

Jacksonville Tree Commission Workshop

Thursday, April 28, 2022 – 9:30 AM

Approved May 18, 2022

Via Zoom Platform & In Person

Commissioners Present: Mike Robinson
John Pappas
Susan Fraser
Rhodes Robinson

Staff: Cindy Chism

Public: Mike Zaffaroni, Liberty Landscape
Tracey Arpen, Greenscape/Scenic Jax
Fred Pope, COJ
John November, Public Trust
Dave McDaniel, COJ

Advisors: Susan Grandin, OGC
Dalton Smith, Urban Forest
Justin Gearhart, City Arborist

1. Call to Order – Chair

2. Roll Call– Cindy Chism

3. Level 3 Document Revision – Susan Grandin & Fred Pope

- a) Ms. Grandin pointed out this is an example of how 2 different people come up with different things for the same topic. What Mr. Pope did (Attachment B) is basically what was discussed, it was just organized differently in Attachment A. Both Attachments remove the stipend.
- b) Ms. Grandin asked if anyone had a red line copy of the suggested changes from the last meeting. Mr. November had one and will send it to Alice Checorski for printing. This copy has blue file name at the top hereafter referred to as Attachment A.
- c) Mr. Pope said he is also providing a red-line document with the suggested changes from the last meeting. This copy has red file name at the top hereafter referred to as Attachment B.
- d) Mr. Pope continued at the last meeting the Scope Plan would be provided by the Applicant with no fees and from the Conceptual Plan forward is reimbursable. On page 2 of Attachment B, Application Process. There are now 2 phases, the Pre-Application Phase, and the Application Phase. The Pre-Application Phase is only creating the scope of work and establishing the location of the project.
- e) In the Pre-Application Phase, I. on page 3, a description of what is included in the Project Scope submittal.
 - i. The Applicant identifies the project team, who will be doing the administrative project management and design services work and their qualifications.
 - ii. Then the site is identified and the public agency which owns the property is contacted.
 - iii. Once the site is selected, then a base map is using the City's GIS aerial with sufficient detail to identify all the proposed improvements on the site. Based on this sheet, the Project Scope Plan (bubble diagram) is developed. At this stage, a very basic estimate of how many trees they could plant and perhaps what type.
 - iv. Then the Applicant meets with the public agency representative at the site to determine tree placement. Photographs are taken and site limitations are noted. The Landscape Architect will draw the bubble diagram using the field notes.

- v. The Project Scope plan is then submitted to Staff for review at the Scope Meeting. Staff will prepare a written summary for the Applicant within 10 business days.
 - vi. What also should be included here, and I missed, a preliminary cost estimate of their fees and a rough estimate of construction so Staff can determine if the costs are inline, e.g., if it's a very small project with a very high estimated fee, Staff would recommend a re-estimation the fees. Mr. November pointed out Ms. Grandin's version, Attachment A, spells all of that out. Mr. November also pointed out in the Project Scope Review Meeting I.A.(6).a says the design consultant shall also attend, shouldn't that be Landscape Architect? Mr. Pope agreed, yes it should say Landscape Architect.
 - vii. Ms. Fraser asked if the Applicant's written description, page 3, I.A.(5).c, is going to be used to judge a good project versus a less good project perhaps an additional criteria could be added, does it have environmental value. That will include flood plain projects or mitigation projects, those invisible projects that have a lot of other value, which we hope to see. Mr. M. Robinson asked if it should be an additional item. Ms. Fraser agreed.
 - viii. Mr. Arpen suggested 2) should be a subset of 1). Perhaps it would be better to describe how the project would benefit the neighborhood, Council District or City, for example 1., 2., 3. Mr. R. Robinson pointed out the Commission's mandate is to plant trees, why should the Applicant need to justify it further. Ms. Grandin added, subsets may not be needed, these are points to consider for the Applicants to think about when submitting.
 - ix. Ms. Fraser asked if anywhere in the Pre-Application process are the Applicant's encouraged to meet with their Council Person? Mr. Pope replied there is no restriction it just seems better to meet with the Council Person will more specific information such as suggested location at least so you know which Council Member to speak with. Mr. November added it's also nice to have Urban Forestry and public agency's approval first.
 - x. Ms. Fraser asked about the written summary of the Project Scope meeting. Wouldn't it also be approving the design professional and the project management team proposed? Mr. Pope agreed, that should be listed; the written summary would include approval of the project scope, the design professional, management team, preliminary cost estimate request additional information or revisions or recommend the selection of another project if issues with the proposed project are not easily resolved. Ms. Grandin asked if page 3, I.A.(6)b. in Attachment A is where Ms. Fraser was suggesting these changes be made.
- e) Mr. November suggested the reimbursement clock start after the Project Scope Review Meeting. Staff is requesting more information or asking for additional steps to prepare for the Conceptual Plan. The Tree Commission and MBRC will have a reasonableness analysis to determine if what was done was reasonable or inflated.
 - f) Ms. Grandin pointed out in Attachment A on page 1 under If an Application is approved, the first sentence, "the work beginning with Pre-Application/Design Phase, Step 2 (Conceptual Design), will be reimbursed." Mr. November suggested after the Project Scope Review Meeting, the time required for preparation of the Conceptual Planting Plan be when the reimbursement clock begins. The non-profit and their Landscape Architect would get paid for the preparation of the Conceptual Design Plan if the project was approved.
 - g) Ms. Fraser suggested, when the Staff prepares the written summary approving or approving with conditions, Staff can assign the resolution of the condition to the Applicant, and then the reimbursement clock would begin, or Staff can resolve the issue themselves and the

