



An invitation for Expressions of Interest from not for profit organisations

The Isle of Wight Council Countryside Estate

PART OF THE ISLE OF WIGHT
VOLUNTARY & COMMUNITY
SECTOR STRATEGY



Isle of Wight Council

Expressions of interest are invited to take over the running of the Isle of Wight Council's Countryside Estate and a 21 year full repairing and insuring lease of the majority of the sites will be granted

Introduction

Expressions of interest are invited from suitably qualified organisations to take over the Isle of Wight Council's Countryside Estate (the sites).

The sites include approximately 170 hectares of land spread over about twenty locations throughout the Island (shown in Schedule 1). These include protected areas as well as unprotected areas, some of great wildlife and landscape value, some of great amenity value and in many cases both. They tend to be areas of particular local importance and are well-loved by the communities around them, but some areas are included that are not widely known or used.

The service in the next few years will come under increasing pressure to reduce its outgoings. On a reducing budget, the service can no longer seek to develop and manage the countryside estate. The service currently operates with low levels of resources and relies significantly on a voluntary sector workforce.

The Isle of Wight Council (the council) wishes to ensure long term sustainability and integrity of the sites, to ensure continued open public access to the sites, and to conserve and enhance their wildlife and landscape.

There is hope that a partner can be found that will seek to develop the service beyond its current levels, offering new opportunities for the public.

The future of the Isle of Wight Council's Countryside Estate – what the council is offering

The council is seeking a suitably qualified organisation to safeguard the Isle of Wight Council's Countryside Estate by taking on the sites, through leases, and developing their potential.

The sites together are more likely to prove to be a sustainable estate than if managed separately, and for this reason the Isle of Wight Council will strongly favour solutions that keep the majority of the sites managed by one organisation, rather than many organisations separately. The council will also take into account the consideration that some of the sites, whilst important and valuable, have less potential for generating income and community involvement than others. It is important that any new arrangement does not leave some of the countryside estate unmanaged or unmanageable. For these reasons solutions which focus on a single site, or a very few sites, are unlikely to be successful.

The successful applicant will need to present a full and persuasive business case, stating which sites they have an interest in. This could cover all or some of the sites in Schedule 1. The applicant will be expected to take a full repairing and insuring lease of at least 21 years, although bids for longer lease periods will be considered.

Other assets

Also included in any transfer to a successful applicant are some or all of the following:

- † One Ford Ranger vehicle and trailer (Schedule 3).
- † Power tools and equipment (Schedule 2).
- † The use of a secure open depot in the Newport area, including use of a lockup container or equivalent covered storage, for two years from the date of agreement.
- The benefit of income from tenancies and concessions situated within the sites.
- Revenue support grant for years 1,2 and 3 of the agreement (See Schedule 4).
- The benefit of any DEFRA HLS grants associated with the land which are transferred to the new tenant (subject to renegotiation with DEFRA) – this includes an obligation to fulfil the conditions of grant where applicable. See further notes below.

These assets may be divided if more than one party is successful. Clearly some of these assets are indivisible - i.e. it will not be possible for more than one tenant to receive the vehicle as ownership cannot practically be shared; and some (e.g. concessions) are directly linked to a specific site. As well as site-based restrictions, items marked † may not be available in part or at all to any party not taking on a majority of the sites.

Staff and volunteers

The whole estate includes up to 1.5 council employees who will potentially be in scope to transfer in accordance with the Transfer of Undertakings (Protection of Employment) Regulations 2006 ("TUPE"). The council will need to ensure that its responsibilities toward these staff are met, which may influence the outcome of any expressions of interest that do not include the majority of the sites.

Voluntary and other unpaid work is an important tool in managing a large and diverse countryside estate with relatively few paid employees. The sites already have good involvement and commitment from volunteers and community groups including town and parish councils, but this is not evenly spread, and in some places these opportunities are better developed than others. A successful applicant will be able to demonstrate how the existing links with volunteers and the community will be supported and fostered; and how new ones could be forged.

Marketing

The successful applicant will be able to develop new marketing and branding arrangements, and may wish to combine the sites with an existing estate or comparable activity, or create an entirely new one. There is also scope for developing and benefiting from further partnerships with community groups and volunteers, and, potentially, sponsorship and commercial arrangements which are appropriate to the sites. Independent organisations are also able to access funding not available to public bodies.

Tenure and boundaries

The council currently holds the vast majority of the countryside estate on a freehold basis. A few areas are managed in partnership with other organisations or in one case jointly with another landowner. Land which is not currently owned or occupied by the council is not included in this proposal. The council will continue to have an interest as the landlord and will make arrangements to ensure that the tenant complies with terms and constraints that exist on the sites as they currently stand.

