



THE CITY OF ERIE

JOSEPH V. SCHEMBER, MAYOR

CITY OF ERIE

DEPARTMENT OF PLANNING AND NEIGHBORHOOD RESOURCES

REQUEST FOR PROPOSALS (RFP)

Tree Inventory & Sustainable Urban Forestry Management Plan

Proposal Number 6542-25

DUE:
April 30, 2025
12:00 P.M. (EST)

Email PDF Submission to:
Jacqueline Spry
Director
City of Erie
jspry@erie.pa.us

Prepared By
CITY OF ERIE
Department of Planning and Neighborhood Resources
626 State Street
Erie, Pennsylvania 16501
REQUEST FOR PROPOSALS (RFP)

Tree Inventory & Sustainable Urban Forestry Management Plan

The Department of Planning and Neighborhood Resources of the City of Erie, Pennsylvania is accepting proposals for a one-time contract to perform certain professional services work for the City of Erie for a Tree Inventory & Sustainable Urban Forestry Management Plan. Information is attached outlining requirements for proposal submission, evaluation criteria, and the proposed contract.

Proposals should be delivered digitally and received by Jacqueline Spry at jspry@erie.pa.us no later than **Wednesday, April 30 2025, at 12:00 P.M.** (EST).

If additional information is needed, please contact Jacqueline Spry, Director of Planning and Neighborhood Resources at jspry@erie.pa.us or (814) 870-1287.

The RFP is also posted on the City of Erie's website: www.cityof.erie.pa.us

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City of Erie, Pennsylvania

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NOTE: The term "proposer" or "firm" in this RFP means the person or firm making a proposal based on the RFP.

SECTION 1. BACKGROUND

This project is partially funded by a grant from the Community Conservation Partnerships Program administered by the Pennsylvania Department of Conservation and Natural Resources (DCNR), Bureau of Recreation and Conservation (Bureau). The Bureau has certain requirements and standards that must be met by the **City of Erie** (the City) and its contracted consultant. This Request for Proposal (RFP) has been prepared in accordance with Bureau requirements and standards. The Bureau will monitor the project and certain documents will be subject to Bureau review and approval.

SECTION 2: DESCRIPTION OF WORK

Name: Tree Inventory and Sustainable Urban Forestry Management Plan

Location: Erie, Pennsylvania

Scope of Services: The selected firm will conduct a comprehensive inventory of the trees located along streets, in boulevards, parks, and city-owned and managed property within the corporate limits of the City of Erie, then create a Sustainable Urban Forest Management Plan.

SECTION 3: GENERAL TERMS

1. The RFP may be obtained online at: www.cityof.erie.pa.us
2. All questions must be submitted in writing to Jacqueline Spry, Director of Planning and Neighborhood Resources at jspry@erie.pa.us or (814) 870-1287. All questions received after Wednesday April 23, 2025 will not be addressed.
3. All data collection must be accomplished by an ISA Certified Arborist (ISA Certification Number) with local knowledge of Pennsylvania tree species and five years of experience. The successful applicant shall have at least one Tree Risk Assessment Qualified, Certified Arborist as designated by the International Society of Arboriculture on the team. The Contractor shall submit proof of certifications with their proposal.
4. The City of Erie reserves the right to reject any or all proposals and to select the proposal that it determines to be in the best interest of the City of Erie.
5. The contract is subject to the approval of the City of Erie mayor, solicitor, director of planning, controller, and clerk and is effective only upon their approvals.
6. Proposers are bound by the deadline and submittal requirements for submittals in response to this RFP as stated above.
7. Proposals will remain effective for City of Erie review and approval for 60 days from the deadline for submitting proposals.
8. If only one proposal is received by the City of Erie, it may negotiate with the proposer or seek additional proposals on an informal or formal basis during the 60-day period that proposals are effective.

The proposer is encouraged to add to, modify, or clarify any scope of work items it deems appropriate to develop a high-quality plan at the lowest possible cost. All changes should be identified with an explanation. However, the scope of work proposed must accomplish the goals and work stated below.

SECTION 4: SCHEDULE AND BUDGET

1. It is anticipated that the planning process will be completed by December 31, 2025 of Notice to Proceed from the City. There is a possible but not guaranteed extension to this timeline.
2. Proposals should clearly set forth in detail all expenses for which reimbursement is expected. Consultant proposals should factor in extra/unforeseen meetings that may arise throughout the process.

