

AGREEMENT FOR PROFESSIONAL SERVICES

THIS AGREEMENT is made and entered into on this 13th day of January, 2015, by and between the City of Manhattan Beach, a municipal corporation ("City") and The Davey Tree Expert Company, an Ohio corporation, operating through its Davey Resource Group division ("Contractor") (collectively, the "Parties").

RECITALS

A. City desires to obtain services of Contractor to assess City's current tree program and develop a Street Tree Master Plan.

B. Contractor represents that it is qualified and able to perform the services required by this Agreement.

NOW, THEREFORE, in consideration of the Parties' performance of the promises, covenants, and conditions stated herein, the Parties hereto agree as follows:

Section 1. Contractor's Services. Contractor shall perform the services described in Exhibit A (the "Services") in a manner satisfactory to City and consistent with the level of care and skill ordinarily exercised by members of the profession currently practicing in the same locality under similar conditions.

Section 2. Term of Agreement. This Agreement shall apply to services rendered on or after January 20, 2015 and shall terminate when the work is completed, unless sooner terminated by the City.

Section 3. Time of Performance. Contractor shall commence its services under this Agreement upon receipt of a written notice to proceed from City in the manner described in Exhibit A. Contractor shall complete the services in conformance with the timeline set forth in Exhibit A, or as otherwise directed by the City's representative.

Section 4. Compensation.

(a) City agrees to pay Contractor in accordance with the fee schedule included as part of Exhibit A. Except as otherwise stated in subsection (c) of this section, in no event shall the Contractor be paid more than \$ 67,930.00 during the term of this Agreement.

(b) Unless expressly provided for in Exhibit A, Contractor shall not be entitled to reimbursement for any expenses. Any expenses incurred by Contractor that are not expressly authorized by this Agreement will not be reimbursed by City.

(c) The City Manager may authorize cumulative increases for additional work of up to 20%. Any additional work in excess of this amount shall be approved by the City Council.

Section 5. Method of Payment. City shall pay Contractor in accordance with the method and schedule of payment set forth in Exhibit B, attached hereto and incorporated herein. Unless otherwise specified in Exhibit B, Contractor shall submit to City a detailed invoice on a monthly basis for the services performed pursuant to this Agreement. Each invoice shall describe in detail the services rendered during the period, the days worked, number of hours worked, the hourly rates charged, and the services performed for each day in the period, as applicable. Within 45 days of receipt of each invoice, City shall pay all undisputed amounts included on the invoice.

Section 6. Independent Contractor. The Parties agree, understand, and acknowledge that Contractor is not an employee of the City, but is solely an independent contractor. Contractor expressly acknowledges and agrees that City has no obligation to pay or withhold state or federal taxes or to provide workers' compensation or unemployment insurance or other employee benefits and that any person employed by Contractor shall not be in any way an employee of the City. As such, Contractor shall have the sole legal responsibility to remit all federal and state income and social security taxes and to provide for his/her own workers' compensation and unemployment insurance and that of his/her employees or subcontractors. Neither City nor any of its agents shall have control over the conduct of Contractor or any of Contractor's employees. Contractor shall not, at any time, or in any manner, represent that it or any of its agents or employees are in any manner agents or employees of City. Contractor shall indemnify and hold harmless City and its elected officials, officers and employees, servants, designated volunteers, and agents serving as independent contractors in the role of City officials, from any and all liability, damages, claims, costs and expenses of any nature to the extent arising from Contractor's personnel practices. City shall have the right to offset against the amount of any fees due to Contractor under this Agreement any amount due to City from Contractor as a result of Contractor's failure to promptly pay to City any reimbursement or indemnification arising under this Section 6.

Section 7. Assignment. This Agreement shall not be assigned, in whole or in part, by Contractor without the prior written approval of City. Any attempt by Contractor to so assign this Agreement or any rights, duties, or obligations arising hereunder shall be void and of no effect.

Section 8. Responsible Principals.

(a) Contractor's responsible principal, Jack McCabe, Vice President of Operations, shall be principally responsible for Contractor's obligations under this Agreement and shall serve as principal liaison between City and Contractor. Designation of another Responsible Principal by Contractor shall not be made without prior written consent of City.

(b) City's Responsible Principal shall be the City Manager, who shall administer the terms of the Agreement on behalf of City.

Section 9. Personnel. Contractor represents that it has, or shall secure at its own expense, all personnel required to perform the Services under this Agreement. All personnel engaged in the work shall be qualified to perform such Services.

Section 10. Permits and Licenses. Contractor shall obtain and maintain during the term of this Agreement all necessary licenses, permits, and certificates required by law for the provision of the Services, including a business license.

Section 11. Interests of Contractor.

(a) Contractor covenants that it presently has no interest and shall not acquire any interest, direct or indirect, which may be affected by the Services, or which would conflict in any manner with the performance of the Services. Contractor further covenants that, in performance of this Agreement, no person having any such interest shall be employed by it. Furthermore, Contractor shall avoid the appearance of having any interest, which would conflict in any manner with the performance of the Services. Contractor shall not accept any employment or representation during the term of this Agreement which is or may likely make Contractor "financially interested" (as provided in California Government Code §§ 1090 and 87100) in any decision made by City on any matter in connection with which Contractor has been retained.

(b) Contractor further warrants and maintains that it has not employed or retained any person or entity, other than a bona fide employee working exclusively for Contractor, to solicit or obtain this Agreement. Nor has Contractor paid or agreed to pay any person or entity, other than a bona fide employee working exclusively for Contractor, any fee, commission, gift, percentage, or any other consideration contingent upon the execution of this Agreement. Upon any breach or violation of this warranty, City shall have the right, at its sole and absolute discretion, to terminate this Agreement without further liability, or to deduct from any sums payable to Contractor hereunder the full amount or value of any such fee, commission, percentage or gift.

(c) Contractor warrants and maintains that it has no knowledge that any officer or employee of City has any interest, whether contractual, non-contractual, financial, proprietary, or otherwise, in this transaction or in the business of Contractor, and that if any such interest comes to the knowledge of Contractor at any time during the term of this Agreement, Contractor shall immediately make a complete, written disclosure of such interest to City, even if such interest would not be deemed a prohibited "conflict of interest" under applicable laws as described in this subsection.

Section 12. Insurance. [Check if Applicable]

(a) Contractor shall at all times during the term of this Agreement carry, maintain, and keep in full force and effect, insurance as follows:

1. A policy or policies of Comprehensive General Liability Insurance, with minimum limits of \$2,000,000 for each occurrence, combined single

limit, against any personal injury, death, loss, or damage resulting from the wrongful or negligent acts by Contractor.

2. A policy or policies of Comprehensive Vehicle Liability Insurance covering personal injury and property damage, with minimum limits of \$1,000,000 per occurrence combined single limit, covering any vehicle utilized by Contractor in performing the Services required by this Agreement.

3. Workers' compensation insurance as required by the State of California.

4. A policy or policies of Professional Liability Insurance (errors and omissions) with minimum limits of \$2,000,000 per claim and in the aggregate. Any deductibles or self-insured retentions attached to such policy or policies must be declared to and be approved by City. Further, Contractor agrees to maintain in full force and effect such insurance for one year after performance of work under this Agreement is completed.

