



THE CORPORATION OF THE CITY OF COURTENAY

## STAFF REPORT

**To:** Council

**File No.:** 4530-01

**From:** Chief Administrative Officer

**Date:** July 4, 2017

**Subject:** Estimated time and cost to undertake an Urban Forest Strategy

### PURPOSE:

The purpose of this report is to inform Council of the estimated time and cost associated with drafting an Urban Forest Strategy (UFS) and obtain direction to proceed with preparation of the strategy in response to the September 19, 2016 Council motion:

*“That Council direct staff to report back on the estimated time and cost of drafting an Urban Forest Strategy”.*

### CAO RECOMMENDATIONS:

That based on the July 4<sup>th</sup>, 2017 staff report “Estimated time and cost to undertake an Urban Forest Strategy”, Council support OPTION 1 and direct staff to proceed to issue a Request for Proposal (RFP) and implement an Urban Forest Strategy as described in the Request for Expression of Interest No.R16-34 document.

Respectfully submitted,

David Allen, BES, CLGEM, SCLGM  
Chief Administrative Officer

### BACKGROUND:

The feasibility of conducting an UFS was explored as a strategic urban forest management tool in conjunction with the recently adopted Tree Protection and Management Bylaw. A UFS is a tool that outlines the extent and general condition/composition of a community’s tree resources on private and public lands; identifies target locations for replanting; provides information to the public and Council on the value of the urban forest, including economic and green infrastructure value; can identify areas of wildfire risk and fire smart guidelines; and explicitly endeavours to engage the public and partner organizations in each contributing to the success of the urban forest.

In addition to standard items of an UFS, the following specific items that were raised during the tree bylaw consultation are anticipated to be addressed through the UFS project: creation of a heritage tree list, the establishment of a city-wide tree canopy target, and a better understanding of the distribution and rarity of coastal Douglas-fir trees as part of the rare Coastal Douglas-fir ecological Biogeoclimatic Zone.

In order to understand the estimated time and cost of conducting the project, staff solicited for Expression of Interests from vending providers to conduct an UFS in three distinct phases: Inventory; Community visioning and goal setting; and Action planning.

The information was posted on the City's website between January 9<sup>th</sup> to January 31<sup>st</sup> and the BC Bid website. Six submissions were received. The Expression of Interest document is available in **Attachment No. 1**.

#### **DISCUSSION:**

The submissions range in cost, estimated timeline, and methodologies to achieve the scope of work. These differences are due to the fact that some consultants focused on highly technical aspects of the work including more traditional arboriculture type assessments, while others emphasised their ability to deliver public consultation outcomes and their familiarity with Best Management Practice in this topic area. Time frames to completion ranged between 3 months and 1 year. The lowest cost estimate provided is \$47,000, while the highest cost estimate provided is \$210,000. However, majority of submissions ranged between \$60,000 and \$80,000.

Based on the information provided, staff believe that it is reasonable to budget \$75,000 for the completion of all three phases of the Urban Forest Strategy. Estimated timeline of project completion is to be finalized when an official contract is made. Staff anticipate that the Urban Forest Strategy to be completed within 12 months. Given staff demands and work plan priorities staff expect that the Urban Forest Strategy could be started later this summer (subject to consultant availability) which is a good time to conduct the ground-truthing inventory components of the work.

#### **FINANCIAL IMPLICATIONS:**

Based on the Expressions of Interest received, staff estimate that all phases of the Urban Forest Strategy as presented in **Attachment No. 1** can be conducted within a \$75,000 budget and with the support of dedicated staff members to assist in all public engagement activities. Sufficient consulting funds are available in the 2017 Development Services Department contracting planning budget.

