

Request for Proposals (RFP):

COMMUNITY FORESTRY EDUCATION, AND OUTREACH

Village of Athens, New York

I. INTRODUCTION AND PROJECT OVERVIEW

The Village of Athens, New York (hereinafter the “Village”) is issuing this Request for Proposal (RFP) to select a qualified educational consultant, training group, or forestry educator to deliver a comprehensive public engagement and professional development curriculum. This work is funded by a 2024 Community Forestry Management Plan Implementation Grant from the New York State Department of Environmental Conservation (NYS DEC).

The goal of this contract is to engage Village residents in the long-term stewardship of our community forest, assist municipal stakeholders in navigating resident feedback regarding public street trees, and provide high-quality safety and skills workshops to Village DPW staff, officials, and the public. Community inclusion, transparency, and accessible safety education are the core priorities for this contract.

Please note that this grant project has been divided into distinct Request for Proposal sections: (1) Tree and Stump Removal, (2) Tree Inventory, (3) Training, Education, and Outreach, and (4) Tree Procurement, Planting, & Pruning. This RFP governs **strictly** the educational and community engagement component.

II. ADMINISTRATIVE INSTRUCTIONS & TIMELINE

- **RFP Release Date:** August 3, 2026
- **Pre-Proposal Meeting:** Thursday, August 13, 2026, at 6:30 PM (Village Clerk's Office)
- **Submission Deadline:** September 3, 2026, at 12:00 PM
- **Proposal Opening:** September 3, 2026, at 12:00 PM
- **Contract Award Date:** September 14, 2026
- **Work Plan & Kickoff Meeting:** Within 45 days of a signed contract.

CONTRACT DELIVERY TIMELINE:

Educational milestones are strategically timed around public notification cycles and seasonal field conditions in Zone 5:

1. **Public Outreach Block (Fall 2026 – Winter 2027):** Execution of community engagement meetings to explain upcoming removal phases, upcoming street tree selections, and capture resident inputs.
2. **Technical Training Block (Spring 2027 – Summer 2027):** Delivery of staff and public technical workshops (planting, safety, young tree training, natural pruning system). All

final educational deliverables, evaluations, and a contract summary report must be submitted no later than **August 31, 2027**.

III. QUALIFICATIONS & SUBMITTAL REQUIREMENTS

Proposers must submit a complete response containing the following items. Failure to include mandatory submittals will result in disqualification.

1. **Non-Collusive Bidding Certification:** Mandatory (Execute using the standard Village template).
2. **Consultant Qualifications (Arborist Certification NOT Required):** While an ISA Certified Arborist credential is a preferred asset for technical accuracy, it is **not mandatory** for this contract. Bidders will be evaluated primarily on their demonstrated capability to design adult education curricula, lead public panels, and teach practical urban forestry skills. Proposers must submit resumes detailing backgrounds in environmental education, arboricultural training, natural resource management, or public relations. Local availability within Greene County will be heavily weighted.
3. **Financial Compliance & Stability Documentation:** Bidders must provide proof of financial compliance and structural stability. In lieu of a formal audited financial statement, a bidder may submit a formal letter from a Certified Public Accountant (CPA) certifying that the business or individual structure is in full compliance with state and federal tax laws, and that all current state and federal tax obligations and returns have been fully met and are completely up to date.
4. **Sample Training Outline:** Provide a brief syllabus or sample lesson plan for at least two of the core technical workshop modules specified in Section IV.

IV. SCOPE OF WORK & TECHNICAL SPECIFICATIONS

1. Public Outreach & Community Engagement Meetings (2 Meetings Minimum)

The Consultant will facilitate a minimum of two (2) interactive public outreach panels to engage Village residents in the decision-making process of maintaining and growing the community forest.

