



CLARION
HOUSING GROUP

Clarion Housing Group
Tree Survey and Maintenance
Specification

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1 Overview

1.1 Introduction

Clarion Housing is the largest housing association in the country with 125,000 homes across more than 170 local authorities. Over 360,000 people call a Clarion Housing home their home.

As a landlord, Clarion is committed to providing excellent customer service to all its residents and to maintaining its homes to a good standard - investing significantly in improving them each year.

Clarion also develops and markets homes for affordable rent and low cost home ownership as well as managing homes for private rent.

Clarion is part of Clarion Housing Group, which also comprises a charitable foundation, a property development company and a repairs and maintenance service.

1.2 Overview of Requirements

Clarion Housing Group recognises the importance and benefits of trees within the urban landscape. Planting is to be carried out in communal housing areas and estates.

Clarion requires a Service Provider to undertake condition surveys and maintenance of trees in all communal areas and Clarion properties.

The Contractor must provide a responsive and effective service in an efficient manner to meet Clarion responsibilities in the care and management of its trees.

The Contractor must ensure that provision is made to remove and dispose of all debris generated from the works on every site visit.

No work is to be undertaken before 8am Monday to Saturday, except with prior approval. No work shall be undertaken on Saturday afternoons or on a Sunday except in emergencies.

All works must be carried out in line with HSE guidelines noted in AFAG401 Tree-climbing operations.

2. General Requirements

2.1 Health & Safety

Contractors must meet Health and Safety policy and risk assessment requirements.

Contractors will need to demonstrate appropriate health and safety competence in order to carry out works in line with current Health & Safety legislation and with particular attention to the requirements of:

- The Health & Safety at Work Act 1974
- Provision and Use of Work Equipment Regulations 1998
- Management of Health & Safety at Work Regulations 1999
- Control of Substances Hazardous to Health (COSHH) Regulations 2002
- Work at Height Regulations 2005

- ARB Approved Contractor

In addition to the above, all Contractors will need to complete and pass the Clarion Health & Safety appraisal prior to contract award. Contractors are subject to H&S review at periods of no less than 18 months to ensure continued compliance with required standards.

2.2 Clarion Policies

Contractors must comply with the following Clarion policies

- Clarion Tree Policy – (policy in the process of being drafted)
- Clarion Code of Conduct
- Clarion Environmental Policy
- Clarion Data Protection

2.3 Qualifications and Accreditations

Contractors must demonstrate they have the relevant qualifications and accreditations, refer to appendix A.

2.4 Occupied Homes

The contractor will work with estate teams and residents when operating in communal areas. Contractors to carry ID and have the appropriate PPE. Contractors must confirm access and provide residents with 1 weeks' notice before attending an appointment.

2.5 Equality and Diversity

The contractor must work with Clarion to offer vulnerable residents, residents with language needs, or those with hearing/reading impairments the option of language services, larger print text, or audio services.

The contractor's staff must demonstrate good customer service skills and have an awareness of safeguarding and duty of care issues.

3 Locations

3.1 Locations and contract structure

Lot number	Region
Lot 1	South London
Lot 2	North London
Lot 3	South - Kent & Surrey
Lot 4	South – Mid Sussex & Hampshire
Lot 5	East
Lot 6	North Upper North (Yorkshire/North West/Staffordshire)
Lot 7	North Lower North (Midlands/South West)
Lot 8	National consultancy/audit

4 Technical requirements

4.1 Condition Surveys
<p>4.1.1. Condition Survey – From Ground Level</p> <ul style="list-style-type: none">• Carry out a detailed inspection• Capture / revise and record data for surveyed trees• Assess and record condition, recommended works and priorities• Take one or more representative photographs• Provide results in a format to be agreed with the Client Representative
<p>4.1.2. Climbing and Diagnostic Inspection</p> <ul style="list-style-type: none">• Assess and explore defects by aerial survey and or diagnostic inspection• Defects inspected and results recorded• Data provided in an agreed format
<p>4.1.3 Tree works to be categorised into the following definition of priorities</p> <ul style="list-style-type: none">• Urgent (public safety/emergency) – works to be carried out within 3 months• Essential – works to be carried out within 1 year• Desirable – works to be carried out within 3 years <p>Contractors to provide a programme of tree re-inspections</p>
4.2 Tree Maintenance
<p>4.2.1. Removal of Basal And Epicormic Growth</p> <ul style="list-style-type: none">• Stem is clear of epicormic growth up to natural crown break.• Area within crown spread is clear of suckers.• Cuts back to the growth collar,• Minimal damage to the bark.•
<p>4.2.2 Removal of Deadwood</p> <ul style="list-style-type: none">• No dead branches or branch stubs greater than 25mm in diameter• Final cuts back to the nearest branch fork or to the branch bark ridge and branch collar.• No hanging branches
<p>4.2.3 Young Tree Maintenance</p> <ul style="list-style-type: none">• Tree has a single leader unless intended to be multi-stemmed.• Only single stems remain where included bark is visible.• No crossing/'rubbing branches are visible.• No basal or epicormic growth is visible.• The crown contains no dead, dying or diseased branches.• Final cuts back to the nearest branch fork or to the branch bark ridge and branch collar.• Stake and ties adjusted or removed as appropriate.
<p>4.2.4 Crown Lifting</p> <ul style="list-style-type: none">• Clearance under the crown meets stated clearance [3 or 5m].• No suckers or epicormic growth.• Final cuts back to the nearest branch fork or to the branch bark ridge and branch collar.

