**REQUEST FOR PROPOSALS**

**Tree Planting and Update Community Forest Management Plan**

**Village of Lancaster**

**Proposals due August 30, 2024 at 4:00 PM**

**PURPOSE**

The Village of Lancaster (the Village) seeks proposals from qualified consultants who will use ISA-certified arborists to provide guidance and coordination of annual tree plantings and update the Village’s Tree Management Plan, as part of the subaward grant agreement between American Forests and the Village for Inflation Reduction Act Urban and Community Forestry Initiative.

The overall goal of the Village is to address deficiencies in tree canopy coverage through the planting of high-quality native trees in the public right of way under the supervision of a certified arborist. The village with support of a certified arborist will coordinate annual tree plantings and selection of tree species for each planting site. The consultant will also update the Village’s Tree Management Plan at the end of the project to account for the completed work and how it impacts future plans for the Village. The proposed tree planting project will be implemented over four years

The proposed project will protect, enhance, and expand equitable tree canopy cover in communities in the Village that currently have low tree canopy cover due to weather, disease, or age. The results of this project will help the Village better understand its urban forest’s composition, structure, and tree maintenance needs; plan for short-term and long-term resource allocation; develop risk management strategies; and enable the Village to promote the economic, environmental, and social benefits its trees provide to the community.

**BACKGROUND**

The Village of Lancaster has an area of 2.7 square miles and is home to 10,027 residents. Over the last decade, the Village has promoted policies and projects to create a resilient, sustainable community and has worked to implement projects to cut energy use, reduce emissions, and adapt to the changing climate. Proof of this commitment is evident in the Village’s designation as a Bronze Climate Smart Community. Additionally, the Village has been designated a Tree City USA community for five consecutive years and awarded the Growth Award in 2023. The Village has also been designated a two-star

NYSERDA Clean Energy Community.

By understanding and addressing environmental hazards and social vulnerabilities, the Village of Lancaster aims to promote equity and resilience across our community, ensuring that all residents can thrive in a healthy and sustainable environment. Through targeted interventions aimed at increasing canopy cover and continuity, we aim to alleviate the disproportionate burden of environmental hazards faced by low to moderate income residents and promote equity and resilience across our entire community.

**PROJECT OBJECTIVES/ GENERAL SCOPE**

This proposal's intent is to provide the Village of Lancaster with consultant services necessary to provide guidance and coordination of planting of 799 trees and update the Village’s Tree Management Plan at the end of the project to account for the completed work and to help protect and enhance the Village’s urban forest resources.

**III. SCOPE OF SERVICES**

***Objective 1: Tree Planting***

*Task 1.1: Kick-Off Meeting*

The consultant(s) shall hold an initial meeting with Village representatives to discuss project requirements, site conditions, and roles and responsibilities; identify new information needs and next steps; and transfer any information to the consultant(s) that would assist in completion of the project.

*Deliverable:*

Meeting minutes detailing project requirements, site conditions, roles and responsibilities, identified information needs, and next steps.

*Task 1.2: Planning/Coordination of Sites and Tree Species*

The consultant(s) will work with Village representatives to identify suitable planting sites and appropriate tree species, considering site conditions, biodiversity goals, community preferences, and grant guidelines for 799 trees. The consultant should also prepare a contingency plan for alternative sites or species in case of unforeseen issues with the primary selections.

*Deliverable:*

Detailed site and species selection plan, including maps of planting sites in TreeKeeper and a list of recommended tree species with justifications for each selection.

*Task 1.3: Preparation of Bid Package for Purchasing Trees*

The consultant(s) will prepare a comprehensive bid package for the procurement of trees. This will include specifications for tree species, sizes, and quality, and instructions for bid submission and evaluation criteria.

*Deliverable:*

Complete bid package document, including tree specifications, bid submission instructions, and evaluation criteria.

*Task 1.4: Weekly Inspections During Tree Planting*

The consultant(s) will conduct weekly inspections during the tree planting process to ensure compliance with project specifications and address any issues that arise.