#### **ADMINISTRATIVE IMPLICATIONS:**

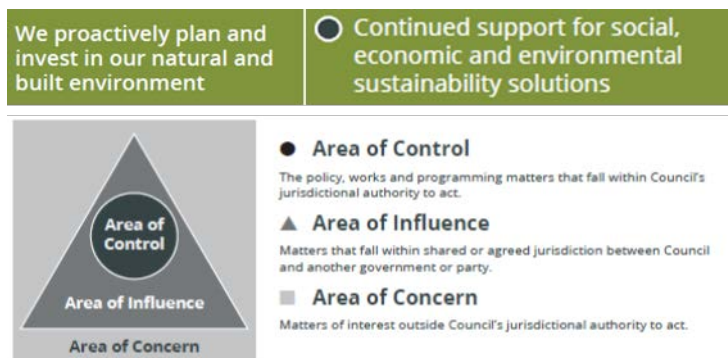
Approximately 12 hours of staff time have been dedicated to preparing the Expression of Interest document and reviewing the submissions. Should Council direct staff to conduct an Urban Forest Strategy, staff time will be required to administrate the Request for Proposal, manage the project including contract management and project initiation and closure. Additional planning staff capacity (policy planner) will assist in project implementation.

#### **ASSET MANAGEMENT IMPLICATIONS:**

There is no immediate asset management implications associated with the creation of an Urban Forest Strategy. However, subsequent action plan items may contain asset management implications, especially as they relate to the value of natural assets to secure sustainable service delivery. Details are unknown at this point.

#### **STRATEGIC PRIORITIES REFERENCE:**

Effective tree management and protection is consistent with Council's Strategic Priority theme "We proactively plan and invest in our Natural and built environment", and specifically "Continued support for social, economic and environmental sustainability solutions" (area of control).



#### OFFICIAL COMMUNITY PLAN REFERENCE:

The OCP contains numerous references to the objective of preserving trees and ensuring tree replanting as a mechanism of beautification, parks and boulevard development and environmental restoration. The following policies are included:

*"Review and update the tree management bylaw to protect wildlife habitat and undertake a tree planting program"* (page 13: the Vision chapter).

*"The City will increase the absorption opportunities for carbon throughout the municipality through the conservation and restoration of forested areas and stands of trees and other urban ecological systems throughout the municipality"* (page 145: the Planning for Climate Change chapter).

#### REGIONAL GROWTH STRATEGY REFERENCE:

The Regional Growth Strategy (RGS) also contains numerous references to the objective of preserving trees and ensuring tree replanting. For example:

Objective 2-B: *"Frame environmental protection and policies around the principles of precaution, connectivity and restoration .... where cost effective, consider the restoration or creation of natural systems to provide sustainable environmental services (e.g. stormwater ponds for improving water quality; tree cover for capturing carbon and reducing GHG emission)"* (page 36: RGS).

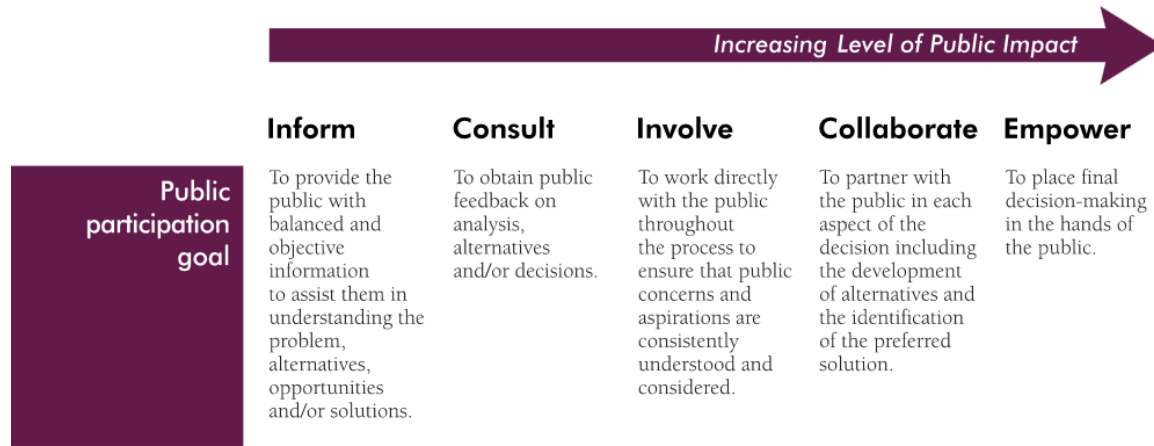
#### CITIZEN/PUBLIC ENGAGEMENT:

In the consultation of the recently adopted Tree Bylaw, staff **"involved"** the public and stakeholder organizations based on the IAP2 Spectrum of Public Participation, in the form of public open houses, an online questionnaire, input from the two key identified stakeholder organizations and dialogue through participation in the Select Committee established to discuss the Tree Bylaw.

