



HOLDEN
FORESTS &
GARDENS



Request For Proposal

Tree Inventory & Urban Forestry Management Plan

**Provided to
The Cuyahoga Metropolitan Housing Authority**

**Prepared by
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PROPOSALS DUE BY: February 21, 2025

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Company Background

Holden Forests & Gardens is a premier public garden featuring a rural and urban campus, with a world-class plant & environmental science center.

We conserve ecosystems, work to understand climate impacts on the Lower Great Lakes region, and foster a love for nature. Our goal is to inspire regional change in conservation and urban land management.

Project Overview

Holden Forests & Gardens (HF&G), on behalf of Cuyahoga Metropolitan Housing Authority (CMHA), is soliciting proposals from a qualified tree inventory consultant (Consultant) interested in providing professional services for preparation of a partial property-wide Tree Inventory & Urban Forest Management Plan of CMHA's public housing.

Project Goals

A tree inventory has never been completed prior to this project for CMHA. It is estimated that there are 3,000-3,500 trees, but the inventory will focus on areas with the highest need based on the residents and the need of the CMHA landscaping team. Specific tree canopy analysis will be required for CMHA managed trees in their private property.

Once the tree inventory has been completed, the Consultant is expected to review and analyze the data to assess the status of CMHA's trees, determining the health, viability, and condition of CMHA's urban forest, and identify the most strategic opportunities to protect and enhance CMHA's tree resources. The Consultant will provide an outline of their firm's plan to develop the Urban Forest Management Plan and include any special services their firm offers to meet CMHA's need for timely completion and overall success of this proposal. In-person meetings are preferred, but meetings may be held virtually.

The tree inventory data will also be used to educate the residents of CMHA on the benefits of their urban canopy and help them to take an active stewardship role in the care and enhancement of the urban forest.

To reach these goals, HF&G is now accepting bids in response to this Request for Proposal.

Scope of Work

In March 2024, Holden Forests & Gardens was the recipient of an Ohio Department of Natural Resources grant. Award funding will include reimbursement funding for an Urban Forest Management Plan and Tree Inventory. A tree inventory and a management plan relating to trees are required elements of the award, and the goal is to provide CMHA with the necessary tools to better manage their landscape for residents. The tree inventory will evaluate the health of the urban forest and provide a better understanding of the type and distribution of trees within CMHA's properties. The project will allow the CMHA to plan for the enhancement of the tree canopy within the CMHA. CMHA utilizes outside contractors to provide tree services.

General

- A. The contract is anticipated to begin mid-March/April 2025. All work on this project must be completed by June 2025.
- B. The project area includes Outhwaite, Carver Park, Lakeview, King Kennedy, and Riverside, which covers approximately 169 acres, with the potential to include more properties if budget allows.

Part A: Tree Inventory Services

- A. The Consultant is required to provide a tree inventory and management software system. The system will provide tree mapping software, like GIS mapping, which has the capability of mapping and prioritizing tree care in CMHA-managed trees. The purpose of the mapping service will be for CMHA staff to utilize the software following the completion of the plan. The software must be available for information updates, such as new trees planted, tree pruning and tree removals. All software must be cloud-based/web-based. The Consultant will coordinate with CMHA staff for installation of all software.
- B. The Consultant is required to use an ISA certified team to conduct an inventory to include all trees maintained by CMHA located on CMHA properties (see appendix for locations).
- C. The Consultant is required to develop a complete inventory and health condition analysis of CMHA's trees including the identification of dead, dying, and/or diseased trees, young trees, and current health and maintenance needs.

Part B: Urban Forestry Management Plan

- a. The Consultant will meet with CMHA and HF&G staff to review the scope of work, desired deliverables & schedules, and will identify the criteria for documenting and developing CMHA's Urban Forest Management Plan.
- b. The Consultant will use the analysis from the tree inventory on CMHA properties to determine the optimal size and species of trees to plant for maximum environmental benefits.

- c. The Consultant will assess the status of CMHA’s urban forest and identify ecologically sound tree care and maintenance practices, establish regular pruning cycles, pest control, yearly tree mitigation plantings, community involvement opportunities, and policies and procedures.
- d. The Consultant will provide a recommended vision for CMHA’s tree canopy that can serve as a guide for the next 20 years. This should include establishing long-term goals for the expansion of the tree canopy by setting achievable tree planting targets.
- e. The Consultant will identify CMHA management team and organizational structure required to effectively implement the Plan; estimate annual CMHA budget needed to effectively achieve annual work plans and goals.
- f. The Consultant will prepare a draft plan for CMHA and HF&G review and incorporate CMHA and HF&G comments in the final plan.
- g. The Consultant will provide software training to the CMHA staff who will be responsible for administering the Urban Forestry Management Plan.

Target Deliverable Schedule

Selection schedule:

HF&G intends to follow, but will not be bound by, the following selection timeline:

Advertisement of RFP	January 8, 2025
Deadline for Questions Submitted by Email	January 24, 2025
Response to Written Questions	January 31, 2025
Deadline for Proposal Submittal	February 7, 2025
CMHA Approval and Award (Tentative)	February 21, 2025

The expected project completion date is June 2025. If this date needs to be adjusted, please include your readjusted proposed date, as well as the reasoning for shifting the schedule. All proposed date changes will be considered.

