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## **INVITATION TO TENDER FOR THE CO-ORDINATION OF INTEGRATED LAND MANAGEMENT PLANS, SPECIALIST ADVICE PLANS AND A FINAL REPORT FOR SCOTLAND'S NINE MONITOR FARMS**

### **Background**

The Monitor Farm Scotland Programme is managed by Quality Meat Scotland with support from AHDB and funded by Scottish Government's Knowledge Transfer and Innovation Fund. The aim of the four and a half year programme is to instigate positive transformational change in innovative sustainable farming practices on nine farms across Scotland and to use the learnings from these farms for the benefit of farmers across Scotland. Our aim will be achieved through assisting to build resilient, dynamic farms focused on attaining full economic, social, and environmental sustainability. The methods used and results achieved will be developed using the data gathered from the 100+ farming businesses participating in the programme and will help create outputs in greater detail and at a larger scale than any Scottish knowledge transfer programme has ever achieved.

The focus of each Monitor Farm in its first year is the baseline data collection and benchmarking of the business, to include an Integrated Land Management Plan (ILMP) and two Specialist Advice Plans.

### **Key objectives**

The Monitor Farm Scotland Programme (MFSP) seeks a contractor to co-ordinate and deliver Integrated Land Management Plans, two Specialist Advice Plans per farm across nine Monitor Farms and a Final Report.

The aim of each ILMP will be to identify opportunities to improve performance and efficiency as well as resilience for each of the nine Monitor Farm business, based on the contractor's independent and confidential assessment of the businesses.

### **Scope of Services**

The contract is made up of four parts to be delivered by one contractor.

1. Co-ordination of the contract
2. Compiling a final report

### **BORN & REARED IN SCOTLAND**

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3. Delivering nine ILMPs
4. Delivering eighteen Specialist Advice Plans

### 1. Co-ordination of the contract

The MFSP anticipates that there will be several days required across the contract period to brief the successful contractor, agree a detailed project plan, introduce the Monitor Farmers to the contractor and confirm the structure and design of each ILMP and Specialist Advice Plan.

The MFSP will meet with the contractor at three further points during the contract; to review progress at approximately mid-point; towards the final stages of ILMP writing; and following completion of the plans to discuss and support the compilation of a final report of the project.

In detail:

1. The successful contractor will co-ordinate the delivery of each ILMP and two Specialist Advice Plans across the nine Monitor Farms. Note that this will include supporting the Monitor Farmers through the application and funding process.
2. The contractor will ensure quality and a consistency of approach in scoping, compiling and delivering the plans across the programme. **The MFSP believes that this is best delivered by a small team or individual contractor with a single named person responsible for quality control and consistency in approach.**
3. Each of the nine ILMPs must be written to a consistent format, approved by the MFSP at the point of the contract award, and be of equal quality and be approved by the Farm Advisory Service (FAS).
4. The contractor will attend an initiation meeting with the MFSP team to finalise the project plan.
5. The contractor will summarise progress at approximately mid-point in the contract, when businesses will have been visited by the contractor.
6. The contractor will summarise the Monitor Farmers' choices of Specialist Advice Plans and will provide information on the specialist contractors conducting these, where applicable.

We expect coordination of this contract to take x days, which will be funded by the MFSP.

### 2. Final report

1. The contractor will compile a final report for the MFSP summarising their findings from the nine ILMPs against the standard headings:
  - a. Business structure
  - b. Enterprise information
  - c. Soil and nutrient management (comprehensive soil analysis will be provided to contractor)
  - d. Basic habitats, biodiversity and conservation review
  - e. Financial analysis
  - f. Cross-compliance and risk areas for the business
  - g. SWOT analyses

2. The final report will identify common themes and differences in the farms across the programme, highlighting areas of good practice and general concerns.
3. The report should highlight anticipated outcomes from the farm businesses participating in the Monitor Farm Programme.
4. The report contents will not identify individual farms, unless this is approved in writing by the Monitor Farmer and the MFSP
5. The contractor will advise where they believe that the ILMP process is effective and where it could be improved.

We expect the report collation and writing to take x days and will be funded by the MFSP.

### **3. Delivering the ILMPs**

The contractor must consider their approach to scoping, planning and compiling an ILMP, with reference to the anticipated impact of recipients being Monitor Farmers.

The Monitor Farm process exposes each chosen farm business to greater scrutiny than normal, through a team approach to decision making, benchmarking against a Community Group of farmers and the public sharing of plans and aspirations.

