



URBAN & COMMUNITY FOREST MANAGEMENT PLAN

UCFMP

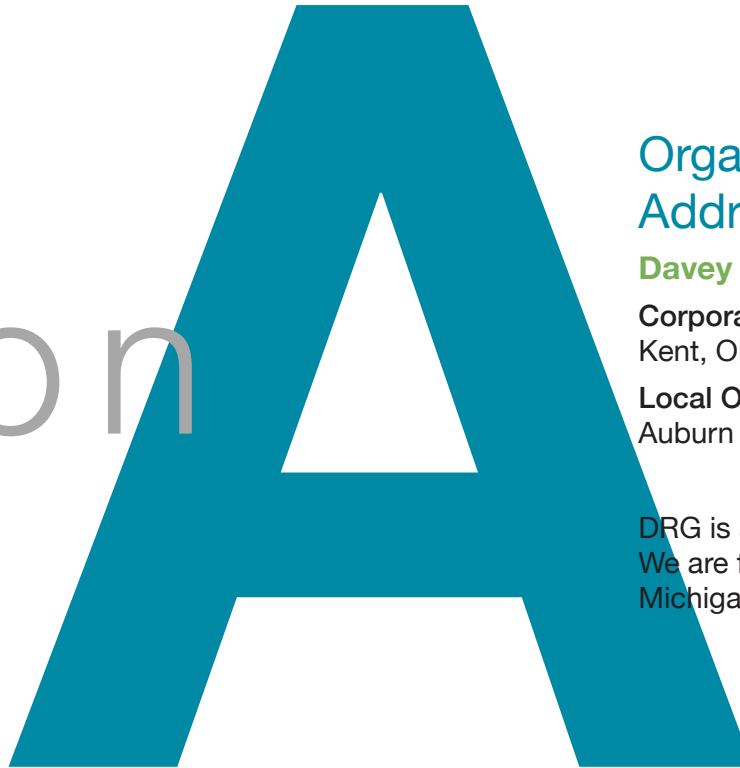
APRIL 2021

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*Per the RFP requirements, this section is included separately in the sealed envelope marked “Fee Proposal.”

section



Organization Name and Address


Davey Resource Group, Inc.

Corporate Office: 295 S. Water Street
Kent, OH 44240

Local Office: 3381 W Lapeer Road
Auburn Hills, MI 48326

DRG is an employee-owned corporation.
We are fully licensed to work in the state of Michigan.

Professional Qualifications



Davey Resource Group (DRG) has put together a team of experienced experts who are committed to developing a meaningful and valuable update to the Ann Arbor Urban and Community Forest Management Plan. The breadth and depth of experience of this team will assure success in this effort for the City of Ann Arbor.



Key personnel that will be working on the Ann Arbor Project include the following:

Team Member	Skills and Qualifications	Location	Role	Projects
Joe Gregory	Over 20 years experience in environmental consulting, thought leader in urban and community forestry	Kent, OH	Assure Quality and Client Satisfaction	Cleveland and Columbus UFMP, oversees all eastern urban forestry projects
Lee Mueller	Understanding of the Michigan community, deep knowledge of the interplay between cities and their constituents	Grand Rapids, MI	Provide Project Oversight	Supports all MI projects including UFMPs developed by DRG, inventories, and urban forestry consulting projects
Kerry Gray	Urban Forest planning expert; intimate knowledge of Ann Arbor	Plymouth, MI	Project Principal, Main Author and Plan Developer	Columbus, Miami Beach, Holyoke (in progress) UFMPs
Emily Hanson	Extensive experience in municipal arboriculture and project management, U&CF operations expert	Hazel Park, MI	Project Management (Budget, Billing) and Project Review	Ann Arbor Tree Inventory manager, Birmingham Tree Manual and Standards of Practice, numerous other inventories
Joe Joyner	Experience in all aspects of urban forestry and arboriculture	Raleigh, NC	Plan Author	Columbus, Miami, and Dallas (in progress) UFMPs. Numerous consulting projects
Jim Jenkins	BCMA, leader in i-Tree methodology	Kent, OH	i-Tree Eco Plan Developer	City of Ann Arbor Inventory, i-Tree reference city projects, ALB projects throughout the northeast
Oliver Kiley	Deep knowledge of Ann Arbor	Ann Arbor, MI	Community Engagement	2015 Ann Arbor UFMP, Ann Arbor Downtown Streetscape Design and Engineering project, Treeline: Allen Creek Urban Trail
Caeley Hines	Community engagement expertise	Ann Arbor, MI	Community Engagement	Community Engagement Projects including Connecting the Rouge Framework Plan, Village of Lexington Master Plan Update. Village of Grass Lake Master Plan
Dr. Christine Carmichael	Extensive experience in environmental equity	Lansing, MI	Community Engagement, Plan Development	City of Oakland UFMP, City of Holyoke UFMP
Paul Hickman	Wood utilization expertise	Ann Arbor, MI	Plan development (wood utilization)	The Ford Project, development of the Circular UrbanWood Triconomy™

Key Personnel Resumes



Joe Gregory



Joseph Gregory is a regional operations manager for Davey Resource Group's (DRG) Environmental Consulting market team. Mr. Gregory is responsible for providing operational, fiscal, and sales support to all regional operational teams. Mr. Gregory is a planner and an urban forester by training and has coordinated numerous projects throughout the U.S., including municipal inventories in Orlando, Detroit, Charlotte, Raleigh, Pittsburgh, and Elgin, Illinois. He has extensive experience with GIS and GPS technologies, several types of field data collection computers/units, tree inventories, tree inventory management software, urban tree risk assessment, urban tree canopy analyses, and the i-Tree suite of software. He has been a leader in developing urban and community forestry planning projects for cities throughout the US. In addition, he guides the development and writing of urban and community forestry management plans and benefit analyses through i-Tree for many municipal and nonprofit clientele.

Mr. Gregory led the DRG's team that authored the groundbreaking and often-imitated Pittsburgh Urban Forest Master Plan. He also led DRG's efforts on the Cleveland Tree Plan. Both of these plans led to significant positive changes in the urban and community forestry programs of their respective city. He has worked with several municipalities to provide contract forestry services, placing Davey urban foresters within municipalities to manage urban forestry program components, such as emerald ash borer management, planting initiatives, and storm response. Mr. Gregory also performs landscape plan reviews, tree appraisals, and forensic investigations, and he serves as an expert witness for urban tree related litigation.

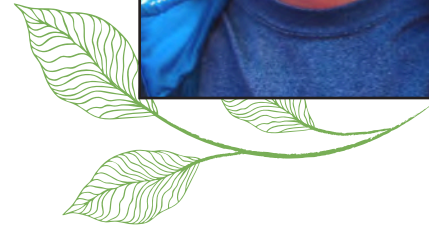
Mr. Gregory is an International Society of Arboriculture (ISA) Certified Arborist and Municipal Specialist (OH-1420AM). Mr. Gregory has a master's degree in geography and urban planning from The University of Akron and a bachelor's degree in conservation from Kent State University.

Lee Mueller

Lee S. Mueller, M.S., C.F., is a market manager with Davey Resource Group (DRG). Mr. Mueller is responsible for expanding environmental consulting services, establishing new regional offices, and strengthening key business partnerships. Throughout his career, Mr. Mueller has demonstrated deep experience in all aspects of developing and supporting complex, multi-partner projects. Mr. Mueller has served as a staff or board member on a variety of professional and nonprofit organizations dedicated to forestry, arboriculture, and parks and recreation. His experience includes deep familiarity with many aspects of urban forestry, forest management, ecosystem restoration, parks and recreation planning, staff and volunteer training, nonprofit programs, and community outreach and engagement.

Additionally, he excels in creating strategic partnerships; building and evaluating processes and systems; engaging diverse communities; and seeking, writing, and managing private or government grants. Prior to joining DRG, he was instrumental in establishing an urban forestry outreach and volunteer program that garnered state and national recognition in Grand Rapids, Michigan, as well as managing large-scale, volunteer-led tree planting and phytoremediation projects in Detroit.

Mr. Mueller is an ISA Certified Arborist (MI-4148A), has an ISA Tree Risk Assessment Qualification (TRAQ), and is a Certified Forester through the Society of American Foresters, a Michigan Qualified Forester through the Michigan Department of Agriculture and Rural Development, a Michigan Registered Forester (#46043), and a Certified Plan Writer through the Michigan Forest Stewardship Program. Mr. Mueller knows that planning processes are complex and affect many partners and stakeholders. His experience working hand-in-hand with municipalities across the Midwest, as well as working directly for non-profit urban forestry partners has made him sought after advisor and consultant.



Kerry Gray



Kerry Gray, M.S. is a principal urban forestry consultant and project manager with DRG. She oversees and provides technical input into DRG's planning projects including urban forest master plans, management plans, municipal forestry operational assessments, and urban forestry and natural resource management ordinance and policy reviews.

Kerry is currently finalizing urban forest master plans for the cities of Columbus, OH and Dallas, TX. She also serves as project manager or technical advisor on a variety of other urban forestry projects, including: Holyoke, MA Urban Forest Equity Plan (2021); Frisco, TX Urban Forest Master Plan (2021); Novi, MI woodland consultant (2021); Ferndale, MI municipal urban forestry consulting services (2019-present); Avondale Estates, GA landscape maintenance schedule (2021); Miami Beach, FL Urban Forestry Master Plan (2020); Belmont, NC tree ordinance update (2020); Cleveland, OH Tree Plan: Tree Canopy Progress Report (2020); Cleveland, OH Tree Nursery Feasibility Study (2020); Michigan Lower Grand River Watershed community urban canopy assessments (2019, 2020); and Forest Preserve District of Cook County, IL tree preservation manual (2019). She believes that engagement is one of the keys to building community trust and support, which is critical to developing and implementing a community-focused urban forest master plan.