- **Meeting 1 (Invasive / Removal Facilitation):** To be scheduled concurrently with the launch of the removal contract. The trainer will educate the public on the ecological threats of targeted invasive tree species and the critical safety parameters governing high-priority hazard removals.
- **Meeting 2 (Reforestation & Homeowner Choices):** To be held prior to the Spring 2027 planting cycle. The Consultant will present the upcoming "Right Tree, Right Place" planting strategy. The trainer will explain why specific native species are chosen for specific rights-of-way (e.g., small canopy trees under overhead wires vs. large shade trees in open parks).
- **Homeowner Consideration Feedback Loop:** While final authorization regarding public right-of-way tree selections rests strictly with the Village Board and its consulting arborist, the Consultant is responsible for collecting, documenting, and structuring resident feedback (such as species preferences, space restrictions, or property

constraints) from these hearings. This data must be compiled into a standardized format and provided to the Village's separate Tree Inventory contractor to be embedded into the master planting database.

2. Staff and Public Technical Training Workshops (Up to 12 Sessions)

The Consultant will design, schedule, and deliver up to twelve (12) structured training workshops. These sessions will be split between specialized professional development for Village DPW field staff and open-enrollment sessions for interested community members.

- **Core DPW Staff Competencies (Initial Skills Assessment Required):** Initial sessions must baseline current DPW field skills. Curricula must cover:
 - *Chainsaw Safety, PPE, and Maintenance:* Safe operational fields, proper personal protective equipment configurations, reactive forces (kickback mitigation), and field felling/bore-cutting demonstrations.
 - *Young Tree Training and Pruning:* Correct structural pruning techniques on young trees to select a strong central leader and clear clearance boundaries.
 - *Mature Tree Pruning:* Natural Pruning System and three part cuts to reduce tree wounds and disease, and preserve structural stability.
- **Public & Mixed Enrollment Sessions:** A minimum of four (4) workshops must be designed for broad community participation. Curricula must cover:
 - *Proper Tree Planting and Establishment:* Hands-on demonstrations of bare-root and ball-and-burlap planting, identifying the true root flare depth, proper mulching techniques, and critical early watering intervals.
 - *Tree Biology, Disease, and Basic Defect Identification:* Accessible field walks teaching local tree identification, spotting common insect pests/pathogens, and understanding basic visual risk trees.

V. MEASUREMENT, PAYMENT, & LEGAL

1. Quarterly Progress Payment Structure

Payments under this contract shall be disbursed strictly on a **Quarterly Progress Basis** throughout the grant lifecycle. Disbursements are completely conditional upon the review, verification, and formal approval by the Village Representative of the following mandatory contract submittals:

- **Detailed Quarterly Status Reports:** The Consultant must submit a narrative status report outlining the specific educational components executed during the billing quarter (e.g., workshops conducted, attendance counts, copies of sign-in sheets, instructional materials distributed, and public meeting feedback summaries compiled).
- **Itemized Invoiced Hours:** Invoices must present an explicit, itemized breakdown of logged hours worked, categorized by instructor/personnel title, direct public contact hours, prep and material design time, and administrative coordination.
- **Pro-Rata Balance Safeguard & Not-to-Exceed Ceiling:** Total quarterly billings shall not exceed the proportional percentage of educational milestones achieved against the maximum contract cap established in Exhibit F. The Contractor explicitly agrees that the

"Total Maximum Contract Ceiling Cost" designated in Exhibit F represents the absolute maximum financial obligation of the Village. The Village will withhold a 10% retainage from each quarterly progress payment, to be released upon successful completion of the final workshop and the delivery of the Final Training Summary Report.

2. Prevailing Wage Obligations

This educational consulting contract constitutes a public work project under New York State Labor Law Article 8 to the extent that it involves field-based technical demonstrations, hands-on tool applications, and operational training. Certified payroll sheets must be submitted monthly if applicable to the instructor's field classifications. It is strictly incumbent on the bidder to review NYS DOL schedules and properly assign correct prevailing wage titles, classifications, and rates based on the precise technical qualifications and operational duties of the specific individuals leading the field training blocks.

LIST OF ATTACHMENTS

- **EXHIBIT A:** Non-Collusive Bidding Certification
- **EXHIBIT B:** Statement of Competency and Professional Portfolio
- **EXHIBIT C:** NYS Department of Labor Certificate of Registration
- **EXHIBIT D:** Insurance Requirements
- **EXHIBIT E:** Technical Specifications (Inventory Standards & Workshop Curriculum)
- **EXHIBIT F:** Schedule of Unit Prices (Bid Form)

EXHIBIT B: STATEMENT OF COMPETENCY AND PROFESSIONAL PORTFOLIO

To be completed by the Proposer

1. CONSULTANT INFORMATION

- Legal Name of Firm/Consultant: _____
- Lead Project Manager Name: _____
- ISA Certified Arborist Number: _____
- Other Certifications (TRAQ, BCMA, etc.): _____

2. RELEVANT MUNICIPAL EXPERIENCE

List three (3) municipal clients for whom you have provided Tree Inventory or Forestry Education services in the last seven (7) years.