Although most are simple and well-established, the boundaries of some countryside landholdings are complex, and in places will need to be defined more clearly before any transfer can take place. Once this has been done it is possible that some areas may prove not to be appropriate for transfer, either because of boundary issues or for other reasons, for example where the council has legal obligations to another landowner. In such cases the Council will retain that site, or part of it, to ensure that the new tenant is confident of the extent of the areas under its control.

It is anticipated that negotiations in respect of detailed leases and asset transfer may not be fully concluded by the intended transfer date, in which case a phased transfer plan will be agreed with the successful applicant which could include interim arrangements for some sites via tenancies at will.

Higher Level Stewardship Agreements

Many sites are subject to a Higher Level Stewardship Agreement (HLS) between the council and DEFRA. These agreements currently provide annual revenue payments plus various capital payments. The agreements mostly cover land included in this process, but some smaller areas are currently subject to HLS that are to be retained by the council. Therefore the total payments available to a successful bidder will be less than the current total amount, the exact figure depending on any new agreement or transfer arrangement made with DEFRA.

These sums provide partial payments for specific, agreed works to conserve and enhance biodiversity, heritage and public access. The agreements oblige the council to undertake certain works on the sites until 2022. Successful parties will be expected to either make all reasonable efforts to transfer the agreement or if necessary enter into a new equivalent agreement with

DEFRA; or if the council retains the Stewardship agreement itself, to fulfil the requirements of the existing agreement and undertake such works on behalf of the council in exchange for the full grant amount. The full details of the existing agreements will be available in the information pack.

The outcomes sought by the council

The Council will expect the successful applicant to achieve a range of specific outcomes. These will determine a number of conditions that will be included in a lease. The outcomes are listed here and will be used to assess the viability and ambition of expressions of interest, and to assess how successful applicants are delivering against the outcomes.

These outcomes are not in priority order. Where there is a conflict between them that cannot be resolved by good management the Sandford principle will apply.

Successful partners will be required to provide and publish an annual statement which sets out how they have addressed these outcomes.

Outcome One

Maintaining and enhancing safe public access to the countryside sites

- The public will have access to the sites to no less an extent than is the case at the time of transfer
- The sites will be regularly inspected and records kept of inspections and management operations
- It will be easy to find out information about the sites both on site and elsewhere
- Barriers to access will be identified and management will help to reduce those barriers

Outcome Two

Conservation and enhancement of the Island's biodiversity, heritage and landscape

- SSSIs will be in favourable or unfavourable recovering status (Metric – number of SSSI compartments in favourable or unfavourable recovering status. Currently all compartments meet this criterion.)
- All SINCs will be managed to conserve and enhance the species and habitats in the SINC citation
- Management objectives will have regard to the Habitat Action Plans published by the IW Biodiversity Partnership; the current AONB management plan; and any documents that succeed these
- To conserve and enhance the natural beauty of the sites (within the AONB this is a statutory requirement on the IW Council under the Countryside and Rights of Way Act, 2000).
- To have regard to conserving biodiversity (This is a statutory requirement on the IW Council under the Natural Environment and Rural Communities Act 2006).

Outcome Three

More interest and community involvement in the countryside and involvement with the maintenance of the sites.

- Number of volunteer work-days will be maintained or improved (Metric – number of days worked by unpaid workers in support of the objectives. This data is available.)

- Number of visits to the sites will increase (Metric – number of visitors to the sites, estimated or measured. There are no current data or estimates.)

How will the council know that its intended outcomes for the estate are being achieved?

The application process invites applicants to describe how the council will know that the outcomes and the criteria for success are being delivered.

The council will not specify in detail how the estate should be operated, except where there are pre-existing conditions. So it will be left to applicants to suggest the best way to do this, but the minimum would be an annual report evidencing achievement of the required outcomes.

Expressing an interest – the process

To be eligible to be considered to take on the sites, applicants must be able to provide evidence of the following:

- both Public and Employer's Liability insurance (minimum £10 million each)
- competence to manage the estate effectively and efficiently
- compliance with relevant legislation including health and safety, risk assessment, equality and diversity, protection of habitats, heritage and species, safeguarding vulnerable adults and children, data protection and freedom of information (you can get advice on these topics, see the 'Contacts' section below)
- compliance with any codes of ethics or institutional standards relevant to your application
- two references in support of the application, that would demonstrate a track record of successful business management by the organisation and/or its directors.

An outline business plan should be provided that can be used to gauge the sustainability and ambition of the applying organisation. This should include a sound financial case that will provide the council with confidence that the applicants are sufficiently well resourced. The business plan should also provide evidence that the applicants are suitably experienced and qualified to take on an estate in public ownership.

The commissioner (details below) will supply an information pack and application documents. Any organisation interested in taking over the estate and considering the development of an expression of interest, should contact the Commissioning Manager in any case for a confidential discussion on making an application. This can take place before and during the writing of an expression of interest.