Prior to joining DRG, Ms. Gray was the Urban Forestry and Natural Resources Planning Coordinator for the City of Ann Arbor, MI. In her role with the City of Ann Arbor, Ms. Gray led the successful development of the city's first urban and community forest management plan. The plan's public engagement strategy resulted in a community-driven plan that was responsive to the issues, needs, and desires of the community, and helped to build key support for its adoption and implementation.

Ms. Gray is a Certified Arborist and Municipal Specialist (MI-3868AM) through the ISA and is a current member and past-chair of the Michigan Urban and Community Forestry Council where she is active in promoting sustainable urban and community forestry activities across Michigan. Ms. Gray holds a bachelor of science degree in forestry and master of science degree in forestry and urban studies, both from Michigan State University.

Emily Hanson

Emily Hanson is the area manager for Michigan's Environmental Consulting team. In this role, Emily provides operational leadership, team oversight, and day-to-day direction for a wide range of ecosystem restoration, ecological consulting, and urban forestry services across the state, including: vegetation surveys, tree inventories, invasive plant control, wetland delineation, contract urban forestry, forest management planning, and native plant seeding and establishment. Emily has been project manager for several Michigan tree inventories including Traverse City, Farmington, Northville, and Wayne County Parks. She co-managed Ann Arbor's tree inventory in 2020. Emily also wrote Birmingham's Tree Manual and Standards of Practice and serves as Woodland Consultant for the City of Novi Michigan's planning department. She is on the Michigan State Urban and Community Forestry Council. Before moving to Michigan, she worked for New York City's Department of Parks & Recreation as a senior forester for street tree planting and manager of the City's tree procurement program. Prior to that she worked as an urban forestry volunteer coordinator for small communities in Illinois, funded by the USDA Forest Service.

Emily has Midwestern roots, growing up in Southern Minnesota and earning her bachelor of science degree in Urban and Community Forestry from the University of Minnesota Twin Cities. She became an ISA Certified Arborist (MN-4445A) in 2011 and earned her ISA Tree Risk Assessment Qualification in 2017.



Jim Jenkins



Jim Jenkins, BCMA, is a senior project manager for Davey Resource Group (DRG). Mr. Jenkins oversees computerized tree inventory projects for municipalities, parks, and future building sites. With the urban forestry team, he provides oversight on core services, including tree inventories, management plans, i-Tree analyses, and related deliverables. Additionally, he performs quality control and quality assurance of in-field work, provides training and orientation for new staff, and ensures safe and efficient production. Mr. Jenkins is experienced with GPS and GIS systems, handheld and pen-based data collection units, various inventory data collection software programs, and the i-Tree suite of software. He also has experience in urban tree risk assessment, landscape tree appraisals, and tree preservation. He has coordinated data collection for i-Tree reference cities in strategic geographic regions throughout the U.S.

Jim Jenkins has provided oversight for numerous large-scale community tree inventory projects, including: Ann Arbor, MI, Charlotte, NC; Orlando, FL; and Buffalo, NY. From 2006 to 2011, Mr. Jenkins worked on the Asian Longhorned Beetle Cooperative Eradication Program in New York City and Boston, where he served as the field project manager and oversaw production, quality control, data management, and communication with the USDA. He is an International Society of Arboriculture (ISA) Board Certified Master Arborist (OH-1425B). He is a graduate of the Davey Institute of Tree Sciences, a four-week comprehensive training program developed by founder John Davey.

Joe Joyner

Joe Joyner is a consulting arborist and plan writer within the Environmental Consulting branch of Davey Resource Group (DRG) . Joe joined Davey in April 2018 and was tasked with helping to bring a large-scale tree inventory for Baltimore City to a successful close. Joe holds a decade of diverse experience within the arboriculture industry. His breadth of experience lends itself to a variety of roles within DRG projects. Previous experience includes tree care operations, risk assessment, historic tree preservation, construction management, code compliance, and business development. Most recently prior to joining the DRG team, Joe worked for a tree care company based out of the Raleigh-Durham (RDU) area of North Carolina where he played a primary role in developing commercial client relationships and helped lay the groundwork for the company's urban forestry consulting department. As an ISA Certified Arborist (SO-6755A) with an ISA Tree Risk Assessment Qualification (TRAQ), Joe specializes in assisting communities, universities, municipalities, landscape professionals, and other primary stakeholders in devising, developing, and implementing urban forest management plans. He has worked on numerous projects for DRG since 2018 including Columbus, Miami, and the Dallas plans.

Joe holds a bachelor's degree in political science and history from the University of North Carolina at Chapel Hill. He also earned a master's degree in International Policy from the School of Public and International Affairs at the University of Georgia.



Oliver Kiley



Oliver Kiley's (SmithGroup) qualifications and expertise focuses on the interactions between natural systems, public infrastructure, and community engagement in complex urban environments. His capabilities include deep knowledge of sustainable practices and a strong background in landscape architecture and environmental design. Oliver is an advocate of data-informed and community-based decision-making methods that enhance the health and resiliency of cities and their residents. Oliver is SmithGroup's leading Geographic Information Systems (GIS) expert. He uses GIS software to conduct in-depth analyses across a range of scales that supports a transparent design and planning process. He has extensive experience working with the City of Ann Arbor including working on the city's 2015 Urban & Community Forest Plan, Downtown Streetscape Design and Engineering project, Y Lot Public Engagement and Concept Development and The Treeline: Allen Creek Urban Trail.

Caeley Hines

Caeley Hynes (**SmithGroup**) specializes in urban design and planning and is a passionate planner who effectively communicates with various stakeholders and coordinates the production and analysis of diverse ranges of data. Her work on several recent master planning and zoning projects gives Caeley a range of project experience to draw from, and her passion for her work allows her to produce high-quality deliverables. She has extensive experience with a variety of planning projects including:

Connecting the Rouge Framework Plan, Wayne County, Michigan, the Village of Lexington Master Plan Update, Lexington, Michigan, and the Village of Grass Lake Master Plan, Grass Lake, Michigan.



Policy Advisors:

Dr. Christine Carmichael



Dr. Christine Carmichael is the Founder and Principal of **Fair Forests Consulting, LLC**, which she began in July 2019. She holds a Ph.D. in Forestry with a Specialization in Gender, Justice, and Environmental Change and a Graduate Certificate in Community Engagement from Michigan State University. Dr. Carmichael has published high-impact research explaining why 25% of Detroit residents eligible to receive a free street tree between 2011-2014 chose to decline this offer. Her subsequent postdoctoral research in Detroit, Michigan explored the perspectives of residents in flood-prone neighborhoods on the health impacts of climate change and barriers to implementation of green infrastructure strategies to reduce those health impacts.

Since beginning Fair Forests Consulting, LLC, Dr. Carmichael has consulted with numerous non-profit environmental groups and government agencies on ways to enhance multicultural partnerships, particularly in urban forestry, parks, and greenspace management. Dr. Carmichael is also a skilled facilitator with expertise in strategic planning and ensuring productive dialogue among diverse groups who have a stake in environmental programs.

Dr. Carmichael's qualifications include an up-to-date knowledge of research on the intersection of environmental justice, equity, and urban and community forestry. She is capable of integrating that expertise into the development of a public engagement plan (PEP) in Ann Arbor that specifically engages constituencies often absent in planning efforts (such as racial and ethnic minorities, lower income residents, renters, and young people), as evidenced by her past and ongoing consulting work. For example, Dr. Carmichael is currently an equity consultant for the city of Oakland, California, ensuring that their Urban Forest Master Plan integrates equity principles derived from academic research as well as local community-based planning efforts.

She is also an equity consultant for Holyoke, Massachusetts, helping to design community engagement activities that are inclusive, culturally relevant, and responsive to the perspectives of predominantly Hispanic residents in four low canopy neighborhoods within the city. Dr. Carmichael will also assist in writing and reviewing Holyoke's Urban Forest Equity Plan to provide actionable guidance for the city as they seek to implement community-identified priorities for urban and community forestry.

