



**REQUEST FOR PROPOSALS**

**2015 Complete Street Tree Inventory Services and Urban  
Forest Management Software Project**

**MAY 2015**

## TABLE OF CONTENTS

<b>1.0 INTRODUCTION AND PURPOSE</b>	<b>Pages 3-4</b>
<b>2.0 REQUEST FOR PROPOSAL TERMS</b>	<b>Pages 4-7</b>
2.1 DEFINITIONS	
2.2 NO OBLIGATION TO PROCEED	
2.3 CITY'S DECISION-MAKING	
2.4 ENQUIRIES	
2.5 ELIGIBILITY	
2.6 EVALUATION AND SELECTION	
2.7 DEBRIEFING	
2.8 SIGNED PROPOSALS	
2.9 ALTERNATIVE SOLUTIONS	
2.10 CHANGES TO PROPOSAL WORDING	
2.11 IRREVOCABILITY OF PROPOSALS	
2.12 COMPLETENESS OF PROPOSAL	
2.13 SUB-CONTRACTING	
2.14 ASSIGNMENT	
2.15 CONFLICT OF INTEREST	
2.16 LAWS OF PRINCE EDWARD ISLAND	
<b>3.0 SCOPE OF WORK</b>	<b>Pages 8-11</b>
3.1 REQUIREMENTS AND SCOPE OF SERVICE	
3.2 ANTICIPATED TIMEFRAMES	
<b>4.0 EVALUATION CRITERIA</b>	<b>Page 12-13</b>

**City of Charlottetown****Request for Proposals – 2015 Street Tree Inventory Services and Urban Forest Management Software****1. INTRODUCTION AND PURPOSE**

*The City of Charlottetown is issuing this Request for Proposals (RFP) for services to conduct a Street Tree Inventory and to provide an Urban Forest Management Software solution. Deadline for completion of the Street Tree Inventory Project will be August 31<sup>st</sup>, 2015.*

Proposals shall be submitted by completing this document and placing it in a sealed envelope, clearly marked on the outside, "**Request for Proposals – 2015 Complete Street Tree Inventory Services and Urban Forest Management Software Project; Attention Controller; 3rd Floor City Hall**", and must be received by the Controller **before 2:00:00 pm local time on Monday, June 8th, 2015**. It is the responsibility of the proponent to deliver the sealed tender to the **3<sup>rd</sup> floor of City Hall** before the time indicated. Late proposals will not be accepted and will be returned to the Proponent unopened.

Any addenda will be posted on the City of Charlottetown website at [www.charlottetown.ca/tenders.php](http://www.charlottetown.ca/tenders.php). Proponents are responsible for checking the website for proposal/quote/tender notices, documents, and addenda. The City is not responsible for ensuring proponents have obtained addenda.

No fax, email or electronic submissions will be received. It is the proponent's responsibility to ensure that their submission is received prior to the closing date and time noted above. There will be no public opening of proposals received. The successful proponent(s) and the respective details will be posted on the City of Charlottetown awards webpage.

This Request for Proposal (RFP) creates no obligation on the part of the City of Charlottetown to award the contract or to reimburse proponents for proposal preparation expenses. The City of Charlottetown reserves the right to accept or reject any and all proposals, in whole or in part, received as a result of this request, and to negotiate in any manner necessary to best serve the interest of the City.

At the election of the City, whether or not a submission or submissions otherwise satisfies the requirements of the RFP, the City may reject summarily any submission received from a proponent which has been anyway involved in litigation, arbitration or alternative dispute resolution with the City within the five (5) year period immediately preceding the date on which the request for Proposals was published.

The City's evaluation may include information provided by the proponent's references and may also consider the proponent's past performance on previous contracts with the City or other institutions.

The City may prohibit a proponent from participating in a procurement process based on past performance or based on inappropriate conduct in a prior procurement process, and such inappropriate conduct shall include but not be limited to the following: (a) the submission of

Complete Street Tree Inventory Services and Urban Forest Management Software quotations containing misrepresentations or any other inaccurate, misleading or incomplete information; (b) the refusal of the proponent to honour its pricing or other commitments made in its proposal; or (c) any other conduct, situation or circumstance, as solely determined by the City.

Any questions in respect of this Request for Proposals must be directed to [acheverie@charlottetown.ca](mailto:acheverie@charlottetown.ca). Questions must be received no less than three (3) business days before the closing date of the RFP.

The **purpose of this Request for Proposal** process is to select a proponent to carry out a Complete Street Tree Inventory and to provide Urban Forest Management Software as detailed below and in Section 3.1.

