

## Tree Valuation Project Brief

### Requirements in Brief

The Principal is seeking to appoint a suitably qualified (level 4 preferred/level 5 highly desirable) and experienced arborist to undertake a tree valuation and prepare a subsequent management plan for all street trees, and trees within Council-owned assets within the Town of Cottesloe.

### Background

The Town of Cottesloe Street Tree Policy supports a commitment to the maintenance of existing trees and the establishment of new trees. As part of this commitment, the Town would like to establish the value of existing trees, and look forward to the future from both a maintenance and replacement perspective.

### Project Scope

Trees are to be assessed by an expert arborist. The scope of works will comprise of:

1. Develop a tree valuation model, appropriate to Cottesloe, based on the Melbourne valuation model. The model is to incorporate the development of an app for auditing and automatic valuation, or alternatively recommend an existing program for ongoing valuation and management, that is compatible with Intramaps. Any software should link to the existing geospatial data the Town has previously had prepared, and it needs to automatically record GPS and spectral photography, and be updatable on a regular basis. The model should incorporate the following parameters:
  - a. Removal costs – current costs of tree removal, including physical removal of the tree and stump;
  - b. Amenity Costs – Derive an Amenity Value Formula from the Maurer-Hoffman Formula, similar to that undertaken in Melbourne, along the following parameters:
    - i. The basic monetary value of the trees is to be taken from the internationally accepted table of values devised by the American Council of Tree and Landscape Appraisers and the International Society of Arboriculture. A table is to be produced for basic value as at 2018 in AUD based on the trunk diameter breast height (DBH);

- ii. Species Factor – produce a table categorising trees into groups based on life span, and growth rate in a particular environment, and then applying a species factor to each group;
- iii. Aesthetics – Derive an aesthetics factor based on the impact on the landscape is the tree was removed;
- iv. Locality – Derive a locality factor based on the tree’s geographical situation e.g. trees in an urban environment carry more weight than trees in a rural environment;
- v. Tree Condition – Derive a rating based on the tree condition, made up of an assessment of the condition of the trunk, growth, structure, pests and diseases, canopy development and life expectancy.

The Amenity Costs Value is then derived from the multiplication of the above 5 factors.

- c. Ecological Services Value – use the i-tree valuation tool from the USDA Forest Service that enables urban forest analysis and assessment, and has been adapted for Australian conditions. This information is to be either linked to, or fed into the developed app, or proposed software.
  - d. Reinstatement Costs – to be determined based on the above factors, and include a 24 month tree establishment fee.
2. Assess existing data, including the current list of trees, coordinates and canopy cover as a starting point;
  3. Using software compatible with the developed application/software, record each tree’s coordinates and condition.
  4. Asses the value of each tree, using the model developed; and,
  5. Based on this assessment, provide a management plan for each tree in terms of either monitor annually, review in 5 years, replacement timeframe, underplanting so as to ensure canopy is continuous, etc. The management plan should also incorporate succession planning for the loss of older trees, including strategies for their retention, health management, treatment and/or replacement, and identification/detection of changes in tree health.

The Council will review the draft valuation and management plan prior to acceptance, and it is expected that the fee includes two rounds of comments/edits from firstly the Town of Cottesloe Officers, and secondly from Council prior to acceptance.

### Key milestones

1. Start-up meeting with Town representatives;
2. Valuation model review by the Town and endorsement by the Reserves, Parks and Playgrounds Committee;
3. Valuation model approval and adoption by the Council;

4. Tree valuation review by the Town and endorsement by the Reserves, Parks and Playgrounds Committee;
5. Tree valuation approval and adoption by the Council;
6. Management plan review by the Town and endorsement by the Reserves, Parks and Playgrounds Committee; and,
7. Management plan approval and adoption by the Council.

### **Deliverables**

1. Tree valuation model;
2. Software;
3. Tree valuation of each Council owned tree; and,
4. Management plan.

### **Relevant Documents**

1. Stratified spatial data; and,
2. Original tree inventory from 1997.

### **General Duties of the Consultant**

The Town does not have the resources to complete this project in-house. For this reason, the Town desires to engage a consultant to act as agent for the Town in attaining approvals and meeting with members of the public. The consultant is required to act in the Town's best interests, at all times, and to manage the works in the best interests of the Town, and as if the consultant was the Town.

Within ten business days of the contract being awarded, the consultant will meet with the Town to confirm timelines for project implementation and Council expectations.

### **General**

At the end of each phase of the project, the consultant is to provide to the Town electronic copies of the documentation (electronic copies will include all required information in a recognised and modifiable drafting format).

### **Quality**

All valuation shall be certified by an appropriately qualified and experienced arborist. All elements of the works shall comply with all applicable Australian Standards.

### **Submission Information**

Each submission will be evaluated based on the following criteria. A maximum of three (3) pages should be submitted for each criterion.

**RELEVANT EXPERIENCE (15%)** - Demonstrate experience and skill in all aspects of the design/construction of projects of a similar nature displaying high quality outcomes, with emphasis on provision of similar facilities and practices as detailed in the specification.

**TECHNICAL SKILLS AND EXPERIENCE OF KEY PERSONNEL (20%)** - Demonstrate key personnel's experience in completing similar projects/works/supply of similar goods and their skills and experience to be used on this project/services.

**METHODOLOGY (25%)** – Demonstrate a sound understanding of the project and present a strategy for undertaking the works.

**RESOURCES (10%)** - Demonstrates the ability to supply and sustain the necessary resources.

**PRICE (30%)** – The vendor is to provide a lump sum fee for the project, broken down in to both the valuation and management plan components. The fee shall include meetings/liaison with the Town of Cottesloe as required.

The consultant is required to nominate a project manager for the project, who will be the consultant's representative throughout the project, and who shall be responsible for all aspects of the project.

#### **Submission Date**

Submissions are to be sent in as per section 6, Lodgement of Tenders and Delivery Method, of Part One of this document, no later than **11am, Monday 22 February 2018**.