One of the questions posed in the online questionnaire was whether respondents support the creation of an Urban Forest Strategy, to which 87% of respondents indicated support (number of respondents = 602). Both stakeholder organizations also submitted their support for an Urban Forest Strategy.

Should Council direct staff to conduct an Urban Forest Strategy, staff would again **"involve"** the public in creation of the strategy.

[http://c.ymcdn.com/sites/www.iap2.org/resource/resmgr/imported/IAP2%20Spectrum\\_vertical.pdf](http://c.ymcdn.com/sites/www.iap2.org/resource/resmgr/imported/IAP2%20Spectrum_vertical.pdf)



**OPTIONS:**

**OPTION 1:** That Council direct staff to conduct an Urban Forest Strategy as described in the Request for Expression of Interest No.R16-34 document (**Attachment No. 1**).

**OPTION 2:** That Council postpone consideration of the Urban Forest Strategy with a request for more information.

**OPTION 3:** That Council direct staff not to conduct an Urban Forest Strategy.

Prepared by:

Nancy Gothard, MCIP, RPP  
Environmental Planner

Approved by:

Ian Buck, MCIP, RPP  
Director of Development Services

**Attachments:**

1. Request for Expression of Interest No. R16-34 – Urban Forest Strategy

## **CITY OF COURTENAY**



REQUEST FOR EXPRESSION OF INTEREST NO. R16-34

## **URBAN FOREST STRATEGY**

**Closing Date: Tuesday January 31, 2017**

City of Courtenay  
830 Cliffe Avenue  
Courtenay, B.C. V9N 2J7  
Attn: Purchasing Division

## SECTION I TERMS OF REFERENCE

### Introduction

The City of Courtenay is seeking expressions of interest from qualified firms with expertise in urban forest inventory and strategy development to, develop an Urban Forest Strategy that establishes baseline information about the community's urban forest, and establishes guidelines and actions to preserve and enhance its urban forest. The RFEI is to gather high-level costs and timelines to conduct such an inventory and strategy, including the costs and timelines for individual sections in order to accommodate potential phasing of the project.

### Background

The City of Courtenay is in the process of reviewing its Tree Management and Protection Bylaw. In the course of the review it has been determined that more information about the community wide urban forest is of value. Courtenay City Council has directed staff to determine the estimated time and cost of drafting an urban forest strategy as described in the Deliverables below.

The City defines an Urban Forest Strategy as a tool that:

- outlines the extent and general condition/composition of a community's tree resources on private and public lands and identifies target locations for replanting;
- provides information to the public and Council on the value of the urban forest, including economic and green infrastructure value;
- identifies areas of wildfire risk and fire smart guidelines;
- provides guidance on corporate policies to support the urban forest on public lands, including a street tree inventory;
- provides guidance on the City's development related policies, guidelines and other regulations for incorporating trees as part of civil infrastructure;
- explicitly endeavours to engage the public and partner organizations in each contributing to the success of the urban forest.

Current information to date on the City's urban forest includes:

- High level canopy cover assessment based on aerial photo sampling techniques from 2012 air photos;
- Public street trees are inventoried in an excel sheet (location, size, species, frequency of maintenance, replacement, special comments). Another consultant is conducting a more detailed street tree inventory including management prescriptions and protocol.

### The Deliverables

#### Phase 1: Inventory

- a. Establish a high-level urban forest inventory of forest extent and condition based on aerial photos and supportive canopy cover analytical software programs as well as selective ground truthing locations.
  - i. Data to be stratified by watershed, land use and neighbourhood.
  - ii. Extent and condition of the rare variant of Coastal Douglas Fir to be included.

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- iii. Areas of concentration of protected species to be included (Garry oak, pacific dogwood, arbutus, western white pine, pacific yew, trembling aspen).

Phase 2: Community visioning and goal setting

- a. Develop, with community input, a vision for the urban forest for the City of Courtenay including a tree canopy cover target based on the information in Phase 1.
- b. Establish short (1-3 year), medium (3-10 year) and long-term (10 year and longer) strategic management objectives that include a monitoring plan with clear measurables, and which correspond with the City's leaf-on aerial photography cycles.

