**This sample HOA Tree Trimming RFP is to be used as a starting point for development of an RFP for your community. Please obtain technical support from a local arborist and a legal professional concerning the specific terms and conditions as they apply to your community.**

**AnyCommunity Homeowners Association**

REQUEST FOR PROPOSALS FOR TREE TRIMMING SERVICES, RFP ####

PROPOSALS DUE BY \_\_\_\_\_ PM, \_\_\_\_\_\_\_ 20##

**Project Description & Proposal Process**

The AnyCommunity Homeowners Association (Association) is seeking proposals from qualified contractors to conduct tree trimming activities within the Association's managed property. The Association is accepting proposals for the scope of work as described below. The Board of Directors of the Association will evaluate proposals based upon professional qualifications, quality assurance and competitive pricing. No specific weighting or scoring is designated for these evaluation criteria, and the Association reserves the right to award the contract to the bidder that they feel is in the best interest of the Association, which may or not be the lowest bidder. The Association reserves the right to waive minor irregularities in submittals at their own discretion. It is the intent of the Association, upon successful completion of this contract, to negotiate a sole-source contract for one or more additional years with the selected contractor to continue this scope of work.

Bids must use the attached bid form and be submitted in a sealed envelope, via mail, hand-delivery or courier, and must be *received* by \_\_\_\_\_ PM, \_\_\_\_\_\_\_ 2012 to be considered for selection. The submittal address is:

AnyCommunity Homeowners Association

[Insert address]

The outside of the envelope should include the bidder's name and contact information and be clearly labeled to read:

AnyCommunity Homeowners Association

Request for Tree Trimming Proposals RFP ####

Questions concerning this proposal may be submitted to [Insert contact name] via email or phone: [insert phone and email contact information]

**Scope of Work**

Conduct routine maintenance trimming on trees and palms managed by the Association.

Project Limits

The AnyCommunity property is located [describe property location using cross streets and adjacent properties/boundaries]. The project limits include [describe the limits - i.e. are front yards included? Trees within medians? Roadside trees to what distance from the curb? Give detailed boundaries, refer to maps if possible]

All trees and palms (as defined by [list reference - City/County Code, other] ) within the project area are to be trimmed (as site conditions warrant), including "shrubs" growing in tree form and meeting the definition of a tree. Hedgerow plants regardless of height are not included in this scope. Bids will apply to all trees and palms within the project limits and will not be constrained to a specified number of trees/palms. Herbaceous palm-like plants such as white bird of paradise and banana "tree" are not included in this scope. Questions concerning the limits of the property shall be addressed prior to bid submittal, as supplemental funds will not be provided to accommodate trees within the property not included in the bid.

Newly planted trees with existing support staking are not included in this scope. Trees and palms without existing support staking area included, regardless of size. Tree branches within the project limits are included in this scope, *regardless of the location of the tree trunk*.

Quality Control

All work is to be performed in accordance with ANSI A-300 and Z133.1 standards and associated Best Management Practices for Tree Pruning and safety as well as [list any other governing documents here].

Extent of work

*Palms*: Palms are to be pruned to remove dead, dying and diseased fronds, as well as fruiting bodies and stalks and leaf stubs. No fronds are to be removed above the horizontal plane (beyond the 9 and 3 positions). The use of climbing spikes or other activities that may damage trees and palms are prohibited.  
  
*Trees*: Trees are to be trimmed to remove a maximum of 25% removal of living foliage, in accordance with the following order of priorities. The maximum 25% foliage removal should be attained for each tree unless all priorities listed below have been met with a lesser degree of pruning:

1. Removal of dead branches two inches in diameter and greater (crown cleaning)
2. Removal of adventitious shoots/sucker growth, except where needed to restore desired branch structure (i.e. to grow new branches to restore over-lifted trees)
3. Removal/reduction of branches for clearance from infrastructure including sidewalks, roadways parking areas and buildings

[include additional pruning priorities to address site-specific needs/concerns, such as:

1. Subordination of co-dominant stems and related improvements to branch structure (with the exception of small trees purposefully grown as multi-stem, such as crepe myrtle)
2. Crown reduction to reduce overall tree height to a target height of [describe targets by species/tree type]
3. Root pruning...

[Include language such as the following text as needed to provide a clear, common-language description of the scope]

Note that in the above hierarchy, items 1 through 3 are considered to be routine maintenance and are not anticipated to significantly affect the overall structure of the trees/palms. Items 4 and 5 are intended to improve the overall structural condition of the trees and are intended to comprise the majority of the material removed from the trees. In addition to accommodating routing maintenance, the principal goal of this tree trimming effort is to improve tree structural health and correct structural problems caused by historic over-lifting, by helping to reduce co-dominant stems/establish single central leaders, reducing the overall height of the trees, and utilizing shoot/sucker growth to restore lower portions of the canopies.

Branches **shall not** to be stub-cut (cutting a branch to a mid-point not adjacent to a secondary branch) unless the branch has been damaged and no suitable lateral branch exists. Tree canopies **shall not** be overlifted (excessive removal of lower branches), except when needed for specific clearance requirements. Overall, cuts should be made to branches three inches in diameter or less when practical to preserve the natural form of the tree and reduce the visibility of pruning scars.

*Ancillary Tasks*: Work activities commonly associated with tree trimming are included in this scope of work, included but not limited to removal of cut material and proper disposal offsite, obtaining any permits or posting any official notices required for the proposed activities.