The City is open to recommended changes to the scope to better accommodate the budget for the project and encourages consultants to suggest modifications to the scope that will assist in achieving the goals and purpose of the project.

SECTION 5: SCOPE OF WORK

INTRODUCTION

This Request for Proposals (“RFP”) is made to qualified interested parties for proposals for a Tree Inventory and Sustainable Urban Forestry Management Plan. The selected firm will conduct a comprehensive inventory of the trees located along streets, in boulevards, parks, and city-owned and managed property within the corporate limits of the City of Erie, then create a Sustainable Urban Forest Management Plan.

A tree inventory will help the City catalogue and document the public tree population, provide a better understanding of the City’s trees, and improve long-term management and growth of the local tree population. The tree inventory will include information such as GPS coordinates, street name, street addresses, land use, growing space, genus and species (in Latin and common names), single or multi-stem designation, diameter at breast height measurements, condition rating and risk assessment (in collaboration with the City Arborist), presence of any utilities, priority management tasks, and general comments or notes about each City tree. The inventory is intended to also identify trees which should be removed and smaller-scale health problems in order to take proactive measures to improve the overall health of the City’s urban forest in the most cost-effective way possible. Thought should be given, but not limited to, invasive species, over-used species, etc. For planting, information should include, but not be limited to species hardy enough for city right-of-ways strips, (drought tolerant, pollution tolerant, etc.). Planting information should include length and width of planting spaces when appropriate for trees in right-of-ways strips, individual pits and boulevards or indicate a lawn area. Information must be provided using TreeKeeper and also in Excel. Existing and historical data from the City Arborist will also be provided and should be incorporated into the inventory.

The Sustainable Urban Forest Management Plan (“SUFMP”) is intended to provide staff with guidance on how to proceed with the information presented in the inventory, including but not limited to, a prioritized list of planting and removal locations and an annual pruning schedule and map. The management plan will also allow for a more coordinated attempt at improving tree diversity within the City, as the plan will outline a list of preferred species and species that should be prohibited. The selected firm shall also assist the City in hosting three (3) public events to inform the residents about the nature of this project and how to care for trees located in city right-of-ways and on private property. The selected applicant shall further provide ten (10) hours of training to City employees in forestry. The plan should insist that, and describe why, certain traditional forestry practices should never be used.

The scope of work includes a tree inventory and a sustainable urban forestry management plan. These services include, at a minimum, the following:

I. Tree Inventory

The selected firm shall conduct a comprehensive inventory of all street trees along streets, in boulevards, parks, and City managed properties within the corporate limits of the City. The following data shall be collected for each tree:

- GPS location
- Street address and relative location
- Land Use (i.e. residential, business zone, natural area, etc.)
- Growing Space type (i.e. street, boulevard, lawn area, park, etc.)
- Growing space dimensions (i.e. length of width of planting spaces; right-of-way strip, individual pits, boulevards or indicate a lawn area.)
- Species (common and Latin)
- Diameter at breast (standard) height (DBH)
- Single or multi-stem designation
- Condition rating including defects (roots, wounds, rot, deadwood, decay, etc.)
- Risk assessment
- Potential for and signs of root girdling
- Arborist maintenance recommendations
- Comments and notes

Existing and historical data in Excel from the City Arborist will be provided and should be incorporated into the inventory.

The GPS tree data is required to be in ESRI's GIS data format, i.e.: Shapefile or Geodatabase (.gdb) format and must be able to be downloaded in an Excel file. The data will conform to the City's GIS system. The City will allow additional attributes to be collected beyond what is required within the system. No proprietary software or tree inventory-specific software will be accepted. The data will be collected and housed within the City's GIS environment. All data collectors must be ISA Certified Arborists. No interns, volunteers, or apprentices may be involved with the data collection on this project.

II. Sustainable Urban Forestry Management Plan (SUFMP)

The selected firm shall provide the UFMP and shall include, at a minimum, the following components based on the inventory set forth above.