Phase 3: Action planning

- a. Conduct a review of current urban forest management practices in Courtenay and other municipalities in similar geographical locations including, but not limited to: documents, resources, priorities, successes, service gaps and capital program.
- b. Review and identify corporate policies to support the urban forest including level of service expectations, budgeting considerations and maintenance protocols.
- c. Develop a monitoring program for the Tree Management and Protection Bylaw to determine if it is contributing to community goals as defined in Phase 2.
- d. Identify the framework for a protected Heritage Tree program, to be included in the Tree Management and Protection Bylaw.
- e. Develop policies, bylaws and programs that are suitable for the community, environment and economy.
- f. Align the policies and guidelines in the current OCP and applicable bylaws as well as standards and guidelines
- g. Identify funding opportunities, financing methods, timeline (short-long term) and resource requirements for plan implementation.

An electronic version of your submission in .pdf format must be submitted to [purchasing@courtenay.ca](mailto:purchasing@courtenay.ca) no later than 2:00pm, Tuesday January 31, 2017. The email subject line must be marked R16-34 "Urban Forest Strategy."

Your submission must be signed by an authorized company representative and include his/her business card.

All inquiries shall be directed to:

Anthony Jeffery, Buyer  
City of Courtenay  
830 Cliffe Avenue  
Courtenay, BC V9N 2J7  
Email: [purchasing@courtenay.ca](mailto:purchasing@courtenay.ca)

## Project Background

The City was incorporated in 1915 with a population of 700 and has grown to include an area of over 3,200 hectares. As of March 18, 2013, Courtenay's population was 24,099 (2011 Census Canada) which makes it the largest municipality of the Comox Valley. Growth in the last three years has increased by 9.4%. The City of Courtenay has approximately 8,279 tax parcels in 2016. As a result of urban growth in the recent years, the City requires an effective management plan to better manage urban forest.

## Service Delivery Context

### Vision and Strategic Goals

The City's vision, as articulated in its Courtenay Strategic Priorities 2016 – 2018, provides that we:

- Actively pursue vibrant economic growth
- Proactively plan and invest in our natural and built environment
- Value multi-modal transportation in our community
- Support diversity in housing and reasoned land use planning
- Focus on organizational and governance excellence
- Invest in our key relationships

## Information Resources

The service delivery context is explained in further detail within local bylaws, policies, standards, legislative documents, application forms and service descriptions, most of which are available online at [www.courtenay.ca](http://www.courtenay.ca). Proponents are invited to become familiar with our website while preparing their submissions.

## Approach to Project Management and Effectiveness

1. Provide a description of the proponent's project management approach and team organization during all three phases of the project.
2. Describe systems used for planning, scheduling, estimating and managing design and construction services.
3. Describe the proponent's experience with quality assurance and control (QA/QC) of projects.
4. Describe the proponent's experience with dispute resolution.
5. Describe the proponent's experience in delivering services on time in a manner that suits the needs of the City.
6. Describe experiences or methods that confirm the quality and value of work.
7. Identify data availability and data needed from the City to undertake proposed task
8. Provide statement regarding your assurance that this engagement will not result in any conflicts of interest.

## Submission Format and Deliverables

Please include descriptions and references that support the proponent's capabilities in providing consulting services by covering the following categories in 15 pages or less, not including appended materials such as full project descriptions, resumes and legal documentation.



### *Cover Letter*

Cover letter (1-page) containing company name, contact name, address, phone number, fax number and email address are the minimum requirements, and which branch of the company the primary contact is located at.

### *General Information*

- Description of firm and sub-consultants (if any)
- Legal company organization
- List of applicable licenses

### *Relevant Experience*

- Firm's overall reputation, service capabilities and quality as it relates to this RFEI.
- A list of at least three projects undertaken for similar work.
- A minimum of three references from other municipalities. The references should be for the above listed projects.
- Firm's capacity and intent to proceed without delay to provide a detailed 2 hour demonstration/interview of capabilities if selected. State your availability and list your expectations, if any, of Courtenay for the provision of the demonstration/interview.