reimbursement clock begins at the Conceptual Design meeting. So, if there are conditions to the approval, Staff will assign resolution of the conditions.

- h) Mr. November suggested “All work performed by the Applicant following receipt of Staff’s written report will be eligible for reimbursement if the project is granted final approval.”
- i) Ms. Fraser suggested a condition could be the Applicant does or does not have another Project Scope Review meeting to demonstrate the issue which Staff felt was large enough to stop the project, was resolved. Or Staff may decide the issue can be resolved in the next phase therefore you do not have to have another Project Scope Review Meeting.
- j) Ms. Grandin agreed. Attachment A, page 3, I.A.(6)b. must include language which says the written summary is either going to approve or approve with conditions or denial. If denial, the Applicant is entitled to bring the project to the Tree Commission for final approval. Staff does not have final denial.
- k) Perhaps in the Scope Plan on page 3 of Attachment B, I.A.(5) is a list of what is a complete Project Scope Plan. Ms. Fraser suggested generating a checklist which is very specific of what is required and would also make it easier for Staff to determine if the Application is complete. Mr. Pope and Mr. November will design the checklist using Attachment A I.A.(2) and (3) as well as Attachment B I.A.(4) and (5).
- l) Ms. Grandin will update Attachment A, page 3 I.A.(5) to reflect the Rough Order of Magnitude cost submission is for the professional fees, administrative fees as well as the construction and maintenance costs.
- m) Attachment A, page 3 – I.B.(1)a. – Mr. Pope suggested adding “the recommendations from City Staff and owner’s representative resulting from the Project Scope Review Meeting.” Ms. Fraser asked if Staff could approve with conditions which require the Applicant to come back for another Project Scope Review meeting to demonstrate the condition has been resolved. Mr. November suggested the issue be resolved at the Conceptual meeting if the Application is complete. Mr. Pope recommended if Staff does not feel the project should be approved unless the conditions are resolved, then the Applicant can go forward to the Tree Commission. Ms. Grandin will add it to Attachment A as I.A.(7).
- n) Mr. Pappas summed up if the Applicant appeals the Staff recommendation, it is still “above the line” and Tree Commission would assess the project “above the line” and then if Tree Commission overrules Staff, then the Applicant would move “below the line.” Ms. Grandin asked if we were setting up an appeal process. Mr. November said if the project is denied, then the Applicant comes to the Tree Commission. Ms. Grandin responded, that is an appeal, currently it is not defined at this stage. Mr. McDaniel suggested we write this in. It was agreed this was a good idea.
- o) Ms. Grandin will add to Attachment A as I.A.(7)b. approval with conditions or denial. Then there will be a (7)c. if it’s a denial then the decision is appealable to the Tree Commission. There is no appeal from the Tree Commission to MBRC.
- p) Mr. Arpen pointed out that Ms. McGovern’s latest project, District 5 Tree Planting, did not include a schematic drawing. Perhaps Staff could have the option of eliminating a schematic design if a project is small enough. If it isn’t necessary for City Staff to submit a schematic drawing why are we requiring of non-profits. Mr. Pope pointed out for a consultant it shouldn’t be a problem. Mr. Arpen pointed out if a project was in Kerry State Forest, an urban forestry planting, how would you even do a schematic. It’s a misuse of Tree Fund money to have to pay a Landscape Architect to do a schematic when one isn’t really required. A Landscape Architect will be involved throughout the process, there should be some trust they know what they are

