

# PLANTING CONTRACTOR RISK RATING FORM FOR DETERMINATION OF REQUIRED QUALIFICATIONS FOR INVITATIONS TO TENDER PLANTING

**\*\*\* THIS RISK RATING FORM APPLIES AS AN AVERAGE TO THE ENTIRE PLANTING PROJECT \*\*\***

CRITICAL SITE FACTORS	LOW or N/A	MODERATE	HIGH TO VERY HIGH	QUALIFICATIONS	NOTES
<b>Obstacle Planting</b>	• < 20%	• 20-60%	• > 60%	Equivalency % /reference	
<b>Fill Plants ( % of Blks)</b>	• < 15%	• 15-30%	• > 30%	Equivalency % /reference	
<b>Microsite Planting (% of total trees)</b>	• < 15%	• 15-30%	• > 30%	Equivalency % /reference	
<b>Species Mix ( avg per blk)</b>	• 1 species	• 2-3 species	• 3+ species	Reference	
<b>Extras: (Time of Plant)</b> - Tubing - Fertilizer - Plantskydd	• < 10% • None • None	• 10-20% • 1-50% of the trees • 1-50% of the trees	• >20% • >50% of the trees • >50% of the trees	Equivalency % /reference	
<b>Extras: (Maintenance)</b> - Tubing - Plantskydd	• <20% • None	• 20-50% • 200-600/Ha	• >50% • >600/Ha	Equivalency % /reference	
<b>Stock Thawing</b>	• Thawed already • initiated by BCTS	• Contractor initiates thaw at cold storage	• On site contractor managed thawing	Reference	
<b>Stock Storage</b>	• tarp only no reefer	• reefer	• multiple reefer sites	Reference	
<b>Planting Time Frame</b>	• > 6 weeks	• 4-6 weeks	• < 4 week	Reference	
<b>Specialized Requirements:</b> • Special equipment • Danger Tree Assessor/Faller • Prime Contractor	• Not Required	• N/A	• Required	Reference	
<b>Project Size</b> <b>Interior:</b> <b>Coast:</b>	• < 500 K • <100-150K	• 500k-1 million • 150-300K	• > 1 million • >300K	Equivalency % /reference	
<b>Minimum Daily Production</b>	• Coastal <10k • Interior <25 K	• Coastal 10-25k • Interior 25-50 K	• Coastal >25k • Interior > 50 K	Equivalency % /reference	

CRITICAL SITE FACTORS	LOW or N/A	MODERATE	HIGH TO VERY HIGH	QUALIFICATIONS	NOTES
Percentage of contract that is Viewable	<ul style="list-style-type: none"> <li>&gt;90% 4x4 or quad</li> </ul>	<ul style="list-style-type: none"> <li>50-90% 4x4 or quad</li> </ul>	<ul style="list-style-type: none"> <li>High -Over 50% inaccessible or unharvested</li> <li>Very High – over 75% inaccessible.</li> </ul>	Equivalency%/ reference	
<b>Access: planters/trees</b>					
-Heli	<ul style="list-style-type: none"> <li>None/ &lt;20%</li> </ul>	<ul style="list-style-type: none"> <li>20-40%</li> </ul>	<ul style="list-style-type: none"> <li>High 40-70%</li> <li>Very High &gt;70%</li> </ul>	Equivalency %/Reference	
-ATV	<ul style="list-style-type: none"> <li>None/ under 20%</li> </ul>	<ul style="list-style-type: none"> <li>20-40%</li> </ul>	<ul style="list-style-type: none"> <li>&gt;40%</li> </ul>	Equivalency %/Reference	
-Boat/Barge	<ul style="list-style-type: none"> <li>None/ &lt;10%</li> </ul>	<ul style="list-style-type: none"> <li>10-30%</li> </ul>	<ul style="list-style-type: none"> <li>High 30-50%</li> <li>Very High &gt;50%</li> </ul>	Equivalency %/Reference	
<b>Other Factors:</b>					
Deliverables	<ul style="list-style-type: none"> <li>Hardcopy maps &amp; spreadsheets</li> </ul>	<ul style="list-style-type: none"> <li>Digital plot &amp; data submission</li> <li>Basic record keeping</li> </ul>	<ul style="list-style-type: none"> <li>Payment plots by contractor</li> <li>Full Regen delay data collection</li> <li>Data download (ie plantwzard)</li> <li>GPS of strata</li> <li>GENUS reporting</li> </ul>	Reference / Samples submitted	
Season	<ul style="list-style-type: none"> <li>Coast -N/A</li> <li>Central/North/East -Summer -Spring</li> <li>Southern -Spring</li> <li>Kootenays -Spring</li> </ul>	<ul style="list-style-type: none"> <li>Coast -Spring</li> <li>Central/North/East -N/A</li> <li>Southern -Fall</li> <li>Kootenays - Fall</li> </ul>	<ul style="list-style-type: none"> <li>Coast -Fall</li> <li>Central/North/East -Fall</li> <li>Southern -Summer</li> <li>Kootenays -Summer</li> </ul>	Reference	
Planting Difficulty <i>Complete FS703 form Note: consider whole planting project</i>	<ul style="list-style-type: none"> <li>&lt; 10 points</li> </ul>	<ul style="list-style-type: none"> <li>10 - 20 points</li> </ul>	<ul style="list-style-type: none"> <li>21 – 30 points <b>Or</b></li> <li>&gt; 31 points</li> </ul>	Information only	
Site Preparation	<ul style="list-style-type: none"> <li>Site prepared</li> </ul>	<ul style="list-style-type: none"> <li>Inconsistent site preparation</li> </ul>	<ul style="list-style-type: none"> <li>none</li> </ul>	Information only	

