



Chartered
Institute of
Ecology and
Environmental
Management



A Householders' Guide to Engaging an Ecologist *Key considerations*

The purpose of this guidance

There may be occasions when a homeowner needs to engage the services of a professional ecologist to advise on a specific project. For example a homeowner may be planning a new house, building extension or refurbishment, landscaping or other land management work that may affect wildlife living in or around the home.

The Chartered Institute of Ecology and Environmental Management (www.cieem.net) is the leading professional membership body for ecologists and environmental managers in the UK, Ireland and abroad. CIEEM understands that whilst many homeowners may have an appreciation of wildlife, engaging an ecologist may well be something new to them. This document is intended to be a pointer to the main considerations to be taken into account when doing so.

The focus of this guidance is on the process of finding and engaging an ecologist and not specific technical matters in relation to survey and assessment for species or habitats. This guidance should not be read in isolation and should be seen as the starting point rather than the answer to all questions. You may wish to seek further advice from your citizens or consumer advice body or a solicitor with regards to contractual responsibilities.

Why do I need an ecologist?

The most common reason you may need the services of an ecologist is that a building project (development proposal) has been identified as having the potential to have an impact on important or legally protected wildlife (species and habitats). In this situation an architect, planning agent or planning authority has concluded that an ecological survey and assessment is required to support a planning application. Some local planning authorities have checklists or guidance that can assist in identifying ecological requirements.

You need to be aware that some types of survey cannot be undertaken in certain seasons or weather conditions. For example some types of bat survey cannot be undertaken when bats are in hibernation over the winter months. Discuss the timetable for your project with your architect, planning agent or ecologist as soon as possible in order to take account of any constraints due to ecological survey and assessment requirements.

How do I go about finding an ecologist?

There is a wide range of ecological consultancies from large multinationals to individuals (often referred to as sole traders). Generally there is a good distribution of ecological consultants across the UK and Ireland, with consultancies often undertaking work across wide geographic areas.

CIEEM provides a searchable directory of ecological consultants on its website: www.cieem.net/members-directory. Here you can search for ecologists within specific geographic areas and for specific services. Before undertaking the search it's worth giving some thought as to what services you are looking for. Are you looking for something in relation to a specific group of animals (e.g. bats) and therefore are you looking for particular expertise in this area? Has your local planning authority requested a screening for Habitats Regulations Assessment/Appropriate Assessment of possible effects on designated conservation sites? Or is a more general ecological survey, often known as a Preliminary Ecological Appraisal, more appropriate? A Preliminary Ecological Appraisal is an initial assessment of the likely impacts of a development proposal or the assessment of the baseline (i.e. current) ecological conditions. Such an appraisal may identify the need for further, more detailed, surveys. (For further information on Preliminary Ecological Appraisal see www.cieem.net/data/files/Resource_Library/Technical_Guidance_Series/GPEA/GPEA_April_2013.pdf).

Why engage a CIEEM ecologist?

CIEEM members have been able to demonstrate to the Institute that they meet the standards expected of the membership grade and have agreed to abide by its Code of Professional Conduct. CIEEM membership therefore provides reassurance on the standard of competence of the ecologist and the Institute has a complaints procedure that the public can use if they feel that the work undertaken for them has not been to the required standard. Members are also required to undertake continuing professional development every year and they have a wide range of training opportunities and guidance available to them through the Institute. If you are appointing an ecologist who is not a member of CIEEM do consider how you will assess their competence to do the work required and, if you have concerns over their work in the future, how this could be resolved.

What should I ask the ecologist to do?

This is one of the most important things to consider. In order for an ecologist to consider the survey and assessment requirements and to provide you with a quote for the work required they will need to understand the current site characteristics, what you are aiming to achieve with your project, how far have you got (i.e. are there plans drawn up or is it just a project idea at the moment), any advice you have already received and what timescale is envisaged. You may wish to consider putting together a short written summary you can give the ecologist(s). Photographs and Google or Bing Maps are often helpful in giving the context of the area.

Next you need to consider what you are asking the ecologist to do. For example is it an assessment for the potential of a property (buildings, trees, barns, other structures) to be used by wildlife such as bats or is it an initial site visit and assessment in order to identify whether there are likely to be any issues in respect of the presence of any protected or notable species and habitats (in which case consider referring to the Preliminary Ecological Appraisal (PEA) guidance produced by CIEEM (referenced above)).

Do be aware that sometimes the results of an initial survey may lead to further surveys being required, for example, if an initial survey identifies a likelihood of a protected species being present on site then further surveys may be required to establish what, where and in what numbers.

Your request to an ecologist(s) could be set out as a series of requirements for example:

I am currently seeking fee proposals (a term often used when seeking more than just a financial quotation) for a preliminary ecological appraisal / bat survey* for land / buildings* at I attach some background details for your information. I am asking for written fee proposals (by email*) by the Please address the areas set out below in any fee proposal you wish to submit.

- A summary of qualifications, experience and membership of professional bodies.
- What work is included in terms of site visits, personnel, assessments, and reports?
- What desk top analysis is proposed? (Desk top analysis looks at past reports and/or existing information e.g. existing wildlife records including those held at local records centres and

can be used to plan the site survey more efficiently and effectively).

- What species or habitat guidance will be used?
- Are there any situations where further survey may be needed?
- What timescales are proposed, including an opportunity to see a draft report?
- What other additional expenses could there be e.g. mileage or sample analysis?
- If additional work, above that set out in the fee proposal, is required what are the hourly rates?
- Summary details of public liability insurance and professional indemnity insurance.