Paul Hickman

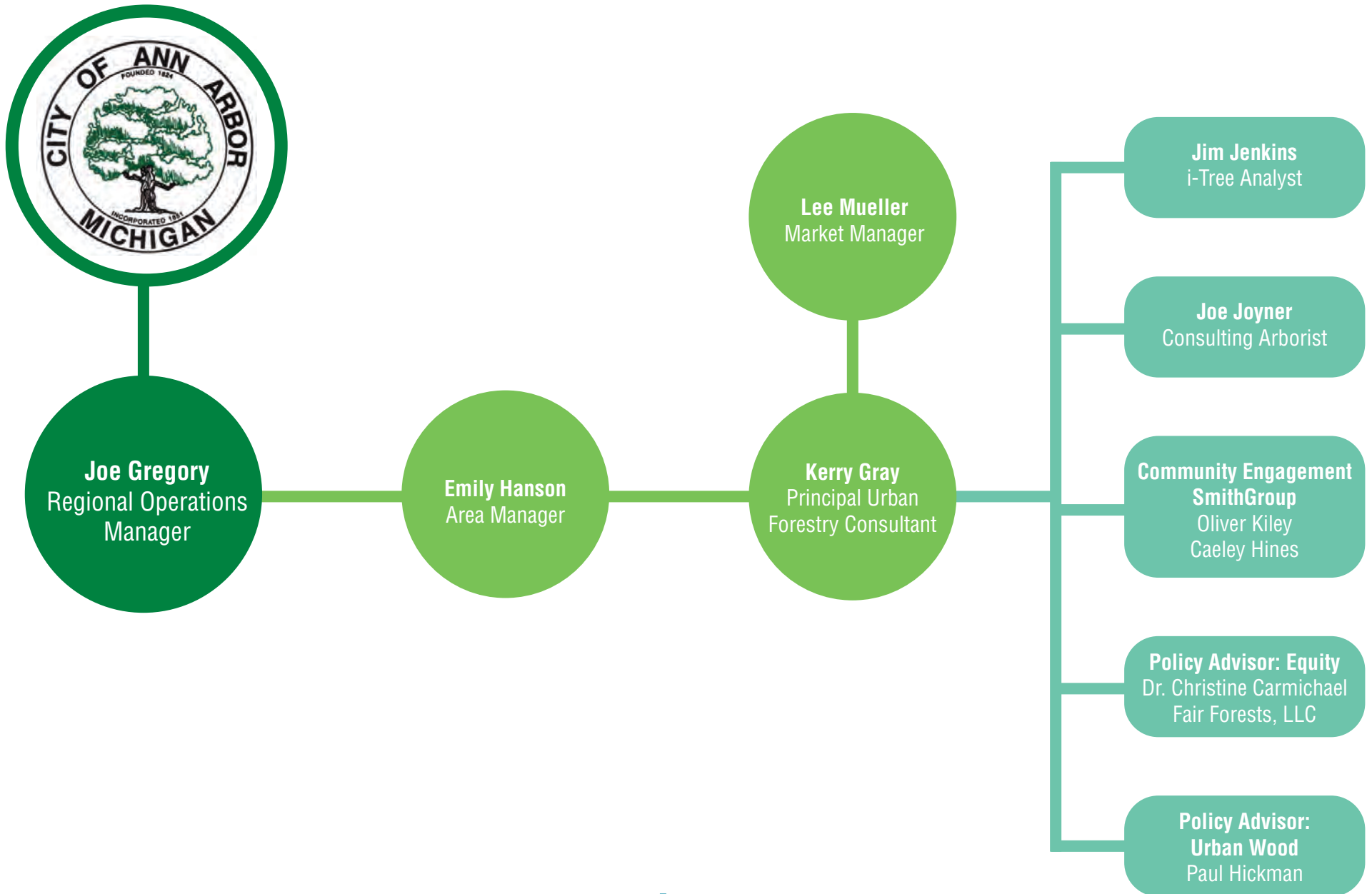
As an entrepreneurial designer, artist, project/production manager and business owner, Paul Hickman has over 35 years of experience designing and creating, from billboards to environmental graphics to commercial environments to furniture and picture frames. His designs feature Intentionally simple and timeless designs, crafted from salvaged woods, featuring rich organic textures integrated with raw modern and industrial materials from sustainable and renewable sources.

Since 1996 he has been a leader in the green building and the local movements. Paul formed **Urban Ashes** in 2009 as a picture frame company that evolved into a full-service design and fabrication company, producing wholesale goods and servicing commercial environments. By empowering our citizens returning from prison and our youth with the opportunity to repurpose their lives with meaningful employment, Urban Ashes fosters an environment where they are able to reclaim these all too often discarded resources and lives. This dynamic combination creates an unparalleled quality behind their hand-made goods that tell a uniquely human story to pass down through the generations.

After ten years—in 2019—Paul took Urban Ashes into a series of transformations to ensure Urban Ashes would reach its maximum potential. By 2020, it was clear to Paul that his greatest impact could be achieved by building what he has coined Circular UrbanWood Triconomies™. Simply put, a circular economy of triple-bottom-line businesses focused on maximizing the capacity of our urban forest and urban wood utilization. Paul facilitates the needed navigation of the terrain and bridge between planting and maintaining our urban forests to maximizing the utilization of the wood from our fallen trees due to end of life, blight, storm damage and expansion of the built environment. In creating these triconomies™, Paul encourages and provides the tools needed to engage these stakeholders in providing real careers and meaningful work to our returning citizens and youth within this new Circular UrbanWood Triconomy™.



Organizational Chart





About Davey Resource Group

Davey Resource Group, Inc. "DRG" was established to nurture and protect natural resources, especially trees and urban forests in communities across North America. DRG is a subsidiary of the Davey Tree Expert Company, one of the largest employee-owned companies in the country. As employee-owners, our team members care deeply about their work and are heavily engaged and invested in the outcomes of our projects. This is a great benefit to our clients.

With over 25 years of experience providing professional arboricultural, urban forestry consulting, planning, mapping services, and more, DRG is well-positioned to guide the City of Ann Arbor through this next phase of urban forest planning. DRG is uniquely qualified to bring Ann Arbor the type of services they require through our:

National Perspective and Local Support

We are engaged at all levels of urban forestry from providing small towns planning tools necessary to become Tree City USA honorees, to performing large inventories with experienced arborists and state of the art approaches. We have local offices in Michigan and around the Country that work with communities of all sizes to meet their urban forestry needs and help solve their challenges.

Processes, Innovation, and Adaptation

We know that no two communities are the same. We have processes for gleaning the right information and unique needs from our clients, and we adapt them to assure that each client's work product is innovative and tailored to their community.

Thought Leadership

We provide knowledge of our industry expertise through education and engagement. In turn, our team learns from our clients and colleagues, and we share that expertise within our projects. For Ann Arbor, we will share the best of our work, our partners, and research to make your new plan fit your program and help continue Ann Arbor's leadership in urban forestry

section B

DRG has completed hundreds of urban forestry consulting projects across the United States and Canada. We have chosen the following projects to show the breadth and depth of our work and how it relates to your project.

Past Involvement with Similar Projects

Holyoke

City of Holyoke, Massachusetts

Yoni Glogower, Director of Conservation and Sustainability | 413-322-5615

glogowery@holyoke.org

Budget: \$101,131 (includes inventory)

In 2021, the City of Holyoke contracted with DRG to develop an Urban Forest Equity Plan (UFEP), one of the first of its kind in the United States. The City completed a community resilience exercise in 2018 which identified increased flooding and high heat events as major concerns for the City especially for the most vulnerable populations that live in the downtown area, where there are large amounts of impervious surfaces and low tree canopy cover. The goal of the UFEP planning effort currently underway is to identify ways to equitably increase canopy cover and tree care in four socially disadvantaged neighborhoods in downtown Holyoke, to address flooding and the impacts of high heat. To that end, DRG and our project partners are examining Holyoke's urban forest through an equity lens by:

- » Developing an understanding of what Holyoke has by conducting a street and park tree inventory in the four target downtown neighborhoods; examining community plans and studies, and conducting city department and management interviews.
- » Engaging the community to understand what they want by hosting bi-lingual and Spanish-only public forums on Zoom and Facebook Live; surveying community residents (Spanish/English); and actively working with community partners to help with resident engagement.
- » Creating a roadmap to help Holyoke equitably care for and grow its tree canopy by developing recommendations and action steps based on the information and community feedback gathered through the planning process.
- » Establishing metrics and benchmarks to measure progress in Holyoke's goals to increase tree canopy cover in areas of highest equity need in Holyoke to mitigate the impacts of climate change.

Holyoke's Urban Forest Equity Plan will be completed in June 2021.



Charlotte, North Carolina Tree Inventory, Tree Management Software, and Urban Forest Plan

City of Charlotte, North Carolina

Tim Porter | 704-336-3459 or Erin Oliverio | 704-432-2925

tporter@charlottenc.gov; eoliverio@ci.charlotte.nc.us

Budget: \$72,611

During this long-term, multi-phased project, Davey Resource Group inventoried street trees, provided our custom tree management software, TreeKeeper®, and in 2016–2017 developed a strategic urban forest plan for the city.

For the tree inventory, Davey Resource Group collected data on approximately 142,000 trees and stumps over a 12-year period. We collected customized tree attribute data, including height and canopy dimensions, detailed condition ratings, maintenance recommendations, and growth space information. Inventory data were provided in GIS formats as well as in our TreeKeeper® subscription software.

Tree master planning was completed in February 2017 with Davey Resource Group developing a plan for Charlotte that serves as a guide to maintain, protect, and support Charlotte's already extensive tree canopy cover. Charlotte's tree canopy is a vital city asset that requires proactive care and protection, especially with the city's high rates of growth and development. The work Davey Resource Group, the City, and its partners and stakeholders undertook was focused on finding ways to cohesively manage and grow Charlotte's urban forest.

Plan development included assessment of existing tree inventory and urban tree canopy data, municipal code and ordinance review, interviews with City staff, community non-profits and utilities, and multiple facilitated public meetings. Davey Resource Group used the data, and public, stakeholder, and City input to do the following:

- » Estimate the ecosystem services tree canopy provides
- » Address the City's aging tree canopy and canopy loss to development
- » Find ways to involve neighborhood organizations in tree management initiatives
- » Identify areas that need trees based on social economic and climatic factors
- » Address reactive tree care
- » Create awareness on value of trees

The city's Urban Forest Plan provided a roadmap which will enable the City to address its tree canopy needs. To make accomplishing the plan easier, Davey Resource Group provided a five-year implementation plan which is found on the Urban Forest Plan's website URL. Davey Resource Group prioritized all recommended tasks within the 12 action steps, placing the tasks in a general timeline, including suggestions of partners that could be involved.

Miami Beach

City of Miami Beach, FL

Omar Leon

omarleon@miamibeachfl.gov | 305-673-7000, ext. 2600

Budget: \$104,400

When the City of Miami Beach needed an urban forestry consultant to address climate change, storms, and substantial reconstruction of its neighborhoods to upgrade aging infrastructure which included raising roads and other improvements that redefined the urban and natural landscape, the City hired DRG. DRG had the team of experts to ensure that the City's vision for its trees remain key features of all its neighborhoods and to be the right tree planted in the right place today, while considering the future adaptation efforts and changes in the urban landscape were implementable parts of the plan.

