

APPENDIX 2 - Sample Brief for Procurement of Arboricultural Services

APPENDIX 2 – SAMPLE BRIEF FOR PROCUREMENT OF ARBORICULTURAL SERVICES

This sample brief is for reference only. Tree Owner shall modify the content / scope of work to suit your own requirements in conducting tree works.

1.0 Objective of the Assignment

1.1 The objective of this Assignment is to *prepare / update tree inventory, carry out tree risk assessment, and undertake associated mitigation measures for trees** within the assessment area. The location and extent of assessment area is shown in Appendix ____.

2.0 Scope of Work

2.1 Arboricultural services to be carried out under this Assignment shall cover the following scope of work.

- (i) Prepare / update* tree inventory for existing trees;
- (ii) Carry out tree risk assessment through on-the-ground or aerial inspection (optional) for trees within the assessment area;
- (iii) Record the inspection findings;
- (iv) Recommend appropriate mitigation measures; and
- (v) Carry out, supervise and record all the recommended mitigation measures (optional) [*Tree Owner can consider to carry out the mitigation measures under a separate contract*].

3.0 Description of the Assignment

3.1 The services provided by the Contractor to complete this Assignment shall meet the requirements as listed in clause 3.2 to 3.3 and to the satisfaction of the Employer.

3.2 Preparation / Updating* of Tree Inventory

3.2.1 The Contractor shall prepare / update* the tree inventory to record all information of existing trees within the assessment areas. Basic tree information, including tree identity number, species, size, health and structural conditions, and site information, such as number of each tree species, photos, tree layout plan, shall be included in the Tree Inventory.

3.2.2 After the completion of Tree Inventory, the Contractor shall submit an assessment report with the following information:

- (i) Tree Schedule;
- (ii) Tree Layout Plan; and
- (iii) Photos of each individual tree.

3.3 Tree Risk Assessment (TRA)

The TRA should be carried out in accordance with to the latest version of “Guidelines for Tree Risk Assessment and Management Arrangement” issued by the Greening, Landscape, and Tree Management Section (GLTMS) of the Development Bureau (DEVB).

3.3.1 Identification of Target Areas

- (i) The Contractor shall Identify the target areas within / adjacent to the assessment area according to the intensity and frequency of use.

3.3.2 Tree Basis Assessment - Tree Group Inspection (Form 1)

- (i) After identification of target areas within the assessment area, the Contractor shall carry out Tree Group Inspection for the trees within target areas.
- (ii) The main objective of Tree Group Inspection is to facilitate an initial screening of trees. Each tree in a tree group has to be inspected systematically for identifying potential tree hazards or tree required for more detailed individual tree risk assessment.
- (iii) The Contractor shall carry out of any tests to the trees necessary for identifying trees for remedial action or detailed tree risk assessment.
- (iv) The Contractor shall submit the report comprising the following to the Employer.
 - (a) The completed and endorsed Tree Group Inspection Form(s);
 - (b) Tree Layout Plan(s) showing the locations of the trees within target areas;
 - (c) Photo record(s) of the trees;
 - (d) Recommendations of mitigation measures for risk abatement; and
 - (e) Records of mitigation measures* *[delete if mitigation measures to be carried out under a separate contract]*.

3.3.3 Tree Basis Assessment - Individual Tree Risk Assessment (Form 2)

- (i) After completion of the Tree Group Inspection, the Contractor shall carry out "Individual Tree Risk Assessment" for the tree(s) recommended in the Tree Group Inspection report.
- (ii) The Contractor shall submit the Individual Tree Risk Assessment report comprising the following to the Employer.
 - (a) The completed and endorsed Individual Tree Risk Assessment Form(s);
 - (b) Tree Location Plan;
 - (c) Photo record(s) of the tree;
 - (d) Other documents, such as any test report on the tree as necessary for further investigating the suspected defects to facilitate assessment of the tree condition and tree failure potential;
 - (e) Recommendations of mitigation measures for risk abatement; and
 - (f) Records of mitigation measures* *[delete if mitigation measures to be carried out under a separate contract]*.

3.3.4 The Contractor shall provide all necessary tools, equipment and transportation for carrying out the Tree Group Inspection, Individual Tree Risk Assessment and mitigation measures* *[delete if mitigation measures to be carried out under a separate contract]*.

3.4 Mitigation Measures*

[delete if mitigation measures to be carried out under a separate contract]

- (i) The Contractor shall submit a detail proposal of mitigation measures for each tree as recommended in Tree Group Inspection and Individual Tree Risk Assessment to the Employer for approval prior to commencement of the works. The proposal shall include:
 - (a) Work description;
 - (b) Annotated plan(s), photo(s) and drawing(s) for clear indication of the proposed arboricultural work; and
 - (c) Method statement for the proposed arboricultural work.
- (ii) The Contractor shall adopt a suitable and safe method with compliance to the relevant prevailing occupational safety and health requirements and guidelines as promulgated by the Labour Department and the GLTMS of DEVB.

- (iii) The Contractor shall submit the report comprising the following to the Employer:
 - (a) Record of the completed mitigation works; and
 - (b) Photo record(s) before and after operation.

4.0 Deliverables

4.1 The Contractor shall provide the following deliverables after completion of each stage of the works as part of the Assignment.

- (i) _____ copies of the updated* Tree Inventory;
- (ii) _____ copies of Tree Group Inspection Report;
- (iii) _____ copies of Individual Tree Risk Assessment Report; and
- (iv) _____ copies of record of completed mitigation measures*. *[delete if mitigation measures are carried out under a separate contract]*

4.2 All the submitted reports shall be in the form of an A4-sized, bound report which shall bear a report cover indicating the Contract number, the Contract title, the date of the report, and that the report is prepared by the approved Inspection Officer and endorsed by the Endorsement Officer. The format of the report shall be agreed by the Employer prior to submission of the report.

4.3 The Contractor shall provide hard and soft (electronic files) copies of all drawings and documents as required by the Employer during the contract period of the Assignment.

5.0 Programme of Implementation

5.1 The due date for the commencement of the Assignment shall be _____. The due date(s) for the completion of Section 3 of the Assignment, including the submission of Inspection Reports and all necessary mitigation measures* *[delete if mitigation measures to be carried out under a separate contract]*, shall be _____.

5.2 The Contractor shall submit the draft programme and revised draft programme within the following periods:

- (i) Submission of the draft programme:
Within __ weeks of the due date for commencement of the Assignment
- (ii) Submission of revised draft programme:
Within __ weeks from the instruction of the Employer

5.3 The draft programme and revised draft programme shall detail the activities to be carried out and target dates for particular tasks. The Contractor shall discuss with the Employer during the above periods to agree the timing of submission of reports, other documents and plans for each of the main elements of the Assignment.

6.0 Standards and Specifications

6.1 The Contractor shall adopt such guidelines, standards and specifications as are applicable to and in current use by the Government of the Hong Kong Special Administrative Region or, if non-existent, international Codes of Practice and Specifications. Reference can be made to the list of guidance documents in tree risk assessment and tree maintenance in the website of GLTMS at www.greening.gov.hk.

7.0 Information Provided by the Employer

7.1 All available information relevant to the Assignment will be provided to the Contractor.

Notes: * Deleted if not applicable.