

**REQUEST FOR PROPOSAL**  
**FOR**  
**Balboa Park Conservancy 2017 Tree Inventory**



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Inventory Project Managed and Performed in a  
collaboration with Tree San Diego.

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## PROJECT SUMMARY

The Balboa Park Conservancy is seeking a qualified contractor to provide tree inventory services for the park. Balboa Park Conservancy (BPC) is working with Tree San Diego (TSD) and in partnership with the City of San Diego Department of Park and Recreation to conduct an inventory of the trees in Balboa Park. The Balboa Park Conservancy works to provide expertise, advocacy and resources to envision, enhance and sustain Balboa Park in partnership with the City of San Diego and in collaboration with other organizations in the Park and the community. The Conservancy's vision is to assure that Balboa Park is a sustainable, world-class destination where all visitors are inspired, engaged and enriched.

The park contains approximately 16,000 trees in three regions.

- CENTRAL MESA, approximately 7,000 trees (46% of the total)
- WEST MESA, approximately 4,900 trees (32% of the total)
- EAST MESA, approximately 3,400 trees (22% of the total)

The last park inventory was conducted in 1998. The goal of this inventory is to acquire specific data attributes for each individual tree established by International Society of Arboriculture (ISA) Certified Arborists on Global Positioning System (GPS) devices. This data will then be taken and added to Tree San Diego's Tree Tracker system (<http://www.treesandiego.org/sd-tree-map/>) for use by the Balboa Park Conservancy and San Diego City Park and Recreation in the management of the Balboa Park Urban Forest. The data would also be stored and made available to the City of San Diego and their GIS Resource Management tools.

The contractor selected by BPC to perform the inventory data collection will have documented expertise in urban tree inventories and will have access to a system to capture the data along with GPS coordinates and photos.

Once the inventory is completed by the Contractor, Tree San Diego and Balboa Park Conservancy will generate a report based on the inventory data collected. The information will be in a form that facilitates the development of a strategic planning and pro-active management approach to the park's urban forest, the system will also provide access to the condition, needs, and benefits of the urban forest and provide a means to coordinate with the City and their maintenance efforts in the park.

## TIMELINE

*Request for Proposal announcement.....March 9th, 2017*

*Contractor RFP Question Deadline 3:00 pm ..... March 13th, 2017*

*Request for Proposal submittal due by 4:00pm to BPC ..... March 17, 2017*

*Award of Contract.....April 1-15, 2017*

***Inventory Completion Target Date      August 1, 2017***

## PROJECT LOCATION AND OVERVIEW

The Balboa Park Tree Inventory Project site is bounded by 6<sup>th</sup> Ave. on the west, 28<sup>th</sup> St. to the east, with the northern corners of the park along Upas St. and Cypress Ave. The inventory will include the Marston House property and extension. The tree inventory will exclude the San Diego Zoo, The Roosevelt Middle School, and The Naval Hospital property. The southern boundary is identified from west to east by I-5, then along Park Boulevard, and finally along Russ Boulevard. This is outlined on the map in Appendix B. The park project site is approximately 1,200 acres. The Project is currently being executed in three phases. Phase 1 will be the WEST MESA. Phase 2 will be the EAST MESA. Phase 3 will be the CENTRAL MESA (See Map in Appendix B). The Proposal should include the entire area of Balboa Park, with itemized budgets for each of the three regions. The initial contract will be issued for the WEST MESA of the park, with an estimated 4,900 trees. Other regions will be awarded once the west mesa inventory submissions are deemed complete and acceptable. However, award of the west mesa tree inventory does not guarantee any contractor any additional contract or compensation for work beyond the WEST MESA. We ask that you quote the project in its entirety, broken down by region, but with the right to execute the project in phases without adversely impacting the per-tree cost.

A map defining the three regions of the park is shown in Appendix B.

