****

**National Asset Delivery**

**Technical Surveys and Testing**

**Scope for EM Detailed Arboricultural Inspections 2023-24**

**Guidance notes to Complier**

This is a template document that takes account of NEC3 guidance and any reference to ‘the contract’ shall mean the NEC3 professional services short contract.

Standard contractual defined terms are identifiable where there is a use of **C**apital **L**etters for the phrase or text. Any text in italics is a defined terms specific to this contract eg *starting date*

The entries in red text are for guidance and the compiler is required to confirm or provide certain information relevant to the works.

Any changes made by the compiler should be highlighted in BLUE text.

PLEASE DO NOT AMEND ANY REFERENCE TO EXISTING APPENDICES OR OTHER DOCUMENTS.

PLEASE LIAISE WITH THE PROCUREMENT TEAM IF YOU REQUIRE ANY ASSISTANCE IN COMPLETING THIS DOCUMENT.

**CONTENTS AMENDMENT SHEET**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Amend. No.** | **Revision No.** | **Amendments** | **Initials** | **Date** |
| 0 | 0 | Original version issued with tender | Insert | Insert |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**Table of Contents**

[**1** **PURPOSE OF THE *SERVICES*** 5](#_Toc510093529)

[**2** **EXISTING INFORMATION** 6](#_Toc510093533)

[**3** **CONSTRAINTS ON HOW THE CONSULTANT PROVIDES THE SERVICES** 7](#_Toc510093534)

[**4** **REQUIREMENTS FOR THE PROGRAMME** 9](#_Toc510093538)

[**5** **SERVICES AND OTHER THINGS PROVIDED BY THE *CLIENT*** 11](#_Toc510093539)

[**6** **SPECIFICATION FOR THE *SERVICES*** 12](#_Toc510093540)

**LIST OF ANNEXES**

**Appendix 1 Supplementary Constraints**

# **PURPOSE OF THE *SERVICES***

## Project objectives

### The principal objective of this project is to ensure all reasonable steps are taken to mitigate any foreseeable hazards presented by trees.

### The specification that applies to the *services* is included in Section 6

## Scope of *services*

### The *services* to be provided under this contract are:

1. Tree safety inspections of trees on the sections of the following motorways and trunk roads: M1 (MP 93.7 - J15), M1 (J15 -J16), M1 (J19-J30), A45, A43, M45 which equates to approximately 274.2km of National Highways routes.
2. Record/update tree inventory details, observations/measurements, tree risk methodology and tree defects/conditions including overall plot condition. Tree inventory data base is managed by Confirm asset management software system.
* To include registration/security clearance and training (no longer than 1 day) in Confirm use.
1. Record/add significant individual trees (not currently record) to the tree inventory data base ensuring appropriate data/measurements are recorded.
2. Where tree safety defects are found, appropriate remedial work shall be raised (on confirm) with an appropriate work priority/timeframe to mitigate the risk.
* Trees recommended for removal, the surveyor shall clearly mark and identify these by means of fluorescent tree marker paint and a tree tag with a identification number (not provided by National Highways).
1. Reporting of tree defects observed by the surveyors outside of the specified areas whilst undertaking their duties, this shall include 3rd party hazardous trees.
2. All work requirements and works orders for safety defects shall be raised within the Confirm asset management system.
3. Contractor to provide their inspector(s) with vehicle(s) marked in compliance with Traffic Signs Manual, chapter 8 part 2.
4. Collaborative programming of inspection with National Highways.

## Deliverables

### The *Consultant* is required to produce the following deliverables:

* + - * 1. Visual inspections of trees identified on the routes, roads identified.
				2. Visual condition assessment of third-party trees along the specified routes.
				3. Trees outside of the above areas which are observed by the contractor and considered a hazard to road users, the public and/or third-party property.
				4. Log data/images in the form provided in the Confirm system, completing all relevant condition fields.
				5. Log any inconsistencies between site observation and the asset data held within Confirm.
				6. A monthly updated forecast of expenditure throughout the survey programme.

#

# **Existing INFORMATION**

* + 1. Confirm database schema for tree asset information containing current asset data. *Asset data as distributed via Confirm Connect (inspection routes).*
		2. ESRI shapefiles containing current landscaped areas to be inspected.

# **Constraints on how the Consultant Provides the Services**

## General

### The *Consultant* Provides the Services in such manner as to minimise the risk of damage or disturbance to or destruction of third-party property.