Updated March 27, 2014

<b>CRITICAL SITE FACTORS</b>	<b>LOW or N/A</b>	<b>MODERATE</b>	<b>HIGH TO VERY HIGH</b>	<b>QUALIFICATIONS</b>	<b>NOTES</b>
<b>Screening Requirement (% of total trees)</b>	<ul style="list-style-type: none"> <li>None required &gt;80%</li> </ul>	<ul style="list-style-type: none"> <li>boot screef &gt; 50%</li> <li>Or 20X20 mineral soil screef 20% - 50%</li> </ul>	<ul style="list-style-type: none"> <li>20 X 20 mineral soil screef &gt;50%</li> </ul>	Information only	
<b>Fill Plants (density sph)</b>	<ul style="list-style-type: none"> <li>&gt;1000/Ha</li> </ul>	<ul style="list-style-type: none"> <li>500-1000/Ha</li> </ul>	<ul style="list-style-type: none"> <li>&lt;500/Ha (High)</li> <li>&lt;300/Ha (Very High)</li> </ul>	Information only	
<b>Block Type</b>	<ul style="list-style-type: none"> <li>clearcut</li> </ul>	<ul style="list-style-type: none"> <li>low retention</li> <li>patch cuts</li> </ul>	<ul style="list-style-type: none"> <li>high retention</li> </ul>	Information only	
<b>Block Size (ha's): Coast Interior</b>	<ul style="list-style-type: none"> <li>Large</li> <li>&gt; 15 ha</li> <li>&gt; 40 ha</li> </ul>	<ul style="list-style-type: none"> <li>Small-Medium</li> <li>5-15 ha</li> <li>15-40 ha</li> </ul>	<ul style="list-style-type: none"> <li>Small-Very Small</li> <li>&lt; 5 ha</li> <li>&lt; 15 ha</li> </ul>	Information only	
<b>Estimated Travel Time</b>	<ul style="list-style-type: none"> <li>&lt; 1 hour drive</li> </ul>	<ul style="list-style-type: none"> <li>1 to 2 hours drive</li> </ul>	<ul style="list-style-type: none"> <li>camp</li> <li>&gt; 2 hours drive</li> </ul>	Information only	
<b>Block Dispersion</b>	<ul style="list-style-type: none"> <li>close to each other or</li> <li>within 15 minutes drive or &lt;5min. flight if heli access of each other</li> </ul>	<ul style="list-style-type: none"> <li>Most close to each other with a couple dispersed or clustered</li> </ul>	<ul style="list-style-type: none"> <li>dispersed over large area</li> </ul>	Information only	
<b>Timing of Viewing</b>	<ul style="list-style-type: none"> <li>Fall (for following year plant)</li> </ul>	<ul style="list-style-type: none"> <li>Winter ( for Spring plant)</li> </ul>	<ul style="list-style-type: none"> <li>Spring to summer (summer or fall plant)</li> </ul>	Information only	

CRITICAL SITE FACTORS	LOW or N/A	MODERATE	HIGH TO VERY HIGH	QUALIFICATIONS	NOTES
Timeframe Tender to Actual Start Date	<ul style="list-style-type: none"> <li>&gt; 8 weeks</li> </ul>	<ul style="list-style-type: none"> <li>4-8 weeks</li> </ul>	<ul style="list-style-type: none"> <li>&lt; month</li> </ul>	Information only	
Number of Blocks	<ul style="list-style-type: none"> <li>&lt;10</li> </ul>	<ul style="list-style-type: none"> <li>10-25</li> </ul>	<ul style="list-style-type: none"> <li>&gt;25</li> </ul>	Information only	

### **Risk Rating forms for Planting Qualifications – How they work**

1. Delete all previous mandatory requirements
2. Complete the risk rating form for each critical site factor (do this with a general view to your project).
3. Where a moderate ranking is achieved, a decision can be made (where a qualification is indicated) whether a qualification is required or not.
4. Where a high or very high score is indicated, include the qualification requirement. The choice to not include the qualification requirement is still an option but this should be well thought out and documented.
5. Use the information gathered in the Planting Risk Matrix to develop mandatory requirements for section 4.01 of the conditions of Tender.
6. The risk rating form is mandatory and must be included in the tender documents as information.
7. Use the risk rating form for your reference checks.
8. Equivalency percentage can be set by the project manager. (70% seems fair but up for debate).
9. The risk rating form should not be used in place of viewing the project by the contractors.

The following is an example of how qualifications can be developed for inclusion in the Conditions of Tender document, 4.01:

The Bidder must submit 2 references from within the last 4 years who can verify with 70% equivalency (or put in the actual number) the proponents experience in fill planting.

The Bidder must submit 2 references from the last 4 years who can verify the proponents experience mixed species planting with 3 or more species.

Mandatory Qualifications developed from the Planting Risk Matrix can be combined, they do not have to be listed as individual requirements.

For example: The Bidder must submit 2 references from the last 4 years who can verify the proponents experience mixed species planting with 3 or more species, had a contract of at least 700,000 seedlings where greater than 30% of the project was fill planting and managed the thaw and delivery of the seedlings.

These qualifications would take the place of all the current qualifications that are being included by each Business Area. **Delete all previous mandatory requirements.**

A mandatory criterion, such as Safe company certification, is already a part of the BCTS version of the Conditions of Tender.