

# Tender Document

**Project Name: Facilitating Investment in Natural Clun Habitats (FINCH)**

**Deadline: Thursday 9<sup>th</sup> October at 12 noon**

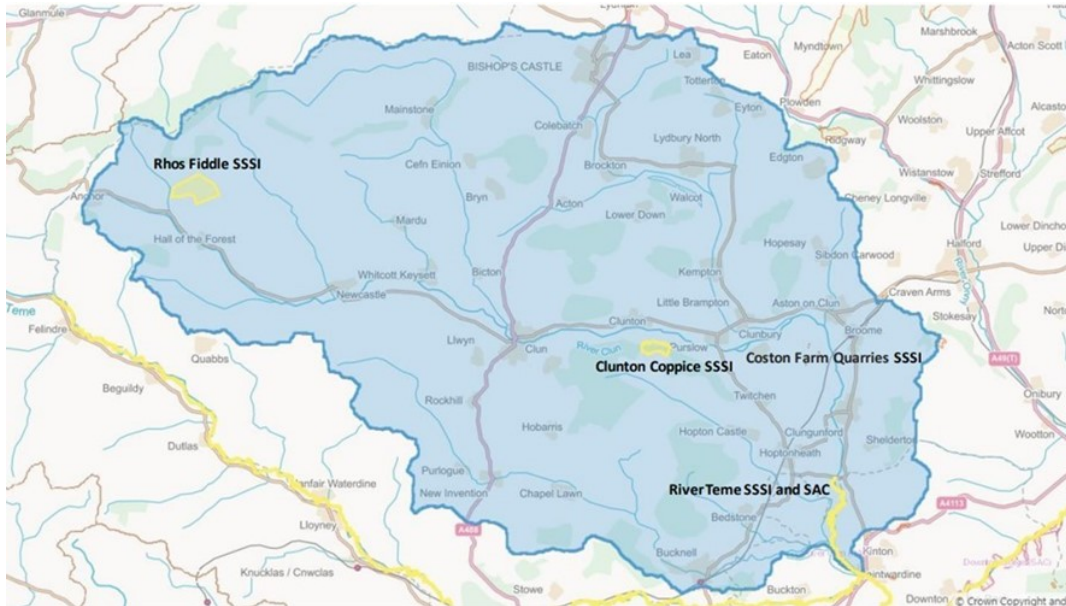


Image: The Clun river catchment

**Type of work:** Investigate the appropriate scale and form of any future market place for ecosystem functions for the Clun and establish how farmers in the Clun catchment can play an effective part in the development of trading models that are under development in the wider area, involving both local and national partners. Also investigating the influence a future Protected Site Strategy can have on this by testing the Landscape Transformation thinking, which underpins the Green Commerce Manual that is part of the initial Advisory Guidance developed last year.

**Employer:** Shropshire Wildlife Trust  
193 Abbey Foregate  
Shrewsbury  
Shropshire  
SY2 6AH

**Contract Administrator:** Renée Wallace, T:07983 539916  
E: [reneew@ShropshireWildlifeTrust.org.uk](mailto:reneew@ShropshireWildlifeTrust.org.uk)

**On behalf of:** Shropshire Wildlife Trust

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## Section 1: Instructions for Tendering

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Tenders must be submitted in accordance with the following instructions and those contained in the accompanying letter. Tenders not complying with these instructions in any particular way may be rejected by Shropshire Wildlife Trust whose decision in the matter shall be final.

1. The tender document must be treated as private and confidential. Tenderers should not disclose the fact that they have been invited to tender or release details of the tender document other than on an “in confidence” basis to those who have a legitimate need to know or whom they need to consult for the purpose of preparing the tender.
2. Persons proposing to submit tenders are advised to ensure that they are familiar with the nature and extent of the obligations to be accepted by them should their tender prove successful.
3. The contract is a fixed price contract.
4. Unit rates and prices must be quoted in pounds and whole new pence.
5. The prices quoted shall remain valid for acceptance for a minimum of 3 months from the tender return date.
6. The tender should be completed in conjunction with the information provided in this document with the following sections to be completed for submission at the time of tendering to receive full consideration, and returned to the email address stated below:
  - Section 6: Schedule of Works
  - Section 7: Form of Tender
  - Section 8: Anti Collusion Certificate
  - Section 9: Contractors Competence Questionnaire
  - Section 10: Environmental Protection Act 1990