The City of Miami Beach, as a barrier island off the coast of Florida, is witnessing first-hand the effects of climate change, sea-level rise, saltwater intrusion, flooding, king tides, and extreme storm events. In addressing these challenges and ensuring that Miami Beach is a dynamic and resilient coastal community, the city has become a pioneer in planning, developing, evaluating, and implementing innovative climate mitigation and adaptation strategies and solutions. One solution the City is interested in pursuing is the preservation and growth of Miami Beach's urban forest because of the effective role that trees have been proven to provide in mitigating the effects of climate change.

In 2019, DRG, in collaboration with Calvin, Giordano and Associates, was engaged by the City of Miami Beach to develop the city's first Urban Forest Master Plan (UFMP). As part of the UFMP development process, DRG has analyzed data for Miami Beach to understand the current state of the urban forest resource and the impacts climate change is having on it and the community. Resource and data analysis completed by DRG for this project include: an urban heat island study; tree canopy cover analysis by neighborhood, stormwater basin, land use; a historical tree canopy change analysis comparing tree canopy cover over three time periods; tree species diversity, composition, climate vulnerability, and pest and disease threats; and an i-Tree analysis of ecosystem benefits provided by the urban forest.

The final UFMP utilizes the results of DRG's resource and data analyses to provide recommendations, action steps, tools, and strategies for Miami Beach to utilize the city's tree canopy as climate mitigation and adaptation strategies and maximize the services the urban forest provides to the community.

Syracuse

Syracuse, NY

Steve Harris, City Forester | 315-473-4330

Email: sharris@syr.gov

Budget: \$80,385

Syracuse contracted Davey Resource Group to prepare an Urban Forestry Master Plan. The project involved organizing several meetings that brought together stakeholders ranging from private citizens to city officials and contractors. The plan made use of tree inventory data that DRG had previously collected. We worked closely with the Onondaga Earth Corps (OEC), a local not-for-profit organization, to organize the substantial public outreach that informed the master plan. OEC organized public meetings throughout the city to ensure all voices were heard and their input was considered for the plan. The end results of this comprehensive plan are to quantify the value of the city's urban forest, propose a multi-year management plan, and aid the City Forester in advocating for reformed zoning laws and guidelines.



SmithGroup

Ann Arbor Urban and Community Forest Management Plan, 2014

The City of Ann Arbor, Michigan, is a city known for its abundant urban forest. However, budget constraints coupled with natural disasters, such as the Emerald Ash Borer, left the health of the urban forest in a critical state and at risk for future degradation. The City, recognizing the critical green infrastructure benefits the urban forest provides to the character, vitality, and resilience of the city, initiated a comprehensive study to assess the value and benefits of its urban forest, research, and implement best management practices, and develop an evidence-based set of targets for the sustainable management of the city's urban forest.

The primary inquiries of this planning effort included:

- » How does the urban forest support the sustainability and resiliency of the city?
- » How can public stewardship for the urban forest be fostered through engagement in the planning process and broader outreach?
- » How can volunteering be used as a mechanism for collaborative resource management?
- » How can understanding the dynamics of changing forest conditions over time be used to effectively manage the forest and public resources?

The City hired SmithGroup to help build and maintain a resilient forest by developing an Urban and Community Forest Management Plan. This effort followed extensive inventory and analysis work conducted by natural resource specialists that inventoried over 57,000 street and park trees and mapped the total extent of the city's urban canopy.

Fair Forests

American Forests

Maisie Hughes, Senior Director of Urban Forestry mhughes@americanforests.org

Dr. Carmichael, through her company Fair Forests Consulting, has been assisting American Forests nonprofit organizations in developing an “equity lens” in their work. American Forests is the host of the Vibrant Cities Lab, (www.vibrantcities.com), a resource-rich website on the development of urban forests in communities small and large. Dr. Carmichael has supported this website by developing recommendations for American Forests from her original work on environmental justice in the urban forest. Additionally, Dr. Carmichael serves as an advisor in other American Forest partnerships including their place-based work that is completed across the country.

Urban Ashes

The Ford Project

The goal of this project was to divert and transform two semi-trailers of Red Oak trees felled on the site for the new construction of The Ford VPEC facilities and return the new goods to be utilized within the new buildings. These urban salvaged trees were processed and manufactured into large conference room tables and two large wood wall sculptures in the lobby. This was a true collaboration in both design and engineering between Ford, the architects, the builders, and Urban Ashes.

This is a perfect example of what a company can do within their new construction to both offset their environmental impact in diverting the trees from the waste stream, but also using them back within the project instead of bringing goods from afar. The icing on the cake is that the trees and the wood used for these tables and sculptures all came from the site of the building.

It is always wonderful to be part of the process of re-purposing urban trees and turning them into something that will be around for decades more, for all to enjoy and talk about. This wood for these pieces never traveled more than 100 miles from where they once stood. Just a short trip for a serious diversion and transformation.

DRG understands that no two cities are alike, each having their own history, culture, demographics, landscapes and priorities that require different strategies to achieve the goal of an equitable urban forest.

section

Proposed Work Plan

Ann Arbor is seeking to update the Urban and Community Forest Management Plan (UCFMP) adopted by City Council in June 2014. Since the plan was adopted, much has been accomplished; yet, at the same time, there have been changes within the city and the urban and community forestry community. The UCFMP update will help to identify issues and opportunities these changes may have brought about while ensuring that Ann Arbor's urban forest program meets the goals set forth by the City to ensure a fair and equitable urban forest that assists in meeting the city's carbon neutral goals. The planning process will utilize the latest science to develop a framework that builds on the existing plan while reflecting the current values and needs of the community.

During the urban forest planning process, it is easy to talk about where a city wants to go, and even envision the results of the plan prior to development. The ideas that swirl throughout a room when engaged people get together to discuss the future of the topic at hand are only limited by the imagination of the participants. These ideas are important and are the basis for any good strategic plan. However, the challenge is to develop workable tactics that move the plan forward. Those tactics must fit the culture of the city, the governmental bodies that fund and care for trees, and others whose roles impact the urban forest. And that is where DRG helps our clients succeed. We listen to the internal and external inputs, incorporate the latest industry science, assess risks and opportunities, develop scenarios, and examine competencies, all in an effort to assure that the tactics that emerge in the process lead to a plan that works for Ann Arbor.

Project Understanding

The City of Ann Arbor seeks to update the 2014 Urban & Community Forest Management Plan to continue to sustain, preserve, maintain, and expand the City’s urban forest through a five-year planning period. The plan update will ensure equity in urban forest activities and goals, that among other opportunities, will incorporate climate change adaptation, urban wood reuse, and canopy strategies. DRG understands this project as described in the RFP, and will perform, together with our project partners and policy advisors, the services and work products necessary to complete this project. Simply said, **our job is to align information, research, and best practices, with input from the Ann Arbor leadership team, stakeholders and, the community, to develop goals, strategies and tactics that the City can use to assure that Ann Arbor’s urban forest is sustainable, protected, preserved, maintained, and expanded into the future.**

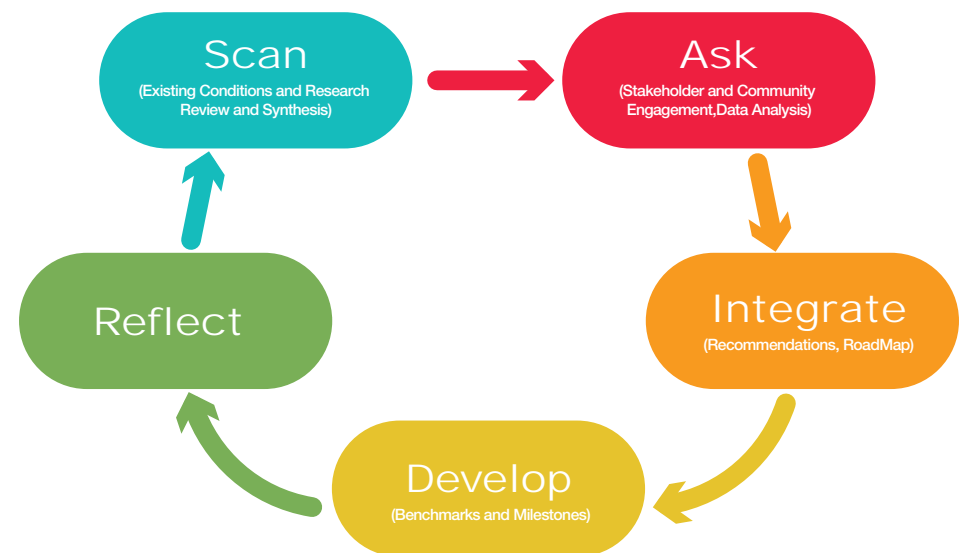
Our experience in providing similar plans is robust and the goals stated by Ann Arbor in the RFP are a reflection of the work that DRG completes every day. The plan update will be developed through the lens of equity and will reflect the current and future needs of the city. In developing this plan, we will:

- » Apply the latest science to define the value of Ann Arbor’s urban forest
- » Craft a compelling story to engage stakeholders in the importance of the urban forest
- » Identify the community's tree canopy priorities.
- » Strengthen equity as a programmatic priority.
- » Define the roles and responsibilities of the stakeholders in plan development and implementation.
- » Build a plan that serves as the platform for trust and collaboration in future urban forest programming

These key focus areas will guide our work plan from the start.

