

22503 ECOLOGICAL SERVICES FRAMEWORK 3 (EcoSF3)

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

To be completed by Contracting Authority Project Manager

Project title: Statutory Biodiversity Credits Scheme: Barrington Hill Feasibility Study and Outline Habitat Management Plan

Bravo project ref (if applicable): n/a

Date: 14 December 2022

**Contracting Authority
(Environment Agency;
Natural England; Defra
etc)**

Natural England

REDACTED Under FOIA Section 40, Personal Information

REDACTED Under FOIA Section 40, Personal Information

Project Manager:

REDACTED Under FOIA Section 40, Personal Information

**Project manager's
phone number:**

Budget holder:

REDACTED Under FOIA Section 40, Personal Information

Cost code:

REDACTED Under FOIA Section 43, Cost

**Commercial Contact (if
applicable):**

n/a

**Project manager's
email:**

REDACTED Under FOIA Section: 40, Personal Information

Project Start Date

1 February 2023

Project Completion Date

30 June 2023

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

**Direct
Award**

Mini-comp

X

Call off from Lot number (please tick)

1

2

3

4

x

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

13th January 2023

Evaluation criteria: (for work over £10k project managers need to prepare and complete an evaluation model on receipt of tender submissions – see [EcoSF3 pages](#) on EA Easinet for template or contact the Framework Manager if other Authority). Please note price and quality weightings are fixed (although you may alter the quality sub-criteria weightings).

Optional: If a minimum score threshold is set for any criteria this must be stated in the table. If not used, please delete the wording.

**Failure to meet the minimum score threshold stated will result in the bid being
n the process with no further evaluation regardless of other quality or price**

Contractors:

Price

Weighting

50%

Quality	Weighting	50%
Quality Sub-Criteria Weightings:		
Approach & Methodology <i>(minimum score threshold 4 will apply)</i>		40

Proposed Staff (inc Pen Portraits) and Contractor's experience/accreditations.		25
Project Management (including project plan)		25
Health & Safety	Optional include weightings if applicable	5
Sustainability Considerations (e.g. Travel management, reduction of carbon footprint, bio-security etc.)		5
Quality Assurance		N/A

Specification

Note – the contractor's proposal will be limited to a maximum of **6 pages*** (including pen portraits for key staff) unless otherwise indicated in your specification. **Do not** ask for full CVs to be provided.

You should set out the information/details you require the Contractor to return in their submission for each section. Do not request RAMS or similar risk assessments, BIM plans etc be returned with submissions, these should only be requested from the successful contractor at the commencement of the contract.

*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.

Please detail the Contractor's required Limitation of Liability. If no sum is stated, the Contract Price for the Services performed or to be performed under the Contract or five million pounds whichever is the greater will apply.

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

Net gain is an approach to development that aims to leave the natural environment in a measurably better state than beforehand. The 25 Year Environment Plan sets out the commitment to embed an environmental net gain principle for development including housing and infrastructure.

The Environment Act received royal assent in November 2021. The Act makes it mandatory for new housing and other development in scope to achieve at least a 10% net gain for biodiversity – a requirement that habitats for wildlife must be left in a measurably better state than before the development as measured by the Biodiversity Metric. Mandatory biodiversity net gain (BNG) is expected to come into force in November 2023.

Where net-gain is not achievable on site, under mandatory BNG, developers will be able to enter into agreements with landowners and managers to fulfil their BNG commitments off-site. Landowners and managers in these agreements will be paid to commit to carrying out work to deliver, monitor and maintain biodiversity units for at least 30 years.

The risk that the market supply of habitat will not satisfy demand, because the market is still establishing, will be addressed by government's plan to provide statutory biodiversity credits that can be purchased by developers where BNG units cannot be found on the market. The income generated through the sale of statutory biodiversity credits will be invested into habitat creation and enhancement projects.