[ReneeW@ShropshireWildlifeTrust.org.uk](mailto:ReneeW@ShropshireWildlifeTrust.org.uk)

7. All contractors must complete, sign and adhere to SWT's Health & Safety Code of Practice for Contractors and Sub Contractors and be entered onto their list of approved contractors.
8. The Contractor will notify and obtain written permission from Shropshire Wildlife Trust if they wish to sub-contract all or any part of the work detailed in this tender whose consent will be at their discretion and may be subject to limitations. If such consent is given it shall not

relieve the Contractor from any liability or obligation under the contract and the Contractor shall be responsible for the acts, defaults or neglect of any sub-contractor (or his agents or employees) in all respects, as if they were the acts, defaults or neglect of the Contractor.

9. No unauthorised alteration or addition should be made to any component of the tender document.
10. Tenders must not be qualified but must be submitted strictly in accordance with the tender document or they will not be considered. Tenders must not be accompanied by statements that could be construed as rendering the tender equivocal and/or placing it on a different footing from other's tenders. The Employer's decision on whether or not a tender is acceptable will be final and the tenderer concerned will not be consulted. Qualified tenders will be excluded from further consideration and the tenderer notified.
11. No alternative tender will be considered.
12. It is the Contractors responsibility to obtain plans to identify, locate and comply with all statutory and other provisions to be observed and performed in connection with the Services and shall indemnify Shropshire Wildlife Trust against any claims made as a result of any failure in compliance.
13. Any queries arising from the tender documents which may have a bearing on the offer to be made should be raised with the Contract Administrator as soon as possible by email and in any case not later than 4 working days before the date of submission of the tender.
14. Prior to the date of submission of tenders the Contract Administrator may issue Addenda to clarify or modify the Tender Documents. A copy of each Addendum will be issued to every tenderer and shall become part of the Tender Documents. Receipt of each Addendum must be acknowledged by the Tenderer.
15. Shropshire Wildlife Trust will evaluate the tenders in accordance with the Tender Selection Criteria set out in Section 2.
16. Shropshire Wildlife Trust does not bind itself to accept the lowest or any tender, and reserve the right to accept or reject a tender either in whole or in part or to annul the tender and not award the contract. Shropshire Wildlife Trust will not be responsible for any costs incurred by the tenderer. Every effort will be made to reach a decision on the award of the contracts within 2 weeks of the closing date for submission of tenders.
17. Tenderers must submit with their tender details of the terms of the insurance they propose to effect, or which they already hold and intend to use, to meet the requirements of the conditions of contract.

18. Tenders MUST be returned via email titled:  
**TENDER: FINCH – Nature Markets Review**
19. The date for the return of the completed tender documents is **12 Noon on Thursday 9<sup>th</sup> October 2025**.
20. Due to strict funding requirements for the project **all works are to be completed no later than 31<sup>st</sup> March 2026**. There will be a penalty charge of 1% of the total costs of the works for every week or part week for exceeding the deadline date. Shropshire Wildlife Trust will consider any exceptional circumstances.
21. Any costs incurred for carrying out work which has not been agreed in advance with Shropshire Wildlife Trust will not be considered.
22. All work must be guaranteed by Contractors for 12 months after the date of completion.
23. **"WARNING"**

Please note that the following warning applies in connection with contracts awarded to you by Shropshire Wildlife Trust:

It is a criminal offence, punishable by imprisonment, to give or offer any gift or consideration whatsoever, as an inducement or reward to any servant of the Trust. Additionally such action will negate all current and future contracts.

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## Section 2: Tender Evaluation Criteria

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To ensure best value with regard to price and quality, a panel of SWT staff will evaluate and score Tenders.

This will be based on:

Evaluation Criteria	Score
Commercial (price)	40
Technical (incl capability, resources, methods and evidence of carrying out similar contracts)	40
Ability to complete works within stated timescale	10
Relevant professional certification (incl specific project staff if relevant) and organisational environmental commitment	5
Evidence of relevant insurance (Public Liability, Professional Indemnity and Employer Liability if applicable)	5
Maximum Total Score	100%

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### **Section 3: Project Details/Information (the brief)**

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#### **1. Background:**

This project (FINCH – facilitating Investment in Natural Clun Habitats) aims to research and develop if, and how, a future Protected Site Strategy (PSS) for the river Clun catchment can help lever in private finance investment and enterprise solutions that can help address the pressures on the Clun SAC. The project has a particular focus on research with farmers and land managers in the pilot area to understand how a future Protected Site Strategy could be developed with them, in ways to achieve agricultural transition to low polluting land management systems. Changes to local planning policies, private sector supply chain procurement priorities and government incentive schemes are all in scope for the study and recommendations for a future Protected Site Strategy in the area.