Key Work Plan Elements

In developing urban forest and community management plans (UCFMP) for communities, DRG has developed a system that utilizes a thorough process of communication, integration, and reflection. We do this through an “adaptive management” approach. This approach takes into account the current programs of the organization, (**scan** what already exists) and determines how that fits into the overall UCFMP. Adaptation is how change can occur if investigations show something is missing or needed. This comes through both research and community engagement and **asking** what the city needs both internally and externally. Next, there is an **integration** and development process. This includes plan recommendations and strategies based on research and engagement. Following this stage is **developing** the plan itself and applying benchmarks and milestones that meet the needs of the City. Lastly, and what DRG believes is the role of the City, is to **reflect** on success within the plan. We will create a dynamic plan that should not sit on the shelf—it will establish goals and tasks for the next five years with approximate resource outlay to achieve the milestones set forth in the plan.



We break our work plan into tasks as follows. As shown in our timeline, some of these tasks will overlap.



“Scan”, “Ask”, and “Integrate” are critical in the development of the plan and support input in these three assessment categories:

- » **Standard-based assessment:** Identifies current status and how that might look as changes occur. (Population growth, pests and diseases, economic fluctuations, external inputs such as the current pandemic.) Includes best management practices, and/or scans of comparable communities.
- » **Demand-based assessments:** Actual desires and needs of stakeholders
- » **Resource-based assessment:** “Static” types of input that include GIS work, inventory information, and other existing information that is able to be measured.

Task One: Kick Off Meeting

To familiarize ourselves with the project and the team, DRG will organize a project kickoff meeting together with the team and steering committee from Ann Arbor. The agenda will be developed by DRG with input from the City, and may include:

- » Introduction, best contact information, and team roles
- » Best practices for communication
 - Calls
 - Microsoft Teams and/or Zoom
 - Calendar meetings
- » Scope review
- » Accessing city reports, regulations, ordinances, etc.
- » Deliverable review
- » Weekly (or Bi-Weekly) updates and who participates
- » Accessing team work product through a mutually agreed upon project management system (Microsoft, Google)
- » Parallel community engagement opportunities
- » Follow up communication including meeting notes

Deliverable: A planned meeting with follow-up notes for review. Standards set for progress meetings throughout the project.

Task Two: Data Collection and Review

DRG will obtain and review research and reports that pertain to Ann Arbor's urban forest. These include but are not limited to:

- » 2015 Urban & Community Forestry Management Plan
- » 2010 UTC Assessment
- » 2013 i-Tree Ecosystem Analysis
- » Sustainability Framework document
- » Natural Features Master Plan
- » A²Zero Carbon Neutrality Plan
- » Climate Action Plan
- » Tree planting data from within the City
- » Tree inventory data (2009 and 2020)
- » Applicable tree and development ordinances with the City
- » *The Sustainable Urban Forest*, by Michael Leff
- » Vibrant Cities Network applicable articles and case studies
- » Tree Risk Management research including, but not limited to:
 - Ann Arbor's current policies and approach to tree risk management
 - Urban Tree Risk Management: A Community Guide to Program Design and Implementation (USFS)
 - ISA available tools on tree risk management
 - Comparison communities that have effective tree risk management programs
- » Review and understand threats to the urban forest of Ann Arbor, including pests, diseases, climate change, invasive species, and human impact through development.
- » Species adaptability studies (Center(s) for Urban Forest Research—USFS)
- » Urban Wood Network Municipal members
- » i-Tree Tools; i-Tree Eco



DRG is familiar with the most recent inventory completed in Ann Arbor. To bring knowledge and science to both the stakeholder engagement process and the plan, we will include information from the inventory report provided in October, 2020. This includes making recommendations for management activities based on tree needs.

To further inform the stakeholder process and the plan, DRG will evaluate the most recent inventory through iTree Eco. i-Tree Eco is a powerful tool for understanding the values and benefits that trees provide to the community.

The data that was collected during the most recent inventory will be analysed to develop the following information:

- » Urban forest structure:—Species composition, number of trees, tree density, tree health, etc.
- » Pollution reduction:—Hourly amount of pollution removed by the urban forest, and associated percent air quality improvement throughout a year. Pollution removal is calculated for ozone, sulfur dioxide, nitrogen dioxide, carbon monoxide and particulate matter 2.5 (<2.5 microns).
- » Public health impacts:—Health incidence reduction and economic benefit based on the effect of trees on air quality improvement.
- » Carbon:—Total carbon stored and net carbon annually sequestered by the urban forest.
- » Energy Effects:—Effects of trees on building energy use and consequent effects on carbon dioxide emissions from power plants.
- » Avoided runoff:—Yearly avoided runoff attributed to trees summarized by tree species or strata.
- » Forecasting:—Models tree and forest growth over time; considers factors like mortality rates, tree planting inputs, pest and disease impacts and storm effects. Some ecosystem services including carbon and pollution benefits are also forecasted.
- » Bio-emissions:—Hourly urban forest volatile organic compound emissions and the relative impact of tree species on net ozone and carbon monoxide formation throughout the year.
- » Values:—Compensatory value of the forest, as well as the estimated economic value of ecosystem services.
- » Potential pest impacts:—Based on host susceptibility, pest/disease range and tree structural value.

Urban Wood Reuse

Addressing the development of an urban wood reuse plan will be undertaken through the knowledge and research done by both DRG and our policy advisor, Paul Hickman of Urban Ashes. A feasibility type study through interviews with appropriate stakeholders, together with the cost estimates and potential programming will be reviewed. We will reach out to Urban Wood Network Municipal members that have developed programs and incorporate recent research into this part of the plan.

Risk Management Chapter

We will examine the current methodology for risk management within the city. Trees, as part of Ann Arbor’s infrastructure, should be fully integrated into risk planning. One way to accomplish this is for DRG to examine the City’s 2020 inventory and determine high risk trees and where they are in relation to critical routes throughout Ann Arbor. We create priority inspection zones from that data. In addition, we can support the importance of risk management in the urban forest by incorporating the “whys” through current research on risk.

Representative Project

City of Aurora, CO—

Wood Utilization Planning

During the completion of an EAB plan for the City, DRG addressed the issue of wood waste within the city. We determined the costs and feasibility of developing such a plan including the placement of a marshalling yard, usage parameters, and ideas for partnerships.

Urban Tree Canopy Goal

We understand that Ann Arbor is currently completing a canopy analysis. Because the current analysis is over 10 years old, we suggest that the development of a canopy goal would be more useful to the city based on the new information. The 2020 inventory, and i-Tree Eco study can support specifically the most beneficial trees that can be planted to expand the canopy. That will be key of achieving a goal. DRG can help Ann Arbor define an approach to developing a goal once the new canopy study is completed.

Sustainable Urban Forests

To assess the state of Ann Arbor's urban forest, DRG will utilize the Indicators of a Sustainable Urban Forest. The indicators are broadly categorized into three categories: The Trees, The Players, and The Management. By evaluating Ann Arbor's Urban Forest through best management practices and industry standards, we are able to gauge the sustainability of Ann Arbor's program. This option can be added to the plan development through our urban forest stakeholder outreach. It is a powerful assessment tool that can lead to positive action within a community tree program.

Data Analysis Approach

Through our experience and thought leadership, we continually build on our base of data used for these types of projects. With the data that currently exists in the field of urban and community forestry, the data that comes from Ann Arbor research and documentation, and data developed through the use of i-Tree Eco, we analyze against the set of questions and goals that Ann Arbor has set through the RFP and kickoff meeting. This scan of data is analyzed by the team. The analysis turns the data into useful information on which to build the plan. Data developed through community and stakeholder outreach is included in analysis for the plan.

Deliverables:

- » **An initial findings report that characterizes the opportunities and challenges faced by Ann Arbor.**

Internal Stakeholder Review

Our team will develop outreach strategies to engage City staff that are involved in tree management and care. Outreach will be based on discussions between Ann Arbor and DRG to determine the most applicable team members to interview and/or complete questionnaires. Staff to be considered should include team members who may influence or guide the direction of urban forestry activities in Ann Arbor. Additionally, the stakeholder group in the RFP will be part of the internal stakeholder review. The review process will generally include interviews with key forestry personnel and examination of forestry budgets, forestry equipment, staffing, and a cursory review of technology use, safety standards, and written policies or procedures. This review is not a comprehensive forestry operations review with detailed recommendations on City operations. Rather, it provides a solid understanding of the City's forestry capacity to form the basis of recommendations for the plan.

Deliverables:

- » **Internal stakeholder results to inform the plan.**

Task Three: Community and Stakeholder Engagement

Development of the Public Engagement Plan

The City of Ann Arbor is committed to meaningful and representative community involvement in this plan, so is Davey Resource Group. In fact, we believe that a UCFMP is not complete without significant feedback from the stakeholders that ultimately benefit from the urban forest. These include the general public as well as Residential and Commercial Neighborhood Associations.

To that end, SmithGroup will join DRG's project team to lead community engagement activities. Additionally, Dr. Christine Carmichael will be a Policy Advisor to assure that the Stakeholder engagement process reaches as many constituencies as possible in a fair and equitable way.

Our team can utilize a variety of methods for facilitating a robust community and stakeholder plan. These methods are organized at a number of levels, including:

Task Three

INFORM.

Communication tools to raise the public awareness, share information, and build knowledge pertaining to the urban forest and plan process. This can include development of online informational portals/ websites and/or educational information to be distributed online, through virtual or in-person meetings, or through physical materials.

LISTEN.

Methods to survey and poll the public—either virtually/remotely through survey tools or through COVID-safe in-person sessions such as outdoor pop-up meetings—in order to understand the public's concerns, issues, and desires.

INVOLVE.