- Recommended and prioritized sustainable urban forest management action items based on the inventory including:
 - A description of the City's canopy cover and composition
 - Prioritized planting locations, including replacements and new plantings
 - A cyclical pruning schedule and map
 - A list of preferred species, prohibited species, and species to be planted in limited quantities
- Short and long-term urban forest goals for a ten-year period
 - Sustainable urban forest management goals and risk mitigation
 - Canopy cover goals
 - Climate change response
 - Tree pruning schedules
 - A plan for replacement and removals
 - Mitigation of pests and diseases
 - Benchmarks to ensure progress towards long-term goals

- Specifications for planting, pruning, removals, and protection
 - Specifications from ANSI, ISA, and/or other nationally recognized standards for tree care (pruning, planting, etc.)
 - Removal of invasive species, over-used species, etc.
 - Planting, information should, consider and include, species hardy enough for city right-of-ways strips, (drought tolerant, pollution tolerant, etc.)
 - Establishing a pruning and maintenance cycle so that care is regularly scheduled.
 - Protection and standards for trees in construction zones
- Required and recommended certifications, qualifications, and training for staff, contracted labor, and consultants
 - Formulating these requirements to mitigate risk, including climate impacts
- Material and budget projections and considerations
 - Short- and long-term budget projections and needs
 - A plan for replacement of equipment and resources
- A program for three (3) public events to educate City residents on this project and the care of trees, for a total of six (6) hours. The selected Applicant will be required to provide presentations in both English and Spanish at each event and shall bear the cost of any translators
- Ten (10) hours of training to be supplied to designated City staff on forestry
- The consultant will assist city staff in updating relevant City of Erie committees, boards, and commissions as well as neighborhood organizations with ongoing data collection efforts
- Up to three (3) hours of technical assistance to City staff to assist staff in understanding how to use the inventory and the SUFMP
- The SUFMP shall be submitted in Microsoft Word and, if possible, InDesign

SECTION 6: SUBMISSION REQUIREMENTS

All proposals must contain the following:

1. **Respondent's Certification Form**
2. **Respondent's Tax Certification Form**
3. **Letter of Transmittal**

This letter must include the following:

- A statement demonstrating your understanding of the work to be performed.
- A statement confirming that the firm meets the Consultant Qualifications (see Section 5 above).
- The firm's contact person and telephone number.

4. **Profile of Firm**

This consists of the following:

- A statement of the firm's experience in conducting work of the nature sought by this RFP; advertising brochures may be included in support of this statement.
- The location of the firm's office that will perform the work.
- Resumes of individuals (consultants, employees) proposed to conduct the work and the specific duties of each in relation to the work. DCNR requires that the project consulting team have the minimum qualifications outlined in Section 4 Consultant Qualifications.
- A reference list of other municipal clients of the firm with contact information.
- Any other information relating to the capabilities and expertise of the firm in doing comparable work.

5. Methods and Procedures

The proposal must include a detailed description of the methods and procedures the firm will use to perform the work. Inclusion of examples of similar work is encouraged.

6. Work Schedule

The schedule must include time frames for each major work element, target dates for public meetings, and dates for completion of draft and final documents. Additionally, ongoing coordination with the City staff lead shall occur regularly throughout the process.

7. Cost

- For each major work element, the costs must be itemized showing:
- For each person assigned to the work, the title/rank (organizational level) of the person in the organization, the hourly rate, and the number of hours to be worked.
- The reimbursable expenses to be claimed.

The itemized costs must be totaled to produce a contract price. If awarded a contract, a proposer is bound by this price in performing the work. The contract price may not be exceeded unless the contract is amended to allow for additional costs.

If awarded a contract, the firm may not change the staffing assigned to the project without approval by the City of Erie. However, approval will not be denied if the staff replacement is determined by the City of Erie to be of equal ability or experience to the predecessor.

The method of billing must be stated. The preferred practice of the City of Erie is to pay upon completion of the work and receipt of the required report. However, the City of Erie will consider paying on a periodic basis as substantial portions of the work are completed. Regardless of the billing method used, a minimum of 10% of the DCNR Grant Award will be withheld until the final product is approved by DCNR and all project costs are paid in full.

8. Contract

The contract form and DCNR “Nondiscrimination/Sexual Harassment Clause” is provided in Section 8. DCNR requires that the “Nondiscrimination/Sexual Harassment Clause” be incorporated and/or attached to the contract in its entirety.

SECTION 7: EVALUATION OF PROPOSALS

City staff will review all proposals to determine compliance with the Submission Requirements listed in Section 3 of this RFP. Only proposals that comply with these requirements will be considered for further evaluation and the City reserves the right to request additional information from any applicant.

City staff may contact any party submitting a proposal after proposal opening and arrange an interview with the appropriate representatives of the applicant. As part of any interview, the applicant will be expected to make a 10-minute presentation on the applicant’s credentials and planned approach to the Project. The applicant should also be prepared to answer questions at any such interview. The selection criteria and weightings for project selection (out of a total maximum score of 100) are as indicated below.