(b) Other Insurance Provisions. The general liability and automobile liability policies are to contain, or be endorsed to contain, the following provisions:

1. City, its officers, officials, employees, designated volunteers and agents serving as independent contractors in the role of City officials, are to be covered as additional insureds as respects: liability arising out of activities performed by or on behalf of Contractor; products and completed operations of Contractor; premises owned, occupied or used by Contractor; or automobiles owned, leased, hired or borrowed by Contractor. The coverage shall contain no limitations on the scope of protection afforded to City, its officers, officials, employees, designated volunteers or agents serving as independent contractors in the role of City officials which are not also limitations applicable to the named insured.

2. For any claims related to this Agreement, Contractor's insurance coverage shall be primary insurance as respects City, its officers, officials, employees, designated volunteers and agents serving as independent contractors in the role of City officials. Any insurance or self-insurance maintained by City, its officers, officials, employees, designated volunteers or agents serving as independent contractors in the role of City officials shall be excess of Contractor's insurance and shall not contribute with it.

3. Contractor's insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.

4. Each insurance policy, except for the professional liability policy, required by this clause shall expressly waive the insurer's right of subrogation against City and its elected officials, officers, employees, servants, attorneys, designated volunteers, and agents serving as independent contractors in the role of City officials.

5. Each insurance policy required by this Agreement shall be endorsed to state: should the policy be canceled before the expiration date, the issuing insurer shall mail 30 days' prior written notice to the City.

6. If insurance coverage is canceled or reduced in coverage or in limits, Contractor shall within two business days of notice from insurer, phone, fax and/or notify the City via certified mail, return receipt requested, of the changes to or cancellation of the policy.

(c) The City's Risk Manager may, in writing, amend and/or waive any or all of the insurance provisions set forth herein. In such case, the Contractor shall comply with the insurance provisions required by the City's Risk Manager.

(d) The policy or policies required by this Agreement shall be issued by an insurer admitted in the State of California and with a rating of at least A-;VII in the latest edition of Best's Insurance Guide, unless waived in writing by City's Risk Manager.

(e) Contractor agrees that if it does not keep the insurance in full force and effect, City may either immediately terminate this Agreement or, if insurance is available at a reasonable cost, City may take out the necessary insurance and pay, at Contractor's expense, the premium thereon.

(f) All insurance coverages shall be confirmed by execution of endorsements on forms approved by City. The endorsements are to be signed by a person authorized by that insurer to bind coverage on its behalf. All endorsements are to be received and approved by City before services commence. As an alternative to City forms, Contractor's insurer may provide complete, certified copies of all required insurance policies, including endorsements affecting the coverage required by these specifications.

(g) Any deductibles or self-insured retentions must be declared to and approved by City, and shall not exceed \$25,000.

(h) Contractor shall require each of its sub-contractors (if any) to maintain insurance coverage that meets all of the requirements of this Agreement.

Section 13. Indemnification.

(a) Indemnity for Design Professional Services. Contractor is considered a "design professional" as that term is defined in Civil Code Section 2782.8. In connection with its design professional services, Contractor shall hold harmless and indemnify City, and its elected officials, officers, employees, servants, designated volunteers, and those city agents serving as independent consultants in the role of city officials (collectively, "Indemnitees"), with respect to any and all claims, demands, damages, liabilities, losses, costs or expenses, including reimbursement of attorneys' fees and costs of defense (collectively, "Claims" hereinafter), including but not limited to Claims relating to death or injury to any person and injury to any property, which arise out of, pertain to, or relate to in whole or in part to the negligence, recklessness, or

willful misconduct of Contractor or any of its officers, employees, subcontractors, or agents in the performance of its design professional services under this Agreement.

(b) Other Indemnities. In connection with any and all claims, demands, damages, liabilities, losses, costs or expenses, including attorneys' fees and costs of defense (collectively, "Damages" hereinafter) not covered by Section (a) herein, Contractor shall defend, hold harmless and indemnify the Indemnitees with respect to any and all Damages, including but not limited to, Damages relating to death or injury to any person and injury to any property, which arise out of, pertain to, or relate to the acts or omissions of Contractor or any of its officers, employees, subcontractors, or agents in connection with the performance of this Agreement, including without limitation the payment of all consequential damages, attorneys' fees, and other related costs and expenses, except for such loss or damage arising from the sole negligence or willful misconduct of the City, as determined by final arbitration or court decision or by the agreement of the parties. Contractor shall defend Indemnitees in any action or actions file in connection with any such Damages with counsel of City's choice, and shall pay all costs, judgments, and expenses, including all attorneys' fees and experts' costs actually incurred in connection with such defense. Contractor's obligation to indemnify shall not be restricted to insurance proceeds, if any, received by Contractor or City. All duties of Contractor under this Section shall survive termination of this Agreement.

Section 14. Termination.

(a) City shall have the right to terminate this Agreement for any reason or for no reason upon five calendar days' written notice to Contractor. Contractor agrees to cease all work under this Agreement on or before the effective date of such notice.

(b) City may at any time, for any reason, with or without cause, suspend this Agreement, or any portion hereof, by serving upon the Contractor written notice. Upon receipt of that notice, the Contractor shall immediately cease all work under this Agreement, unless the notice provides otherwise. If the City suspends only a portion of this Agreement, such suspension shall not make void or invalidate the remainder of this Agreement.

(c) In the event of termination or cancellation of this Agreement by City, due to no fault or failure of performance by Contractor, Contractor shall be paid based on the percentage of work satisfactorily performed at the time of termination. In no event shall Contractor be entitled to receive more than the amount that would be paid to Contractor for the full performance of the Services required by this Agreement. Contractor shall have no other claim against City by reason of such termination, including any claim for compensation.

Section 15. City's Responsibility. City shall provide Contractor with all pertinent data, documents, and other requested information as is available for the proper performance of Contractor's Services.

Section 16. Information and Documents.

(a) Contractor covenants that all data, documents, discussion, or other information (collectively "Data") developed or received by Contractor or provided for performance of this Agreement are deemed confidential and shall not be disclosed or released by Contractor without prior written authorization by City. City shall grant such authorization if applicable law requires disclosure. Contractor, its officers, employees, agents, or subcontractors, shall not without written authorization from the City Manager or unless requested in writing by the City Attorney, voluntarily provide declarations, letters of support, testimony at depositions, response to interrogatories or other information concerning the work performed under this Agreement or relating to any project or property located within the City. Response to a subpoena or court order shall not be considered "voluntary," provided Contractor gives City notice of such court order or subpoena.

(b) Contractor shall promptly notify City should Contractor, its officers, employees, agents or subcontractors be served with any summons, complaint, subpoena, notice of deposition, request for documents, interrogatories, request for admissions or other discovery request, court order or subpoena from any party regarding this Agreement and the work performed thereunder or with respect to any project or property located within the City. City retains the right, but has no obligation, to represent Contractor and/or be present at any deposition, hearing or similar proceeding. Contractor agrees to cooperate fully with City and to provide City with the opportunity to review any response to discovery requests provided by Contractor. However, the City's right to review any such response does not imply or mean the right by City to control, direct, or rewrite the response.

(c) All Data required to be furnished to City in connection with this Agreement shall become the property of City, and City may use all or any portion of the Data submitted by Contractor as City deems appropriate. Upon completion of, or in the event of termination or suspension of this Agreement, all original documents, designs, drawings, maps, models, computer files containing data generated for the work, surveys, notes, and other documents prepared in the course of providing the Services shall become the sole property of the City and may be used, reused or otherwise disposed of by City without Contractor's permission.