Evidence from reviews highlights the more rapid speed of change made by previous Monitor Farmers through participation in the programme.

For each farm, the successful contractor will deliver the core components of the ILMP. These are:

- A statement of the vision and objectives for the plan
- An action plan setting out practical measures to improve the Monitor Farm business's financial and environmental performance
- A farm map
- An overview of the whole business, including:
  - looking at business structure
  - enterprise information
  - soil and nutrient management
  - a basic habitats, biodiversity and conservation review
  - an in depth financial analysis
  - a cross-compliance assessment to highlight where there may be risk areas for the business
  - an assessment of strengths, weakness, opportunities and threats as they relate to the Monitor Farmer's vision for the business.

### **Carrying out the basic ILMP**

To carry out the review, you must be accredited under the Farm Business Adviser Accreditation Scheme for Scotland (FBAASS). You must have no direct connections to the business under review, either as a partner, a director or shareholder of a limited company, a close family member of a sole trader or any of the foregoing, or with any involvement in the management of the business.

You may, with the agreement of the Monitor Farmer and the MF Regional Advisor, engage another adviser or advisers to help with aspects of the service (e.g. to provide specialist knowledge of environmental issues).

It is not a requirement of the scheme for any additional adviser, brought in by you, to be FBAASS registered, however they must be appropriately qualified. This contract is with you as the main accredited adviser, who must bear overall responsibility for delivering the service across each farm and across the programme.

It is up to you and each Monitor Farmer to agree on how best to work together but, to get the most out of the service, it is essential that each farmer is fully involved in the process and provides all the information needed to give a full picture of their business. This will allow you and the farmer to develop a clear understanding of their business, opportunities and constraints and to formulate practical options for improving their performance and achieving their objectives.

This service is estimated to involve around 3 days' advisory support for each Monitor Farm, depending on the size and complexity of the business. The Integrated Land Management Rules and procedures set out the areas and issues that must be considered. This guidance must form the core of your contract with the MFSP.

### **Information handling**

The Farm Advisory Service will review the quality of your report prior to issuing it to the Monitor Farmer.

FAS have the authority to recommend amendments and changes to the review. The MFSP will approve the full payment of the contract when all nine ILMP reviews are completed to the satisfaction of FAS. You must notify The MFSP immediately if the report requires amendments or changes, leading to delay in the use of the review by the Monitor Farmer.

FAS will always respect the farmer's personal privacy and the requirements of the law, in particular the Data Protection Act (DPA) and in agreement with the Scottish Government's privacy policy.

Further information on how FAS look after their information can be found at

<https://www.ruralpayments.org/publicsite/futures/privacy-policy> or in hardcopy from your local Scottish Government Area Office

### **Application for grants and payments**

#### **Applying for the grant**

The Monitor Farm Regional Advisers will support each Monitor Farmer to apply online.

If a Monitor Farmer's application is successful, they will receive a formal offer letter. Once they receive the offer, you, as an accredited adviser, will be expected to carry out the review.

### **Payment**

Grant assistance towards the cost of the ILMP will be paid by the Farm Advisory Service direct to you as the farm adviser on evidence that the work has been completed.

On the immediate receipt of your final report, the farmer must complete the Feedback and Declaration form (one document) and return it directly to the Scottish Farm Advisory Service (see address details in Section 4).

The Farm Advisory Service will pay your company as the adviser 80% of the cost\* of carrying out the ILMP up to a maximum of £1,200 per plan. The grant does not cover the full cost of the service, the MFSP will pay the balance of the cost and the total VAT. The duplicate invoice the Monitor Farmer receives from you will detail the cost breakdown and what the MFSP will be required to pay.

\*Excluding VAT, except for businesses which are not registered for VAT and will not reclaim the VAT from HM Revenue & Customs, in which case grant will be based on the total cost inclusive of VAT.

#### **4. Specialist Advice Plans**

In addition to the ILMP, the successful contractor will deliver two specialist advice plans to each Monitor Farm. These will be decided between the contractor and the farm business from the menu below:

1. Improved farm efficiency
2. Climate change adaptation and mitigation
3. Soil and nutrient management
4. Biodiversity, habitat and landscape management
5. Woodland management and conservation
6. Water pollution, prevention and control
7. Organics
8. Animal welfare
9. Resilience Planning

Please note that this list is shorter than available in the standard FAS. Carbon audits and Succession Planning will be separately addressed during the Monitor Farm programme.