## GENERAL DESCRIPTION OF PROJECT and SCOPE OF SERVICES

### TREE INVENTORY

The contractor will conduct an inventory of each of the three regions of Balboa Park, with a total of roughly 16,000 trees. The project shall include field data collection, data entry, and data transfer coordination. Contractor shall provide all equipment needed to perform the services and collect the information, including GPS equipment and data collection hardware and software. The contractor will collect the data fields specified in Appendix A and summarized here:

- UNIQUE ID NUMBER
- X/Y COORDINATES
- PARK
- PARK LOCATION/MGMT ZONE
- FAMILY
- GENUS/SPECIES
- COMMON NAME
- Cultivar
- D.B.H
- DBH Measurement Method
- # of STEMS
- BPC CONDITION
- GROW SPACE
- HARDSCAPE DAMAGE
- CLEARANCE REQUIRED
- IRRIGATION PRESENT
- BPC MAINTENANCE RECOMMENDATION

- NOTES
- PHOTO – OPTIONAL: We request this collection item be priced as an option.

## MEETINGS

The contractor will need to participate in meetings with BPC, TSD, and City Park and Recreation staff to execute the inventory and coordinate ongoing quality assurance of the data and methods used. We anticipate:

- Kick-off meeting
- Bi-monthly status update calls
- Two to three jobsite visitations to assess and potentially calibrate maintenance and condition evaluation criteria
- Completion summary meeting.

## DATA DELIVERY

The contractor will need to provide the inventory data in an exportable and interchangeable file format (Shape files and/or CSV files) that Tree San Diego can import into its Tree Tracker system. The data also needs to be in a format that the City of San Diego can import into its GIS systems at a later date. Please specify your planned data format and structure in your proposal. Also, if you are pricing out an option to include photographs, please specify the format and structure of that information to be provided.

## MINIMUM QUALIFICATIONS

Contractor will use International Society of Arboriculture (ISA) Certified Arborists with tree inventory experience to inventory all of the park's trees. Data will be collected using GPS equipment with sub-meter accuracy. Data will be collected according to the fields specified in Appendix A.

In addition, at least one member of each crew of staff conducting the field inventory shall:

- Have a minimum of 3 years education and/or experience in the taxonomy of tree species common to Southern California sufficient to accurately identify 95% of the taxonomy encountered.
- Have a minimum of 3 years field experience in tree risk assessment used to evaluate the condition and maintenance requirements.

Contractor must maintain all required insurance, business licenses, and/or permits.

## PROJECT MANAGEMENT

The Contractor shall designate an individual to serve as project manager and to be the primary point of contact for BPC and TSD.

If subcontractors are required, the Contractor will be responsible for the quality and completeness of their work, as well as their conduct. The Contractor will serve as the point of contact for any subcontractors.

The Contractor will develop a project timeline with major milestones that show how progress will be made to meet the deadline. This will be submitted for review and approval prior to actual on-ground activity begins.

The Contractor will review data for accuracy and completeness before submitting to BPC. The Contractor will also work with BPC during the project to evaluate the standards used for condition and maintenance requirements to make sure BPC's expectations are calibrated with Contractor's assessments.

## Evaluation Criteria

Proposals will be reviewed and evaluated based on;

1. Project Understanding & Approach
2. Contractor Qualifications & Experience
3. Contractor Capability
4. Contractor Project Schedule / Work Plan
5. Project Costs

## PROPOSAL REQUIREMENTS

This document and its appendices comprise the Request for Proposal (RFP) for the project. Responses to this RFP should be submitted as specified below. We do not specify any page limitations, but we ask that your responses be clear and concise. Submission of proposals electronically as PDF files is encouraged to save paper and time.

