on adults (e.g. feeding) is helpful. Be cautious, even if the record comes from suitable habitat.
ON	Adults entering or leaving nest-site in circumstances indicating **O**ccupied **N**est (including high nests or nest holes, the contents of which can not be seem) or adults seen incubating
FF	Adult carrying **F**aecal sac or **F**ood for young
NE	**N**est containing **E**ggs
NY	**N**est with **Y**oung seen or heard

1.1 Pressures, Climate Change, Access and Monitoring Specification Comments

Pressures

'Pressures' are observations of land management or other factors at a site that have the potential to impact on the condition of designated features. These are recorded as part of monitoring surveys and used to inform Natural England's engagement with land managers. A list of potential pressures to be assessed will be supplied on contract award. Ideally, these should be recorded using ArcGIS Field Maps - Natural England can provide shapefiles for this purpose. Pressures recorded should be flagged and summarised in the final report according to the following template:

Broad Pressure	Detailed Pressure	Date Identified	Risk to Condition (High/Med/Low)	Pressure Status (Active/Potential)	Comments

Climate
An assessment of the current and future impacts of climate change on the condition of the feature (and associated habitats if relevant) is required for all features based on:

- previous data trends (if available)
- current condition
- future impacts (based on professional knowledge and over available sources).

The contractor should suggest any potential management mitigations or changes in designation that may be appropriate based on projections. Documents to assist with this process will be made available on contract award.

Access
Natural England arranges access permission with landowner/managers well in advance of the surveys and provides them with approximate timings of site visits. Any relevant information they supply regarding access arrangements or restrictions will be passed to the contractor on contract award.

Where land owners/managers request to be contacted again prior to each survey visit, their contact details will be securely shared with the contractor. At some sites, this information will be supplemented by an associated map. The contractor will then be expected to liaise directly with landowners/managers to arrange specific dates and times for access. Contact should ideally be made at least 48 hours prior to a survey visit, with any refusals or other issues arising notified to the Natural England project officer within three working days.

Monitoring Specification Comments

The contractor should provide interpretation of the accuracy, appropriateness and quality of the information and targets as set out in the Monitoring Specification Documents. These comments should detail whether the current document provides sufficient information to accurately monitor the feature(s) which this contract covers. Where amendments or additions are required, these should be described in sufficient detail for staff to update the documents.

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

- Strong experience in CSM compliant breeding bird surveys, with knowledge and experience of surveying SSSI's and condition assessments for breeding birds
- Understanding of Phase 1 methodology with experience surveying a range of habitats and creating accurate GIS maps

3. Proposed programme of work. Key dates and milestones

Intended data of Contract Award 28/03/2024
Intended Contract start data 01/04/2024
Inception meeting W/C TBC
Draft report submitted by TBC
Final report by 01/11/2024

SSSI Monitoring Framework

PART 2

QUOTE

To be completed by Framework Contractor

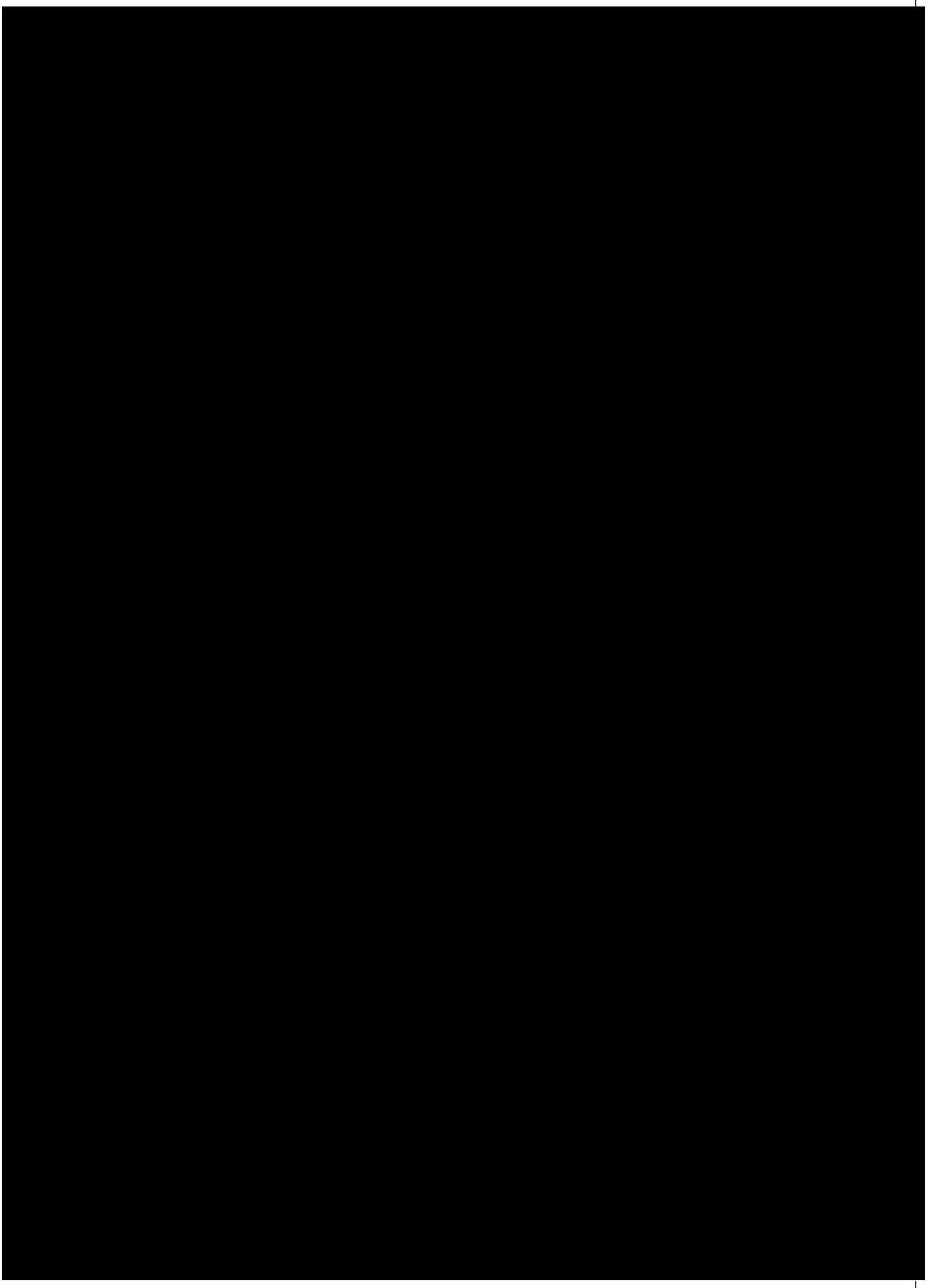
Framework Contractor Company name	
Contractor Project Manager name	