The City is requesting the following work to be performed:

1. Inventory all street trees on City right-of-ways and manicured areas of parks.
2. Provide Urban Forest Management Software and licensing.
3. Provide training – on-site data collection and software training.
4. Provide a database and work records load.

Proponents are required to submit itemized quotes that include individual prices for:

- Cost per tree - please note that the City reserves the right to determine the number of trees included in the inventory (see the bullet points noted below):
  - to include inventory attributes for each tree and coordinates (estimate of up to 6,000 trees in inventory); or
  - to include inventory attributes for each tree and coordinates (estimate of up to 7,000 trees in inventory)
- Training – software and on-site data collection
- Database load
- Work records load
- Cost for software subscription/licensing
- Other costs

All prices are to include HST.

The timeline for the above work to be performed is between June 22<sup>nd</sup> and August 31<sup>st</sup>, 2015.

Upon **written** request, the City of Charlottetown will consider a contract extension if it is deemed that such an extension is duly required. **Such a request for an extension must be received prior to the original contract completion date**, and must contain an explanation for such a request.

## **2.0 REQUEST FOR PROPOSAL TERMS**

The City has formulated the terms and procedures set out in this RFP to ensure that it receives proposals through an open, competitive process, and the Proponents receive fair and equitable treatment in the solicitation, receipt and evaluation of their proposals.

The following terms will apply to this Request for Proposal and to any subsequent Contract. Submission of a proposal in response to this Request for Proposal indicates acceptance of all the following terms.

### **2.1 DEFINITIONS**

Throughout this Request for Proposal, terminology is used as follows:

- a) “City” means The City of Charlottetown.
- b) “Contract” means the written agreement or Purchase Order resulting from this Request for Proposal, in accordance with this Request for Proposal.
- c) “Contractor” means a successful Proponent to this Request for Proposal who enters into a written Contract with the City.
- d) “Must”, or “required” means a requirement that must be met in order for a proposal to receive consideration.
- e) “Proponent” means an individual or a company that submits, or intends to submit, a Proposal in response to this “Request for Proposal”.
- f) “Proposal” means the Proponent’s response to this “Request for Proposal”.
- g) “Should” or “desirable” means a requirement having a significant degree of importance to the objectives of the Request for Proposal.

### **2.2 NO OBLIGATION TO PROCEED**

Though the City fully intends at this time to proceed through the RFP, the City is under no obligation to proceed to the purchase, or any other stage. The receipt by the City of any information (including any submissions, ideas, plans, drawings, models or other materials communicated or exhibited by any intended Proponent, or on its behalf) shall not impose any obligations on the City. There is no guarantee by the City, its officers, employees or agents, that the process initiated by the issuance of this RFP will continue, or that this RFP process or any RFP process will result in a contract with the City.

### **2.3 CITY’S DECISION-MAKING**

The City has the power to make any decision, or to exercise any contractual right or remedy, contemplated in this RFP at its own absolute and unfettered discretion.

### **2.4 ENQUIRIES**

All enquiries related to this Request for Proposal are to be directed, in writing, to the contact person Amanda Cheverie (acheverie@charlottetown.ca). Information obtained from any other source is not official and should not be relied upon. Enquiries and responses will be recorded and may be distributed to all Proponents at the City’s option. Any questions regarding this RFP must be submitted by at least three (3) working days prior to the closing date. Any questions submitted after this date may not be answered.

**2.5 ELIGIBILITY**

Proposals will not be evaluated if the Proponent's current or past corporate or other interests may, in the City's opinion, give rise to a conflict of interest in connection with this project.

**2.6 EVALUATION AND SELECTION**

The City's intent is to enter into a Contract with the Proponent who has the highest overall ranking.

By responding to this RFP, Proponents will be deemed to have agreed that the decision of the City will be final and binding.

**2.7 DEBRIEFING**

Unsuccessful Proponents may request a debriefing meeting with the City.

**2.8 SIGNED PROPOSALS**

The proposal must be signed by the person(s) authorized to sign on behalf of the Proponent and to bind the Proponent to statements made in response to this Request for Proposal.

**2.9 ALTERNATIVE SOLUTIONS**

If alternative solutions are offered, please submit the information in the same format, as a separate proposal.

**2.10 CHANGES TO PROPOSAL WORDING**

The Proponent will not change the wording of its proposal after closing and no words or comments will be added to the proposal unless requested by the City for purposes of clarification.