- Firm Experience (40 points maximum). Qualifications, familiarity, and experience of the firm and proposed team members.
- Technical Approach (20 points maximum). Project understanding and the consultant’s approach to the planning, organizing, and execution and management of the project effort.
- Budget and Project Timeline (10 points maximum). Cost of services proposed, average hourly labor costs, and identified cost control.

- Project timeline (10 points maximum).
- Understanding of the overall project and completeness of the proposal (20 points maximum).

SECTION 8: CONTRACT FOR PROFESSIONAL SERVICES

The selected consultant will be required to execute a contract with the City of Erie. The City of Erie will have the right to terminate the contract at any time, with or without cause, upon (30) thirty days written notice. The contract period for the services contemplated by this Request for Proposals will commence upon awarding of the contract.

Terms & Conditions The City of Erie reserves the right to reject any or all proposals or to award the contract to the next most qualified firm if the successful firm does not execute a contract within (30) thirty days after the award of the proposal. The City of Erie shall not pay for any information contained in proposals obtained from participating firms. The City of Erie reserves the right to request clarification on any information submitted and additionally reserves the right to request additional information of one (1) or more applicants.

If, through any cause, the consultant shall fail to fulfill in a timely and proper manner the obligations agreed to, the City of Erie shall have the right to terminate its contract by specifying the date of termination in a written notice to the firm at least ninety (90) working days before the termination date. In this event, the firm shall be entitled to just and equitable compensation for any satisfactory work completed. All documents submitted as part of the consultant’s offering will be deemed confidential during the evaluation process.

Execution of the Work and Payments Upon evaluation of proposals received in accordance with the criteria outlined above, the selection of consultant by the City of Erie, and following the concurrence in the award of contract by the Erie City Council, a written contract will be executed.

Upon execution of the contract, the selected firm shall immediately begin the work and shall continuously execute the work through project completion and closeout.

The selected consultant shall submit invoices for work completed to the City of Erie. Payments shall be made to the consultant by the City of Erie in accordance with the contract after all required services and tasks have been completed to the satisfaction of the City of Erie.

Equal Opportunity Employment Statement Any business that enters into a contract for goods or services with the City of Erie shall:

- Implement an employment nondiscrimination policy prohibiting discrimination in hiring, discharging, promoting or demoting, matters of compensation, or any other employment related decision or benefit on account of actual or perceived race, color, religion, national origin, gender, physical or mental disability, age, military status, sexual orientation, gender identity, gender expression, or marital or familial status. 14 City of Erie – RFP for a Citywide Historic Resource Survey
- Not discriminate in the performance of the contract on account of actual or perceived race, color, religion, national origin, gender, physical or mental disability, age, military status, sexual orientation, gender identity, gender expression, or marital or familial status.
- Comply with all applicable ordinances, statutes and regulations of the City of Erie, Commonwealth of Pennsylvania or Federal Government relating to Equal Employment Opportunity.

SECTION 9 SPECIAL CONDITIONS

- a. The selected firm shall have prior municipal experience in tree inventory data collection and analysis and shall provide a minimum of three (3) municipalities as references.
- b. All data collection must be accomplished by ISA Certified Arborists (ISA Certification Number) with local knowledge of Pennsylvania, Ohio, and New York tree species and five years of experience. The successful applicant shall have at least one Tree Risk Assessment Qualified, Certified Arborist as designated by the International Society of Arboriculture on the team. The Contractor shall submit proof of certifications with their proposal.
- c. **No subcontractors** will be allowed to work on this project. A list of degrees, Certifications or other documentation must be submitted by the applicant as competent data collection experts.
- d. The applicant must be licensed and bonded in the City of Erie prior to starting the project.
- e. All inventory data and draft SUFMP should be submitted to the City by November 31, 2025 for review and comment, and final deliverables shall be delivered no later than December 31, 2025. The City will communicate any grant extensions with consultants to determine an amended project schedule.
- f. **Applicants must submit proposals for both the tree inventory and the SUFMP. Failure to do so shall disqualify an applicant.**

APPENDIX A
NONDISCRIMINATION/SEXUAL HARASSMENT CLAUSE

The Grantee agrees:

