

**National Asset Delivery
Technical Surveys and Testing**

Scope for

**603429 SWAD 2020 Tree Condition
Surveys Phase 2:**

M5 Junction 9 (Tewkesbury) to Junction 31 (Exeter)

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LIST OF ANNEXES

Appendix 1 **Supplementary Constraints**

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1 PURPOSE OF THE SERVICES

1.1 Project objectives

1.1.1 The principle objective of this project is to undertake and report on the condition inspection and survey of highway trees for the specified lengths of Strategic Road Network (SRN), so discharging a duty upon Highways England to identify 'safety critical defects' and 'reactive defects' in the interest of maintaining a safe network.

1.1.2 The specification that applies to the *services* is included in Section 6. The survey and reporting should be undertaken in accordance with the 'Tree Condition Inspections / Surveys - Supply Chain Brief' for the 'SWAD 2020 Tree Condition Surveys Phase 2: M5 Junction 9 (Tewkesbury) to Junction 31 (Exeter)'.

1.2 Scope of services

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

- (1) Arboricultural surveys as specified in the 'Tree Condition Inspections / Surveys - Supply Chain Brief' for the 'SWAD 2020 Tree Condition Surveys Phase 2: M5 Junction 9 (Tewkesbury) to Junction 31 (Exeter)'.

1.3 Deliverables

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

- (1) A single report should be produced for the route, as specified in the 'Tree Condition Inspections / Surveys - Supply Chain Brief' for the 'SWAD 2020 Tree Condition Surveys Phase 2: M5 Junction 9 (Tewkesbury) to Junction 31 (Exeter)'. It should be titled "Highways England SWAD 2020 Tree Condition Surveys - Phase 2: M5 Junction 9 (Tewkesbury) to Junction 31 (Exeter)". Contents of the report must include but is not limited to a brief introduction, scope, methodology, survey limitations, a brief summary of the survey findings, survey results in the form of summary tables, and overview plans of the route showing tree locations referenced to the summary tables. The overview plans and 'Tree Survey Sheets' (refer to the 'Supply Chain Brief' for content on these) must be presented in appendices. The summary tables, overview plans and 'Tree Survey Sheets' must separate carriageway direction and be presented in the direction of travel, adopting the convention that the first direction reported is implicit in the survey title.

2 EXISTING INFORMATION

- 2.1.1 This inspection / survey requires knowledge of the Highways England operational estate. The extent of the estate is being continuously revised following delivery of improvement schemes, land transactions or receipt of new information, and should therefore be taken from the latest base layer of EnvIS (Highways England Environmental Information System). The soft estate layer and road marker post layer are provided with this tender package as GIS layer file attachments contained within an email specific to the route.
- 2.1.2 The Highways England [GeoStore](#) website enables the *Consultant* to request and download OS base mapping to assist with reporting for this project, subject to registration and approval on application for specific data. Details will be provided to the *Consultant*.
- 2.1.3 The Highways England 'South West Network Induction' is available to support the *Consultant* with their staff induction.

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3 CONSTRAINTS ON HOW THE CONSULTANT PROVIDES THE SERVICES

3.1 General

- 3.1.1 The *Consultant* Provides the Services in such manner as to minimise the risk of damage or disturbance to or destruction of third party property.
- 3.1.2 The *Consultant* complies with the constraints and meets with the requirements outlined in Appendix 1.
- 3.1.3 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.

3.2 Working hours & site specific constraints

- 3.2.1 The *Consultant's* working hours for site works shall be daylight hours unless agreed otherwise with the Highways England Technical Surveys Manager.
- 3.2.2 The *Consultant* is responsible to ensure that all field staff are appropriately inducted by a competent person on all aspects of activities required by the brief. The Highways England 'South West Network Induction' is available to support the *Consultant* with their staff induction. Evidence of staff induction is required.
- 3.2.3 The *Consultant* must have in place Safe Systems of Work, Risk Assessments and a Method Statement that are specific to the activities proposed. These should be provided to the Highways England Technical Surveys Manager for review prior to any site activity. Refer to the 'Tree Condition Inspections / Surveys - Supply Chain Brief' for contact details.
- 3.2.4 The *Consultant* must place and be competent to place 'Surveying' signs on the network where field staff are visible to road users for periods exceeding 15 minutes. Such signs are considered to be information signs, not instruction signs, therefore the persons) placing them do not require Chapter 8 sector scheme certification. Signs should be placed 1.2m away from traffic and facing oncoming traffic.
- 3.2.5 If stopping or parking in the hard shoulder, verge or a maintenance hard standing space, the survey vehicle must be marked up appropriately for Highways Maintenance (Chapter 8 compliant). If an unmarked private vehicle is used, it may only be used in the same way as any other road user (i.e. no stopping or parking in the hard shoulder or on the verge, no parking within maintenance hard standings).