Utility Location

It shall be the Contractor's responsibility to use (at minimum) Sunshine one-call to identify the location of utility lines, and to proceed with ground-disturbing activities (including root-pruning) only after utilities have been marked. All damage to or injury from utility lines is the sole liability of the Contractor.

Irrigation lines will be marked by the Association upon request by the Contractor with a minimum of 72 hours advance notice. Damage to marked irrigation lines caused by the Contractor will be repaired by the Association, with the repair costs subtracted from the amount owed to the Contractor. Damage to unmarked irrigation lines owned by the Association will be repaired at the Association's expense.

Maintenance of Traffic

Vehicular access through the community will be maintained at all times and no roadways shall be completely closed to traffic at any time. Any permitting, costs or other coordination required for maintenance of traffic within public roadways is the sole responsibility of the Contractor.

Tree Removal, Hazardous Trees

Tree removal is not included within this scope of work. Should the Contractor identify trees or palms that are candidates for removal, may be considered hazardous, display signs of disease, nutritional deficiencies or other problems, this information should be relayed to the Association. The Association, at their discretion, may request a bid from the Contractor to perform these services.

Restoration of Work Site

The work site shall be cleaned at the end of each work day to remove debris piles from sidewalks, all paved areas and pedestrian access areas. No debris shall be stored for any length of time within the front or rear yard of a residence. No debris piles shall be left in any location for a period of more than three days. Should debris piles be left in any area for more than three days, the Association may at their discretion hire a third-party contractor to remove the debris, and subtract this expense from the fees owed to the tree trimming Contractor. Upon completion of work, the entire work site shall be restored at the contractor's sole expense, to include repairing sod and any paving, structures or other site features that were damaged by the contractor during the project. Any damage to property that may result in collateral damages (i.e. damage to roofing tiles) must be repaired at the Contractor's expense, immediately after damage.

Avoiding Damage to Personal Property

The Contractor shall take appropriate precautions to avoid damage to buildings, vehicles and other properties, as well as people. Appropriate precautions may require use of special practices to secure and lower cut branches and to temporarily restrict vehicular and pedestrian access to work sites

**Additional Services**

[List any additional/optional services here]

As a benefit to the residents of the Association, the Association requests that the Contractor provide tree trimming services to residents within resident-maintained backyard areas, as requested by homeowners. The Association requests that the bidders provide the costs for these services using the attached bid form.

**Minimum Qualifications**

All work must be performed by a licensed contractor and by/under the direction of an ISA Certified Arborist. *Provide a copy of contractor's license and arborist certification with bid proposal*. All bidders must provide proof of workman's compensation insurance for their staff and a certificate of liability insurance for a minimum of $100,000. Upon award of contract, the Contractor must provide an updated certificate of insurance naming the Association as additional insured.

**Pricing**

Bids will be accepted as a lump-sum price only. Bid price should cover all anticipated work and *no additional funds will be provided* for unanticipated costs covered within the listed scope of work. Information provided by bidder such as number of trees, size of trees and anticipated pruning required will be not be considered to take precedence over the RFP on the scope of work.

**Schedule of Work**

Respondents must indicate a schedule of work indicating the notice required from the HOA prior to beginning work and the total time required to complete the project.

**Inspection and Enforcement**

Selected Contractor will be responsible for fines and judgments levied by the City or County in reference to violation of codes by activities performed by Contractor. The Association may use a (third-party) landscape inspector and may request an inspection from the City for verification of completion of work and compliance with applicable regulations prior to final payment.

**Payment Schedule**

One lump-sum payment will be provided upon completion of the project. Project will be considered complete once:

* Contractor notifies Association's representative that work is complete
* Association conducts final walk-through and identifies any outstanding items (Association will complete walk-through within one week of notification of completion of work by the Contractor)
* Contractor completes outstanding items identified by the Association in the final walk through
* City inspector completes site inspection and verifies compliance with City code (if requested by the Association and completed within two weeks of Contractor's notice of completion of work)

The total project payment will be reduced by 5% if project is not completed by the stated schedule of work in the bid, with the exception of Acts of God including inclement weather, which must be communicated to the Association's representative at the time they are identified, and a new schedule mutually agreed upon.

**AnyCommunity Association Tree Trimming Bid Form**

Company Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone/fax/email\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Qualifications**

Please attach copy of the company's certificate of insurance, business license and certification of the ISA Certified Arborist that will be oversee tree trimming activities.

**Schedule of Work**

Minimum notice needed from Association prior to beginning work:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Maximum number of days required to complete work (barring Acts of God including inclement weather, provided they are communicated to the Association's representative at the time they are identified):

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Payment**

Association will provide payment within 30 days of completion of work, as defined in the RFP. Please state amount, if any, contractor will reduce final invoice for payment within one week (five business days) of completion of project.

Proposed Total Lump-Sum Fee for work:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Prices for resident maintained trees:** (all trees to be pruned in accordance with the Extent of Work for the Association's trees unless otherwise directed by the homeowner. All trees/palms to be pruned in accordance with ANSI standards and associated BMPs).

Small Tree (less than 20 feet in height): \_\_\_\_\_\_\_\_\_\_\_\_\_\_ Medium Tree (20 to 40 feet): \_\_\_\_\_\_\_\_\_\_

Large Tree (greater than 40 feet in height): \_\_\_\_\_\_\_\_\_\_\_ Palm (any size): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The undersigned is an authorized representative of the company and attests to the accuracy of the information provided on this bid, and agrees to the scope of work, terms and conditions and related material included on RFP ####. This bid may not be withdrawn within 30 days of issuance.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name Title Date

Please include any additional information you feel may be relevant in the evaluation of your bid.