doing. For a simple project why can't staff say no schematic is required because the conditions are such that precise planting locations are not necessary, we can tell from the Conceptual aerial photographs it will not be an issue.

- q) Mr. McDaniel pointed out the District 5 project Mr. Arpen referenced was a Level 2 Project. Mr. Arpen said the only difference between a Level 2 and a Level 3 is the Level 3s is brought by a non-profit, a Level 2 is brought by Staff. The big distinction is there is more burden on the non-profits than on Staff in terms of schematic plans and so forth.
- r) Mr. M. Robinson responded, from the Project Scope Review meeting, Staff could in their recommendation Staff could say a schematic plan is not required to show the 6 trees being planted in the middle of Camp Milton Park. To scale drawings are not required showing bare root long leaf pine is being planted every 10 feet on a 100-acre plot.
- s) Ms. Fraser said in the end a construction plan is required, turn it in as the schematic and turn it in as the construction plan. There are projects which are put stakes in the ground, plant the tree and move on and there are projects which are Emerald Trail going through downtown Jacksonville and where every fire hydrant must be mapped.
- t) Mr. November suggested the schematic could be waived solely at Staffs discretion. The Applicant can request it, if the Staff denies the request, there is no appeal.
- u) Ms. Grandin reminded the attendees this document was not an ordinance, just instructions on the Application process. There really shouldn't be a Level 3 project submitted which is only for 6 trees. The construction documents are not required until the Applicant has a contract with the City because the Applicant must hire, maybe, a Landscape Architect to do the drawings then that becomes what is bid out. It depends on how much the project costs because of CCNA.
- v) Mr. McDaniel pointed out that a Level 3 Project should be very complex otherwise it should be a Level 2. There is no reason not to give Staff the discretion to waive a schematic plan as appropriate. Mr. Pope suggested going into detail with the Conceptual plan by adding the requirement for the drawing to be to scale. Mr. Arpen said, except Staff may have issues which need to be resolved. It would be a shame for the non-profit to have paid for a Schematic plan if there were fundamental issues. Conceptual plan shouldn't be too difficult, it doesn't seem to be a burden but if it is eliminated, that would cause some problems.
- w) Ms. Fraser said what is being discussed is do we have Concept, Schematic and Construction or do we have Schematic and Construction. It seems like whatever you have in the beginning Staff can determine if it's Concept and Schematic. Staff can decide based on information submitted whether another step in the middle is necessary. It would allow Applicants to turn in more information if they had it and based on that information being sufficient, the Schematic plan may be omitted.
- x) Ms. Grandin pointed out the change to Attachment A, page 4, I.B.(2) Conceptual Design submission is due no later than 90 business days after the project scope is approved. This is a change from the original 30 days.
- y) Ms. Grandin directed everyone's attention to Attachment A, page 5, I.C.(4) and the (4) after the OR. These (4)s give the option to the Commission to decide if they don't want the Applicant to bid out the project and following the guidelines required by CCNA then select the second (4) after OR but if the Commission wants to have the option for projects of any size, then the Commission should select the first (4) and remove the (4) after the OR.
- z) Mr. November asked if she was sure CCNA applied? That is if a project is projected to cost over \$325,000 or \$35,000 in design fees, then CCNA comes into play. Mr. McDaniel pointed out that

defeats the purpose, the purpose of the Level 3 Project is to get trees in the ground while alleviating the burden on City Staff. Mr. Pope suggested limiting the Level 3 Program to \$300,000 and \$35,000 professional fees, to avoid CCNA being triggered. If there are no limits and CCNA is triggered, the Landscape Architect who drew the initial plans may not be chosen as the Landscape Architect for the project.