(d) Contractor shall maintain complete and accurate records with respect to sales, costs, expenses, receipts and other such information required by City that relate to the performance of the Services. All such records shall be maintained in accordance with generally accepted accounting principles and shall be clearly identified and readily accessible. Contractor shall provide free access to City, its designees and representatives at reasonable times, and shall allow City to examine and audit the books and records, to make transcripts therefrom as necessary, and to inspect all work, data, documents, proceedings and activities related to this Agreement. Such records, together with supporting documents, shall be maintained for a period of 3 years after receipt of final payment.

(e) Contractor's covenants under this Section shall survive the termination of this Agreement.

Section 17. Default

(a) Contractor's failure to comply with the provisions of this Agreement shall constitute a default. In the event that Contractor is in default for cause under the terms of this Agreement, City shall have no obligation or duty to continue compensating Contractor for any work performed after the date of default and can terminate this Agreement immediately by written notice to Contractor. If such failure by Contractor to make progress in the performance of work hereunder arises out of causes beyond Contractor's control, and without fault or negligence of Contractor, it shall not be considered a default.

(b) If the City Manager or his delegate determines that the Contractor is in default in the performance of any of the terms or conditions of this Agreement, City shall serve the Contractor with written notice of the default. The Contractor shall have ten (10) days after service upon it of the notice in which to cure the default by rendering a satisfactory performance. In the event that the Contractor fails to cure its default within such period of time, the City shall have the right, notwithstanding any other provision of this Agreement, to terminate this Agreement without further notice and without prejudice to any other remedy to which it may be entitled at law, in equity or under this Agreement.

Section 18. Changes in the Services. City shall have the right to order, in writing, changes in the Services or the services to be performed. Any changes in the Services requested by Contractor must be made in writing and approved by both Parties.

Section 19. Notice. Any notices, bills, invoices, etc. required by this Agreement shall be deemed received on (a) the day of delivery if delivered by hand during the receiving party's regular business hours or by facsimile before or during the receiving party's regular business hours; or (b) on the second business day following deposit in the United States mail, postage prepaid, to the addresses set forth below, or to such other addresses as the Parties may, from time to time, designate in writing pursuant to this section.

If to City: City of Manhattan Beach Public Works
3621 Bell Avenue
Manhattan Beach, California 90266
Attn: Juan Price

If to Contractor: Davey Resource Group
6005 Capistrano Unit A
Atascadero, CA 93422
Attn: Jack McCabe, Vice President of Operations

Section 20. Attorneys' Fees. If a party commences any legal, administrative, or other action against the other party arising out of or in connection with this Agreement, the prevailing party in such action shall be

entitled to have and recover from the losing party all of its attorneys' fees and other costs incurred in connection therewith, in addition to such other relief as may be sought and awarded.

Section 21. Entire Agreement. This Agreement represents the entire integrated agreement between City and Contractor, and supersedes all prior negotiations, representations, or agreements, either written or oral. This Agreement may be amended only by a written instrument signed by both City and Contractor.

Section 22. Governing Law. The interpretation and implementation of this Agreement shall be governed by the domestic law of the State of California.

Section 23. Venue. Any litigation concerning this Agreement shall take place in the municipal, superior, or federal district court with geographic jurisdiction over the City of Manhattan Beach.

Section 24. City Not Obligated to Third Parties. City shall not be obligated or liable under this Agreement to any party other than Contractor.

Section 25. Exhibits; Precedence. All documents referenced as exhibits in this Agreement are hereby incorporated in this Agreement. In the event of any discrepancy between the express provisions of this Agreement and the provisions of any document incorporated herein by reference, the provisions of this Agreement shall prevail.

Section 26. Corporate Authority. The persons executing this Agreement on behalf of the Parties warrant that they are duly authorized to execute this Agreement on behalf of the Parties and that by their execution, the Parties are formally bound to the provision of this Agreement.

Section 27. Severability. Invalidation of any provision contained herein or the application thereof to any person or entity by judgment or court order shall in no way affect any of the other covenants, conditions, restrictions, or provisions hereof, or the application thereof to any other person or entity, and the same shall remain in full force and effect.

EXECUTED on the date first written above at Manhattan Beach, California.

CITY OF MANHATTAN BEACH

CONTRACTOR: Davey Resource Group,
A Division of The Davey Tree Expert
Company



Mark Danaj
City Manager



Jack McCabe
Vice President of DRG Utility

ATTEST:

 2-3-15

LIZA TAMURA
City Clerk



 ALEXANDRA KLUCZAROV
NOTARY PUBLIC
STATE OF OHIO
Comm. Expires
May 13, 2018
Recorded in
Portage County

APPROVED AS TO FORM:



QUINN M. BARROW
City Attorney

EXHIBIT A
SCOPE OF SERVICES

Proposal: RFP #1015-15 Tree Master Plan

City of Manhattan Beach, California



A Division of The Davey Tree Expert Company

Western Region Office

6005 Capistrano Unit A
Atascadero, CA 93422

Company Headquarters

1500 N Mantua Street
Kent, OH 44240

www.daveyresourcegroup.com



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Proposal

As part of an ongoing commitment to environmental and quality of life issues, the City of Manhattan Beach is exploring the development of a comprehensive tree management program through the development of a Street Tree Master Plan (STMP). Manhattan Beach will be well served by Davey Resource Group's (DRG's) experience in providing plans to cities throughout California and across the country. Our well-developed methodology is thorough, yet flexible and based on our ability to connect to both the constituents and clients within a community. The following description of our approach to this project is based on working with communities and entities that we have served both locally and across North America.

Phase One – Kickoff Meeting

We will begin this project with a kickoff meeting that will be held in the City of Manhattan Beach. We will set the agenda with your input and approval before this meeting takes place. At this time, we establish lines of communications, expectations for interaction (telephone, e-mail, other), and introduce you to our team and their roles. DRG team members attending this meeting include our, Project Developer, and Project Coordinator via teleconference. For this meeting, it is our hope that your critical project team members would be in attendance. This includes not only your project manager, but any key personnel that might be interacting with DRG throughout this process. At this meeting, we will obtain names and contact information from you for the projected stakeholder interview candidates. Also, we will verify the resources that we need to obtain from Manhattan Beach. We will discuss and agree on milestone dates for timely completion of the project and assure that our bi-weekly reporting meets your standards. We will review our implementation plan as well. Lastly, we will have interactive discussion that refines your goals and objectives for the plan and it's outcomes beyond the RFP. This may include the development of a vision and mission for the plan, or incorporating the City's mission and vision into the plan. Together, we will determine the final scope of work within the budget you have allocated for this project, and finalize timing and deliverables.