Proposals should include, at a minimum:

1. Contact information for your organization, including physical address, phone and fax numbers, and email addresses for the primary person responsible for your proposal and who will be the primary point of contact for any and all correspondence and discussion pertaining to this RFP.
2. Statement of project understanding. Please provide a detailed description of the project so that we can determine mutual understanding of the project's needs and goals. Clearly define tree threshold determinations ie. by species and/or size.
3. Statement of qualifications and experience. Present the qualifications of your firm as well as the staff selected to execute the proposal.
  - a. References – please provide at least 3 relevant projects, including a contact name for each reference who we could contact to discuss your work.
4. Contractor's Capability statement should outline the equipment and technology that that will be used during the data collection period, the file format to be used for data collection and transfer, and the compatibility with the Tree San Diego tree tracking system.
  - a. Data Detail – please detail the proposed format of the inventory data and delivery timeframe. Please specify also the format of any photographic data and how it would be delivered.
5. Contractor's work plan – please provide a breakdown of the tasks and timeframe for completion of this project. Please provide the estimated labor hours required to complete the project, broken down by task. Please do this for each park region, rather than the project as a whole.
6. Compensation – Please provide an itemized cost for the proposed effort. All pricing must be inclusive and include all labor, material and equipment necessary to complete the tree inventory. We expect that a cost per tree is the simplest way to present the overall cost, and if you compute a total, please be clear about the number of trees you are estimating.

7. PRICING OPTIONS – Please provide a pricing option to include photographic records of each tree.

Please submit all RFP question via email to Jackie Higgins, [jackie@balboapark.org](mailto:jackie@balboapark.org) by March 9th, 2017 at 4:00pm

Please submit proposals by March 17, 2017 at 4:00pm. Mail or email (PDF encouraged) to:

Jacqueline Higgins  
Director of Planning, Design, and Programs  
(619) 331-1920  
[jackie@balboapark.org](mailto:jackie@balboapark.org)

Balboa Park Conservancy  
1549 El Prado, Suite 1  
San Diego, CA 92101

## APPENDIX A - REQUIRED INVENTORY FIELDS AND COLLECTION SPECIFICATIONS

Revision Notes: This list below of inventory fields includes revisions and comments made at the BPC Steering Committee meeting on 1/20/2017

### FIELD LEGEND -Primary Source of Field Requirement:

- \* CALFIRE Attribute
- \*\* CurrentTrees\_SD Schema (City of San Diego standards)
- \*\*\* OpenTreeMap field for Tree San Diego
- \*\*\*\* BTC Requested Field

### FIELD LISTING

#### UNIQUE ID NUMBER

Inventory Collection shall include a unique ID for each tree.

NOTE: In addition, our Tree tracker will auto-assign another ID number, and the city, upon importing this data, will likely assign a reference number of their own. Tree San Diego will include all ID numbers in its compilation of the data.

#### X/Y COORDINATES

These are the GPS coordinates of the tree in standard XY format

#### PARK

The name of the Park. In this case, Balboa Park

#### PARK LOCATION/MGMNT ZONE

The City of San Diego requests that this field be used to indicate one of the following regions of the park:

WEST MESA

CENTRAL MESA

EAST MESA



FAMILY

GENUS/SPECIES\*\*

COMMON NAME

Cultivar\*\*\*

All of these fields denote the scientific and common classifications of the tree

D.B.H+\*

DBH of the tree in any units desired, according to ISA Standards

DBH Measurement Method \*\*\*

Records the method used for measuring DBH – options for inventory:

Visual DBH estimate,

Calipers at 12",

DBH tape,

# of STEMS\*

Indicate the number of trunks/stems

BPC CONDITION\* (general condition from the following list, as per ISA guidelines)

Excellent (100%)

Very Good (90%)

Good (80%)

Fair (60%)

Poor (40%)

Critical (20%)

Dead (0%)

GROW SPACE\* (The area from which the tree grows)

T = Tree Lawn

W = Well/Pit

M = Median

P = Raised Planter

O = Open/Unrestricted

I = Island

U = Unmaintained Area"

HARDSCAPE DAMAGE

This field captures whether the tree is impacting any hardscapes. It is a simple yes/no choice

#### CLEARANCE REQUIRED\*

FOR THIS RFP, PLEASE Identify any clearance issues, pertaining to trees adjacent to structures  
CalFire definition: Trees, which are causing or may cause visibility or clearance difficulties for pedestrians or vehicles, will be identified, as well as those trees blocking clear visibility of signs or traffic signals.