- aa) Ms. Fraser pointed out they would know that from the beginning. Mr. November suggested not limiting it, there may be a project we want going forward. Mr. McDaniel said on Gold Star Hwy Project, Prosser was paid \$30,000 to design half-a mile, which cost \$450,000, over 200 4" and 5" trees.
- bb) Mr. McDaniel asked who would oversee the bidding process, would it have to follow the same rules as the City bids, stay on the street 30 days, etc. Ms. Fraser asked how a non-profit would put together a bid. They don't know how to legally put together a CCNA bid. Mr. Pappas said the way it's been done in the past is a disbursement agreement which goes through Council which sends the funds to a company who would put the bid together. That company would have City Procurement review it before advertising. The oversight would be done by City Staff. Mr. Smith pointed out that this is then going to put more burden on Staff, which again defeats the purpose of the Level 3 Program.
- cc) Mr. Pope pointed out that Consultants can not be selected by price, only qualifications. Therefore, competitive bid process will not work. Mr. Pappas suggested verifying the requirements with Mr. Pease from Procurement. Mr. November pointed out many times the Landscape Architect will also be the Project Manager. Ms. Grandin added those are 2 separate fees which would be added together. Mr. McDaniel suggested Ms. Grandin speak with Bill Joyce from Public Works first and then Greg Pease from Procurement before continuing the discussion. The goal is to plant trees with a Level 3 Professional which is taking on the work, but if City Staff must do RFPs and grade proposals, that's wasting tree fund money, we'll just eliminate the middleman and plant them ourselves. This item is deferred until more information is gathered.
- dd) Mr. November suggested a change to Attachment A, page 8, Exhibit D b.ii.2. should say final approve of the design from Tree Commission Staff.
- ee) Mr. Arpen asked about Homeowner's Associations, noted on Attachment A, page 9, Exhibit E b. Because homeowner's associations are not always long term, most dependent on voluntarily pay memberships, without a dedicated board, they may be there when the project begins and gone when it's finished. There is no requirement for Homeowner's Associations to even be incorporated, unlike the 503(c). Mr. McDaniel agrees, if a Homeowner's Association requests a Level 3 project, Staff will do their best to convince them to select a Level 2 instead. Mr. Arpen replied, if the Homeowner's Association was mandatory, everyone was required to join and pay dues, there would be at least a level of management. Mr. Pope pointed out the Level 3 Project could be a 3 year commitment. The consensus was to remove Exhibit E b.1. Homeowner's Associations.
- ff) Mr. November suggested the Application Deadline be changed to 45 business days vice 30 business days (Attachment A, page 10, last line). Mr. McDaniel agreed. Mr. Arpen pointed out the non-profits know when then planting season is and should be able to backtrack the process to start the project early enough to hit the planting season.
- gg) A checklist was suggested for what is required for an initial submission and a list with number of days for each step.

hh) Ms. Grandin suggested the workshop attendees continue their review of the last 4 pages of Attachment A and email Ms. Chism with any questions or suggestions.

4. **Adjournment** – the next Tree Commission meeting is scheduled for May 18th, 2022 at 9:30am and will be a Hybrid/Zoom meeting in Ed Ball Building, 10th Floor, Public Works Office, conference room 5.

JACKSONVILLE TREE COMMISSION LEVEL 3 TREE PLANTING PROGRAM

APPLICATION INSTRUCTIONS and PROCESS GUIDE

WHAT IS THE LEVEL 3 TREE PLANTING PROGRAM?