**2.11 IRREVOCABILITY OF PROPOSALS**

By submission of a clear and detailed written notice, the Proponent may amend or withdraw its proposal prior to the closing date and time. Upon closing time, all proposals become irrevocable. By submission of a proposal, the Proponent agrees that should its proposal be successful the Proponent will enter into a contract with the City of Charlottetown.

**2.12 COMPLETENESS OF PROPOSAL**

By submission of a proposal the Proponent warrants that, if this Request for Proposal is to design, create or provide a system or manage a program, all components required to run the system or manage the program have been identified in the proposal or will be provided by the proponent at no charge.

## Complete Street Tree Inventory Services and Urban Forest Management Software

**2.13 SUB-CONTRACTING**

- a) Using a sub-contractor (who must be clearly identified in the proposal) is acceptable. This includes a joint submission by two Proponents having no formal corporate links. However, in this case, one of these Proponents must be prepared to take overall responsibility for successful interconnection of the two product or service lines and this must be defined in the proposal.
- b) Sub-contracting to any firm or individual whose current or past corporate or other interests may, in the City's opinion, give rise to a conflict of interest in connection with this project will not be permitted. This includes, but is not limited to, any firm or individual involved in the preparation of this Request for Proposal.
- c) Any Sub-contracting of the service to any firm or individual after the award of a Contract must have prior approval by the City.

**2.14 ASSIGNMENT**

This RFP and any resulting contract may not be assigned by either party without the prior written consent and approval of the other party, which consent may not be unreasonable withheld; provided however, either party, without such consent, may assign or sell the same in connection with the transfer or sale of substantially its entire business to which this contract pertains or in the event of its merger or consolidation with another company. Any permitted assignee shall assume all obligations of its assignor under this contract. No assignment shall relieve any party of responsibility for the performance of any accrued obligation that such party then has hereunder.

**2.15 CONFLICT OF INTEREST**

Any potential conflict of interest must be disclosed to the City in writing. Any conflict of interest identified will be considered and evaluated by the City. The City has the sole discretion to take the steps they deem necessary to resolve the conflict. If, during the term of the Contract, a conflict or risk of conflict of interest arises, the Proponent will notify the City immediately in writing of that conflict or risk and take any steps that the City reasonably requires to resolve the conflict or deal with the risk.

**2.16 LAWS OF PRINCE EDWARD ISLAND**

This Request for Proposal will be governed by and will be construed and interpreted in accordance with the laws of the Province of Prince Edward Island.

### 3.0 SCOPE OF WORK

#### 3.1 REQUIREMENTS AND SCOPE OF SERVICE

The Proponent will carry out a complete street tree inventory. For the purposes of this RFP, street trees are defined as: all trees within City right-of-ways and City owned manicured/controlled park areas.

The inventory will identify available planting sites and stump locations.

The required tree/site attributes will be available in a specified digital format.

The inventory must be completed using GPS/GIS technologies and electronic data collection hardware to a sub meter accuracy. Aerial photographs may be used to assist in data collection.

The Proponent will provide urban forest management software and training. The Proponent must provide the City in their proposal with an outline of the proposed training for the City employees.

The Proponent must provide a report to summarize the findings of their inventory.

The scope of work must include a Basic Level 1 risk assessment for all inventoried trees. The proponent will provide the City with the process by which the risk assessment will be conducted.

All work will conform, at minimum, with the most current version of the American National Standards Institute A300 Standards.

**Information provided to successful proponent by the City of Charlottetown:**

City will provide orthographic imagery, as available and a City boundary in an (ESRI) shape file.

**Tree Inventory Specifications:**

The following list of attributes will be collected for each tree. The City is amenable to suggestions made by the Proponent in regards to this list.

1. Location points: Identify the location of each tree, planting site or stump. All locations should have unique, sequential identification number; municipal street address (street number and name); GPS/GIS coordinates to the UTM NAD83 standards. Addresses that are created to easily identify a tree location must be identified using a consistent format. A description of where the tree is located on the property must be included – front, side, rear, or median.
2. Inspector name.
3. Date of inspection.
4. Planting site/growing space – turf, hardscape, tree hole treatment, staking, etc.
5. General site conditions – i.e. erosion, slope, etc.
6. Type – street, boulevard or park tree.