<p>4.2.5 Crown Thinning</p> <ul style="list-style-type: none"> • The specified percentage of canopy has been removed. • The natural shape of the tree has been preserved. • There is an even density within the crown • No dead, dying, damaged branches remain in the crown. • The natural shape appropriate to the species is preserved • Final cuts back to the nearest branch fork or to the branch bark ridge and branch collar. • No stubs or foreign bodies exist in the crown.
<p>4.2.6 Prune Back from Street Furniture</p> <ul style="list-style-type: none"> • 2 - 3m clearance between tree and stated item/s. • Overall natural appearance to tree. • Flowing branch line. • No truncated branches. • Final cuts back to the nearest branch fork or to the branch bark ridge and branch collar.
<p>4.2.7 Tip Prune Side Laterals from Structure</p> <ul style="list-style-type: none"> • Specified clearance between tree and structure. • No cuts greater than 5cm. • Final cuts back to the nearest branch fork or to the branch bark ridge and branch collar. • Overall natural appearance to tree. • Flowing branch line.
<p>4.2.8 Crown Reduction</p> <ul style="list-style-type: none"> • The specified percentage (or amount in metres) has been removed. • Final cuts back to the nearest branch fork or to the branch bark ridge and branch collar. • The final overall form is balanced and appropriate to the species.
<p>4.2.9 Standard Prune – Lift and Thin</p> <ul style="list-style-type: none"> • The specified percentage (or amount in metres) removed. • Final cuts back to the nearest branch fork or to the branch bark ridge and branch collar. • The final overall form is balanced and appropriate to the species.
<p>4.2.10 Pollard – Reduce Back to Previous Reduction Points</p> <ul style="list-style-type: none"> • All re-growth removed. • Pollard head/s not damaged. • Final pruning cuts small and clean. • Trunks (and any major branches) free of basal and epicormic growth. • Main structure from base of trunk to pollard heads unaltered.
<p>4.2.11 Felling and Dismantling</p> <ul style="list-style-type: none"> • Tree felled or dismantled as appropriate • Remaining stump at appropriate height/depth according to further treatment.
<p>4.3 Hedge Maintenance</p>
<p>4.3.1 Hedge Reduction</p> <ul style="list-style-type: none"> • The specified percentage (or amount in metres) has been removed. • Hedge sides trimmed to create a balanced and pleasing profile

<ul style="list-style-type: none"> • Final cuts back to nearest branch forks or to the branch bark ridges and branch collars. • The final overall form is appropriate to the species
<p>4.3.2 Hedge Removal by Felling and Dismantling</p> <ul style="list-style-type: none"> • Hedge clear felled or dismantled as appropriate • Remaining stumps at appropriate height/depth according to further treatment.
<p>4.4 Stump and Root Treatment</p>
<p>4.4.1 Grub Out Tree</p> <ul style="list-style-type: none"> • Evidence of CAT scan provided. • No stump/roots visible following grubbing. • Any removed kerbs and paving reinstated • Excavated area back-filled with appropriate material as required. • Back-fill compacted. • Back-fill height level with surrounding ground height.
<p>4.4.2 Chemical Treatment of Stump to Prevent Regrowth</p> <ul style="list-style-type: none"> • Stump prepared as per chemical manufacturer's recommendations. • Stump protected (when required) as per manufacturer's instructions. • No re-growth during following growing season. • PA1 and PA6 Certificate available for person applying herbicide
<p>4.4.3 Stump Grind</p> <ul style="list-style-type: none"> • No stump or buttress roots visible in area identified for grinding. • Evidence of CAT scan provided. • Excavated area back-filled with appropriate material if required. • Back-fill compacted. • Back-fill height level with surrounding ground height.
<p>4.4.4 Root Prune.</p> <ul style="list-style-type: none"> • Record of CAT use. • Excavation undertaken for area specified. • Edges of excavation area clean and straight. • Remaining roots undamaged during excavation. • Protection given to roots to be retained. • Reinstatement complete.
<p>4.5 Ivy and Other Climbers</p>
<p>4.5.1 Severing and Treatment of Stumps</p> <ul style="list-style-type: none"> • All climber growth severed at base • All climber stumps treated with appropriate chemical • PA1 and PA6 Certificate available for person applying herbicide.
<p>4.6 Pest Control</p>
<p>4.6.1 Control of Caterpillars Using Chemical Treatment</p> <ul style="list-style-type: none"> • No living caterpillars 48 hours following chemical application. • PA1 and PA6 Certificate available for person applying herbicide.