Phase Two – Research and Fact Finding

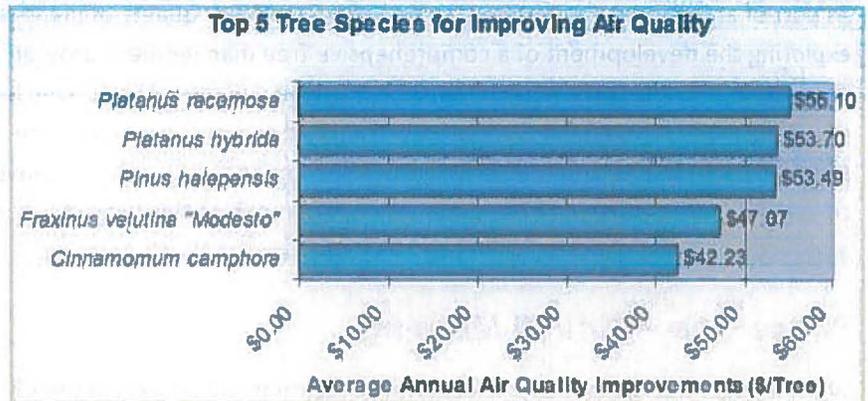
DRG has varied methodologies for the completion of a street tree master plan. We base our projects on an adaptive management methodology; examining what the city has, what they want, want they need, and how to achieve the goals. Based on the objectives Manhattan Beach wants to achieve for this plan and techniques we have utilized for other communities, we have developed the following methodology:

Task 1: To incorporate and evaluate the existing tree inventory, DRG plans on utilizing *i-Tree Streets* (www.itreetools.org). The *i-Tree* suite of tools was developed in partnership with the USDA Forest Service, the National Arbor Day Foundation, the Society of Municipal Arborists, the International Society of Arboriculture, Casey Trees and The Davey Tree Expert Company. *i-Tree* provides the models necessary for cities to analyze their trees and assess the value of the services they provide. *i-Tree Streets* was developed to determine the structure, function, and value of the urban forest and will help evaluate the ecosystem services provided by the urban forest and establish meaningful and measurable goals for the future. Knowing that the urban forest doesn't exist

in a vacuum, DRG will focus efforts toward critical issues that are of concern to municipalities such as **stormwater runoff and air quality.**

The following quantification is available through i-Tree Streets:

- Stormwater runoff reduction.
- Air quality improvement.
- Carbon dioxide reduction.
- Energy conservation.
- Property value increase.



In addition, i-Tree Streets calculates the following aspects of your tree resource:

- Structure (e.g., species composition, age distribution, canopy cover).
- Function (environmental and aesthetic benefits).
- Value (annual monetary value of benefits and costs).
- Replacement Value
- Management needs (e.g., recommended maintenance, stocking levels, tree conflicts).

The data, charts, and documents created through the i-Tree Streets analysis will be full color graphic reports that will inform the remainder of the Street Tree Management Plan and support the development of your goals and objectives. It will be utilized to “tell a story” about Manhattan Beach’s urban forest in a factual and scientific method to internal and external stakeholders.

Task 2: Once the i-Tree Streets report is completed, DRG will begin to **develop recommendations for urban forest goals, objectives, and policies.** This will be a process that is completed through research and education. Determining what the City has is the first step; this will be captured through departmental interviews and research of existing codes and policies. The stakeholder and constituent interviews are critical as they set the tone for the project. We work with the city’s project manager to determine the list of key personnel that have a “stake” in the urban forest. This may include members of various city departments and elected officials, if desired. Having previously conducted many of these types of projects, DRG has developed methodology for this critically important task. Our process includes developing a standard set of questions that will be asked during these interviews. These questions do not preclude additional discussion that might be pertinent, but they do allow for consistency in research. In addition, if a critical stakeholder’s schedule makes it difficult to conduct the interview, an e-mail survey can take the place of a face-to-face interview. Once this step is complete, DRG will analyze the data to determine program strengths, gaps, and challenges. DRG will consider best management practices (BMPs) and incorporate community culture to develop our recommendations to include in the plan.

While we are researching existing codes and policies, we will also **examine current operations standards** that exist within the city. We will do this by researching specifications currently in use, as well as auditing recent



planting and maintenance sites within the city limits. We will document and compare them with current BMPs including ANSI A300 and Z133, CalFire, and the International Society of Arboriculture. We will determine what standards need to be updated and incorporate recommendations into the plan. These include pruning intervals and vegetation management for conflict(s) as requested in the RFP.

Because our experience is nationwide, we have a great deal of experience in the **development and revision(s) of Tree Ordinances and Standards**. To complete this objective, DRG will incorporate questions about the current ordinances and standards into our research. This includes asking staff and stakeholders if the current ordinance is being followed and enforced, provides for proper mitigation, fits with the culture of the community, or is too burdensome or not strong enough. Also, if desired, we can reach beyond the internal stakeholders and work with those who are directly impacted by ordinances and standards. In addition, these issues will be a part of the first community workshop presentation to determine if stakeholders understand and are satisfied with the ordinance(s). Recommendations will be provided as a secondary document and incorporated into the plan if desired. This task will include the assessment and development of tree preservation standards, view ordinance effectiveness, removal criteria, appeals process, and tree valuation standards as requested in the RFP.

During this task, DRG will examine the “conflict” issues that may exist within city. This includes looking at the public right of way tree ordinances as opposed to private property trees. Also, we will work to determine what coordination is taking place for utility tree pruning to develop recommendations for the plan. This may include interviews with utility foresters from Southern California Edison and will be part of the internal interviews with Manhattan Beach staff.



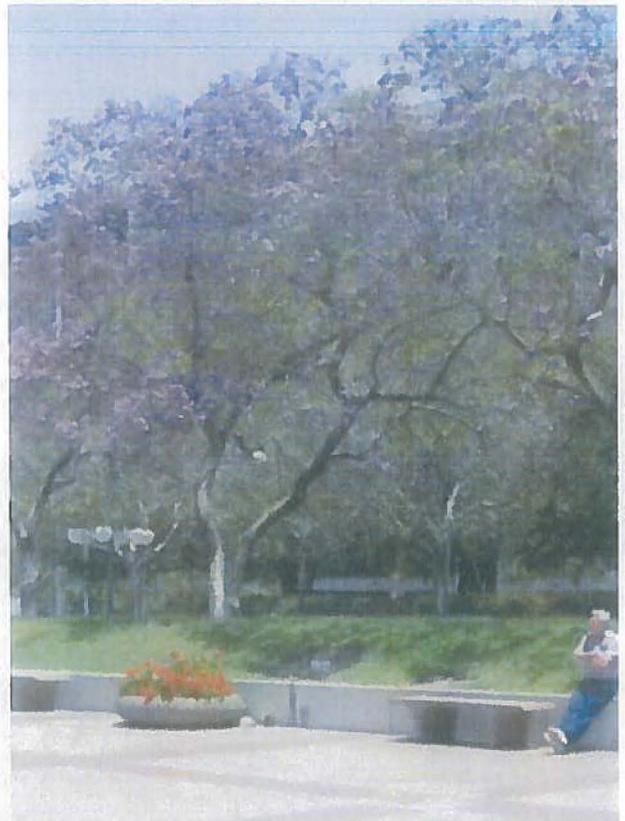
Task 3: In general, DRG has utilized comparison cities in most of our management plans. In many cases, we are able to incorporate some of the tools that we have developed including i-Tree Streets reports and Canopy Studies as part of the comparison. As requested, we will reach out the Cities of Beverly Hills, Santa Monica, and Palo Alto. In addition, we will determine, with your approval, additional cities within California as comparison cities for the report. (Alternates serve to “fill in”

when we are unable to obtain the right amount of information from a city.) To obtain the full amount of data needed to create relevant comparisons, we send an email survey asking about pertinent practices and funding sources. In addition, we ask for detail that includes number of trees per capita, budget breakdowns, personnel numbers, and general political support. We then follow up with a phone interview as well. This not only informs the plan in general, but will also inform the need for an urban forester. Because our footprint is across North

America, we can also bring in unique concepts for funding and practices from other cities, many who are DRG clients, and incorporate that information into the plan and the report.

