



# **REQUEST FOR PROPOSALS**

CITY OF CHARLESTON  
TREE INVENTORY

Issued: JANUARY 10, 2025

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City Manager

## SECTION ONE: GENERAL INFORMATION

### 1.1. Purpose

The City of Charleston is soliciting proposals (“EOI” or “Proposals”) from qualified individuals/firms to provide services to inventory of up to 15,000 trees, stumps, and planting sites within the City of Charleston’s right of way, for the entire city, excluding the Mary Price Ratrie Arboretum and Spring Hill Cemetery.

The initial phase of this project is funded through a grant from the federal government through the Inflation Reduction Act. In the event additional federal grant monies are not awarded, future phases of the project may be discontinued at the discretion of the City."

## SECTION TWO: SCOPE OF SERVICES

### 2.1. Expectations

The successful firm will be expected to perform the following activities:

- 2.1.1 The proposal must include a per tree price based on the data fields below for any trees or planting sites in excess of 15,000. The inventory must be completed in multiple phases, potentially over a two or three year period. The inventory must follow the ANSI Part 9 Standards and the data must be collected by International Society of Arboriculture (ISA) certified arborists.

The data fields must include:

- Address/Location: including house address, street, side, and X and Y coordinates and if in a park, the park name.
- Species: using botanical and common names, and cultivars when appropriate.
- Tree Size: measured by diameter at breast height (DBH) in 1-inch size classes.
- Condition: categorized as good, fair, poor, or dead based on signs of stress, poor structure, damage, soil and root problems, disease and pests.
- Primary Maintenance: assigned as remove, train, discretionary, palm prune, stump removal, or plant.
- Risk Rating: collected per the ISA BMP, moderate, low, high, and extreme.
- Defects: including dead and dying branches, broken or hanging branches, branch attachment, trunk condition, cracks, decay or cavity, tree architecture, and root problems.
- Risk Assessment Complete: indicating if the assessment could not be completed due to obstructions, safety concerns, or unforeseen site conditions.

- Overhead Utilities: recording if overhead utilities are present and conflicting, present but not conflicting, or not present.
- Vacant Planting Sites.
- Date of Inventory: the date the data was collected by the urban forester.

The proposal must include a **data software program** for a minimum of three (3) years with the following features:

- An interactive work environment that manages inventory data in the field or on a desktop.
- Unlimited information with multiple editable data layers, i.e., historical data, additional facilities and assets.
- The ability to assign roles to an unlimited number of users, i.e., administrator, edit, read, public, contractor.
- A public view to inform the public about tree benefits, etc. The content of the public view must be editable and determined by the City.
- The ability to switch from desktop to mobile view.
- The ability to calculate the environmental benefits of the trees and project future benefits.
- The ability to search or explore and query the live data.
- The ability for designated users to make edits to all data fields to see how a tree has changed over time.
- The ability to create work orders for individuals or groups of trees and log specific callers for a specific site.
- The ability to upload photos or documents including from a mobile phone.
- The use of the Council of Tree and Landscape Appraisals trunk formula method for tree valuation with the ability to further define attributes for an actual tree valuation and record price estimates and local information.
- Configurable dashboards, reports and filters for each user.
- The City must have access to and own its data and have the ability to export and import all or part of the data. The data must be provided to the City in shapefiles and Microsoft Excel.

The proposal must include eight (8) hours in-person **training** on using the inventory data and software to be scheduled at a mutually convenient time.

The proposal must include monthly **inventory update reports** and a **summary report** of the tree inventory data and estimate of tree benefits.

The proposal must include a **comprehensive management plan** and estimated budget for recommended maintenance over a five-year period. The tree management plan must assist the City in recognizing priority and proactive management tasks, understanding the value of

community trees. The plan must be geographically based and include sections that report findings citywide, by the CEJST (Climate & Economic Justice Screening Tool) and non CEJST areas. The following separate sections must be included as options:

Option 1: Kanawha City;

Option 2: Virginia Avenue and Staunton Avenue from 40<sup>th</sup> Street to 50<sup>th</sup> Street on the river side of McCorkle Avenue in Kanawha City:

Option 3: Venable Avenue and Washington Avenue from 42<sup>nd</sup> Street to 49<sup>th</sup> Street on the railroad side McCorkle Avenue in Kanawha City.