Natural England (NE) is working with and advising Defra on the design and development of the Statutory Biodiversity Credits Scheme, including the mechanisms for sale and investment. The process of selecting projects for investment will include a Feasibility Study stage that will determine the suitability and feasibility of the habitat creation/enhancement proposals of eligible projects. Successful projects may then progress to a detailed design stage. We are looking to test this Feasibility Study stage working in partnership with Barrington Hill NNR team.

Barrington Hill National Nature Reserve (NNR) is a 16.1ha (39.5 acre) NNR located in Somerset. The site comprises four species rich lowland meadows surrounded by well-established hedges on gently sloping clay-rich soils.

In 2022 the size of NE's landholding here was doubled by the acquisition of adjacent land comprising cropped field and permanent grassland and river, providing an opportunity to complement the NNR. An initial proposal for habitat creation/enhancement on the site includes: creation of lowland meadow, scrub, wet woodland, wet scrapes, leaky dams, wet grassland.

The purpose of this commission is to:-

- Undertake a compilation of existing desktop evidence for the outline Habitat Management and Monitoring Plan (HMMP)
- Using this information, assess the feasibility and appropriateness of the current proposals, and if necessary make recommendations for changes.
- Prepare an agreed costed outline Habitat Management and Monitoring Plan.
- Undertake a Biodiversity Metric baseline survey, and a forecast Biodiversity Metric uplift resulting from implementing the HMMP.
- Provide feedback on this approach to project development as part of the design of the Statutory Biodiversity Credits Scheme.

Scope of contract

The report should:-

1. Be predominantly desk based, but include field survey where required for completion of the Biodiversity Metric baseline assessment including river condition assessment, using the latest version of the biodiversity metric
2. Be proportionate to the scale of the site.
3. The feasibility study is limited to the new land and does not include the existing NNR
4. NE should agree with, and own, the outcomes of the report.

Any existing information held by NE about the acquired land including the initial habitat creation/enhancement proposals, initial metric baseline assessments (excl. river), soil analysis will be shared with the successful contractor to inform the feasibility study.

Background Information issued separately

Annex A provides information on the site and proposals.
The HMMP template (at test stage) is included in Annex b

Requirements:-

1. Undertake the gathering and collating of the initial evidence base for an outline Habitat Management and Monitoring Plan for the newly acquired land. The evidence base should include the scope as specified in the table below
2. Assess the feasibility of the existing proposals for habitat creation on the land against the best outcomes for nature and the constraints and opportunities identified by the evidence.
3. Discuss any changes that may be required to the original proposals and agree these with the client.
4. Consider opportunities for incorporating wider environmental benefits at the outset, including contribution to the nature recovery network and potential for access, carbon protection and sequestration, flood risk management, water quality improvements etc.
5. Provide an outline Habitat Management Plan to deliver the agreed proposals. The outline habitat management plan should follow the format of the draft NE BNG HMMP template, demonstrate a clear thought process from evidence to actions. Actions should be addressed in broad terms e.g. stock fence, footpath, mixed scrub, leaky dam etc. to a level that is possible to estimate costs from.
6. Provide estimate costings for the capital and maintenance costs for delivery of the plan over a 30 year period.
7. Complete a baseline Biodiversity Metric assessment and uplift forecast assessment of the agreed proposals.
8. To provide a two page assessment of the Feasibility Study design as part of the process of developing a Statutory Credits Project.

The report should include, where relevant, the following:-

Report Headings	Contents
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	<ul style="list-style-type: none"> • Access / services • Public access / activity • Local strategy context – incl. NRN/LNRS/ habitat priorities • Local Plan context • Climate change risk 	
<p>Baseline Collection of current site information</p> <p><i>The primary criterion for identifying opportunities for a given habitat is the physical ability of land to support that habitat</i></p>	<ul style="list-style-type: none"> • Baseline habitat information inc Baseline metric calculation & qualitative summary of baseline habitats (NOTE partial survey data exists for hedgerows and area habitats, NOT river) Summary of the current • land uses • Baseline date selected and justification (especially where different from survey date) • Important existing ecological features and their influence on the feasibility of BNG (designated sites, protected and priority species, irreplaceable habitats, ecosystem services) • Maps and figures to illustrate habitat types and extents 	
<p>Appraisal of options / Feasibility of proposals</p>	<ul style="list-style-type: none"> • Additionality- is the site subject to existing agrienvironment or other agreements? • Resource requirements (who to deliver and ability to deliver) • Assessment of the landowner's ability to deliver the habitat creation and management, taking into account knowledge, skills, partnership arrangements, financial sustainability. • Habitat creation/ restoration/ enhancement proposals 	