- | | |
|------------------------|-------------------------|
| 1. Municipality: _____ | Service Provided: _____ |
| 2. Municipality: _____ | Service Provided: _____ |
| 3. Municipality: _____ | Service Provided: _____ |

3. TECHNICAL CAPABILITIES

- Inventory Software: Describe the software/platform you will use to collect and deliver data (e.g., TreePlotter, ArcGIS, etc.):

- GPS Accuracy: Specify the GPS hardware/accuracy level used:

- Workshop Samples: ☐ Attached (Provide a sample syllabus or outline for a past workshop).

4. FINANCIAL DISCLOSURES

- Audited Financial Statement: ☐ Attached
- Has the firm ever defaulted on a contract? ☐ No ☐ Yes
- Are there any pending lawsuits against the firm? ☐ No ☐ Yes

EXHIBIT C: NYS DOL CERTIFICATE OF REGISTRATION

Instructions for the Proposer

Pursuant to NYS Labor Law §220-i, all contractors and consultants performing work on a public work project must be registered with the New York State Department of Labor. This applies to the field-work portion of the Tree Inventory.

A valid copy of the "Certificate of Registration" issued by the NYS Commissioner of Labor must be attached to this page.

CONSULTANT DECLARATION:

The undersigned hereby certifies that the bidding entity is currently registered with the NYS Department of Labor and that such registration is active and in good standing. We further certify that all staff or subcontractors utilized for field data collection will be covered under this registration or hold their own in accordance with state law.

Company Name: _____

NYS DOL Registration Number: _____

Authorized Signature: _____ Date: _____

EXHIBIT D: Insurance Requirements

VILLAGE OF ATHENS

TREE WORK RFP INSURANCE REQUIREMENTS

MARCH 2026

Proof of Workers' Compensation coverage for all individuals working on the project

General Liability in the amount of \$1,500,000 per individual and \$3,000,000 aggregate

Automobile Liability in the amount of \$1,500,000 per individual and \$3,000,000 aggregate

EXHIBIT E: TECHNICAL SPECIFICATIONS

1. OBJECTIVE AND STANDARDS

The purpose of this contract is to deliver safe, professional-grade arboricultural training and community education that aligns with the current science-based practices recognized by the New York State Department of Environmental Conservation (NYS DEC).

- All instruction regarding tree maintenance, tree biology, and safety parameters must conform structurally to the ANSI A300 performance standards for tree care operations and the ANSI Z133 safety requirements for arboricultural operations.

2. PUBLIC OUTREACH & COMMUNITY ENGAGEMENT PANEL SPECIFICATIONS

The Consultant shall facilitate interactive, structured public panels. Each meeting format must include a designated presentation segment, a question-and-answer period, and a formal mechanism to log community input.

- Meeting 1: Risk Mitigation and Invasive Species Management
 - *Timing:* Fall 2026 (coordinated with the launch of municipal tree removals).
 - *Technical Focus:* Educating the public on why structural hazard trees pose liabilities, explaining the environmental degradation caused by local invasive tree species (e.g., Callery pear, Norway maple), and outlining how removing these specimens protects the broader Village canopy ecosystem.
- Meeting 2: Community Reforestation and "Right Tree, Right Place" Principles
 - *Timing:* Winter/Early Spring 2027 (prior to the Procurement and Planting RFP release).
 - *Technical Focus:* Explaining urban canopy diversity goals, soil and growing space constraints, and avoiding structural conflicts (e.g., planting compact, low-maturing species under overhead utility corridors and high-canopy shade trees in open public parks).
- The Homeowner Choice & Consideration Log:

- While the final authority on tree locations and species lists rests strictly with the Village and its consulting arborist, the Consultant is responsible for providing a structured format for residents to state local considerations or constraints during or following these panels.
- The Consultant must compile these preferences into a standardized Homeowner Consideration Index (Excel or CSV format) containing: *Property Address, Resident Input Type (e.g., specific species preference, allergy concern, structural constraint), and Consultant Recommendation*. This completed index must be delivered directly to the Village's separate *Tree Inventory Contractor* to be hard-coded into the master planting site GIS layer.