- 3.2.6 If temporary traffic management is required to safely inspect / survey any trees, the road lengths will need to be identified by the Consultant early on and details provided to the Highways England Technical Surveys Manager at SWSurveys@highwaysengland.co.uk.
- 3.2.7 Traffic management and road space booking will be arranged by the Highways England Technical Surveys Manager and provided by Highways England supply chain at no cost to the *Consultant*. Some 4 to 6 weeks is usually required to make the necessary arrangements for traffic management and it is subject to road space being available. The provider of traffic management would become Principal Contractor for these elements of the survey and their safety requirements will need to be complied with.
- 3.2.8 It is a requirement that all persons working on the Highways England network wear high visibility long sleeved yellow jackets and trousers, and protective footwear at all times. Other personal protective equipment identified in the supply chain Risk Assessment must also be worn as and when appropriate.
- 3.2.9 It is prohibited to cross any live Highways England carriageway on foot, including slip lanes up to the node point where the Highways England network switches to County road. Crossing a live County road is not prohibited.
- 3.2.10 The Regional Operations Centre must be advised in advance of accessing the network, then at arrival on site and finally on departure from site.
- 3.2.11 No access should be made onto private land without prior consent of the landowner / tenant / occupier.

3.3 Health, Safety and Environment & Risk Management

Health and Safety requirements

- 3.3.1 In Providing the Services the *Consultant* meets the requirements of Annex 2 of the supplementary constraints relation to health and safety duties. The *Consultant* also adheres to the requirements in Section 3.2 above.
- 3.3.2 When implemented, the *Consultant* shall comply with the requirements of Highways England's 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.
- 3.3.3 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

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

Risk Management

- 3.3.5 The *Consultant* identifies, manages and mitigates risks in accordance with the principles of ISO31000.
- 3.3.6 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.

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4 REQUIREMENTS FOR THE PROGRAMME

4.1.1 The *Consultant* submits programme to the *Client* with his tender.

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

- (i) the *starting date*, - which will be 1st July 2020.
- (ii) *Start-up meeting* – to be held at Highways England Ash House office, Exeter, within 2 weeks of the tender award.
- (iii) *completion date*, - field surveys to be complete by 25th September 2020; final survey reports to be submitted by no later than 2nd November 2020.
- (iv) and any post site works, - n/a
- (v) reporting and review period - draft report to be provided by no later than 12th October 2020; Highways England Environmental Manager will review and return comments by 21st October 2020; final report is required by no later than 2nd November 2020.
- (vi) The services and other things provided by *Client* (see Section 5)
- (vii) The *Consultant* is responsible to ensure that all field staff are appropriately inducted by a competent person on all aspects of activities required by the brief. The Highways England 'South West Network Induction' is available to support the *Consultant* with their induction. Evidence of staff induction is required.
- (viii) The *Consultant* must have in place Safe Systems of Work, Risk Assessments and a Method Statement that are specific to the activities proposed. These should be provided to the Highways England Technical Surveys Manager for review prior to any site activity.
- (ix) Safety Critical Defects – the *Consultant* must provide details immediately to the Regional Operations Centre, and advise the Highways England Environmental Manager at soonest opportunity.
- (x) High Priority Reactive Defects – the *Consultant* must provide details weekly to the Highways England Service Manager, copied to the Highways England Environmental Manager.
- (xi) As the survey progresses the *Consultant* must inform the Highways England Environmental Manager fortnightly of percentage completion along the route.
- (xii) The *Consultant* must provide a monthly summary of all defects along the route to the Highways England Environmental Manager, and then a final summary on completing the survey of the route.

- (xiii) The *Consultant* must prepare a report for the routes entitled “Highways England SWAD 2020 Tree Condition Surveys - Phase 2: M5 Junction 9 (Tewksbury) to Junction 31 (Exeter) - excluding SMART Motorway”. This should be submitted to the Highways England Environmental Manager in draft by 12th October 2020.
- (xiv) Comments on the draft report will be returned to the *Consultant* by 21st October 2020 and one report review meeting at the Highways England Ash House office in Exeter should be programmed prior to issue of the final report. This would require attendance by the report author(s) and Highways England Environmental Manager. The final report is required to be submitted to the Highways England Environmental Manager by no later than 2nd November 2020.
- (xv) One hard copy and an electronic copy of the final report should be issued to the Highways England Environmental Manager. An unlocked Excel spreadsheet of the summary tables presented in the report should also be provided, so Highways England can develop the necessary follow up actions. All information obtained and issued in delivery of these surveys will become the property of Highways England and may be stored or used by Highways England or its agents for the purpose of managing the Strategic Road Network.
- 4.1.3 The programme should be in the form of an activity and time related bar chart, produced as a result of a critical path analysis.
- 4.1.4 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:
- (i) 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.
 - (ii) activities associated with delivering the project, to include start-up meeting, mobilisation period, field survey, reporting, report review meeting.
 - (iii) draft report submission;
 - (iv) draft report review period;
 - (v) final report submission.

- 4.1.5 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.
- 4.1.6 The *Consultant* updates the programme every four weeks. The *Consultant* submits an updated programme to the *Client* upon request.

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5 SERVICES AND OTHER THINGS PROVIDED BY THE CLIENT

- 5.1.1 The *Client* does not provide anything with respect to Traffic Management, unless requested by the *Consultant*. Refer paras 3.2.6 and 3.2.7.
- 5.1.2 'Not used'.
- 5.1.3 The other things that will be provided by the *Client* are as follows:
- (1) Refer to Section 2.

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6 SPECIFICATION FOR THE SERVICES

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

- The attached 'Tree Condition Inspection / Surveys - Supply Chain Brief' for the 'SWAD 2020 Tree Condition Surveys Phase 2: M5 Junction 9 (Tewksbury) to Junction 31 (Exeter)'.

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