	<ul style="list-style-type: none"> • Preferred option/s and why based on the following ecological principles:- <ul style="list-style-type: none"> ○ Habitat connectivity ○ Natural ecosystem functioning ○ Fit with existing or developing biodiversity plans ○ Consideration of impact of nutrient contamination on the site and adjacent protected sites. ○ Consideration of species conservation priorities. • Examination of case studies i.e. what has/ hasn't worked in the past • Preliminary biodiversity units/ predicted uplift • Habitat modelling and/ or indicative mapping • Risks and constraints, impacts and opportunities identified • Financial sustainability of proposals • Duration of project (if longer than 30 years) • Stakeholder mapping • Recommendations/ Conclusions 	
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Exemplar projects <i>Wider benefits</i>	<ul style="list-style-type: none"> Initial consideration of how the project may deliver wider environmental benefits, for example: <ul style="list-style-type: none"> Climate mitigation (carbon capture/ flood risk) and climate adaptation <ul style="list-style-type: none"> Ecosystem services Other benefits to biodiversity People benefits e.g.access, learning
Summary / Next steps	<ul style="list-style-type: none"> Summary of findings Summary of requirements Project timeline
Conclusion	<ul style="list-style-type: none"> Consultation on what can be achieved and what is needed to maximise the likelihood of success

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

Approach and Methodology (including Health & Safety, Sustainability and Quality Assurance unless being evaluated separately):

Clearly set out the proposed approach and methodology for delivering the full scope of each of the main components of the work. Include technical detail where appropriate on methodologies and robustness of approach. Justify the proposed approach by explaining why the methods proposed are the most suitable. Please highlight any alternatives with reasons/benefits of using those alternatives.

Project Management (including programme plan)

Health and Safety

Sustainability

Quality Assurance

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

Understanding of BNG and experience of completing biodiversity metric assessment
 MoRPH River Condition Assessment qualification
 Habitat creation and management experience
 Habitat Management Plan writing
 Use of GIS mapping
 Project costing experience
 Project management experience

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

3. Proposed programme of work and payment table (Detailing specific tasks, key milestones, deliverables & completion date where appropriate)
Payment schedule *We always hold back a minimum of 30% until the project is complete* **should detail the % amount that will be paid after delivery of each task** (. Set out how you want the Section 7 cost proposal table broken down (eg. by key task/sub-tasks; deliverable etc).

Task no.	Task and deliverable	Completion date	Payment schedule
1	Online Start Up meeting	10 Feb 2023	n/a
2	Desktop study of proposals for habitat creation and enhancement, determining options, risks, constraints	15 March 2023	15%
3	Interim evaluation feedback on the design of the feasibility stage in the context of the development process for a Statutory Credits project.	31 March 2023	n/a
3	Completion of baseline assessment using latest version of the Biodiversity Metric, including River condition assessment	1 May 2023	15%
4	Draft outputs	26 May 2023	20%
5	Draft review meeting	9 June 2023	n/a
6	A final electronic report for the feasibility study	15 June 2023	10%
7	Outline habitat management plan	15 June 2023	10%

8	A short evaluation report of the delivery, lessons learnt and any recommendations for the feasibility study	15 June 2023	30%
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Note: The following information is managed at framework level and should not be repeated unless there are specific requirements that relate to your project. General requirements should be covered in Section 1 and be included in the Contractors reply to the Approach and Methodology section unless you are using the optional evaluation criteria. Delete sections if not required.