Task 4: To support the planning process, we propose conducting **public outreach** through four meetings and an online survey. We propose utilizing four of the meetings **during** plan development for community feedback. DRG is prepared to utilize these meetings to seek input from the community stakeholders about the urban forest within Manhattan Beach. At these community meetings, our project team will present information that has been researched through the Tasks 1-3, as well as seeking some input for the planting palette (Task 5). We will prepare information on the plan to present to the public including the results of the i-Tree Streets analysis.

When seeking input from the community, we present findings obtained through research and interviews through MS PowerPoint and discussion. Then we create a series of questions that are explained to the group. For example, these questions might be: "Do you believe that Manhattan Beach has a strong enough view ordinance?" or "Do you believe that Manhattan Beach needs to strengthen its appeal process?" These questions are then posted within the meeting and participants have the opportunity to "vote" and establish priorities. Many times, constituents provide their own solutions and ideas to incorporate into plans. As appropriate, we include these in our discussions. (We utilize a methodology that incorporates the use of green, yellow, and red "sticky dots" to vote on questions and commentary. Green is favorable, yellow is somewhat supportive, and red is against a concept or an idea.)



In addition, DRG will present the plan to City Council for input and revisions. It is assumed that the City will be responsible for securing a location for and publicizing the community meeting(s). DRG will assist with development of a meeting announcement flyer and press releases.

As we work through the research portion of the project, the questions developed to solicit input from the public become very clear. We develop the questions and seek your final approval on what is to be presented during the meetings. We allow additional feedback at the meetings to assist in the development of the plan. After the meetings, the feedback is gathered, synthesized, and then utilized to create recommendations for the plan.

In addition to public meetings, DRG has had success in creating online surveys to gauge the public perception of the community's urban forest and the management thereof. Survey questions are written based on findings



and approved by the city's project management. The survey is posted on the city's website and DRG and Manhattan Beach will work in partnership to draw respondents to the survey.

Outreach also gives an opportunity to refine recommendations to the public including ongoing processes for education to businesses, property owners, and residents. Those recommendations will become part of the plan, along with the recommendations from the on-line survey.

DRG will also present the plan to City Council as requested. We are flexible as to the type of presentation Council prefers. All PowerPoint presentations, handouts, summaries, etc., will be prepared with time for approval from Manhattan Beach project management.

Task 5: A citywide planting palette and planting plan will be developed through examining the i-Tree Streets report, input from internal stakeholders through the fact finding process, best management practices, and public meeting input. This task also can take place prior to the public meetings to receive specific input as to the species citizens would like to see on their streets. Ultimately, the list that is developed should prioritize tree planting that will enhance the city's livability and economics. Most importantly, the tree list should provide trees that also meet the goals and objectives of the plan and look to providing environmental sustainability for Manhattan Beach. Our landscape architect and urban forestry specialists will develop this plan that will result in drawings (CAD, or other format) and recommended list(s) for the plan.

Phase Three

Putting the actual plan together is the last phase of the project. With consideration for all the information that has been gleaned through research, interviews, meetings, and studies, DRG creates the plan and the recommendations. This will include potential funding strategies and revenue streams, estimated costs to fund the proposed plan, the planting plan, the tree palette, and code/ordinance additions and/or modifications. Much like many of the plans that DRG develops, specific questions are asked and answered through the research process. As you will see in the matrix developed below under "Methodologies," we understand that there are specific needs being addressed through this project. Additional goals and objectives will arise during this project as well. Phase Three puts all of those together to form the details in the plan.

Availability to Perform the Work

DRG will be available to perform the work as necessary. Our team is flexible, and many team members are involved in each project. Our internal quality control and work planning procedures assure that your project is moving forward on a timely basis. Also, because of the size of our team, many tasks can take place at the same time. This assures completion when you need the project to be completed.

Methodologies

Utilizing all of the research completed in Phase Two, DRG will write the plan and develop recommendations that have been requested in the RFP. These include the development of recommendations for codes and ordinances as necessary. The following matrix outlines each task as developed in the RFP and DRG's methodology for completing the component. In addition, the phase in which each requested component is noted within the methodology. Additional methodologies for project completion appear at the end of the matrix.

Manhattan Beach Request	Davey Resource Group Methodology
Thorough review of the current tree inventory	Phase Two: The review will include analyzing the inventory through i-Tree Streets. This analysis will help determine the structure, function and value of the urban forest as a whole, and determine which trees, by species, are providing significant benefits for the City. A full report will be included as part of the plan and will be used to educate constituents during the community input phase.
Review of current municipal code requirements, suggest modifications.	Phase Two: These will be reviewed through the research portion of the project. In addition, they can be compared to other cities, and modifications will be suggested based on review of other models, Best Management Practices, and experience.
<p>Meet with and discuss current practices with City employees engaged in tree maintenance issues.</p> <p>Catalog and identify recurrent issues, specifically those considered points of contention, between staff and the public.</p> <p>Specifically address vegetation conflicts relating to traffic views, blockage of regulatory signage, sign placements, and general encroachment of vegetation onto right of way.</p> <p>Suggest recommended practices.</p>	<p>Phase One and Two: During the kick off phase, DRG will work with Manhattan Beach project leadership to determine which employees to interview. Additional suggestions may be made by DRG. Questions will be developed and approved by Manhattan Beach project leadership. Employees will be interviewed by DRG staff.</p> <p>Recommendations will be made through analysis, review of other models, Best Management practices, and experience.</p>
Conduct a sufficient number of public meetings and outreach to engage, educate, receive input and integrate public comment as appropriate. Additionally, the proposer shall plan to present the draft plan and report at a City Council meeting.	Phase Two: DRG will conduct four community meetings that include three for education and input into the plan, and one for draft plan comment. In addition, with the City's approval, (and input), DRG will develop an on-line survey to seek additional input. As requested, the draft plan will be presented to City Council.
Development of a recommended tree palette and planting plan.	Phase Three: Using the i-Tree Analysis, the Street Tree Guide for Southern California, and other

Manhattan Beach Request	Davey Resource Group Methodology
	resources, our Landscape Architect together with our urban forestry specialist(s), will develop and tree palette and plan will include species lists, as well as drawings and planting specifications (as necessary.)
Development of pruning interval matrix by species and annualized costs.	Phase Three: By examining the current tree inventory and Best Management Practices, DRG will develop the matrix. Annualized costs will be developed through our partnership with Southern California tree care companies.
Create a recommended tree preservation standard for trees that may have a high valuation but are problematic due to disease of structural defect.	Phase Three: During the fact finding process, DRG will examine the current processes and standards that currently exist for high value trees. Standard will be developed utilizing comparison communities, best management practices, and current community culture.
Explore current view conflict and city policy thereof; recommend modification if warranted.	Phase Three: Examine current processes, standards and culture of the city. Recommendations, if necessary, will come from comparison communities, (specifically where view ordinances are viable,) best management practices, and culture of the city.
Develop standardized removal criteria which include investigating hardscape, utility and view considerations.	Phase Two and Three: Exploring current standards and comparing them with like cities and best management practices will allow the development of standard criteria that can be followed.
Review current appeal processes, recommend modification if warranted.	Phase Two and Three: Most likely, significant input for this task will come in community meetings and fact finding. In addition, best management practices will be incorporated into making recommendations if necessary.
Develop and/or recommend a tree valuation standard.	Phase Three: Current standards and best management practices exist for tree valuation systems. DRG will explore the best standard for the City, with recommended adaptations as necessary.
Develop a proposed budget to fund recommended street tree master plan.	Phase Three: Budget(s) will be recommended by tasks at current dollars.
Gather data and generate report on current practice of minimum of 5 California agencies and funding mechanisms employed to maintain their urban forests. The report shall contain a matrix of practices and funding mechanisms. The agencies polled shall include the Cities of Santa Monica, Beverly Hills, and Palo Alto in addition to 7 other cities of similar size and demographic.	Phase Two: Incorporating tasks from requests by Manhattan Beach, (this list), additional tasks as identified through the Planning process, and prior experience, DRG will develop a list of 5 cities with Manhattan Beach approval, to report on current practices. In addition, with nationwide experience, DRG can also offer additional input into the report that may include unique practices and funding mechanisms that may not be in practice in California.