You will be paid by FAS for completing these specialist plans as they fully funded by FAS up to a maximum of £1,000 per plan (the farm business must pay the VAT in full and will be compensated by the MFSP).

A hard copy application form can be requested by telephoning: 0300 323 0161 or by email: [One2one@Ricardo.com](mailto:One2one@Ricardo.com).

You may, with the agreement of the Monitor Farmer and the MF Regional Advisor, engage another adviser or advisers to help with these specialist advice plans.

You will be contracted to act as each Monitor Farmer's agent and support them to apply online at <https://www.fas.scot/specialist-advice/>

The MFSP will pay the successful contractor for the co-ordination work required to discuss and plan delivery of the SAPs across the MF suite of farms.

This co-ordination work is expected to take up to 5 days.

### Timetable

The contractor must deliver all nine approved ILMP reviews by 15<sup>th</sup> March 2023.

The contractor must deliver a summary of the MF ILMP findings 30<sup>th</sup> March 2023.

Specialist Advice Plans must be completed by May 30th 2023.

### Budget

The budget for this project is expected to breakdown as follows:

	£	No. of Days	Comments
ILMP (80%)	£1200		FAS funded
ILMP (20%)	£300		Daily rate and number of expected days
Specialist Support			Case by case scenario
Report writing		5 days	Daily rate and number of expected days
Contract Coordination		8 days	Daily rate and number of expected days
<b>TOTAL QUOTATION</b>			
VAT Registered Yes/No, if yes please detail VAT registrations number			

### Quotation

A fully costed quotation to deliver the above should be included in the tender. Written quotations in pounds Sterling and excluding VAT must be received by QMS no later than 5pm on 16<sup>th</sup> December 2022.

The quotation will be evaluated using the following criteria and weightings (see proforma for more info):

Evaluation Criteria	Weighting
Quality (technical)	80%
Price (commercial)	20%

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**Quality Meat Scotland**

MEAT WITH INTEGRITY



**Pro Forma:**

	£	No. of Days	Comments
ILMP (80%)		3 days	
ILMP (20%)			
Specialist Support			
Report writing		5 days	
Contract Coordination		8 days	
<b>TOTAL QUOTATION</b>			
VAT Registered Yes/No, if yes please detail VAT registrations number			

Key Competencies (criterion)	Comments
1. A sound understanding of business management and progressive farming practices	
2. Knowledge and understanding of key performance indicators for cattle, sheep and arable businesses	
3. Experience in completing Integrated Land Management Plans to a high standard	
4. Ability to coordinate and deliver 9 ILMPs	
5. Ability to present a report of findings to each farm and a summary report of all farms	
6. Knowledge of the Monitor Farm Scotland Initiative and the expectation of farms to progress	
7. Ability to apply knowledge and utilise expertise to tailor specialist advice plans for 9 farms	
8. Ability to collect in depth financial data for farming businesses	
9. Build trusting relationships with farmers to collect data and advise on recommendations	

### Evaluation criteria

QMS evaluate quotations against qualitative criteria as well as quantitative. The successful bid will be one which scores highest overall against both Price and Quality, as detailed below.

Criterion	Weighting
<b>Price</b>	<b>20%</b>
<b>Daily Rate excluding VAT</b>	
<b>Quality</b> Details and examples of the benchmarking software  <b>Experience</b> Please submit details of your relevant knowledge, skills and experience, detailing how these will be applied to successful delivery. Please enclose a CV.  <b>Essential</b> <ol style="list-style-type: none"> <li>1. A sound understanding of business management and progressive farming practices</li> <li>2. Knowledge and understanding of key performance indicators for cattle, sheep and arable businesses</li> <li>3. Experience in completing Integrated Land Management Plans to a high standard</li> <li>4. Ability to coordinate and deliver 9 ILMPs</li> <li>5. Ability to present a report of findings to each farm and a summary report of all farms</li> <li>6. Knowledge of the Monitor Farm Scotland Initiative and the expectation of farms to progress</li> <li>7. Ability to apply knowledge and utilise expertise to tailor specialist advice plans for 9 farms</li> <li>8. Ability to collect in depth financial data for farming businesses</li> <li>9. Build trusting relationships with farmers to collect data and advise on recommendations</li> </ol>	<b>80%</b>
<b>TOTAL</b>	<b>100%</b>