Anticipated Schedule of Award

HF&G anticipates providing recommendations to CMHA and finalizing the award by February 21, 2025.

Evaluation Metrics

Evaluation of the proposals by HF&G and CMHA is expected to be completed within 10 days of receiving the proposals.

Selection will be based upon the following criteria:

- Proposed Personnel - qualifications, professional experience, and skills of the firm.
- Ability to meet the requirements of the scope of services.
- Client References - Performance of similar projects based on input from references.
- Proposed Fee Structure / Cost of Services.
- Completeness of the proposal submitted and responsiveness to the RFP.
- Ability to comply with CMHA's standard professional services agreement.

All interested parties are encouraged to submit proposals to the RFP, as the award is not based solely on the lowest cost proposal submitted. Total cost will be taken into consideration, but the Consultant's capabilities, competence and capacity will be considered as well. HF&G reserves the right to choose the overall best firm according to CMHA's criteria. HF&G, and its designated representatives, shall be the sole judge of its own best interest, the proposal, and the resulting negotiated agreement. HF&G's decision will be final.

The above factors, along with other factors that HF&G or CMHA may deem appropriate, will be used to identify the proposal that represents the best value, which will be the basis for the contract award.

Selection Interviews

HF&G reserves the right to hold selection interviews with any Consultant submitting a proposal under this RFP. These interviews will be held after the proposal scoring process and solely at the discretion of HF&G. The intent of HF&G is to hold interviews only with top-scoring Consultants based on the evaluation metrics. The selection interview will be used to gain further insight into the Consultant's capabilities.

Submission Requirements

Submittal Format & Contents

The Consultant shall submit a digital copy of the proposal. The proposal shall be typed and must contain no more than 20 typed pages. A 12-point font size is required for the typed portion of the letters and proposal sections. Smaller fonts are allowed for tables, charts, and exhibits. The inclusion of 11" by 17" sheets is allowed if folded to 8.5" by 11". Resumes of key personnel and sample plan sheets are not counted toward the 10-page, double-sided limitation if inserted at the end of the proposal. The proposal must be signed by an authorized representative of the Consultant and include a statement to the effect that the proposal is valid for ninety (90) days. The following information shall be included:

- A. **Cover Letter** - This letter should briefly describe the firm's name, address and phone number of the person authorized to negotiate agreement terms and make binding agreements.
- B. **Background** - Provide history of the firm or Consultant's urban forest service experience, which specifically addresses the firm's experience at servicing related urban forest services such as an Urban Forest Management Plan.
- C. **Approach** - Provide a proposal for completion of the project, including timeline and strategy for completion of the Urban Forest Management Plan and Tree Inventory.
- D. **References** - The proposal shall include a list of recently completed projects that are similar in scope and function to this proposal. Provide a description of the project, client name, and the name, title, and telephone number of the primary contact person.
- E. **Management and Staff** - The proposal shall include an organizational chart and describe the organizational structure that is proposed to work on this project. The proposal shall include resumes of all key personnel, percentage of commitment to the project, describing their qualifications, education, and professional certification. A project manager/single point of contact shall also be included.
- F. **Schedule of Fees** - Submit the Schedule of Fees in a separate document included in the proposal submittal package, including:
 - A Fee Schedule identifying the fee, or fee range, for each Scope of Work Objective.
 - The Fee Schedule should itemize the major components and tasks identified in the proposed methodology to meet the objectives outlined in the Scope of Work. Consultant may include additional tasks and costs, but must provide a detailed description of the task.
 - Total proposed "not-to-exceed" cost of services should be no more than \$30,322 and include a Fee Schedule describing all charges and hourly rates for additional services not included in the Scope of Work, with a description of each additional service.

The Consultant should specifically indicate in its proposal any clauses in CMHA's proposed Agreement which are unacceptable to the Consultant. CMHA's proposed Professional Services Agreement is attached to this Request for Proposals

Insurance Requirements

A certificate of insurance must be included with the proposal, evidencing the following:

- General liability insurance of \$1,000,000 and automobile insurance coverage of \$1,000,000 indicating the CMHA as an additional insured.
- Professional Liability (errors and omissions) insurance providing a minimum coverage of \$1,000,000.
- Workers' Compensation Coverage and Employer's Liability Insurance.
- Each liability insurance certificate shall state that coverage afforded therein is primary and shall bear endorsements that provide HF&G be given at least 30 days written notice before any material change or cancellation of such policy, for any reason.