Manhattan Beach Request	Davey Resource Group Methodology
Identify cross over issues, policies and regulations of public right of way trees versus private property trees.	Phase Two: By examining current policies and regulations, and determining the community's understanding of the value of trees, DRG will determine conflicts with tree ordinances, culture of the care of trees on private property v public property trees.
Identify and recommend coordination techniques for line clearing and other overhead utility conflicts with outside utility companies.	Phase Two: Understanding the standards and policies (PRC 4298 and FAC-003-03 in particular) and how those intersect with community culture and practice will be the determining factors on resolving conflicts and creating coordination. This will flow from community meetings and will be addressed in the plan as appropriate.
Analyze and estimate current and future carbon sequestration potential of the Urban Canopy.	Phase One: DRG will develop current environmental numbers through the use of i-Tree to determine current environmental benefits of tree city trees.
Coordinate Master Tree Plan with Veterans Parkway Master Plan.	Phase One and Three: During the kick off meeting, DRG will determine the key components of the Veterans Parkway Master Plan to the City. During the plan development process, DRG will assure that the two plans are coordinated.
Identify the need for an Urban Forester.	Phase Two: After examining current operations, policies, community support, elected official support, DRG will make a recommendation for the need for an urban forester for Manhattan Beach.

Additional Methodology and Deliverables

Utilizing the completed fact finding of stakeholder research, ordinance review, i-Tree Streets analysis and the canopy study, the first draft of the plan will be completed 120 days (or sooner) after the kick off meeting. When completing these projects, we will send a "100% draft" document to the city for their review. When that review is complete, we make corrections and re-submit our document back to the city for final comments. We understand that there are many circumstances that can cause a project to slow down. We develop a timeline based on your knowledge of your current staffing situation and work to help you adhere to the timeline. If we encounter issues with timing, we communicate them immediately so that you are aware of them.

The actual format of the document can be as Manhattan Beach desires. We will use not only a narrative document but tables, texts, images, and maps to convey the critical information necessary to achieve your objectives. We intend to utilize not only one of our current urban forest specialists to help design the document, but we will also utilize our corporate communications department. They have extensive graphic design experience and have assisted DRG with a number of our projects and their design. One concept is to break down the actual document into booklets that can be housed together as one document or stored in a binder and removed for certain projects or specific uses. Another concept is to bind the document completely



with sections tabbed for ease of use. A third concept is to link the document back to an action plan and goals list that can be literally “checked off” as recommendations are achieved. We will bring plan samples to the kickoff meeting for as part of the discussion. The plan can be designed with a number of audiences in mind. It will be available in color for Web applications (with dynamic links) as well as .pdf files. All maps and drawings will be available separately. We will deliver 3 bound copies and one CD that contains the Management plan in a PDF format and a CD that contains PowerPoint presentation(s) that summarize the plan for public relations purposes.

Engagement Philosophy

Our philosophy of engagement embodies our goals and visions for what we do everyday. We keep our employee owners engaged through interesting projects and growth opportunities and allow their ideas to help drive our business. We believe that the first “rule of engagement” is listening. We provide advice and commentary as experts, but our clients and their constituents have opinions and ideas that need to be heard. We also believe in preparedness prior to engaging communities. This means that we will have completed most of our research prior to the start of community meetings. It also means that our presentation styles are rehearsed and professional, but leave room for comments and questions. Lastly, we understand the passion that trees can sometimes evoke in communities. We feel the same—or we wouldn’t be in the business of helping communities manage their urban forests. We allow this passion to help drive the plan as needed, but not influence the scientific, social, and design principles that create an outstanding urban forest program.

Project Timeline

The project timeline below is flexible. We have the ability to move this project forward to meet the needs of Manhattan Beach. Projected completion is 6/30/2015.

Task	Weeks										
Kickoff Meeting	Week 1										
I-Tree Streets Analysis		Weeks 2-4									
Stakeholder Interviews		Weeks 2-4									
Review of Ordinances		Weeks 3-4									
Review of Operations Standards		Weeks 3-4									
Comparison Cities Input			Weeks 5-8								
Canopy Study			Weeks 6-7								
Community Input Meetings (3)				Weeks 11-12							
Plan Development					Weeks 13-17						
Plan Presentation Meeting (Community)						Week 18					
Draft 1 Delivered							Week 19				
Manhattan Beach Edits								Weeks 19-21			
Draft 2 Delivered									Week 22		
Final Plans to City										Week 24	
City Council Meeting											Week 25



Staff Resumes

Ruth Williams, Urban and Community Forestry Specialist, joined Davey Resource Group in 2011. She has an extensive career in community engagement in the urban forest, throughout the Western US and Canada. Her current projects include support of the City of Orange Management Plan, the City of Roseville Master Plan, and all i-Tree projects currently being conducted by DRG. Other projects she supported include a specialized canopy project for the City of Portland, Oregon, a management plan for the city of Kirkland, WA and a master plan for the City of Clovis, CA. Prior to joining DRG, Ms. Williams was the executive director of Tree Davis, a nonprofit in the Sacramento Valley with the mission to advocate for and protect the trees in Davis and other Yolo County environs. While the Executive Director of Tree Davis, Ms. Williams developed a number of projects supporting the City of Davis Urban Forest Program. These included community engagement planting projects and creating public advocacy projects for the urban forest. While working in Davis, Ms. Williams was appointed by City Council to the Climate Action Team. That team produced the Climate Action Plan for the city and includes a number of tree related objectives and goals. Her background also includes working as an arborist for various tree companies.

Ms. Williams is a former board member of the California Urban Forests Council and served as chair of the Sacramento Regional Council of that organization for five years. She holds a Bachelor of Science degree in Environmental Horticulture and Urban Forestry, and Landscape Design and Architecture; both from the University of California at Davis. In addition, she has a Masters of Arts in Nonprofit Administration from the University of San Francisco. In addition to her formal education, Ms. Williams is a graduate of the American Society of Consulting Arborists Academy, a Certified Arborist with a municipal specialist designation and holds a Tree Risk Assessment Qualification (TRAQ). She volunteers her time as a docent at an arboretum and with the Western Chapter of the ISA. ***For this project, Ms. Williams will serve this project as a researcher and author. She will assist in the development of all aspects of the project.***

Dan Howse, Landscape Architect, is the project developer and Landscape Architect for DRG's Land Development Solutions division in the Western Region of the US. Mr. Howse lends his LA expertise to various projects across the country, specifically in the development of plant palettes from a planning and design perspective. In addition, Mr. Howse is responsible for working with our design and construction clients to develop and implement solutions for the preservation of trees and mature landscapes on development and redevelopment sites. He is also the staff expert on transplanting and large tree moving. Mr. Howse's depth of experience on sites includes working as a landscape contractor, for a site developer, and as an assistant manager of Davey's Large Tree moving group. On the design side, Mr. Howse is a licensed landscape architect and spent 10 years with the Olin Partnership working on projects across the country. More recently, Mr. Howse directly participated in the "Reading Takes Root" program. He is a graduate of Temple University's landscape architecture program. ***For this project, Mr. Howse will provide expertise on the Tree Palette, and street design and additional design consulting as needed.***