Commenced in 2024, the project worked with an initial 17 landowners between August 2024 and March 2025 (referred to as cohort 1) and has started to investigate the supply chain and the extent of corporate stakeholders in the area. Individual landowners have received an audit of their landholdings based on ecological surveys, to explore opportunities and appetite for land use change and their link to potential scope in relation to the nature credits market (BNG, carbon, NN). Initial understanding of what a green finance market could offer was low at the start of their engagement and participating landowners have increased their knowledge. However, as this is not a static topic, further learning could be explored.

As a wider piece of work under the PSS pilots, consultancy firm 3keel developed and produced the 'Green Commerce Manual for Protected Site Strategies'.

For this second year (August 2025 to March 2026) another 15 landowners have been engaged (cohort 2), they are receiving a similar individual landholding audit looking at opportunities and appetite for land use change in relation to the current credit markets and a similar low level of knowledge has been observed.

Whilst exploring the supply chain and initial ideas with cohort 1, it was noted that perhaps the Clun as a catchment is too small for an effective market place. Whilst the cohort had very early ideas around a possible 'Clun Catchment Collective', links into Shropshire, the Marches region and beyond should be explored, to answer the question how land managers in the Clun can engage with these markets and ultimately what a future PSS can do to facilitate this.

## 2. The Brief:

By 31<sup>st</sup> March 2026, the successful contractor is expected to build on the supply chain and green commerce work started with cohort 1 and involve cohort 2 in this learning in the following way:

Activity	Deliverable	Additional notes
Raise the understanding around green commerce and green finance of both cohorts	<ul style="list-style-type: none"> <li>Two workshops, one aimed at none to very low knowledge (mainly cohort 2) and one to build further understanding (both cohorts)</li> </ul>	Exclude Village Hall hire and refreshments, this will be provided. Focus on workshop content and delivery.
Develop and define the 'Clun Catchment Collective' into an appropriate entity to offer ecosystem services trades	<ul style="list-style-type: none"> <li>Participating landowners working together to define their offer and working towards establishing a trading entity</li> <li>At least one workshop event</li> <li>Actionable insights for the PSS guidance</li> </ul>	<p>Exclude Village Hall hire and refreshments, this will be provided.</p> <p>Contact details of the participating landowners will be shared</p>
Further engagement with the 'warm leads' identified in the first year of FINCH, including development of soft market testing to ensure products generated through the Clun Catchment Collective will be attractive to buyers.	<ul style="list-style-type: none"> <li>Report detailing engagement with previously warm and new leads</li> </ul>	<p>'Information on 'warm leads' will be provided</p> <p>If the contractor is planning to hold any stakeholder workshops, this (incl room hire and refreshments) needs to be included in the tender response and covered in the budget</p>
New engagement with potential private buyers from any new leads identified through ongoing engagement, partner leads and wider stakeholder workshops		
Desk review of all current private finance investment platforms and connected research work in Shropshire, the Severn Basin and the Marches to determine how the Clun can capitalise on its opportunities	<ul style="list-style-type: none"> <li>Report of this reviews covering both PSS and landowner perspectives</li> <li>Actionable insights for PSS guidance</li> </ul>	Information of who we are currently aware is investigating or developing in this field will be provided but contractor should bring their own expertise, and learning from elsewhere into the mix also



Workshop testing of the PSS process (as per the Green Commerce Manual) to understand the current blockers, opportunities and stakeholder dynamics from Clun specific development and wider coordination	<ul style="list-style-type: none"> <li>• Workshop with cohort 1 and 2</li> <li>• Workshop Evaluation Report</li> <li>• Actionable insights for PSS guidance</li> </ul>	Green Commerce Manual distributed with this tender invitation. This is currently an internal document, and it should remain confidential and only be used to respond to this tender. Exclude Village Hall hire and refreshments, this will be provided.
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The applicant should outline method and approach to most effectively meet the project objectives and brief within the budget set.