Applicants wishing to proceed will be offered an information pack that will include a draft lease, financial information, a list of assets, details of partnerships, current and previous lease and contractual requirements, liabilities, certain planning related information and details of how to submit your expression of interest.

Completed applications should be submitted to the commissioner by 12:00 hrs (noon) on **Friday 6th March 2015**. Applicants should contact the Commissioning Manager to discuss how bids will be delivered, which can be in a number of ways including by post, hand or email.

Applications received after the closing date cannot be considered.

Once expressions of interest have been received, they will be assessed against the outcomes listed above, and the evidence of competence and capacity. The council has an obligation to secure the outcomes that have been set for the estate, in a way that delivers the best possible public value.

Organisations that meet these criteria will be invited to make a presentation to a panel, which will represent council and community interests.

This panel is scheduled to meet in Mid-March 2015 (the date will be confirmed in the letters inviting applicants to present). The panel will consider the applications and make recommendations to the council on how the estate should be disposed. This process will be followed by a period of negotiation with a preferred applicant, to conclude the required legal documentation. At this stage it would also be necessary to negotiate with DEFRA in the matter of the HLS agreements.

This is a competitive process and decisions will be based only on the information that applicants supply and the quality and credibility of their presentation. The council strongly advises that applicants take expert advice on their expressions of interest.

What a successful bid would contain

This is an open but competitive process. Each application will be assessed on its own merits, on how much it convinces the panel that the application will secure the future of the estate, and how well the applicant has described its resources, competence and approach to delivering the required outcomes. The council will welcome innovative suggestions and ideas for how the outcomes can be delivered, as part of making the estate sustainable while delivering the councils outcomes.

It is expected that the successful applicant will have done the following:-

- demonstrated how their vision will deliver the council's outcomes for the estate and will secure the long-term development and growth of the estate;
- set out in their business plan the timescales, investment plans and community engagement arrangements needed to ensure success;
- suggested how best the assets can be transferred, and what changes will take place in how the estate will be secured and developed;
- demonstrated commitment to the future of the estate, to the benefit of people, communities and visitors;
- demonstrated a practical approach to financial sustainability.
- inspired confidence in ability to promote the public and environmental value of the estate, as well as the business acumen and experience that will be required.

Timing

This invitation for expressions of interest will be issued by	14 January 2015
Information packs will be issued from	14 January 2015
The closing date for completed applications is	6 March 2015
The appraisal panel will issue invitations to shortlisted applicants by	13 March 2015
The panel will meet by	24 March 2015
Partner Organisation in place by	1 April 2015

It is anticipated that negotiations in respect of detailed leases and asset transfer may not be fully concluded by 1 April 2015, in which case a phased transfer plan will be agreed with the successful applicant which could include interim arrangements and completion of tenancies at will.

Contact

Matthew Chatfield will act as the Commissioning Manager for this process. Note that as Matthew works part-time he will not always be available in the office.

There is a further information pack which includes more details of the sites involved and other technical information. However as this is a substantial body of data, to keep costs down this will be issued only to enquirers who, having reviewed this document, then request further information.

If, having read this document you are still interested in this process then to request the further information pack or enquire about anything in this document further, please contact Gina Gajic who will act as the point of contact and pass messages to the appropriate officers for response.

Gina Gajic, Administration Officer
Recreation, Leisure and Public Spaces
Isle of Wight Council
County Hall
Newport, Isle of Wight
PO30 1UD
Tel: (01983) 821000
Email: gina.troke@iow.gov.uk

Applicants or their agents should not approach any other council employee for information. The single point of contact is designed to ensure that every bidder has equal access to all the information available that may arise through contact with potential applicants.

Schedule 1: sites under consideration

Name	Local nature reserve	Hectares	Parish	Lease of whole/part	IWC Occupied	Title number
Afton Marshes North & South	Yes	14.78	Freshwater	Whole	Y	IW34659
Medina Riverside Park	No	1.85	Newport	Part	Y	IW68444
Dodnor Creek and Dickson's Copse	Yes	9.03	Newport	Whole	Y	IW51456 IW73181
Golden Hill Country Park	No	20.76	Freshwater	Whole	Y	IW52624
Brading Down	Yes	31.47	Brading	Part	Y	IW70801
Shide Chalk Pit	Yes	5.04	Newport / Arreton	Whole	Y	IW69567
Rew Down	Yes	11.62	Ventnor	Whole	Y, management of privately-owned area	IW69414
Nansen Hill Bonchurch	No	4.78	Ventnor / Shanklin	Whole	Y + management of area not owned	IW70099
Quarrel's Copse Wootton	No	4.66	Wootton Bridge	Part	Y	IW37724
Wootton Common	No	1.63	Wootton Bridge	Part	Y	IW37724
Haylands Wood	No	1.27	Ryde	Whole	Y	IW68394
Binstead Wood	No	1.88	Ryde	Whole	Y	IW42080
Millennium Wood, Seaclose	No	0.73	Newport	Whole	Y	IW53495
Sibden Hill & Batt's Copse (boundary as at March 2013)	Yes	5.72	Shanklin	Part	Y	Numerous titles
Sandown Levels	No	16.66	Sandown	Part	Y (no public access)	IW29620
The Landslip Bonchurch	No	26.5	Ventnor/Shanklin	Part	Y	IW69020
Blackgang Viewpoint	No	0.51	Chale	Part	Y	P123198
Rosemary Lane / Swanmore Meadows	No	8.81	Ryde	Whole	Y	IW69323 IW69354 IW69369 IW69368
Total		167.7				