#### IRRIGATION PRESENT\*\*\*\*

YES/NO. This should be determined by visual observation. I.e. within turf lawn area or separate tree bubblers visually observed.

Turf spray adjacent or dedicated tree bubbler

#### BPC MAINTENANCE RECOMMENDATION\*

Choices include: (definitions are included at the end of this document – left out here for brevity)

1. Priority 1 Removal
2. Priority 2 Removal
3. Priority 3 Removal
4. Priority 1 Prune
5. Priority 2 Prune
6. Large Tree Routine Prune
7. Small Tree Routine Prune
8. Training Prune
9. Stump Removal
10. Plant Tree
11. N/A

#### NOTES

Free Text field for every tree, to denote special situations. Examples include DISEASE, INSECT OR MECHANICAL DAMAGE

#### PHOTO\*\*\* - OPTIONAL

We would like to collect photos for each tree along with the tree inventory data. We would like the Proposals submitted to be priced with and without photos collected. Also, proposals should indicate the format that photos would be in and confirm that contractor would be able to provide photos along with inventory data.

## PROTECT\*\*

NOTE: THIS FIELD IS NOT PART OF THE RFP AND WILL NOT BE COLLECTED BY HIRED CONSULTANT

NOTE: THIS FIELD WILL BE ADDED BY BPC VOLUNTEERS AFTER THE INVENTORY IS COLLECTED

Here we indicate whether a particular tree is a:

1. Landmark Tree
2. Heritage Tree
3. Parkway Resource Tree
4. Preservation Tree
5. N/A

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### NOTES:

CalFire definitions for maintenance requirements field:

1. Priority 1 Removal. Trees designated for removal have defects that cannot be cost-effectively or practically treated. The majority of the trees in this category will have a large percentage of dead crown and pose an elevated level of risk for failure. Any hazards that could be seen as potential dangers to persons or property and seen as potential liabilities would be in this category. Large dead and dying trees that are high liability risks are included in this category. These trees are the first ones that should be removed.
2. Priority 2 Removal. Trees that should be removed but do not pose a liability as great as the first priority will be identified here. This category would need attention as soon as "Priority One" trees are removed.
3. Priority 3 Removal. Trees that should be removed, but that pose minimal liability to persons or property, will be identified in this category.
4. Priority 1 Prune. Trees that require priority one pruning are recommended for trimming to remove hazardous deadwood, hangers, or broken branches. These trees have broken or hanging limbs, hazardous deadwood, and dead, dying, or diseased limbs or leaders greater than four inches in diameter.
5. Priority 2 Prune. These trees have dead, dying, diseased, or weakened branches between two and four inches in diameter and are potential safety hazards.
6. Large Tree Routine Prune. These trees require routine horticultural pruning to correct structural problems or growth patterns, which would eventually obstruct traffic or interfere with utility wires or buildings. Trees in this category are large enough to require bucket truck access or manual climbing.
7. Small Tree Routine Prune. These trees require routine horticultural pruning to correct structural problems or growth patterns, which would eventually obstruct traffic or interfere with utility wires or buildings. These trees are small growing, mature trees that can be evaluated and pruned from the ground.
8. Training Prune. Young, large-growing trees that are still small must be pruned to correct or eliminate weak, interfering, or objectionable branches in order to minimize future maintenance requirements. These trees, up to 20 feet in height, can be worked with a pole-pruner by a person standing on the ground.
9. Stump Removal. This category indicates a stump that should be removed.
10. Plant Tree. During the inventory, vacant planting sites will be identified by street and address. The size of the site is designated as small, medium, or large (indicating the ultimate size that the tree will attain), depending on the growing space available and the presence of overhead wires.

# APPENDIX B -- Map of Balboa Park Showing Park Regions Tree Inventory Phases

Exclusion Areas