The plan will be developed upon completion of the entire inventory and must include:

- Species, genus and family composition and distribution of each tree.
- Pest Susceptibility – condition and recommendations
- Condition and factors affecting condition of each tree, i.e., root characteristics, branch structure, trunk, canopy, foliage condition, and the presence of pests.
- Condition rating by the certified arborist as Excellent, Good, Fair, Poor, or Dead.
- Tree recommendations based on condition.
- Analysis of a tree population’s relative age distribution by assigning age classes to the size classes of inventoried trees.
- Relative age recommendations for planting, pro-active maintenance, preservation, removal, and replacement of trees.
- Tree defect observations and recommendations.
- Infrastructure conflicts and recommendations.
- Functions and benefits of tree including environmental, economic and social.
- Recommended management of tree, including level of further inspection, level of priority of recommended maintenance.
- Routine inspection recommendations.
- Routine pruning cycle recommendations.
- Young tree training cycle recommendations.
- Tree planting and stump removal recommendations.
- Development of a maintenance schedule and budget.

## SECTION THREE: INSTRUCTIONS TO FIRMS SUBMITTING PROPOSALS

### 3.1. The Proposal

Proposals should be prepared simply and economically, providing straightforward, concise descriptions of the firm's capabilities to satisfy the City's investigative service needs. Emphasis should be placed on completeness and clarity of content.

Ownership of all data, materials, and documentation originated and prepared for the City pursuant to this solicitation will belong to the City and are subject to the West Virginia Freedom of Information Act, unless the content is proprietary in nature such that it is excluded from production. All pages or sections of submitted documents considered by the firm to be proprietary in nature should be clearly labeled.

### 3.2. Questions About the Solicitation

All questions must be transmitted according to established deadlines by e-mailing [bids@cityofcharleston.org](mailto:bids@cityofcharleston.org).

### 3.3. Submission of Proposal

All proposals must be submitted in writing and in electronic format as a PDF file readable with Adobe Acrobat software.

Proposals must be transmitted according to established deadlines by e-mail to [bids@cityofcharleston.org](mailto:bids@cityofcharleston.org).

### 3.4. Qualifications, Experience, and Past Performance

Vendors should provide information regarding its employees, such as staff qualifications and experience in completing similar services; copies or descriptions of any staff certifications or degrees applicable to this solicitation; descriptions of past services completed, including the location of the client, project manager name and contact information, and type of services provided.

Vendors must submit at least 3 examples of completed relevant comparable projects.

Vendors must submit at least 3 written client references.

## SECTION FOUR: PROPOSAL EVALUATION & SHORTLIST

### 4.1. Evaluation Committee

All proposals will be reviewed by the City of Charleston, which will consider the statements of qualifications and performance data and other material submitted by the interested firms. The City of Charleston will select no less than 3, but no more than 5 firms that, in the committee’s opinion, are the best qualified to perform the desired services.

The shortlisted firms will be invited to participate in interviews. The selection committee may require in-person interviews, software demonstrations, location visits, and other details from applicants that it deems necessary to adequately ascertain the qualifications of the applicants and proposals, and the ability of each to perform the services at the City of Charleston expected in this contract.

### 4.2. Shortlisted Firm Evaluation

The City of Charleston will evaluate the firms that have been determined most qualified and able to perform the desired services. The evaluation criteria are based on a 100-point total score:

#### **Experience & Qualifications**..... 70 pts

- Professional competence (15 pts)
- Experience providing comparable services (15 pts)
- References (10 pts)
- History and Stability of Firm (10 pts)
- Proposed Software Capabilities and Ease of Use (20)

#### **Implementation Services**..... 15 pts

- Current workload and ability to complete work-including personnel to be assigned to the project, and their qualifications (15 pts)

#### **Oral Interview**..... 15 pts

- Demonstrated thoughtfulness in project development (10 pts)
- Assessment of the firm’s proposed project managers (5 pts)

## SECTION FIVE: SCHEDULE OF EVENTS

Release of the RFP	January 10, 2025
Written Questions Submission Deadline	January 24, 2025
Addendum Issued (if necessary)	January 31, 2025
Proposal Due Date	February 5, 2025
Estimated Date for Interviews of Shortlisted Firms	February 10-14, 2025

**NOTE:** The schedule is subject to change. Please visit the following City website for updates:  
<https://charlestonwv.gov/bids-purchasing/current-bids>