What things should I look for when comparing proposals from different ecologists?

Seek more than one fee proposal. As with many things costs can vary and it is a good idea to get two or three fee proposals in order that you can compare.

Do ask questions. As with all things in life the cheapest is not always the best or best value overall. Think about what may be involved from start to the finish of your project and the ecological advice you're likely to need through this time. If you are not sure go back to the ecologist(s) and ask questions.

Be fair and respectful. The ecologist will have taken time to prepare the fee proposal. Take time to objectively assess the proposals. Do they cover the same sort of things? If not what are the differences and what implications could that have on costs? You may want to establish some criteria to compare fee proposals. This can also help if you want to offer feedback as to why you selected one quotation over another. Generally it is not considered fair to disclose the exact details of proposals from one ecologist to another. You may wish to ask if an ecologist's fee proposal would change if, for example, an alternative survey programme proposed by another ecologist was undertaken rather than that originally proposed. You will need to be sure that the work proposed will meet your requirements (for example, if you are applying for planning permission, you need to make sure that the ecologist is quoting for the survey work and reporting required appropriate to the needs of the local planning authority when considering your application).

Compare the experience of ecologists in undertaking similar work. For example reports submitted in relation to planning permission are often available online these days and you can always look over past reports from companies/ecologists.

What is 'licensing'?

This is a particularly complex area. Put simply, there are two distinct parts to licensing. Firstly the ecologist may be required to have a licence to undertake surveys for particular species where they are known to be present, for example entering a known bat roost to count the bats. Without the appropriate licence such disturbance of the species could be against the law and constitute a criminal offence. If you know that there are protected species or habitats that you are asking to be assessed by the ecologist, it is advisable to ensure they have the appropriate licences or are eligible to apply for them. Ecologists usually refer to their licences in their CVs or references.

The second area is applying for a licence to permit disturbance to protected species as part of undertaking development. If your project is likely to have an effect on protected species, including their habitats, you may need a licence prior to undertaking any works, even if you have planning permission. Your ecologist will need to apply for a licence on your behalf and may well need to monitor the development as it takes place and potentially after it is completed. It is unlikely that the ecologist's original fee proposal will have covered this, as prior to undertaking the original survey, the requirements for licensing are unlikely to have been known or predictable. You will probably therefore need to ask your ecologist to give you a further quote for any additional work such as this. There is no requirement for the same ecologist who undertook the initial assessment to undertake the licence work. However for continuity purposes it is often a good idea. Any ecologist applying for a development licence must have the appropriate level of experience.

Licensing authorities vary across the UK devolved administrations and Ireland. In terms of project planning you should allow for additional time for licensing prior to commencing works. Your ecologist will advise you of the appropriate licensing body and the likely timescales required to obtain the licence.

Get the most out of the process

No matter why you need to engage an ecologist, it is a good opportunity to learn about your home and the surrounding area. Take the opportunity to talk about what they have found out and read their report, particularly the results and recommendations sections. Are the recommendations clear and well explained? Is it clear what the next steps are? Do they distinguish between what is 'required' and what would be 'additional' good practice? If any of this is not clear go back to the ecologist and ask for clarification. The chances are if it is not clear to you then it will not be clear to others who read the report. There are networks of biological record centres which store records for species and habitats for future survey and monitoring purposes. Your ecologist is likely to want to pass on relevant species and habitats records to the appropriate organisation to help create a better understanding of the local area.

Giving feedback

We all like to know we have done a good job and ecologists are no different. We never stop learning, so it is good to offer constructive feedback. Were they professional (meeting timescales and demonstrating competence), if situations changed were you kept informed and the reasons for the changes explained, did they do a good job? A short email to the ecologist would be helpful for them in responding to similar job requests in the future.

What if I am not satisfied with the work?

CIEEM ecologists are professionals and focused on doing a good job for those who engage them, meeting the Institute's standards and furthering wildlife conservation. For these reasons complaints about ecological work are generally low. However, if you are not satisfied with an aspect of the work go back to the ecologist and explain your concerns clearly. This is best done in writing by email or letter. If it cannot be resolved satisfactorily between you and the ecologist, and the ecologist is a member of CIEEM, you may wish to consider CIEEM's professional conduct complaints procedure (see www.cieem.net/professional-conduct). Through the complaints procedure you will need to explain where you consider they have breached CIEEM's Code of Professional Conduct. If the ecologist is not a member of CIEEM, CIEEM can have no role in addressing potential complaints and you will need to refer to your local Trading Standards Authority.

Sources of further information

Home owner bat guidance

<http://www.cieem.net/bat-survey-guidelines-for-uk-homeowners-2015>

Bat Conservation Ireland

http://www.batconservationireland.org/wp-content/uploads/2013/09/BCIrelandGuidelines_Building.pdf

Competition and Consumer Protection Commission (Ireland)

<http://www.consumerhelp.ie/tradespeople>

Citizens Advice Information (Ireland)

<http://www.citizensinformation.ie/en/>

Citizens Advice Bureau (UK)

<https://www.citizensadvice.org.uk/consumer/getting-home-improvements-done/before-you-get-building-work-done/>

Biological record centres

<http://www.alerc.org.uk/>

Bat Conservation Trust

<http://www.bats.org.uk/>

Acknowledgements

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