Work-sessions, virtual whiteboarding activities, and other activities designed to directly connect public and stakeholder engagement into the decision making process. These activities are often critical for clarifying priorities and establishing project goals and values.

EMPOWER.

Leveraging engagement during the planning process to set up long-term involvement and engagement with urban forestry activities, in order to support citizen action and sustained support for a healthy urban forest.

COVID will determine the parameters of the outreach that will take place. Under “normal” circumstances, we would offer a variety of opportunities and settings for stakeholders to participate and provide their input into the planning process. In consideration of the safety constraints due to COVID-19, a plan will be made to run the outreach sessions virtually and stakeholder groups will be invited to attend. These sessions will be both educational, raising awareness regarding how the urban trees and canopy relates to such items that affect the human condition including health and climate change mitigation.

Representative Project

City of Oakland, CA—Equity Planning within their UFMP

After completing a major inventory within the City, Oakland turned to DRG to have them build their first urban forest master plan. A significant component of the plan is examining equity among planting and maintenance activities within the city. Oakland has been part of the “green gentrification” movement and this is an opportunity to address tree planting/maintenance with that trend in mind.

Sessions will be interactive, soliciting responses from participants. We anticipate the following sequence of engagement sessions:

- » **Session #1 & #2:** Two sessions focused on sharing information about the current state and management of the urban forest (“inform”) and soliciting feedback from participants and stakeholders through question & answer discussions, live polling, and/or questionnaire survey (“listen”). These sessions are anticipated to be held remotely/virtually, with an option for physical surveys or special accommodations for those without access. A simple website hub/portal can be launched in advance of these sessions to provide a common location for project information and resources.
- » **Session #3:** This session will focus on sharing draft findings and a menu of recommendations under consideration. Participants may be involved in the process of refining and/or prioritizing recommendations (“involve”) if needed.

If conditions regarding the health and safety of in-person gatherings improve during the planning process we propose holding at least one in-person session where physical distancing and safety protocols can be maintained. An in-person session could take the form of a neighborhood walking tour, a “workshop in the woods”, or other in-person venues. With in-person sessions, we have seen success with offering honorariums to neighborhood leaders to help organize and boost attendance. These and other options will be discussed with City staff once a budget has been established for this type of community interaction.

We will develop and distribute an on-line survey in addition to the engagement sessions so that a wider net can collect stakeholder responses. If a physical version of the survey is also desired, our team can provide one and work with the city to distribute it to specific communities where online engagement may be less effective.

Overall, public and stakeholder input will be used in a number of ways, mainly:

- » A series of goals and objectives will be developed; these will be significantly based on stakeholder input.
- » Summary reports of the input from each of the meetings will be prepared and submitted. This stakeholder input will help to inform the priorities identified and integrated into the plan.
- » A summary of the process and the input provided by residents, businesses, institutions and any other stakeholders will be developed and included as an appendix to the report.

Deliverables: Approved public engagement plan, and subsequent results of the public engagement.

Task Four: Identify and Evaluate Opportunities and Recommendations (Plan Development)

The effort and summary materials produced in phases two and three of this project will culminate in the **integration** of data and the **development** of an updated UFMP that provides strategic guidance over the next five years. We will incorporate the data that has been gleaned through **scanning** the work and the research of the past and present, and through the process of stakeholder and community engagement. The plan will include goals, objectives, recommendations, and strategies that will include behavioral and science based solutions.

While writing the plan, we incorporate a vision for the plan that is developed with the Ann Arbor team early on in the process. This vision is based on the preliminary findings and engagement results. The document itself will be narrative text and graphic representation that will incorporate sections on Program, Policy, Management, Operations, Public Tree Inventory, Community Participation, and Education. Goals, objectives and recommendations from the prior plan will be examined, evaluated, and updated if appropriate. New recommendations will be developed as changes and needs come to light through research and engagement. New items will be included in the plan including potential urban wood reuse program, climate change adaptation, canopy goal guidance, and tree risk management.

The plan narrative includes a discussion of:

- » **Challenges.** Challenges faced by Ann Arbor that are affecting the urban forest. This includes information that is covered in our interviews, research, and outreach. We look at general categories including community growth, equity, climate change, health challenges, pests and diseases, changing demographics, etc.
- » **Urban Forest Indicators.** A comparison with common indicators of healthy, vibrant urban forests allows the project team to participate in conversations based on minimum standards, expected outcomes, and actions that drive results. Using the indicators allows the team to have conversations based on minimum standard metrics for community trees, those that interact with them, and those that manage them.
- » **Priorities and Themes.** Themes begin to develop during the research, outreach and engagement part of plan development. Both the internal and external priorities together with these themes set the stage for the plan's direction and actions.
- » **Guiding Principles.** We also develop some guiding principles that act as further direction in plan development. We will include equity in the principles.
- » **Urban Forest Values.** Using details gathered through the inventory, we present a complete and comprehensive section on why trees matter. This is where we include the benefits of Ann Arbor's trees to the community as well as what those benefits mean. This will be developed through the use of i-Tree Eco.
- » **Recommendations.** As we take into account the priorities and themes discovered in Tasks Two and Three, we develop our recommendations based on where we see gaps in management and community need. These recommendations fall into the categories that are made clear as the plan progresses. If the recommendations need resource to complete, we add what those resources are in general costs and possible personnel.
- » **Monitoring and Measurement.** The final portion of the plan focuses on developing a component to determine effectiveness of the implementation of the UCFMP. This can be a methodical and simple follow-up with assignments for review on an annual basis.

Plan goals, objectives and recommendations will be presented within one section of the document. As stated, they will include actions items, potential estimated costs, results, and timeframes for implementation and/or completion.

Below is the process for actual plan development:

Document Outline: UFMP Draft 1 (80% complete, unformatted)

DRG will provide a document outline for review with City staff prior to beginning the first draft of the UCFMP. From that outline, we will develop our first draft for the City's review and comments. Feedback on this draft version is anticipated to focus on completeness of content and includes feedback on plan goals.

UFMP Draft 2 (95% complete, unformatted)

The version of the draft will have additional polish and wordsmithing and provide City reviewers the opportunity to give feedback on elements of style and grammar that ensure it has the city's voice. Once Ann Arbor's team provides their feedback on this draft and we reach consensus on the final elements to be included in the plan, we transition into the graphic design phase of the document.

UFMP Draft 3 (99% complete, formatted through InDesign)

This version of the draft is an opportunity for the City to review the graphic design element of the plan, adjust images and graphic design elements. Moving into the design phase, we tailor the plan utilizing a modern appearance and visually pleasing palette that includes a well-balanced combination of a narrative document, tables, images, and maps to share and convey the critical information necessary to achieve your objectives. Design and deliverable concepts can vary. We have an internal design team that supports our client's projects in up-to-date design work that coordinates with your community image and culture. During the initial work on the project, we provide you with a color palette(s) and design concepts that you can choose from to tell the story of the Urban and Community Forest Management Plan in a way that meets the needs of Ann Arbor. At this time, we will also develop the presentation requested for use in aiding approval of the plan.

UFMP Final Version (100% complete, including presentation)

Two printed and bound copies of the final version will be presented to the City. We will also deliver an electronic PDF file. In addition, we will deliver the plan in InDesign files for the City's use. In this way, the City can have complete access to the UCFMP content for additional customizations.

Timing

Task	Team Members	Hours	Month of Completion											
			1	2	3	4	5	6	7	8	9	10	11	
Task One: Kick Off Meeting	Gregory	2	■											
	Mueller	2	■											
	Gray	4	■											
	Hanson	3	■											
	Joyner	2	■											
	Kiley	4	■											
	Carmichael	2	■											
Steering Committee Meetings	Gray	15		■		■		■		■		■		■
	Hanson	15		■		■		■		■		■		■
Task Two: Data Collection and Review														
Document Research and Review	Gray	24		■	■	■								
	Joyner	45		■	■	■								
Analysis of Inventory	Gray	4		■	■	■								
	Joyner	20		■	■	■								
i-Tree Eco/Inventory Comparison	Jenkins	18		■	■	■								
Urban Wood Reuse	Gray	5		■	■	■								
	Joyner	10		■	■	■								
	Hickman	20		■	■	■								
Risk Management	Gray	5		■	■	■								
	Joyner	10		■	■	■								
Urban Tree Canopy Goal	Gray	5		■	■	■								
	Joyner	10		■	■	■								

Task	Team Members	Hours	Month of Completion										
			1	2	3	4	5	6	7	8	9	10	11
Task Three: Community and Stakeholder Engagement													
Stakeholder Focus Groups (8 Focus Groups)	Gray	25			■	■	■	■	■				
	Hanson	20			■	■	■	■	■				
Develop Portal/Website (Graphics, Development, Coord.)	Gray	4		■									
	Kiley	5		■									
	Hines	17		■									
Prep for Engagement Session 1&2 (materials, presentations, etc)	Gray	4		■									
	Hanson	3		■									
	Kiley	8		■									
	Hines	24		■									
Session 1—Coordination, Logistics, Facilitation (Two-hour session)	Gray	3			■								
	Kiley	4			■								
	Hines	8			■								
	Hanson	3			■								
Session 2—Coordination, Logistics, Facilitation (Two-hour session)	Gray	3						■					
	Hanson	3						■					
	Kiley	4						■					
	Hines	8						■					

Timing (continued)

Task	Team Members	Hours	Month of Completion											
			1	2	3	4	5	6	7	8	9	10	11	
Web + Print Survey Creation—Draft, Formatting, Finalization	Gray	4												
	Joyner	2												
	Kiley	3												
	Hines	6												
Survey + Session 1&2 Result Tabulation and Graphics	Gray	3												
	Kiley	4												
	Hines	8												
Prep for Engagement Session 3	Gray	3												
	Kiley	4												
	Hines	8												
Session 3—Coordination, Logistics, Facilitation (Two-hour session)	Gray	3												
	Hanson	3												
	Kiley	4												
	Hines	8												
Final Engagement Summary Report	Gray	4												
	Joyner	4												
	Kiley	8												
	Hines	16												
Engagement Equity Support	Carmichael	20												

Task	Team Members	Hours	Month of Completion											
			1	2	3	4	5	6	7	8	9	10	11	
Task Four: Plan Development														
Draft 1	Gray	40												
	Joyner	110												
	Kiley	16												
	Hines	40												
	Carmichael	30												
Draft 2	Gray	30												
	Joyner	50												
	Carmichael	8												
Draft 3	Gray	10												
	Joyner	20												
Presentation	Gray	2												
	Joyner	10												
Layout and Graphics	Varies	60												
Other: Project Management	Gray	33												
	Hanson	33												
	Kiley	16												
	Carmichael	10												
Total Hours		1004												

Section D: Fee Proposal

Per the RFP requirements, this section is included separately in the sealed envelope marked “Fee Proposal.”