<p>4.6.2 Control of Caterpillars by Removal of Tents</p> <ul style="list-style-type: none"> • No tents visible following control. • All arising's disposed of by incineration
<p>4.7 Re-instatement of tree pits and tree pit construction</p>
<p>4.7.1 Re-instatement of tree pits and construction.</p>
<p>4.8 Replanting of trees</p>
<ul style="list-style-type: none"> • Planting is to be carried out in communal housing areas and estates • Suitable replacement tree to be planted at same or alternative site • Appropriate watering aid installed [leaky pipe, Root rain Arbor drench] • Appropriate support mechanism installed • All as agreed with the Client Representative
<p>4.8 Out of Hours / Emergency Call Out Service</p>
<ul style="list-style-type: none"> • Unplanned emergency tree works may be required from time to time due to adverse weather conditions or other unforeseen events. • Service provider to respond within 4 hours with the tree/site to be made safe within 24 hours • The Service Provider shall provide a 24-hour emergency response service for 365 days a year. • Outside of normal hours, Clarion can be contacted via our out of hours service on 0300 500 8000.
<p>4.9 4.10 Notification of being on site</p>
<p>The contractor shall provide prior notification of attendance on site and to demonstrate what work has been completed and to allow queries from residents to be dealt with</p> <ul style="list-style-type: none"> • The Contractor will provide access to a portal, accessible to Clarion staff to view live documents or send an excel spreadsheets to the AO detailing what sites have been addressed during the week.
<p>4.11 Equipment</p>
<ul style="list-style-type: none"> • The Contractor must ensure that machines are properly guarded, maintained and that work is completed so that no danger is presented to the operator or any persons. • All appropriate regulations are followed for the maintenance of plant and equipment. • Special care should be taken to prevent material being thrown towards traffic, pedestrians or windows. • Equipment must comply with the relevant H&S laws, regulations and standards. – Appendix A.
<p>4.12 Dress code</p>
<ul style="list-style-type: none"> • All operatives working on behalf of the contractor must wear appropriate clothing, carry ID and be able to be clearly identified by both residents and staff. • The Contractor shall ensure that all operatives are equipped with and wearing the appropriate protective clothing and adhere to health and safety regulations.

5 Monitoring

5.1 Monitoring

- A regional Contract Manager will manage each contract/lot; the contract manager will manage the day-to-day activities, including schedules, compliance with KPI's and complaints.
- KPI's will form part of the contract so that performance is monitored and expectations for quality of service are clear to the contractor.
- Regular contract meetings will be held to discuss all aspects of the contract. Contract meetings will take place every month for the first 6 months, then providing the contract is performing well these will be reduced to quarterly meetings.
 - The contractor will provide reports, KPI information, complaints, expenditure, and invoices 5 days prior to all contract meetings.

5.2 Portal

The Contractor will be required to provide a client portal to allow Clarion staff access live data and reports.

The minimum requirements for the portal are:

- All datacentres must be ISO27001 accredited.
- Secure Software Development Lifecycle (SSDL) must be followed and evidenced
- The portal must have an annual penetration test carried out by an external CREST accredited supplier. There should also be evidence of any findings being mitigated in a timely manner.
- The company must hold at least Cyber Essentials or be able to demonstrate equivalent

6 Notification of Improvement

- Any sites not maintained as required by the agreed programme, or which fail an inspection will be brought up to standard within one week.
- Those sites that are not brought up to standard within this timeframe will be subject to an improvement plan.
- Contractors to carry out no less than 5% post works inspections

7 Continuous Improvement

- Identify new practices and/or methods to limit environmental damage.
- Identify and advise on watering methods and re-siting of replacement trees and suitable locations.

8 Consultancy/audit function

Separate contractor/consultant to oversee a programme of pre and post tree surveys and tree maintenance/works audits carried out by contractors across the 7 lots.

- Sampling of inspections and surveys to identify inconsistencies / appropriate works
- Post inspections to assess the delivery of completed works.

9 Billing

- Contractors must produce an invoice on receipt of a valid Purchase Order and within 14 days of completion of works
- Invoices to provide a breakdown of works.

10 Social Value

- Clarion Housing Group actively encourages all residents to be involved in the management and development of the area where they live. Contractors must be able to support this through attendance at resident and community events as and when required/possible.
- Contractors to work with Clarion Futures to provide details of any job vacancies, to allow Clarion residents to have the opportunity to apply for any vacancies.
- Contractor to provide a reduced rate for tree works for our elderly or venerable residents' gardens.