### The *Consultant* complies with the constraints and meets with the requirements outlined in Appendix 1.

### The *Consultant* submits information detailing how the *Consultant* will provide the Services to the *Client* prior to the *services* commencing. This information will include any lifting plans, risk assessments, method statements, the *Consultant’s* staff training information and any other relevant Health and Safety requirements.

## Working hours & site-specific constraints

### The *Consultant’s* working hours for site works shall be daylight hours, to be agreed with the *Client* prior to commencement on site.

### No TM is to be provided by the *Consultant*. Any TM required to enable inspections must be arranged through the *Client*.

## Health, Safety and Environment & Risk Management

### Health and Safety requirements

### In Providing the Services the *Consultant* meets the requirements of Annex 2 of the supplementary constraints relation to health and safety duties.

### The *Consultant* shall comply with the requirements of National Highways safety passport scheme and ensure that all of his employees, and any of his subcontractor’s, are registered in accordance with the implementation of the scheme. Details on the scheme can be found here: <http://www.highwayssafetyhub.com/safety-passport.html>

### Not Used

### Before commencing the construction phase of the *services*, the *Consultant* confirms to the *Client* that adequate welfare facilities are in place. Where the facilities detailed in section 5 are not deemed adequate, the *Consultant* provides all necessary facilities to Provide the Services and to comply with the minimum requirements set out in HSE guidance document L153*.*

### Environmental requirements

### In Providing the Services the *Consultant* meets the requirements of Annex 2 of the supplementary constraints in relation to environmental duties.

### Risk Management

### The *Consultant* identifies, manages and mitigates risks in accordance with the principles of ISO31000.

### The *Consultant* submits a risk register, which captures all risks associated with the delivery of the *services* including those identified by the *Client*, with his tender and maintains it for the contract period. [Note to Compiler: Project specific risks that are to be managed by the *Consultant* should be included on the risk register issued as part of the Instructions for Tenderers]

# **Requirements for the programme**

### The *Consultant* submitsprogramme to the *Client* with his tender.

### The *Consultant* Provides the Services taking into account the following programme constraints:

1. the *starting date* and *completion date* and any post site works, reporting and review period.
2. The services and other things provided by *Client* (see Section 5)
3. Insert details of any further constraints on the sequence and timing that work that is to be undertaken. Requirements for completion of site work, including any phasing of works, and deadlines for reporting.

### The programme should be in the form of an activity and time related bar chart, produced as a result of a critical path analysis.

### The programme should preferably be provided in either a PDF or MS Excel format and cover the full contract period including post site activities. Activities should be clearly defined and named and the programme should detail the following:

1. dates and times associated with the project, including the *starting date*, *completion date* & *Consultant’s* planned completion, and any other dates or times that will specifically impact the delivery of the project
2. an expected distance covered per shift per inspector in order to meet the programme.
3. any programme resulting in greater than 3km length tree plots being inspected per day by any surveyor must include a justification of how the pace of inspection can be maintained without reducing quality of delivered inspection.
4. activities associated with delivering the project.

### The *Consultant* should provide details of the proposed resources (plant, labour, subcontractors etc.) expected to deliver each activity. This information can either be shown on the programme itself or provided in an associated resource statement included in the Proposal for Providing the Services.

### The *Consultant* updates the programme every 2 weeks. The *Consultant* submits an updated programme to the *Client* upon request.

# **Services and other things provided by the *Client***

In the majority of cases, the *Client* will provide temporary TM. In cases where no TM is provided state ‘The *Client* does not provide anything’.

* + 1. Not used.
		2. The other things that will be provided by the Client are as follows:
			- 1. User accounts for access to National Highways implementation of Confirm asset management system.

# **Specification for the *SERVICES***

### The *Consultant* shall Provide the Services in accordance with:

* + 1. Surveyors will be qualified to a minimum of the level 3-4 Technicians Certificate in Arboriculture or equivalent relevant qualification, have completed LANTRA Professional Tree Inspection (PTI)certificate, have completed LANTRA bats & arboriculture or have relevant training in tree features that have the potential to support wildlife and have a minimum of 2 years’ experience undertaking full visual inspection using visual tree assessment (VTA) methods.
		2. They shall be confident in identifying issues requiring remediation with the ability specify suitable arboricultural work (in accordance with current best practices guidance and BS 3998), prioritised based on risk. They will be able to identify a wide range of pests, diseases, and identify and record issues which interfere with the safe operation of the highway as per the current defect recording standards and in line with the DMRB and recommend hazard monitoring intervals and wider tree management objectives.

### All inspections and defects to be captured using Confirm Connect on a compatible Android/iOS/Windows device suitable for use all weather conditions.