Section E: Authorized Negotiator

Lee Mueller, Market Manager

lee.mueller@davey.com

248-221-0439

Section F: Attachments

This section includes:

- » Attachment A: Legal Status of Offerer
- » Attachment B: Conflict of Interest Form
- » Attachment C: Living Wage Compliance Form
- » Attachment D: Non-Discrimination Form

**ATTACHMENT A
LEGAL STATUS OF OFFEROR**

(The Respondent shall fill out the provision and strike out the remaining ones.)

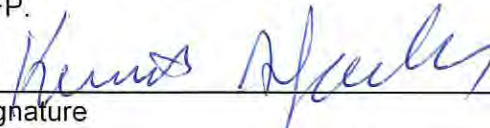
The Respondent is:

- A corporation organized and doing business under the laws of the state of Delaware, for whom Kenneth A. Joehlin bearing the office title of VP & GM, Environmental Consulting & Business Development, whose signature is affixed to this proposal, is authorized to execute contracts on behalf of respondent.*

*If not incorporated in Michigan, please attach the corporation's Certificate of Authority N/A

- A limited liability company doing business under the laws of the State of _____, whom _____ bearing the title of _____ whose signature is affixed to this proposal, is authorized to execute contract on behalf of the LLC.
- A partnership organized under the laws of the State of N/A and filed with the County of _____, whose members are (attach list including street and mailing address for each.)
- An individual, whose signature with address, is affixed to this RFP.

Respondent has examined the basic requirements of this RFP and its scope of services, including all Addendum (if applicable) and hereby agrees to offer the services as specified in the RFP.


Signature _____ Date: 3/22/2021
(Print) Name Kenneth A. Joehlin Title VP & GM, Environmental Consulting & Business Development
Firm: Davey Resource Group, Inc.
Address: 295 S. Water Street, Suite 300, Kent, Ohio 44240
Contact Phone 800-828-8312 Fax 330-673-0860
Email ken.joehlin@davey.com

Delaware

The First State

Page 1

I, JEFFREY W. BULLOCK, SECRETARY OF STATE OF THE STATE OF DELAWARE, DO HEREBY CERTIFY "DAVEY RESOURCE GROUP, INC." IS DULY INCORPORATED UNDER THE LAWS OF THE STATE OF DELAWARE AND IS IN GOOD STANDING AND HAS A LEGAL CORPORATE EXISTENCE SO FAR AS THE RECORDS OF THIS OFFICE SHOW, AS OF THE SIXTEENTH DAY OF JUNE, A.D. 2020.

AND I DO HEREBY FURTHER CERTIFY THAT THE ANNUAL REPORTS HAVE BEEN FILED TO DATE.

AND I DO HEREBY FURTHER CERTIFY THAT THE FRANCHISE TAXES HAVE BEEN PAID TO DATE.



7777084 8300


SR# 20205724647

You may verify this certificate online at corp.delaware.gov/authver.shtml

A handwritten signature in black ink, appearing to read "JWBULLOCK", is written over a horizontal line. Below the line, the text "Jeffrey W. Bullock, Secretary of State" is printed.

Authentication: 203117941

Date: 06-16-20

LICENSE NO. 1989007806	STATE OF DELAWARE	VALID
POST CONSPICUOUSLY	DIVISION OF REVENUE	01/01/16 - 12/31/16 NOT TRANSFERABLE
DLN: 15 98609 30	BUSINESS CODE 099 GROUP CODE 007	LICENSED ACTIVITY PROFESSIONAL AND/OR PRSL SRVCS-UNCLASSIFIED PROFESSIONAL AND/OR PERSONAL SERVICES
DATE ISSUED: 12/07/15	**VALIDATED**	2016
LICENSE FEE: \$ 75.00	BUSINESS LICENSE	BUSINESS LOCATION
MAILING ADDRESS		DAVEY TREE EXPERT COMPANY THE PO BOX 3967 GREENVILLE DE 19807-0967
DAVEY TREE EXPERT COMPANY THE PO BOX 5193 KENT OH 44240-5193		PATRICK T. CARTER DIRECTOR OF REVENUE
IS HEREBY LICENSED TO PRACTICE, CONDUCT OR ENGAGE IN THE OCCUPATION OR BUSINESS ACTIVITY INDICATED ABOVE IN ACCORDANCE WITH THE LICENSE APPLICATION DULY FILED PURSUANT TO TITLE 30, DEL. CODE.		

IMPORTANT - TEAR AT ABOVE PERFORATION AND DISPLAY IN A PUBLIC LOCATION

Federal E.I. No. or Social Security Number 1 34017 6110 001	Business Code 099 Group Code 007	Licensed Activity PROFESSIONAL AND/OR PRSL SRVCS-UNCLASSIFIED PROFESSIONAL AND/OR PERSONAL SERVICES
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The State of Delaware Business License printed above must be posted in a public area at the location address listed. If you have any questions regarding this license, please call (302) 577-8778.

REPLACEMENT LICENSES

Keep this portion of your license separate, in case you need a replacement for any lost, stolen or destroyed license. A \$15 fee will be charged for the replacement of a license. Send the \$15 along with a copy of this form or provide your Federal Employer Identification Number, or Social Security Number, suffix, Business Code, Business Name and address to Delaware Division of Revenue, Attn.: Business Master File, PO Box 8750, Wilmington, DE 19899-8750. You will receive your replacement license within three to four weeks.

OTHER IMPORTANT INFORMATION

Most licensees are also required to pay either gross receipts or excise taxes in addition to the license fee. You can file these taxes online or obtain a paper form from our website at www.revenue.delaware.gov. You must submit all business tax returns filed with the Division of Revenue under the same identification number. If you are a sole-proprietor, and have a federal employer identification number, use the employer identification number, not your social security number. Only sole proprietors with no employees are allowed to file under their social security number. Inquiries regarding your coupon booklets to pay withholding, corporate tentative, and Sub Chapter "S" estimated taxes, or to make changes to your name, address, or identification number, should be directed to the Business Master File Unit at (302) 577-8778.

INTERNET SITE

The Division of Revenue web address is: www.revenue.delaware.gov. Visit our web site for tax tips, links to telephone numbers, forms that you can download, links to other State agencies, the Delaware Code, the publication "Delaware Guide for Small Business" and lots more. Internet filing of personal income tax returns via the Division of Revenue's website is available. Internet filing for Withholding, Gross Receipts and Corporate Tentative payments is also available.

UNITED STATES OF AMERICA
STATE OF OHIO
OFFICE OF THE SECRETARY OF STATE

I, Frank LaRose, do hereby certify that I am the duly elected, qualified and present acting Secretary of State for the State of Ohio, and as such have custody of the records of Ohio and Foreign business entities; that said records show DAVEY RESOURCE GROUP, INC., a Delaware corporation, having qualified to do business within the State of Ohio on June 19, 2017 under License No. 4040871 is currently in GOOD STANDING upon the records of this office.



Witness my hand and the seal of the Secretary of State at Columbus, Ohio this 24th day of April, A.D. 2020.

A handwritten signature in blue ink that reads "Frank LaRose".

Ohio Secretary of State

Validation Number: 202011502710

**ATTACHMENT B
CITY OF ANN ARBOR DECLARATION OF COMPLIANCE**

Non-Discrimination Ordinance

The "non discrimination by city contractors" provision of the City of Ann Arbor Non-Discrimination Ordinance (Ann Arbor City Code Chapter 112, Section 9:158) requires all contractors proposing to do business with the City to treat employees in a manner which provides equal employment opportunity and does not discriminate against any of their employees, any City employee working with them, or any applicant for employment on the basis of actual or perceived age, arrest record, color, disability, educational association, familial status, family responsibilities, gender expression, gender identity, genetic information, height, HIV status, marital status, national origin, political beliefs, race, religion, sex, sexual orientation, source of income, veteran status, victim of domestic violence or stalking, or weight. It also requires that the contractors include a similar provision in all subcontracts that they execute for City work or programs.

In addition the City Non-Discrimination Ordinance requires that all contractors proposing to do business with the City of Ann Arbor must satisfy the contract compliance administrative policy adopted by the City Administrator. A copy of that policy may be obtained from the Purchasing Manager

The Contractor agrees:

- (a) To comply with the terms of the City of Ann Arbor's Non-Discrimination Ordinance and contract compliance administrative policy.
- (b) To post the City of Ann Arbor's Non-Discrimination Ordinance Notice in every work place or other location in which employees or other persons are contracted to provide services under a contract with the City.
- (c) To provide documentation within the specified time frame in connection with any workforce verification, compliance review or complaint investigation.
- (d) To permit access to employees and work sites to City representatives for the purposes of monitoring compliance, or investigating complaints of non-compliance.