4. Health and Safety Requirements

Note: Only include if high risk activities being undertaken e.g. working at height, near or over water). Do not request RAMS or similar risk assessments are returned with submissions. These should only be requested at contract award

Working near river for River Assessment

Information to be returned by the Contractor in Part 2 Section 4

Risk assessment approach to carrying out river condition assessment.

5. Sustainability Considerations

Note: Only include if project has high risk/impact sustainability considerations e.g. travel, carbon footprint, specific bio-security risks etc. that need to be managed.

Travel management

Information to be returned by the Contractor in Part 2 Section 5

6. Quality Assurance

Note: Only use if there are specific QA requirements that need to be evidenced e.g. specific UKAS accreditations, chain of custody, reporting protocols etc. Do not request details of standard ISO accreditations.

Information to be returned by the Contractor in Part 2 Section 6

22503 ECOLOGICAL SERVICES FRAMEWORK 3 (EcoSF3)
SCHEDULE B PROJECT FORM AND CONFIRMATION OF INSTRUCTIONS
PART 2
TASK QUOTATION SHEET

To be completed by Framework Contractor

Framework Contractor name

APEM Ltd

Contractor Project Manager name

REDACTED Under FOIA Section: 40, Personal Information

**Contractor project
manager phone
number:**

REDACTED Under FOIA Section: 40, Personal Information

**Contractor project
manager e-mail
address:**

REDACTED Under FOIA Section: 40, Personal Information

8.-Terms & Conditions

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

Notes	<p>You must have a purchase order number from the Contracting Authority before you start any work in connection with this proposal.</p> <p>If you have carried out a protected species survey, data collected must be uploaded onto the NBN network account of this in your quote.</p>	
By signing this form appendices (i) (Insert Contractors Name) used).) agree to provide the services stated above for the Ecological Services Framework 3 Agreement
The contractor is APEM Ltd.		REDACTED Under FOIA Section: 40, Personal Information
Contractor Project Manager: APEM Ltd		REDACTED Under FOIA Section: 40, Personal Information
Signature:		
Date:		

9. Confirmation of Instructions			
(Contracting Authority Project Manager to complete)			
Notes	<p>All agreed post submission amendments to scope, proposal, timetable or costs must be updated in the sections above prior to accepting the proposal.</p> <p>A commission code (also known as an approval reference number) must be obtained from <small>REDACTED Under FOIA Section: 40, Personal Information</small> prior to confirming award and must be quoted on your purchase order.</p> <p>A Bravo ECM reference should be obtained from Commercial if the project has been issued via Bravo and quoted on your purchase order.</p>		
Authorisation	Name	Signature	Date
Contracting Authority Project Manager	REDACTED Under FOIA Section: 40, Personal Information		
Authorised Contracting Authority Signature (usually the budget holder)	REDACTED Under FOIA Section: 40, Personal Information		
DgC Authorised Signature (if required)	REDACTED Under FOIA Section: 40, Personal Information		
Commission Code (i.e. 'approval reference number')	REDACTED Under FOIA Section: 43, Commercial Information		
Purchase order no.	REDACTED Under FOIA Section: 43, Commercial Information		
Bravo ECM Ref (if	REDACTED Under FOIA Section: 43, Commercial Information		

applicable) n/a

The completed Project Form should be returned to the Contractor as authorisation to commence work. A copy must be provided to the named Commercial Lead if the award has been conducted via Bravo.

22503 ECOLOGICAL SERVICES FRAMEWORK 3 (EcoSF3)
SCHEDULE B PROJECT FORM AND CONFIRMATION OF INSTRUCTIONS

PART 3
CHANGE CONTROL SCHEDULE

Notes

To be completed by Contracting Authority Project Manager

Any extensions, price changes or amendments to existing orders need to be discussed with REDACTED Under FOIA Section 40, Person 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 Bravo ecm reference has been provided.

10. Change Control

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

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