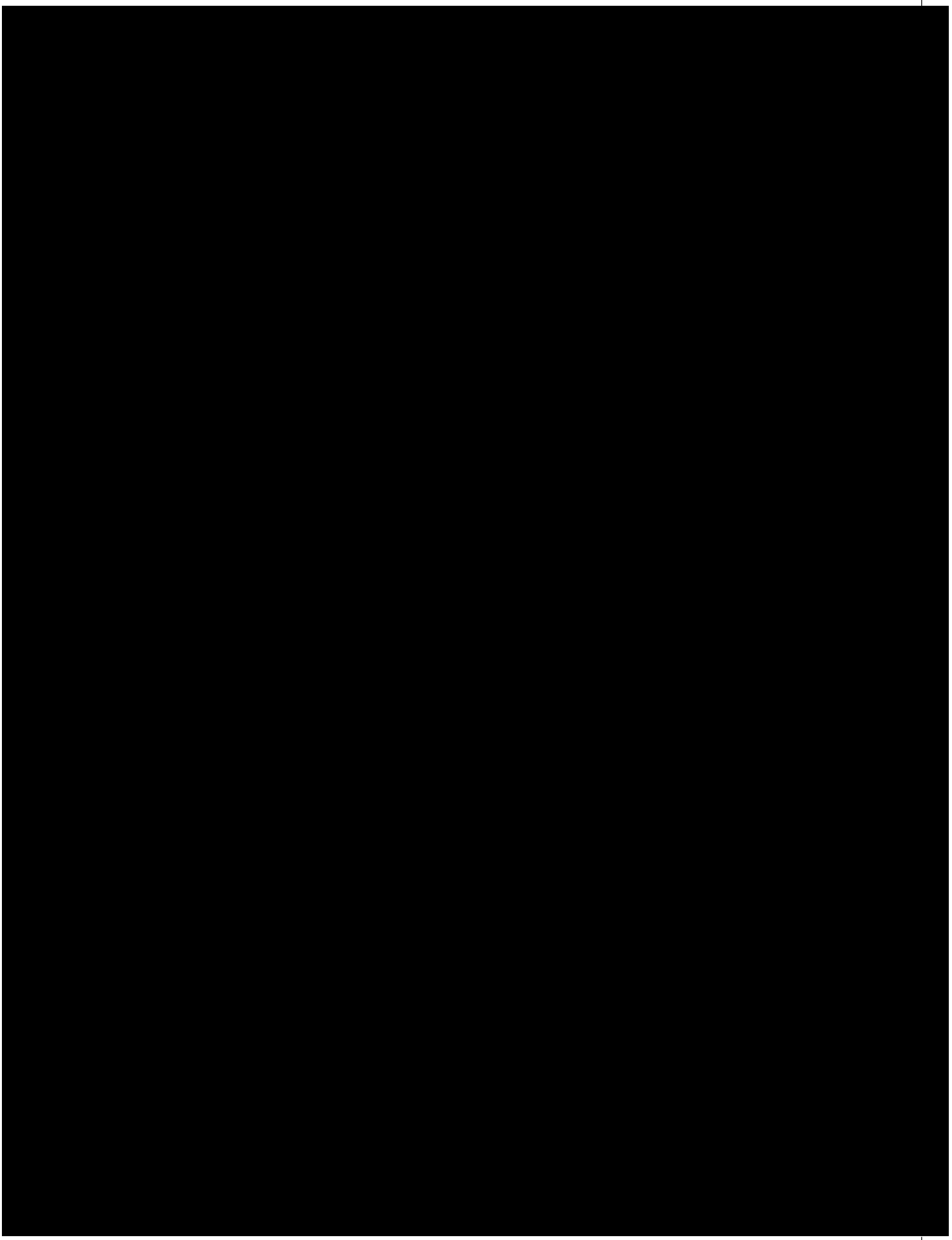
[redacted]

Note: Your proposal must not exceed 2 sides of A4 plus the Costs Proposal in Section 4 (unless indicated above). Attachments must not be included unless requested with the exception of a project chart and full cost schedule.

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 Natural England's Project Manager.

[redacted]





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[redacted]

Date:

[redacted]

Terms and Conditions	All call off contracts under the SSSI Monitoring and Evaluation Framework are subject to the terms and conditions agreed at framework award.
You must have a purchase order number from Natural England before you start any work in connection with this proposal.	

SSSI Monitoring and Evaluation Framework

PART 4

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 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 a Atamis reference has been provided.

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 (Framework Manager / Date**