The undersigned states that he/she has the requisite authority to act on behalf of his/her employer in these matters and has offered to provide the services in accordance with the terms of the Ann Arbor Non-Discrimination Ordinance. The undersigned certifies that he/she has read and is familiar with the terms of the Non-Discrimination Ordinance, obligates the Contractor to those terms and acknowledges that if his/her employer is found to be in violation of Ordinance it may be subject to civil penalties and termination of the awarded contract.

Davey Resource Group, Inc.

Company Name
 3/22/2021
Signature of Authorized Representative Date

Kenneth A. Joehlin, VP & GM, Environmental Consulting & Business Development

Print Name and Title
295 S. Water Street, Suite 300, Kent, Ohio 44240
Address, City, State, Zip
800-828-8312/ken.joehlin@davey.com
Phone/Email address

Questions about the Notice or the City Administrative Policy, Please contact:
Procurement Office of the City of Ann Arbor
(734) 794-6500

**ATTACHMENT C
CITY OF ANN ARBOR
LIVING WAGE ORDINANCE DECLARATION OF COMPLIANCE**

The Ann Arbor Living Wage Ordinance (Section 1:811-1:821 of Chapter 23 of Title I of the Code) requires that an employer who is (a) a contractor providing services to or for the City for a value greater than \$10,000 for any twelve-month contract term, or (b) a recipient of federal, state, or local grant funding administered by the City for a value greater than \$10,000, or (c) a recipient of financial assistance awarded by the City for a value greater than \$10,000, shall pay its employees a prescribed minimum level of compensation (i.e., Living Wage) for the time those employees perform work on the contract or in connection with the grant or financial assistance. The Living Wage must be paid to these employees for the length of the contract/program.

Companies employing fewer than 5 persons and non-profits employing fewer than 10 persons are exempt from compliance with the Living Wage Ordinance. If this exemption applies to your company/non-profit agency please check here No. of employees ___

The Contractor or Grantee agrees:

- (a) To pay each of its employees whose wage level is not required to comply with federal, state or local prevailing wage law, for work covered or funded by a contract with or grant from the City, no less than the Living Wage. The current Living Wage is defined as \$13.91/hour for those employers that provide employee health care (as defined in the Ordinance at Section 1:815 Sec. 1 (a)), or no less than \$15.51/hour for those employers that do not provide health care. The Contractor or Grantor understands that the Living Wage is adjusted and established annually on April 30 in accordance with the Ordinance and covered employers shall be required to pay the adjusted amount thereafter to be in compliance with Section 1:815(3).

Check the applicable box below which applies to your workforce

Employees who are assigned to any covered City contract/grant will be paid at or above the applicable living wage without health benefits

Employees who are assigned to any covered City contract/grant will be paid at or above the applicable living wage with health benefits

- (b) To post a notice approved by the City regarding the applicability of the Living Wage Ordinance in every work place or other location in which employees or other persons contracting for employment are working.
- (c) To provide to the City payroll records or other documentation within ten (10) business days from the receipt of a request by the City.
- (d) To permit access to work sites to City representatives for the purposes of monitoring compliance, and investigating complaints or non-compliance.
- (e) To take no action that would reduce the compensation, wages, fringe benefits, or leave available to any employee covered by the Living Wage Ordinance or any person contracted for employment and covered by the Living Wage Ordinance in order to pay the living wage required by the Living Wage Ordinance.

The undersigned states that he/she has the requisite authority to act on behalf of his/her employer in these matters and has offered to provide the services or agrees to accept financial assistance in accordance with the terms of the Living Wage Ordinance. The undersigned certifies that he/she has read and is familiar with the terms of the Living Wage Ordinance, obligates the Employer/Grantee to those terms and acknowledges that if his/her employer is found to be in violation of Ordinance it may be subject to civil penalties and termination of the awarded contract or grant of financial assistance.

Davey Resource Group, Inc.

 Company Name


 Signature of Authorized Representative
 3-22-2021

 Date
 VP & GM, Environmental
 Consulting & Business
 Development

 Print Name and Title

295 S. Water Street, Suite 300

 Street Address
Kent, Ohio 44240

 City, State, Zip
800-828-8312/ken.joehlin@davey.com

 Phone/Email address

ATTACHMENT D



VENDOR CONFLICT OF INTEREST DISCLOSURE FORM
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All vendors interested in conducting business with the City of Ann Arbor must complete and return the Vendor Conflict of Interest Disclosure Form in order to be eligible to be awarded a contract. Please note that all vendors are subject to comply with the City of Ann Arbor's conflict of interest policies as stated within the certification section below.

If a vendor has a relationship with a City of Ann Arbor official or employee, an immediate family member of a City of Ann Arbor official or employee, the vendor shall disclose the information required below.

1. No City official or employee or City employee's immediate family member has an ownership interest in vendor's company or is deriving personal financial gain from this contract.
2. No retired or separated City official or employee who has been retired or separated from the City for less than one (1) year has an ownership interest in vendor's Company.
3. No City employee is contemporaneously employed or prospectively to be employed with the vendor.
4. Vendor hereby declares it has not and will not provide gifts or hospitality of any dollar value or any other gratuities to any City employee or elected official to obtain or maintain a contract.
5. Please note any exceptions below:

Conflict of Interest Disclosure*	
Name of City of Ann Arbor employees, elected officials or immediate family members with whom there may be a potential conflict of interest.	<input type="checkbox"/> Relationship to employee <hr/> <input type="checkbox"/> Interest in vendor's company <input type="checkbox"/> Other (please describe in box below)
N/A	

*Disclosing a potential conflict of interest does not disqualify vendors. In the event vendors do not disclose potential conflicts of interest and they are detected by the City, vendor will be exempt from doing business with the City.

I certify that this Conflict of Interest Disclosure has been examined by me and that its contents are true and correct to my knowledge and belief and I have the authority to so certify on behalf of the Vendor by my signature below:		
Davey Resource Group, Inc.	800-828-8312	
Vendor Name	Vendor Phone Number	
	3/22/2021	Kenneth A. Joehlin
Signature of Vendor Authorized Representative	Date	Printed Name of Vendor Authorized Representative

Appendix A:

Limited Warranty

Davey Resource Group, Inc. (“DRG”) provides this limited warranty (“Limited Warranty”) in connection with the provision of services by DRG (collectively the “Services”) under the agreement between the parties, including any bids, orders, contracts, or understandings between the parties (collectively the “Agreement”).

Notwithstanding anything to the contrary in the Agreement, this Limited Warranty will apply to all Services rendered by DRG and supersedes all other warranties in the Agreement and all other terms and conditions in the Agreement that conflict with the provisions of this Limited Warranty. Any terms or conditions contained in any other agreement, instrument, or document between the parties, or any document or communication from you, that in any way modifies the provisions in this Limited Warranty, will not modify this Limited Warranty nor be binding on the parties unless such terms and conditions are approved in a writing signed by both parties that specifically references this Limited Warranty.

Subject to the terms and conditions set forth in this Limited Warranty, for a period of ninety (90) days from the date Services are performed (the “Warranty Period”), DRG warrants to Customer that the Services will be performed in a timely, professional and workmanlike manner by qualified personnel.

To the extent the Services involve the evaluation or documentation (“Observational Data”) of trees, tree inventories, natural areas, wetlands and other water features, animal or plant species, or other subjects (collectively, “Subjects”), the Observational Data will pertain only to the specific point in time it is collected (the “Time of Collection”). DRG will not be responsible nor in any way liable for (a) any conditions not discoverable using the agreed upon means and methods used to perform the Services, (b) updating any Observational Data, (c) any changes in the Subjects after the Time of Collection (including, but not limited to, decay or damage by the elements, persons or implements; insect infestation; deterioration; or acts of God or nature [collectively, “Changes”]), (d) performing services that

are in addition to or different from the originally agreed upon Services in response to Changes, or (e) any actions or inactions of you or any third party in connection with or in response to the Observational Data. If a visual inspection is utilized, visual inspection does not include aerial or subterranean inspection, testing, or analysis unless stated in the scope of work. DRG will not be liable for the discovery or identification of non-visually observable, latent, dormant, or hidden conditions or hazards, and does not guarantee that Subjects will be healthy or safe under all circumstances or for a specified period of time, or that remedial treatments will remedy a defect or condition.

To the extent you request DRG’s guidance on your permitting and license requirements, DRG’s guidance represents its recommendations based on its understanding of and experience in the industry and does not guarantee your compliance with any particular federal, state or local law, code or regulation.

DRG may review information provided by or on behalf of you, including, without limitation, paper and digital GIS databases, maps, and other information publicly available or other third-party records or conducted interviews (collectively, “Source Information”). DRG assumes the genuineness of all Source Information. DRG disclaims any liability for errors, omissions, or inaccuracies resulting from or contained in any Source Information.

If it is determined that DRG has breached this Limited Warranty, DRG will, in its reasonable discretion, either: (i) re-perform the defective part of the Services or (ii) credit or refund the fees paid for the defective part of the Services. This remedy will be your sole and exclusive remedy and DRG’s entire liability for any breach of this Limited Warranty. You will be deemed to have accepted all of the Services if written notice of an alleged breach of this Limited Warranty is not delivered to DRG prior to the expiration of the Warranty Period.

To the greatest extent permitted by law, except for this Limited Warranty, DRG makes no warranty whatsoever, including, without limitation, any warranty of merchantability or fitness for a particular purpose, whether express or implied, by law, course of dealing, course of performance, usage of trade or otherwise.