## Complete Street Tree Inventory Services and Urban Forest Management Software

7. Name – the tree must be identified by common name and scientific name (genus, species and variety or cultivar when known).
8. Planting date or estimated age.
9. Trunk diameter at breast height (DBH) measured at 1.4m above the ground. When trunk abnormalities or configuration interfere with DBH measurement, a ‘measurement of choice’ can be made elsewhere on the trunk and the height of that measurement must be noted in the comment field. Use of the multi-trunk formula to determine DBH must be noted in the comment field.
10. Number of stems.
11. Height – estimated in meters. Degree of accuracy must be determined through discussions with the Proponent and City staff and stated in height descriptor.
12. Spread – estimated in meters. Degree of accuracy must be determined through discussions with City staff and stated in spread descriptor.
13. Health and Structural condition – assess above ground woody components based on visible root, trunk, scaffold branches, twig and foliage conditions. Proponent will provide criteria for assessment.
14. Observations/comments include but are not limited to:
  - Dead trees
  - Structural defects
    - Roots - i.e. broken roots, cracked soil, construction damage, exposed or girdled roots, root rot
    - Trunk - i.e. bleeding or sap flow, burls, cavities, cracks or splits, decayed areas, included bark, loose bark, rot, wounds, vandalism, vehicle damage
    - Limbs, branches and stems – i.e. cavities, co-dominant forks, crown dieback, crossing branches, deadwood, decay, included bark, cracks or splits, loose bark, poor structure or taper, twig dieback, wounds, vandalism, vehicle damage
  - Disease or Discoloration assessed and identified - leaves, roots, root crown, trunk, limbs, branches and twigs
  - External indicators of decay such as fungal fruiting bodies
  - Evidence of attack by insects. Visual identification of insect. Insect symptoms indicators must be described.
  - Evidence of decay within the above ground root flare
  - Noticeable degree of lean and direction of lean
  - Hollow stems/limbs
  - Frost cracks
  - Cables or bracing
15. Site description, overhead utilities or infrastructure obstructions
16. Tree risk rating – based on a Basic Level 1 risk assessment for all trees.

**Maintenance Recommendations:**

Visual examination of each tree to determine and prioritize required maintenance will be carried out. All trees will be placed in the following categories (the City is amenable to suggestions made by the Proponent in regards to this list.):

## Complete Street Tree Inventory Services and Urban Forest Management Software

- Removal – a tree that does not represent an immediate hazard and should be removed as soon as permitted.
- Immediate removal – indicates a hazardous situation and the tree is considered a high priority removal.
- Large trees – require selective removal of dead, dying, broken and/or diseased wood to minimize potential risk. Trees are large enough to require a bucket truck or manual climbing.
- Young trees – corrective pruning to minimize future maintenance requirements. Trees are up to 6m in height and can be pruned from the ground.
- Stump removal – indicates a stump that should be removed.
- Vacant tree site – sites where trees were previously removed.
- New planting site – should be identified by street address, site number and GPS coordinates but must not be:
  - Within 10m of another street tree or intersection
  - Within 5m of a driveway or alley
  - Within 3m of a utility pole, street lamp, fire hydrant, traffic control device or other utility structures and any identifiable underground utilities
  - Under building utility wires
  - In boulevards or setbacks of less than 1.5m in width
  - In sites where a conflict with other existing vegetation will occur
  - In hardscape surfaces, medians or park frontages(The proponent will work with the City to modify the above restrictions to ensure that new planting sites are available).
- Clearance requirements over streets and sidewalks is noted when branches interfere with the movement of traffic or pedestrians or when signs, streetlights or traffic lights are obstructed.

**Inventory Data:**

- Inventory data must be compatible to ESRI ArcGIS Desktop software and UTM NAD 83 standards. Each point features should reflect the correct location of an individual tree with all relevant tree/site attributes correctly completed. Tree attributes should be exportable for use in spreadsheets or other database software and the tree location data should be exportable for use in other GIS industry standard mapping products now or in the future.
- Point data must be compatible with City owned handheld Trimble GeoXT.
- Point data must be accurate to 1m or less.

**Quality Control:**

The Proponent will provide a description of methodology through which quality control will be achieved.

Field and computerized quality control checks will take place to ensure quality control is adhered to.

The Proponent agrees to meet with and update specified City staff based on a **pre-arranged**

Complete Street Tree Inventory Services and Urban Forest Management Software **schedule**. Contact information will be provided.

#### **Urban Forest Management Software:**

- The solution must be easy to use and intuitive.
- The solution must have mobile access capabilities – must be able to run the applications and access data in the field. Compatible mobile devices must be identified.
- The solution must allow for management of tree inventories, manage resident requests, generate work orders, create flexible reports and allow for easy mapping.