Dr. Julia Bartens is a Consulting Urban Forester and Urban & Community Forestry Specialist with the Davey Resource Group. Dr. Bartens received her MS in Urban Horticulture and her PhD in Urban Forestry, both from Virginia Tech. Prior to that, she studied Horticulture at University of Hannover, Germany, completing her undergraduate work. Before working for the Davey Resource Group, Dr. Bartens was a postdoctoral scholar for the University of California until 2013 where she worked closely with the Urban Ecosystems and Social Dynamics Team of the USDA Forest Service's Pacific Southwest Research Station. While there, she helped assess land cover and quantify effects of urban trees on building energy use, air pollutant uptake, carbon sequestration, rainfall interception, and property value increases for San Jose and Marin County, CA, and Denver, CO. Dr. Bartens recently worked on a project with a large utility company for which she evaluated the potential effects of trees on utility conduits. This project aimed to determine whether trees pose a risk to such structures which would in turn affect tree management within the conduits' vicinity. She has published and reviewed scientific and technical publications, including work on trees and structural soil, tree stability, dendrochronology, and Urban Forest Inventory and Analysis, including California. She is an ISA certified arborist, (MA-5129A) and a member and volunteer of the Western Chapter ISA. She is a founding member of the Urban Tree Growth & Longevity working group (urbantreegrowth.org), an organization that fosters communication and collaboration amongst researchers and practitioners to enhance the quality of research on urban tree growth, mortality, and longevity. Her interests include urban soils, urban tree growth and longevity, ecosystem service assessments, GIS, and many other topics related to urban forest sustainability. *For this project, Ms. Bartens will assist in research, and plan development.*

Tina McKeand is a Project Coordinator and Urban & Community Forestry Specialist for Davey Resource Group. Ms. McKeand recently was the project coordinator for the Cities of Orange and Roseville, CA master plans. She is currently working on the City of Mountain View Urban Forest Master Plan. She completed a canopy study analysis and management plan for the City of Anchorage, AK and is assisted with a US EPA project on the use of stormwater retention strategies in cities across the United States. Her recent projects include the cities of Sacramento, Roseville, and Woodland tree inventories and i-Tree Streets projects for Palo Alto, San Mateo, Burlingame, and Roseville. In addition, she was responsible for the development of an urban forest master plan for the Cities of Clovis CA, and Tempe, Arizona, which included a sample inventory, and a complete i-Tree Streets analysis. She also worked on the Portland project as a primary author. Ms. McKeand is the former urban forester for the City of Yuma, Arizona, having worked for Davey for over seven years. In her position with Yuma, she was fully responsible for the development, planning, and management of their urban forestry program. Her duties included supervision and management of staff, development, and implementation of training programs, monitoring of contractors, and adherence to all industry standards for tree care, including all safety practices and operations. She was responsible for communication with City council, City management, and other departments and outside agencies. Other duties included budget development and administration, as well as grant writing and administration. She is the former president of the Arizona Community Tree Council and a volunteer for the Western Chapter of the International Society of Arboriculture. She is a Certified Arborist (WE-5005AM) with a Municipal Specialist designation and a graduate of the Municipal Forestry Institute. *For this project, Ms. McKeand will be the coordinator, leading the team in all aspects of research and information gathering. In addition, she will serve as the primary author and designer for the project. She will be the lead contact for the City of Manhattan Beach.*



Project Management

Emily Spillett is an Operations/Project Manager and joined the Davey Resource Group team in 2001 as a consulting forester. She has eleven years professional experience working with utility forestry, urban forestry, land use planning, and natural resource management issues. Ms. Spillett currently manages a variety of municipal and utility projects in California, Oregon, Washington, and British Columbia including municipal projects in Salinas, San Jose, San Francisco, San Mateo, Orange and other municipalities throughout California and the Western United States. Ms. Spillett leads the team of foresters through the unique requirements of consulting projects throughout the West. She is currently managing a variety of projects including the Mountain View and Roseville Master plans and supported the projects in the cities of Clovis, CA and Kirkland, WA. She was involved in two consulting projects for the City of Portland and provided oversight on the Anchorage canopy analysis project and small management and planning projects in California. Her past professional experience includes working with The Nature Conservancy as both an interpreter and as a research biologist. Ms. Spillett holds a Bachelor of Science degree in environmental forest biology from the State University of New York College of Environmental Science and Forestry. In order to obtain this degree, Ms. Spillett was required to complete forest and ecological inventories in the Adirondack Mountains of New York. She is an International Society of Arboriculture (ISA) Certified Arborist and Utility Specialist (WE-6702AU). ***For this project, Ms. Spillett will manage all day-to-day operations on the project including personnel management, logistical planning, project delivery and cost control.***

Dana Karcher is a project developer and market manager for Davey Resource Group, working with communities throughout the West helping them achieve their vegetation management goals. Ms. Karcher joined Davey Resource Group in 2006 after six years as a self-employed arboriculture consultant and the executive director of an urban and community forestry nonprofit organization. During that time, she worked closely with municipal foresters on grant writing and program management. In her current position, she is responsible for the project development and marketing activities of the Western region team. Recent projects that Ms. Karcher has been involved in include a variety urban forest projects throughout the West and i-Tree reports for a number of municipalities. She developed the projects for the cities of Mountain View, Roseville, Orange, Sacramento, Woodland, Roseville, Burlingame, San Mateo, Palo Alto and San Jose among others. She is on the team that is delivered a management plan for the cities of Clovis, Orange, and Roseville CA, and Tempe, Arizona. Currently, she is supporting the City of Mountain View Master Plan project. She frequently conducts meetings, presenting programs to government bodies and at public hearings. Ms. Karcher holds a degree in Political Science from the California State University, East Bay. She is a Certified Arborist through the International Society of Arboriculture (WE-7103A) and Immediate Past-President of the Western Chapter of the International Society of Arboriculture. She was an advisor to the state urban forester on the California Community Forestry Advisory Board. She is a member of the Society of Municipal Arborists and the Utility Arborist Association. She is a frequent speaker on urban and community forestry throughout the country was a founding faculty member for the Municipal Forester Institute. She was the former President of the California Urban Forests Council, and a graduate of the ASCA Academy. ***For this project, Ms. Karcher will provide direct project support to the City providing analysis, recommendations, and project editing. In addition, Ms. Karcher will assist in community meetings and public hearings as necessary.***



About Davey Resource Group

Davey Resource Group has a company history rich in science, technology, arboriculture, and urban forestry. Our employees are trained to understand the vital role that trees play in communities and the relationship of people to their trees. Our roots as a Tree Expert Company mean that we provide a unique perspective on consulting urban forestry. In 1880, John Davey created a company and culture founded on the principal that nature and the built environment can co-exist for the benefit of people and their communities. Purchased by our employees in 1978, our company still believes that to be true and we feel this philosophy aligns well with our client's vision for their urban forest.

Davey, with its home office in Kent, OH, operates in 45 states, with offices throughout the country. In the Western US, DRG is based out of Atascadero, California with offices in the Sacramento region, throughout the Bay Area, Southern California, San Joaquin Valley, and Northern California. DRG has 800+ employees that provide services to municipalities, utilities, park districts, golf courses, and private entities. Our tools include the latest in software and hardware that helps us meet the needs of our clients. Providing innovative solutions to meet the opportunities and challenges of our clients is what Davey Resource Group does every day. That is the Davey Difference. We listen to our clients. We incorporate the best and most current research into the custom design of each project. Our resources are deep, our client list is diverse, and our partnerships are beneficial to our clients.