The Tree Commission, established by Section 94.106 *Ordinance Code*, is a City advisory body to the City Council, Mayor's Office, City staff, and community stakeholders, whose task is to develop policies and programs that encourage the preservation and restoration of the City's tree canopy.

The Level 3 Tree Planting Program (the "Program") was created by the Tree Commission as a way for the City to partner with and provide funding to a local community or not-for-profit organization to implement a tree planting project on publicly owned land within Duval County.

An organization interested in obtaining funding for such a project must complete a Level 3 Tree Planting Program application which describes the project and the amount of funds requested. The Tree Commission will review each tree planting application and then make recommendation to the Mayor's Budget Review Committee regarding approval of the project based upon the information submitted.

If a project is approved, an Agreement is entered into between the Applicant and the City of Jacksonville, which establishes the scope of the project and funding provided by the City.

FUNDING

Funding for an approved Project comes from the Tree Protection and Related Expenses Trust Fund (the "Tree Fund"), as authorized by Sec.111.760, *Ordinance Code*, and Sec. 25.04, *City Charter*. Funds deposited in the Tree Fund must be spent on the installation and maintenance of trees on public lands in Duval County.

WHO MAY APPLY FOR PROGRAM FUNDING?

1. Eligible 501(c)(3) Not-for-profit Organizations.
2. Local Community Organizations.
3. Other units of local governments operating in Duval County.

IF AN APPLICATION IS APPROVED, HOW IS FUNDING PROVIDED?

If the Project is approved by the Tree Commission and the Mayor, the work beginning with Pre-Application/Design Phase, Step 2 (Conceptual Design), will be reimbursed. All work prior to Staff approval of the Project at that point is not reimbursable. Once the Project and the associated fees and construction costs have received approval a contract is drafted that will outline the funding.

If the Project is approved by the Tree Commission and the Mayor, the City will pay a lump sum amount of \$2,500 to the Applicant to cover the expenses incurred by the Applicant and the Landscape Architect to prepare the Scope of Work and the Conceptual Planting Plan. The \$2,500 fee shall be equally divided between the Applicant and the Landscape Architect.

The \$2,500 payment is in addition to the negotiated fee established by the Fee Proposal for the Schematic Planting Plan and Project Execution included as part of the Application and ultimately a part of the Agreement between the City and the Applicant. The \$2,500 payment cannot be processed until the Agreement between the Applicant and the City is fully executed, a purchase order is issued, and the City

receives a pay request from the Applicant.

If the project is not approved, the Applicant will not be entitled to the \$2,500 fee.

HOW DO I APPLY FOR AND OBTAIN FUNDING?

An organization interested in obtaining funding for the design and construction of a tree planting project will follow a three-phase process: (1) the Pre-Application/Design phase, (2) the Application phase, and (3) the Project Execution phase. The Project becomes more defined with each phase.

I. PRE-APPLICATION/DESIGN PHASE

~~The Pre-Application Phase procedure is a 4-step process. The first step is to establish the Project Scope, where the Applicant identifies the location and the general scope of the proposed Project. The second step is the preparation of a Conceptual Planting Plan by the Applicant's Landscape Architect and submittal to City staff for review and approval. The Applicant shall also review the Conceptual Planting Plan with the District Council Member. The approved Conceptual Planting Plan will be used in the preparation of the Schematic Planting Plan and cost estimate that will become part of the Application submitted to City staff and the Tree Commission. The third step is to establish a fee for the proposed work. The fourth step is to convert the Conceptual Planting Plan into a more detailed Schematic Planting Plan for inclusion into the Application.~~

During each step of the process, Staff may request additional information or adjustments to the scope or design of the project. Failure to provide such changes may result in the Staff's recommendation of denial of the project.

Communications between the Applicant and the Staff is intended to be an iterative process with the goal to determine the best solution that will enhance the City's tree canopy.

A. STEP 1 – PROJECT SCOPE

(1) Identification of Project Site

- a. Applicant identifies a site for a specific tree planting project and contacts the public agency that owns or manages the property to determine its interest in a tree planting project on the subject property or on another property selected by the Public Agency.
- b. If the contacted Public Agency is not interested in a tree planting project, then the Applicant must identify another project site and repeat the procedure above.