### *Core Team Experience and Qualifications*

- Describe each core team member's position within the firm. Provide resumes of each proposed core team member. List professional credentials and affiliations.
- Briefly describe each core team member's roles and responsibilities.
- Provide core team's experience working together on similar types of projects.
- Identify core team members' capacity (percent of time) available over the next year or that can be made available to service the City over the next year.
- Identify hourly rates for core team members.
- Identify proposed sub-consultants, if any.

### *Project Understanding and Approach*

- Describe the firm's understanding of this type of project work.
- Describe a typical Urban Forest Strategy project.
- Estimate project cost and duration for all phases.

### **Evaluation**

Respondents will be evaluated based on a variety of factors, with various weighting, as outlined in Table A below. Respondents' qualifications will be based in part on their track record, recent experience with providing local government with an Urban Forest Strategy, demonstrated ability to complete projects within an approved schedule and budget, as well as any other factors the City deems to be relevant to the project success.

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*Evaluation Criteria*

Table A

Evaluation Criteria	Wt.	Score Per Evaluation Criteria					Weighted Total
		Poor (.3)	Marg (.5)	Fair (.7)	Good (.9)	Exc. (1.0)	
Quality of Submission	15						
Relevant experience	20						
Project Understanding, Approach & Availability	20						
Team Qualifications	15						
References	10						

**Demonstration**

Upon request by the City, qualified proponents may be required to provide a demonstration and or interview of their capabilities. The demonstration(s) will be scored out of a weighted score of 20 points and the scores combined with the above scoring of the response to the RFEI will determine which, if any will be asked to negotiate a contract with the City.

**Agreement**

The successful proponent will be required to enter into a formal agreement with the City prior to their initial project assignment.

## SECTION II – INSTRUCTIONS TO PROPONENTS

### 1. Not a Tender Call

This RFEI is not a tender call, and the submission of any response to this RFEI does not create a tender process. This RFEI is not an invitation for an offer to contract, and it is not an offer to contract made by the City. Proposals will not be opened in public.

### 2. No Obligation to Proceed

a) Though the City fully intends at this time to proceed through the RFEI process in order to select the goods or services, the City is under no obligation to proceed to the purchase, or any other stage. The receipt by the City of any information (including any submissions, ideas, plans, drawings, models or other materials communicated or exhibited by any intended Proponent, or on its behalf) shall not impose any obligations on the City. There is no guarantee by the City, its officers, employees or agents, that the process initiated by the issuance of this RFEI will continue, or that this RFEI process or any RFEI process will result in a contract with the City for the purchase of the product, service or project.

b) The City reserves the right to accept or reject all or part of the proposal, however the City is not precluded from negotiating with the successful Proponent to modify its proposal to best suit the needs of the City.

c) The City reserves the right to reject, at the City's sole discretion, any or all proposals if the proposal is incomplete, obscure, irregular or unrealistic.

d) A proposal may be rejected on the basis of the Proponents past performance, financial capabilities, completion schedule and non-compliance with Federal, Provincial and Municipal legislation.

e) The City reserves the right to accept or reject a proposal where only one proposal is received.

### 3. Cost of Preparation

Any cost incurred by the Proponent in the preparation of the proposal will be solely at the expense of the Proponent.

### 4. Confidentiality and Freedom of Information and Protection of Privacy Act

The proposal should clearly identify any information that is considered to be confidential or proprietary information (the "Confidential Information"). However, the City is subject to the Freedom of Information and Protection of Privacy Act. As a result, while the Act offers some protection for third party business interests, the City can't guarantee that any Confidential Information provided to the City can be held in confidence if a request for access is made under the Freedom of Information and Protection of Privacy Act.

### 5. Sub-Contracting

Under no circumstances may the provision of goods or services, or any part thereof be sub-contracted, transferred, or assigned to another company, person, or other without the prior written approval of the City.

6. Limitation of Damages

The Proponent, by submitting a proposal, waives any claim for loss of profits if no contract is made with the Proponent. By submitting a response the Proponent agrees to all terms and conditions of this RFEI. Proponents who have obtained the RFEI electronically must not alter any portion of the document, with the exception of adding the information requested. To do so will invalidate the proposal. The Proponent is responsible to ensure that they have obtained and considered all information necessary to understand the requirements of the RFEI and to prepare and submit their proposal.