Proposals must be submitted by February 21, 2025

Contact Information

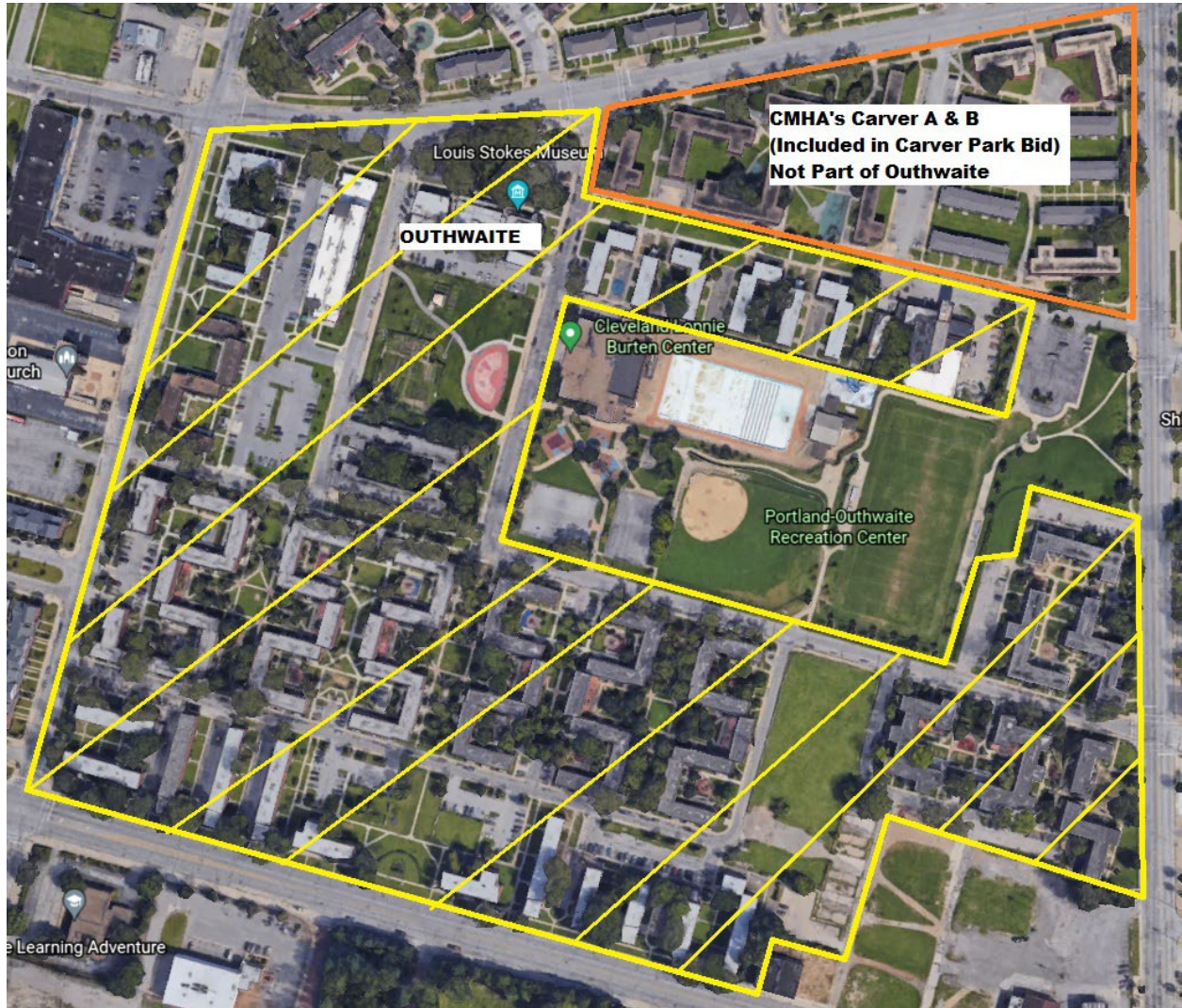
Questions about the RFP

All inquiries and questions regarding this RFP shall be submitted in writing to HF&G and CMHA by 5:00 P.M., January 24, 2025. All such requests should be addressed to Amanda Wood, awood@holdenfg.org with Amanda Block (blocka@cmha.net) and Pam Brown (pbrown@holdenfg.org) cc'd on the email. The Consultant shall be responsible for the prompt delivery of the request. CMHA and HF&G shall not be responsible for any explanation or interpretations of the RFP other than by written addendum posted to the HF&G's webpage on or before February 21, 2025. No oral interpretations of any provision in the RFP shall be binding upon HF&G.

Appendix

Site locations in order of priority

- **Outhwaite** (30.21 acres)
 - 2452 East 46th St, Cleveland, OH 44104



- **Carver Park** (19.35 acres)
 - 2366 East 55th Street, Cleveland, OH 44104

No map available of area

- **Lakeview** (20.54 acres)
 - 1332 West 28th Street, Cleveland, OH 44113
 - 2700 Washington Ave, Cleveland, OH 44113



- **King Kennedy (32.47 acres)**
 - 2501 East 59th Street, Cleveland, OH 44104
 - 6001 Woodland Ave, Cleveland, OH 44104



- **Riverside (65.60 acres)**
 - 4609 Rocky River Drive, Cleveland, OH 44135
 - 17800 Parkmount Ave, Cleveland, OH 44135