(2) **Project Scope Base Sheet:** The landscape architect copies an aerial from the City GIS or other websites to use as a base sheet of the subject property. The aerial is reproduced at a scale that clearly shows existing property lines and site improvements such as buildings, parking lots, play areas, overhead powerlines, trees, and surface drainage features on the site. Property boundary lines can be obtained from the JaxGIS website (<https://maps.coj.net/DuvalProperty/>).

(3) Project Scope Plan

- a. The Applicant and landscape architect, or a representative from the landscape architecture firm shall meet with the public agency representative at the site to determine where trees can be planted. Photographs are taken to show typical site conditions. Site limitations are also noted. The landscape architect will then transfer the field notes to the base sheet and draw a bubble diagram around each potential planting area and the estimated number and type of trees that could be planted in each area.

- b. The Applicant submits the Project Scope Plan to the Public Agency for its review and requests written support for the proposed tree planting project.
 - c. The Applicant then revises the Project Scope Plan to incorporate any recommendations received from the Public Agency.
- (4) **Project Scope Submittal:** The Applicant prepares the Project Scope submittal for Staff review once the Agency's approval is received. The Project Scope Submittal includes the following items.
- a. The Public agency's written support of the project
 - b. Project Scope Plan
 - c. The Applicant's written description of the following:
 - 1) How will the project benefit the neighborhood, Council District, or the City?
 - 2) Is the project site highly used by or visible to the public and how?
 - 3) Will the project be an enhancement of an underserved or blighted area? If so, how?

(5) Rough Order of Magnitude of Professional and Administrative Fee. An estimation of the professional and administrative fee (not the cost of construction) that will be required to take the design through the entire Application Phase will be required prior to Staff approval.

(5)(6) Project Scope Review Meeting

- a. Once the Project Scope submittal, including the Rough Order of Magnitude of the fees, is complete, the Applicant shall schedule a meeting with City Staff and the public agency representative to review the location and scope of the proposed project. The design consultant/landscape architect, or representative from the landscape architecture firm shall also attend.
- b. Staff will prepare a written summary of the meeting to all parties within 10 business days of the meeting. Also included will be a statement either approving the project scope, requesting additional information or revisions, or recommending selection of another project if issues with the proposed project are not easily resolved.

B. STEP 2: CONCEPTUAL DESIGN

(1) Conceptual Planting Plan

- a. Landscape Architect prepares a conceptual design using the base map prepared for the Project Scope showing, in more detail, the buildings, parking lots, play areas, future construction sites, easements, overhead powerlines, identified underground utilities, and surface drainage features in and surrounding each proposed planting site. Incorporate recommendations from the owner's representative and City Staff into the Conceptual Planting Plan.
- b. Show the following information on the plan:
 - 1) The location of each tree to be removed identified by common name and trunk diameter at breast height (DBH).
 - 2) The location of existing trees to remain with the edge of the tree canopy shown as a dashed line.

- 3) The location of each new tree identified by common name and tree caliper. Circle each tree with a solid line that represents the expected mature canopy spread of the species. Refer to the Tree Commission Approved Tree Planting List, which can be found on the Tree Commission webpage of the Public Works Department of the City of Jacksonville

(2) Conceptual Design Submittal

- a. The Conceptual Design is due no later than ~~thirty (30)~~**ninety (90)** business days after the project scope is approved. Upon receipt of the **conceptual design** submittal, the staff will set a meeting date that will allow at least 10 business days for Staff to review the design before the meeting.