### **3. Expectations:**

We expect the appointed contractors/consultants to attend an inception meeting online before work commences.

We expect regular updates on the progress of the works, and a project meeting programme will be agreed with the project team upon appointment.

We expect the contractors/ consultants to have relevant and adequate insurance for all works undertaken, to indemnify them both during the contract and afterwards should their works have any undue adverse impact.

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## **Section 4: Schedule of Works**

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1. The Contractor is invited to submit a method statement and cost breakdown set out against the deliverables above in order to deliver this project.
2. Maximum fee, to include all works, expenses, licences and tools, all general risks, liabilities and obligations set forth or implied in the documents on which the tender is to be based, whether or not such details are specifically set forth in the Schedules is £50,000 (plus VAT)
3. General directions and descriptions of works can be found in Section 3 and should be used to inform the method statement.
4. Any other queries relating to this Schedule of Works must be notified to the Contract Administrator.

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## Section 5: Form of Tender

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### PROJECT FINCH

To: Shropshire Wildlife Trust

We the undersigned do hereby undertake on the acceptance by Shropshire Wildlife Trust of our tender to supply and/or deliver the goods and/or services on such terms and conditions and in accordance with such specifications as are contained or incorporated in the invitation to tender.

This tender remains open for consideration for 3 months from the date fixed for the submission of lodgement of tenders however due to funding requirements all works must be completed by 31<sup>st</sup> March 2026.

We undertake to complete and deliver the whole of the works comprised in the contract for the sum of (excluding VAT):

Amount in words: .....

.....pounds.....pence

Amount in figures: £.....

Dated .....

Signature.....

Print name.....

In the capacity of.....

Duly authorised to sign

Tenders for and on behalf of: .....

Registered address:

.....

.....

Tel:.....

Email:.....

Shropshire Wildlife Trust

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## Section 6: Anti Collusion Certificate

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1. We certify that this tender is made in good faith, and that we have not fixed or adjusted the amount of the tender by or under or in accordance with any agreement or arrangement with any other person. We also certify that we have not and we undertake that we will not before the award of any contract for the work:
  - a) communicate to any person other than the person calling for those tenders the amount or approximate amount of the proposed tender except where the disclosure, in confidence, of the approximate amount of the tender was necessary to obtain insurance premium quotations required for the preparation of the tender;
  - b) enter into any agreement or arrangement with any other person that they shall refrain from tendering or as to the amount of any tender to be submitted;
  - c) pay, give or offer to pay or 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 other tender or proposed tender for the said work, any act or thing of the sort described at (a) or (b) above.
2. We further certify that the principles described in paragraph 1(a) and (b) above have been, or will be, brought to the attention of all sub-contractors, suppliers and associated companies providing services or materials connected with the tender and any contract entered into with such sub-contractors, suppliers or associated companies will be made on the basis of compliance with the above principles by all parties.
3. In this certificate, the word 'person' includes any persons and any body or association, corporate or incorporate; 'any agreement or arrangement' includes any transaction, formal or informal and whether legally binding or not; and 'the work' means the work in relation to which this tender is made.

Dated.....

Signed .....

Print Name .....

duly authorised to sign tenders for and on behalf of .....

.....

## Section 7: Contractor's Competence Questionnaire

The client has an obligation to ensure that the Contractor engaged to undertake the works is competent to do so. The client fulfils this obligation by inviting tenders from contractors on its approved list and seeking evidence that contractors have undertaken works of a similar nature in the past and have an appropriate safety management system. Each tenderer is required to complete the following simple questionnaire which is to be returned with tenders and will form part of the evaluation of the Tender.

1. Please provide evidence that you have successfully supervised and administered Contracts of this nature, value and scale in the last 3 years. Please provide 3 examples.

Client & project	Dates	Contract value
1.		
2		
3.		

2. Please confirm you have the necessary resources to undertake and manage the works and would be able to complete the works within the stated timescale.

[illegible]

3. Do you have recognised quality, professional and environmental management or other relevant certification in place? If so please give details.

4. Provide details of any works which you propose to sub contract, with company details and summarise how your organisation assesses potential sub-contractors to check their Health & Safety performance

5. Provide evidence of your Health & Safety Policy.

6. Provide evidence and copies of your insurance cover.