Davey Resource Group believes in making a difference and improving the management of our urban and community forest resources, including our own pursuit for **continuous improvement** in the following areas:

- **Quality Assurance:** This includes feedback loops to ensure that you receive deliverables that are well researched, state-of-the-art, and individualized to meet Manhattan Beach's goals and objectives.
- **Teamwork:** Our personnel each have a role in the development of the plan. In addition, we start each project understanding that Manhattan Beach's stakeholders are a critical part of the team.
- **Communication:** Our personnel are trained to understand the critical importance of communication before, during, and after a project—both internally and with the client.



References

City of Clovis, California

Contact: Jeff Wooten, City Arborist, (559) 324-2652, jeffwo@cityofclovis.com

Contact: Eric Aller, Parks Manager, (559) 324-2616, erica@cityofclovis.com

Davey Resource Group began our relationship with Clovis by performing a complete tree inventory for them in 2009-10. That project, coupled with an i-Tree *Streets* analysis and the purchase of TreeKeeper software, led them to the next logical step, a management plan. In 2012, DRG was contracted to complete a management plan funded by a CalFire grant. The project began with a kick-off meeting where we developed our communication parameters and the internal and external stakeholders list. We aligned their plan with a mission and vision statement that parallels that of Clovis. We discussed comparative communities to examine during this process for evaluation with Clovis' program. In general, we explored the culture of Clovis so that we went into the community meetings with an understanding of their community. The project included stakeholder interviews, two community meetings, an on-line survey and a final city council presentation. The deliverable was a plan that will serve the community for years to come. Included in the plan are recommendations for moving the program forward and allowing it to continue to grow. Our hope is that it will be a model plan for the San Joaquin Valley. The project was completed in 2013. (DRG personnel that worked on the plan included, Emily Spillet, Tina McKeand, Dana Karcher and Ruth Williams.)

City of Orange, CA Urban Forest Management Plan

Contact: Christian Saxe, 714-532-6455, csaxe@cityoforange.org

This project began in early 2013. The City of Orange created an opportunity to develop a plan based on the fact that there are numerous departments managing trees within the city. The DRG task was to understand the role of the various tree care departments and create a plan that addresses conflicting ordinances and roles. To do this, we performed document research, extensive interviews among external stakeholders, examined their current inventory, and created recommendations based on our findings. We worked with their ordinances to determine conflicts, overlaps, enforceability, and ease for use. This plan was completed in June of 2014. (DRG personnel that have worked on this project include Tina McKeand, Dana Karcher and Ruth Williams.)



City of Roseville, CA Urban Forest Master Plan and Canopy Study

Contact: Michael Neumann, 916-774-5579, mneumann@roseville.ca.us

The City of Roseville has worked with DRG since their first inventory project in 2008. Since that time, DRG has assisted them in developing an i-Tree Streets plan, customized TreeKeeper Software, and now, and Urban Forest Master Plan and Canopy Study. The plan, began with a kick-off meeting and meetings with stakeholders. A great deal of research went into the plan, including numerous interviews, meetings, document analysis, current code understanding, and comparative municipality studies. The project also included a full canopy study where DRG did the extraction work and determined the first canopy numbers for the City. In addition, DRG has made recommendations for managing the Roseville's open space, and oak tree mitigation programs. The project is near completion and will be delivered as both a hard copy document and an online document. DRG will be presenting the plan to City Council in Fall of 2014. Still in the completion phase are a "report card" and educational materials. (DRG Personnel working on this project include Emily Spillett, Dana Karcher, Tina McKeand, Ruth Williams, Julia Bartens and Deb Sheeler [GIS/IT].)

Proposed Costs

We have developed pricing for this project based on our interpretation of the RFP, our past experience in developing plans, and examining what we believe will be needed to complete your plan to the City of Manhattan Beach's satisfaction. Each task within each phase is priced separately. For example, for research and stakeholder interviews, we commit a number of hours to determine what we believe will give enough information to inform the plan. Adjustments can be made to the budget based on number of interviews, and hours of research committed to the project. We would be happy to discuss our pricing to assure it fits your budget parameters to develop a plan that fits the needs of the city.

Hourly Rates

Employee Name	Title/Role	Rate
Dana Karcher	Market Manager/Community Meeting Leader	\$125.00/Hour
Emily Spillett	Project Manager	\$115.00/Hour
Tina McKeand	Project Leader/Urban and Community Forestry Specialist	\$95.00/Hour
Julia Bartens, PhD.	Urban and Community Forestry Specialist	\$95.00/Hour
Ruth Williams	Urban and Community Forestry Specialist	\$85.00/Hour
Dan Howse	Landscape Architect	\$85.00/Hour

Phase, Task	Personnel	Hours	Total
PHASE 1: Project Kickoff			
Task 1: Kick Off Meeting, includes preparation, follow up, and travel.	Karcher, McKeand		\$2,140.00
PHASE 2: Analyze Inventory			
Task 1: Review Inventory, Perform i-Tree Streets Analysis	Williams, Bartens		\$4,420.00
Task(s) 2: Research/Stakeholder Meetings			
Research Existing Codes and Policies	McKeand	12	\$1,140.00
Interviews with Internal Staff/Stake holder (10)	McKeand	40	\$3,800.00
Analysis of Interview Data	McKeand	32	\$3,040.00
Review Operations Standards/Provide Recommendations	Williams, Bartens	40	\$3,400.00
Develop and Revise Tree Ordinance, Preservation Guidelines	McKeand	60	\$5,700.00
Task 3: Comparison City (5 cities minimum)			
Review/Analysis	Williams, Bartens	60	\$2,550.00
Task 4: Outreach			
Community Meetings (4)	Karcher, McKeand	24	\$2,280.00
Council Meetings (3)	Karcher	15	\$1,830.00
Developing Meeting Materials-discussions with client	Karcher, McKeand	24	\$2,280.00
Outreach and follow up	Karcher, McKeand	16	\$1,520.00
Online Survey			
Survey Development	Williams, Bartens	24	\$2,040.00
Survey Implementation	Williams, Bartens	16	\$1,360.00
Survey Analysis	Williams, Bartens	24	\$2,040.00
Task 5: Planting Palette			
Planting Palette, Review and Recommend	Howse, McKeand	32	\$2,720.00
PHASE 3: Plan Drafting			
Draft 1 Compilation	McKeand	120	\$11,400.00
Draft 1 Review	McKeand	40	\$3,800.00
Draft 2 Compilation	McKeand	40	\$3,800.00
Draft 2 Review	McKeand	20	\$1,900.00
Final Draft Compilation	McKeand	32	\$2,720.00
Formatting	Communications/Admin	20	\$1,900.00
Copies of Plan (18)			\$150.00
Total			\$67,930.00



Additional Information

- We understand that the City of Manhattan Beach would like to pay in full after the project is completed. (Page 3, RFP, under "Payments".) During the length of this project, we will be incurring expenses including payroll in performance of this project. We respectfully request that we negotiate different payment terms once the project is awarded.
- We acknowledge the receipt of Addendum #1 (dated 11/12/14) and Addendum #2 (dated 11/20/14).

City of Manhattan Beach Bid Form