*Deliverable:*

Weekly inspection reports detailing planting progress, compliance with specifications, and any issues or recommendations for adjustments.

*Task 1.5: Next Year Warranty Inspections*

The consultant(s) will perform inspections of the planted trees the following year to assess their health and ensure warranty compliance. Any necessary actions for tree replacement or maintenance will be identified.

*Deliverable:*

Annual inspection report, including the health assessment of planted trees, warranty compliance status, and recommendations for replacements or maintenance.

***Objective 2: Update Urban Forestry Tree Management Plan***

*Task 2.1: Initial Assessment and Review*
The consultant(s) will conduct an initial assessment and review of the current Urban Forestry Tree Management Plan. This will include evaluating existing data, policies, and practices

*Deliverable:*

Assessment report summarizing the current state of the Urban Forestry Tree Management Plan, including strengths, weaknesses, and areas for improvement.

*Task 2.2: Data Collection and Analysis*
The consultant(s) will collect and analyze new data on the urban forest, including tree inventory, health assessments, and environmental benefits.

*Deliverable:*

Data collection and analysis report, including updated tree inventory, health assessments, and analysis of environmental benefits.

*Task 2.3: Development of Updated Plan*
Based on the assessment, stakeholder feedback, and data analysis, the consultant(s) will develop an updated Urban Forestry Tree Management Plan. The plan will include new goals, strategies, and actions for managing the urban forest and risk management and mitigation strategies. This could address potential challenges such as weather impacts, disease outbreaks, or other unforeseen issues that might affect the tree planting and maintenance process. In addition, there should be a clear plan for long-term maintenance and sustainability beyond the initial project period.

*Deliverable:*

Draft updated Urban Forestry Tree Management Plan, including new goals, strategies, and actions.

*Task 2.4: Review and Refinement of Updated Plan*
The consultant(s) will present the draft updated plan to stakeholders for review and feedback. The Arborist will summarize data into a “State of the Forest” tree management plan and create charts and graphs to present to Village Forest Advisory Board and Village Board, including tree specifics, areas to focus on, and future planting sites. The Arborist will work with the Village Forest Advisory Board to develop goals for the future of the “Community Forest” in the short, medium, and long-term. Based on this feedback, the consultant(s) will refine and finalize the plan.

*Deliverable:*

Final updated Urban Forestry Tree Management Plan, incorporating stakeholder feedback and refinements.

*Task 2.5 – Approval of Community Forest Management Plan*

Incorporating recommendations from Village representatives, the Consultant will create a complete Community Forest Management Plan that details the recommended processes and activities to conduct a multi-year tree management program. This plan will include, at a minimum, the following items:

* Executive Summary
* Tree Inventory analysis identifying management needs (i.e., pruning rotations, removal implementation, prioritization of workload)
* Planting plan to address the unique characteristics of the project location, including species diversity, erosion control, and other areas that could be impacted with planting and address local needs
* Budgets and work plans, including timelines and tasks, for long-term community forest care
* Recommendations for use of a community tree board and designation of activities
* List of reference materials used
* Glossary of terms used in the plan
* Relevant Appendices, such as species recommended for future planning

*Deliverable: Final Community Forest Management Plan*

Arborist will complete final edits and send to Village Forest Advisory Board and Village Board for their final revisions. After final edits, Community Forest Management Plan will be digitized by software used by the Arborist. The completed and approved Community Forest Management Plan, along with a report summarizing scope of work, determinations, and next steps, will be sent as part of grant reporting.

All work products including digital forms produced or created by the vendor due to or related to the performance of work or services under this solicitation will be property of the Village of Lancaster.

**TIMELINE**

The project timeline presented below will be refined with the selected consultant upon execution of contract.