#### **Other Information:**

There will be a ten percent (10%) holdback on all payments until progress is approved or until the full contract is completed and passes inspection by the City of Charlottetown.

The Proponent agrees to provide and maintain at his/her own expense, liability and property damage insurance with respect to his/her hired help, equipment and property damage. Coverage of said insurance is required to be a minimum of **two million dollars (\$2,000,000.00) per occurrence**. A copy of the insurance policy is required to be provided to the City of Charlottetown prior to commencement of any work.

All work must be carried out in compliance with Occupational, Health and Safety and the Provincial Workers Compensation Board regulations. Proof of coverage through the Workers Compensation Board must be provided.

The Proponent agrees and does hereby at all times save harmless the City of Charlottetown against all claim, demands, loss, costs, damages, actions, suits and other proceedings by or attributed to anything done or maintained by the Proponent in fulfilling of any of the provisions of this Proposal.

### **3.3 ANTICIPATED TIMEFRAMES**

The following outlines the anticipated schedule for the Request for Proposal and contract process. The timing and sequence of events resulting from this Request for Proposal may vary and shall ultimately be determined by the City of Charlottetown.

#### **Event Anticipated Dates**

Request for Proposal issued	May 22 <sup>nd</sup> , 2015
Last Date for Submission of Questions	June 2 <sup>nd</sup> , 2015
Request for Proposal closes	June 8 <sup>th</sup> , 2015
Review of Proposals	June 9 <sup>th</sup> -12 <sup>th</sup> , 2015
Contract Award	June 15 <sup>th</sup> , 2015
Contract and Work commences	June 22 <sup>nd</sup> , 2015
Contract deadline	August 30 <sup>th</sup> , 2015

**4.0 EVALUATION CRITERIA****PROPOSAL SUBMISSION AND EVALUATION CRITERIA**

The following items should be included in the Proponent's submissions and will be the basis for evaluation. Information should be provided sequentially as shown:

*No assumptions shall be made that information regarding the Proponent or its participants, their experience, expertise and performance on other projects is known by the City, other than the documentation and responses submitted by the Proponent.*

**Cover Letter****0 Points**

Should include the following information:

- Company name, address, website address, telephone number, fax number, e-mail address and primary contact person.
- Signed by the person or persons authorized to sign on behalf of the company.
- Acknowledgment of any addendums issued for this Request for Proposal.

**References****15 Points**

- Provide a minimum of three (3) references from clients that the Proponent has served, highlighting similar previous experience, including organization name, address, contact name, telephone and fax number and client profile.

**Training****25 Points**

- Provide an outline of your training strategy (both software and on-site data collection), time commitment required from City staff and number of staff permitted to attend training.

**Tree Inventory****40 Points*****Qualifications***

- Provide a brief history of your company, including the number of years the business has been a tree care company, the size of the business nationwide and globally, as well as a statement of specialization and expertise.
- Provide qualifications and resume for the Project Manager who will have the overall responsibility for the project. .
- Provide names, certifications and qualifications of staff carrying out the project.

***Project Implementation***

- Provide a detailed methodology, listing of data to be collected and a work plan to achieve the project objectives.
- Provide an indication of the time required to complete this project and availability for this project.

**Urban Forest Management Software****40 Points*****Qualifications***

- Describe your track record of success in delivering Urban Forest Management Software solution. Describe how your organization differentiates itself from your competitors. Provide a list of current clients utilizing the proposed software solution.
- Describe development of your proposed solution and how you gather feedback from users, the method and frequency for deploying new releases and the support you provide.

***Project Implementation***

- Describe the key features of your proposed solution and what differentiates it in the marketplace. Provide information on the user interface, ease of use and specific efficiencies it supports. Describe the implementation methods and support that you provide.

***Technology***

- Describe the software and technologies to be used and how these meet the technical requirements outlined in this RFP.
- Describe the functionality of your product and how it meets the business requirements outlined in this RFP.
- Describe the options available for hosting the solution including how you will provide support for the application (if applicable).

***Product Demonstration***

- Shortlisted vendors will be required to provide a demonstration of their proposed solution's functionality

**Pricing****20 Points**

- Provide a quote for completion of the Project, as per outlined on page four (4) of this RFP.
- Provide an estimate of ongoing costs e.g. license maintenance, annual upgrade costs, support.

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The Evaluation Committee may apply the evaluation criteria on a comparative basis, evaluating the proposals by comparing one Proponent's proposal to another Proponent's proposal. The Evaluation Committee will not be obligated to select the proposal that offers the lowest price or cost or and is not obligated to award the RFP.