3. STAFF AND PUBLIC TECHNICAL WORKSHOP CURRICULUM

The Consultant shall provide a total of up to twelve (12) technical training workshops.

A. Municipal DPW Field Staff Modules (Skills Assessment & Safety Focus)

The training lifecycle for municipal staff must begin with an Initial Skills Assessment to evaluate current DPW competencies regarding tool configurations and field techniques. Curricula for staff work must include:

1. Chainsaw Safety, Personal Protective Equipment (PPE), and Maintenance:
 - Mandatory review of required OSHA and ANSI Z133 PPE (chaps, eye/hearing protection, hard hats, safety footwear).
 - Hands-on training covering chain filing, tool tensioning, safety features, fuel/oil mixtures, and pre-operational safety checklists.
2. Reactive Forces and Precision Cutting Techniques:
 - Detailed instruction on identifying and mitigating operational reactive forces (kickback, pull-in, push-back).
 - Mandatory field-based demonstration and hands-on practice of precision felling principles, focusing on directional targets, establishing a proper open-face or conventional hinge, and executing bore-cutting (open-face felling with a bypass/holding wood) safely.
3. Young Tree Structural Pruning:
 - Classroom and field exercises explaining the long-term economic and safety benefits of early structural intervention.

- Hands-on training for identifying and establishing a dominant central leader, correcting co-dominant stems, removing structural defects (crossing or included-bark branches), and establishing permanent municipal clearance boundaries over streets (14 feet) and sidewalks (8 feet).
4. Mature Tree Pruning and the Natural Pruning System:
- Classroom and field exercises explaining the Natural Pruning System and its benefits for minimizing wounds, preventing disease, and preserving structural health.
 - Hands-on training on identifying the branch collar, cutting outside the branch bark ridge, and making three part cuts for heavy branches.

B. Public and Mixed-Enrollment Modules

A minimum of four (4) workshops must be designed and promoted for broad public and community volunteer participation to support local stewardship:

1. Proper Tree Planting and Establishment Standards:
- Hands-on field planting demonstration showing the structural differences between bare-root, containerized, and ball-and-burlap (B&B) nursery stock.
 - Critical focus on locating the true root flare before planting, digging a proper wide-bottom structural planting hole, removing twine/burlap/wire baskets to prevent future root girdling, proper structural backfilling (prohibiting artificial amendments), creating woodchip mulch zones (explaining the dangers of "mulch volcanoes"), and setting baseline structural watering intervals for Hardiness Zone 5.
2. Tree Identification, Basic Biology, and Pest/Pathogen Monitoring:
- Public field walks instructing attendees on standard local tree identification utilizing bark textures, winter buds, leaf arrangement patterns, and branching systems.
 - Basic visual indicators for tree stress, identifying structural decay or cavities, and recognizing regional insect pests and pathogens (e.g., Emerald Ash Borer, Spotted Lanternfly, Oak Wilt) affecting Greene County urban canopies.

EXHIBIT F: SCHEDULE OF INSTRUCTIONAL ESTIMATES & RATES

To be completed and submitted by the Proposer. Rates shall be used as the auditing framework for hourly billing invoices and total project caps. Unit fields include all labor, instructional material printing, safety demonstration gear, travel, and insurance incidentals.

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closeout reporting)				
TOTAL MAXIMUM CONTRACT CEILING COST				\$ _____

PROPOSER HOURLY RATE SCHEDULE

(To be utilized for invoicing validation alongside Quarterly Status Reports)

- Lead Educational Consultant / Instructor Rate: \$ _____ / \text{Hour}\$
- Assistant Instructor / Public Meeting Facilitator Rate: \$ _____ / \text{Hour}\$

Dated this _____ day of _____, 2026

Respectfully submitted by:

Company/Educator Name: _____

Authorized Signature: _____

Printed Name & Title: _____