7. Cancellation of RFEI

The City reserves the right to cancel this RFEI at any time.

8. Accuracy of Information

The City makes no representation or warranty; either express or implied, with respect to the accuracy or completeness of any information contained or referred to in this RFEI.

9. Cancellation of Contract

The City reserves the right to terminate the Contract, at its sole and absolute discretion, on giving 30 days written notice to the successful Proponent of such termination and the successful Proponent will have no rights or claims against the City with respect to such termination. Cancellation would not, in any manner whatsoever, limit the City's right to bring action against the successful Proponent for damages for breach of contract.

10. Default

- a) The City may, by notice of default to the Contractor, terminate the whole or any part of this Contract if the Contractor fails to make delivery of the Services within the time specified, or to perform any other provisions of this Contract.
- b) In the event the City terminates this Contract in whole or in part as provided in clause 15(a), the City may procure goods or services similar to those so terminated, and the Contractor shall be liable to the City for any excess costs for such similar goods or services.
- c) The Contractor shall not be liable for any excess costs under clause 15(b) if failure to perform the Contract arises by reason of Force Majeure or acts of the City.

11. Misrepresentation or Solicitation

If any director, officer or employee or agent of a Proponent makes any representation or solicitation to any Councillor, officer, employee or agent of the City of Courtenay with respect to the RFEI, whether before or after the submission of the proposal, the City shall be entitled to reject or not accept the proposal.

12. Business License and Permits

The successful Proponent shall be responsible for acquiring and payment for all required licenses, permits and approvals from authorities having jurisdiction, for the performance of the work.

The successful Proponent shall be responsible to acquire and maintain a valid City of Courtenay or Inter-Community Business License for the term of the contract if the successful Proponent is to conduct work on City property.

13. Payment Terms

The successful Proponent shall invoice the City in an acceptable format and will be paid as per the City's standard payment terms, net 30 days from date of invoice.

14. Applicable Laws and Agreements

The laws of the Province of B.C. shall govern this request for proposal and any subsequent contract resulting from the proposal.

15. Insurance

As a minimum, the successful Proponent shall procure and maintain through the term of the Contract, at its own expense and cost, the following insurance policies:

- a) Professional Liability Insurance policy covering errors and omissions with coverage of not less than \$500,000 per claim and a minimum \$1,000,000 aggregate per year.
- b) Commercial General Liability Insurance in an inclusive amount of not less than \$2,000,000 for each occurrence or accident. Minimum coverage must include Personal Injury, Contractual Liability, Non-Owned Automobile Liability, Products/Completed Operations, Contingent Employers Liability, Cross Liability and Severability of Interest, City of Courtenay named as an additional insured and a 30 day written notice of insurance cancellation clause.
- c) Motor Vehicle Insurance including Bodily Injury and Property Damage in an inclusive amount of not less than \$2,000,000 per accident per licensed motor vehicle used to carry out the work.
- d) Proof of WorkSafe BC registration, including proof of up to date assessment payments in the form of a WorkSafe BC Certificate of Compliance letter.

16. Ownership of Material and Copyright

- a) Any drawings, audio-visual materials, plans, models, designs, specifications, software, reports and other similar documents or products produced by the Respondent for the benefit of the City as a result of the provision of the Services (the "Material") may be used by the City as part of its operations associated with the Materials provided.
- b) All Material shall be transferred and delivered by the Respondent to the City following the expiration or sooner termination of this Agreement, provided that the City may, at any time or times prior to the expiration or sooner termination of this Agreement, give written notice to the Respondent requesting delivery by the Respondent to the City of all or any part of the Material in which event the Respondent shall forthwith comply with such request. All materials created electronically must be provided in electronic format, in a format and in a medium acceptable to the City.
- c) The Respondent agrees that the City will own all of the Material and the Respondent irrevocably assigns to the City all of the Respondent's title in the Material. The Respondent retains ownership of the "Embedded IP". The Material does not include intellectual property or confidential information that is proprietary to the Respondent and (a) used by the Respondent to prepare, produce or supply the Material, or (b) that is otherwise embedded within the Material ("Embedded IP").
- d) The Respondent hereby represents and warrants that any portion of the Material produced by the Respondent will not infringe any patent or copyright or any other industrial or intellectual property rights including trade secrets.