The following sites are not included and will be retained by the council or the council's tenant:

- Fort Victoria Country Park
- Charles Wood
- Alverstone Mead
- Standen Heath
- Pan Country Park
- Pelham Woods
- Hersey Reserve
- Shanklin Meadow
- Bouldnor Viewpoint
- One Horse field

Countryside expressions of Interest – Draft Information document

Schedule 2: Inventory of Countryside Service tools

A range of tools and equipment including chainsaws, brushcutters, winches, barrows, workshop tools and hand tools. The division of these tools will be negotiated with the successful bidder or bidders – this will require discussion as some of them are particularly suited to certain sites, and in many cases there is only one of a type of tool. As the council is retaining a number of countryside sites it will not be passing over all the tools as some will be required for the remaining sites.

EQUIPMENT NAME & MODEL NO.	COMMENTS	LOCATION
Elektra Bekum (Metabo) Mains Bandsaw BAS 316G		Workshop
Sealey Pillar Drill GDM 160 FX 16 Speed		Workshop
Ryobi Bench Coping Saw		Workshop
DeWalt Cordless Drill DC 988 18V 2 batteries	Charger on bench	Workshop
Matabo Cordless Drill BST 12V IMPULS 2 batteries	Charger on bench	Work shop
Draper Bench Sander	Circular Disc and Bench Sander	Workshop
DeWalt RouterDW 625E		Workshop
Bosch Belt Sander		Workshop
Bosch Sander GSS 140A		Workshop
Elektra Bekum (Metabo) Mains Bandsaw BAS 316G	Not set up	Workshop
Sealey Pillar Drill GDM 16 Speed	Not set up	Workshop
Bosch GSB- 20-2 RE Drill Professional		Workshop
BCS Allan Scythe Vanguard BCS 603		Large container
Generator SDMO HX 2700 TB UK		Large container
Shovels	3 in Large container 1 Snowshovel 2 Drainage Shovels	Large container Small container Small container
Spades	9 in Large container 1 in Small container	Large container Small container
Bowsaws 21inch 24inch 30 inch 12 inch	8 functional, 4 frames 6 functional 2 in Small container 1 in Small container	Large container Small container Small container
Loppers		Large container
Ragforks	12 in total	Small container
Sledgehammers	1	Large container
Mauls	1	Large container
Bars	2	Large container
Shuvholers	2 in number Red and Blue	Large container
Drivall	1	
Mattock	1	
Rakes Lawn General purpose	1 3	
Wheelbarrows	1 4 in barn	Large container
Sack trucks	1	Small container
Submersible pump Einhall Royal TMP 255/1-5		Small container
Forks	6	Large container
Pickaxe	1	Large container
Yardbroom	1	Large container
Post adjustor	1 doubleheaded	Large container
Tamper	2	
Litterpickers	4	
Cement Mixer Belle mini mix Petrol Dec 1974		Small container
Flat bar	1	Small container
Fencing bar	1	Small container
Bar	2	Large container

Schedule 3: Vehicles

Ford Ranger vehicle and one trailer
HW60 KSU
Ranger; Double XL 2500cc Diesel
Registered 02/11/2010
Mileage on 24/10/2014 26446

Schedule 4: Revenue support

A revenue support grant will be given by the IW Council to the successful partner to assist the initial delivery of the objectives and encourage the development of a sustainable business plan.

This sum is for all the sites that are offered: if more than one partner is successful the sum may be distributed at the council's discretion between the partners. The first payment will be made at the commencement of the agreement and subsequent payment will be made annually thereafter. In addition to this revenue grant support the successful bidder will have access to DEFRA grants linked to sites within the portfolio; and income from existing concessions at Brading Down and Blackgang Viewpoint carpark currently valued at £10k p.a.

Revenue Grant Schedule:

Year 1: sum £55,000
Year 2: sum £38,000
Year 3: sum £28,000
Year 4: sum £0