1. In the hiring of any employee(s) for the manufacture of supplies, performance of work, or any other activity required under the grant agreement or any subgrant agreement, contract, or subcontract, the Grantee, a subgrantee, a contractor, a subcontractor, or any person acting on behalf of the Grantee shall not discriminate by reason of race, gender, creed, color, sexual orientation, gender identity or expression, or in violation of the *Pennsylvania Human Relations Act* (PHRA) and applicable federal laws, against any citizen of this commonwealth who is qualified and available to perform the work to which the employment relates.
2. The Grantee, any subgrantee, contractor or any subcontractor or any person on their behalf shall not in any manner discriminate by reason of race, gender, creed, color, sexual orientation, gender identity or expression, or in violation of the PHRA and applicable federal laws, against or intimidate any of its employees.
3. Neither the Grantee nor any subgrantee nor any contractor nor any subcontractor nor any person on their behalf shall in any manner discriminate by reason of race, gender, creed, color, sexual orientation, gender identity or expression, or in violation of the PHRA and applicable federal laws, in the provision of services under the grant agreement, subgrant agreement, contract or subcontract.
4. Neither the Grantee nor any subgrantee nor any contractor nor any subcontractor nor any person on their behalf shall in any manner discriminate against employees by reason of participation in or decision to refrain from participating in labor activities protected under the *Public Employee Relations Act*, *Pennsylvania Labor Relations Act* or *National Labor Relations Act*, as applicable and to the extent determined by entities charged with such Acts' enforcement, and shall comply with any provision of law establishing organizations as employees' exclusive representatives.
5. The Grantee, any subgrantee, contractor or any subcontractor shall establish and maintain a written nondiscrimination and sexual harassment policy and shall inform their employees in writing of the policy. The policy must contain a provision that sexual harassment will not be tolerated and employees who practice it will be disciplined. Posting this Nondiscrimination/Sexual Harassment Clause conspicuously in easily-accessible and well-lighted places customarily frequented by employees and at or near where the grant services are performed shall satisfy this requirement for employees with an established work site.
6. The Grantee, any subgrantee, contractor or any subcontractor shall not discriminate by reason of race, gender, creed, color, sexual orientation, gender identity or expression, or in violation of the PHRA and applicable federal laws, against any subgrantee, contractor, subcontractor or supplier who is qualified to perform the work to which the grant relates.
7. The Grantee and each subgrantee, contractor and subcontractor represents that it is presently in compliance with and will maintain compliance with all applicable federal, state, and local laws and regulations relating to nondiscrimination and sexual harassment. The Grantee and each subgrantee, contractor and subcontractor further represents that it has filed a Standard Form 100 Employer Information Report ("EEO-1") with the U.S. Equal Employment Opportunity Commission ("EEOC") and shall file an annual EEO-1 report with the EEOC as required for employers' subject

to *Title VII of the Civil Rights Act of 1964*, as amended, that have 100 or more employees and employers that have federal government contracts or first-tier subcontracts and have 50 or more employees. The Grantee, any subgrantee, any contractor or any subcontractor shall, upon request and within the time periods requested by the Commonwealth, furnish all necessary employment documents and records, including EEO-1 reports, and permit access to their books, records, and accounts by the granting agency and the Bureau of Diversity, Inclusion and Small Business Opportunities for the purpose of ascertaining compliance with the provisions of this Nondiscrimination/Sexual Harassment Clause.

8. The Grantee, any subgrantee, contractor or any subcontractor shall include the provisions of this Nondiscrimination/Sexual Harassment Clause in every subgrant agreement, contract or subcontract so that those provisions applicable to subgrantees, contractors or subcontractors will be binding upon each subgrantee, contractor or subcontractor.
9. The Granter's and each subgrantee's, contractor's and subcontractor's obligations pursuant to these provisions are ongoing from and after the effective date of the grant agreement through the termination date thereof. Accordingly, the Grantee and each subgrantee, contractor and subcontractor shall have an obligation to inform the commonwealth if, at any time during the term of the grant agreement, it becomes aware of any actions or occurrences that would result in violation of these provisions.
10. The commonwealth may cancel or terminate the grant agreement and all money due or to become due under the grant agreement may be forfeited for a violation of the terms and conditions of this Nondiscrimination/Sexual Harassment Clause. In addition, the granting agency may proceed with debarment or suspension and may place the Grantee, subgrantee, contractor, or subcontractor in the Contractor Responsibility File.

Based on Management Directive 215.16 Amended (8/2/18)

DCNR-2021-Gen
Gen-GPM – 1 Rev. 8/18