August 30, 2024 4:00 P.M. deadline for proposal submission

Week of Sept 9, 2024 Selection and Notification of Consultant

Week of Sept 30, 2024 Kick-off meeting between Village and Consultant

November 30, 2024 Completion of Plan for Tree Sites and Species

Spring 2025 Season 1 Planting

Fall 2025 Season 2 Planting

Spring 2026 Season 3 Planting

Fall 2026 Season 4 Planting

Spring 2027 Season 5 Planting

Fall 2027 Season 6 Planting

Spring 2028 Season 7 Planting

March 2028 Submission of Draft Tree Management Plan to Village Board

April 2028 Submission of Final Tree Management Plan

May 30, 2028 Deadline for Project Completion

**PROPOSAL REQUIREMENTS**

The Consultant will demonstrate that the firm has relevant experience in performing projects of comparable value and scope to the type described in this RFP. Proposals for consideration must include the following information and documentation:

1. Overall firm profile(s) of the Consultant and any Subconsultant(s), including full contact information.

2. Identification of all team members who will be assigned to the project, their titles, applicable licenses and certifications, and resumes. *Consultant MUST submit proof of ISA certification for at least one arborist designated for on-the-ground participation in the project*. Include an organizational chart showing how the project team will operate internally and how it will liaise with the Village.

3. An overall description of the Consultant’s approach to meet the overall objectives of the Project, generally organized according to the format included in the Scope of Services. Include a description of any unique qualities your firm will employ while completing the project, as well as a proposed number of meetings with Village stakeholders to complete the required tasks.

4. A detailed timetable for the Project identifying completion of tasks, deliverables, and project milestones. Describe how the timely completion of tasks will be achieved. Final submission of approved documents is scheduled to occur no later than October 2024.

5. Descriptions of the firm’s projects in which they (a) managed a tree planting and maintenance project and/or (b) Updated and/or prepared community forestry management plan.Descriptions should include project locations, budget information, and completion dates.

6. References, including full contact information, from a minimum of three clients with similar projects.

7. A detailed schedule of fee estimates for each identified deliverable. The total project budget for all deliverables in this RFP has been set at $46,754.

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| --- | --- | --- | --- |
| **Item for Bid** | **Cost per Hour** (Rate) | **# of Hours** | **Total Bid** (Rate x # of Hours) |
| **Planning/Coordination of Sites and Tree Species** |  |  |  |
| **Preparation of Bid Package for Purchasing Trees** |  |  |  |
| **Weekly Inspections During Tree Planting** |  |  |  |
| **Next Year Warranty Inspections** |  |  |  |
| **Community Forest Management Plan**  |  |  |  |
| **Consultant in-person meetings (**kick off, interim, Village Board presentation) |  |  |  |
| **CONTRACT TOTAL (MAX)** | n/a |  |  |

8. Proof that the Consultant is licensed to conduct business in the State of New York or a statement that the Consultant will take the necessary steps to achieve such certification.

9. Proof that the Consultant has the necessary workers' compensation and insurance certificates.

**EVALUATION AND SELECTION CRITERIA**

All submitted proposals will be reviewed for the experience, qualifications, and completeness of proposal requirements identified in this solicitation. The selection and retention of a Consultant will be based on an evaluation of their ability to meet the following requirements for the services requested:

Project Understanding and Proposed Approach (40%)

 Quality and comprehensiveness shown in the Consultant’s proposed approach (15%).

 Extent of Consultant’s demonstrated understanding of the project scope and objectives (15%).

 Creativity and originality of Consultant’s proposal (10%).

Experience and Qualifications of the Project Team (45%)

  Education, training, and experience of assigned personnel, including project manager (15%).

 Experience and quality of the team’s relevant experience in completing similar projects (15%).

 Feedback of recent clients and the quality of Consultant references (10%).

 Extent to which Consultant has the personnel, equipment, and facilities to provide the

 requested services (5%).

Total Project Cost (15%)

 Detail of budget (5%)

 Reasonableness of itemized and overall costs (10%).

**PROPOSAL SUBMISSION**

Complete proposals, containing the respondent’s name and return address, are **due by 4:00 PM local time on August 30, 2024**.

Proposals shall be delivered to:

**Michael E. Stegmeier**

**Village of Lancaster**

**5423 Broadway**

**Lancaster, NY 14086
716-683-2105**