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- b. The Conceptual Design Submittal includes the following:
 - 1) Conceptual design plan
 - 2) Brief description of the work:
 - i. The level of Tree Removal.
 - ii. Is soil replacement required?
 - iii. Is Irrigation proposed for the project and what type?
 - iv. Will project include the use of volunteers, or other community involvement?
 - v. Is there an education component?
 - vi. Services provided by property owner/manager or others.
 - vii. The level of maintenance and the period of time required to establish the installed. Otrees.
 - viii. Rough cost estimate for improvements, i.e., tree removal, tree installation and maintenance, irrigation, soil replacement).
 - ix. Additional information requested by Staff in the Project Scope Review Meeting or that the Applicant feels may be needed.
- (3) **Conceptual Design Review Meeting:** The Applicant meets with City staff, and the property owner/manager to review the Conceptual Planting Plan prepared by Applicant's Landscape Architect.
- (4) **Staff Review:** Staff returns to the Applicant written review comments of the Conceptual Planting Plan within ten (10) business days after the review meeting.
- (5) **Revised Conceptual Planting Plan (if necessary):** Any review comments are to be incorporated into a revised Conceptual Planting Plan for Staff approval.
- (6) **Discussion with District Council Member:** The Applicant shall meet with and discuss the approved Conceptual Planting Plan with the District Council Member.
- (7) The approved Conceptual Planting Plan shall be incorporated into the Schematic Planting Plan that is submitted with the Level 3 Application.

C. STEP 3: FEE PROPOSAL FOR SCHEMATIC PLANTING PLAN AND PROJECT IMPLEMENTATION

- (1) Once the Conceptual Planting Plan is approved, the Applicant shall estimate the overall project budget as a not-to-exceed lump sum. This lump sum amount shall not include the effort spent by the Applicant to prepare the Project Scope and Conceptual Planting Plan.
- (2) The Applicant will submit a proposed overall budget to pay for the Schematic Planting Plan, cost estimation, preparation of the Application, and for general administrative, project management, and design services provided by the Applicant, the Landscape Architect and the Project Manager necessary to complete the Tree Planting Project. There are three parts to the Fee Proposal, one prepared by the Applicant, one by the Project Manager one by the Landscape Architect.
 - a. The Applicant's fee proposal includes the price to prepare the Level 3 Application and to provide general administrative services for the project. Work includes the general coordination with the user agency, City Staff, Project Manager, and Landscape Architect, and the preparation of billings and reports required by the City. If an employee of the Applicant is qualified to act as Project Manager, then project management services are included in the Applicant's fee proposal.
 - b. The Project Manager's fee is for the detailed management and quality control of the Project from Schematic Design through bidding, construction and maintenance. Also included is the coordination with the City, the Applicant, the Landscape Architect, and the selected Landscape Contractor regarding the fulfillment of the Contract requirements between the Landscape Contractor and the Applicant, including established performance schedules.
 - c. The Landscape Architect's fee proposal includes the cost of design services to prepare the Schematic Planting Plan, final design drawings, and bid documents; to review bids; and to provide inspection services during the construction and maintenance period. If the Landscape Architect also serves as Project Manager, then the cost of those services will be included in its proposal.
- (3) The City Staff will review the fee proposal within 10 business days and approve it or request modifications before acceptance. The Applicant can proceed with the Schematic Design once the Applicant receives written acceptance of the fee proposal.
- (4) Funding Note: Depending on the scope of the Project, in order to receive funding for the Landscape Architect's professional fees the Applicant may be required to select the Landscape Architect (Design Consultant) through a competitive bid process. (If the aggregate of the design fees will be more than \$35,000 or if the construction cost is over \$325,000. Refer to Sec. 255.20, Florida Statutes, Sec. 287.055, Florida Statutes, and Chapter 126, Jacksonville Ordinance Code for these requirements.)
 - a. If the design fee is estimated to be up to \$2,500, 1 solicitation is required.
 - b. If the design fee is estimated to be from \$2,501 to \$15,000, 2 solicitations are required.
 - c. If the design fee is estimated to be from \$15,001 to \$30,000, 3 solicitations are required.
 - d. If the design fee is estimated to be from \$30,001 to \$35,000, 4 solicitations are required.

OR

- (4) The maximum professional's fee is \$35,000 and the maximum construction cost is \$300,000.

D. STEP 4: SCHEMATIC PLANTING PLAN

- (1) The Landscape Architect shall prepare the Schematic Planting Plan based upon the approved Conceptual Planting Plan with any modifications requested by Staff as part of the Conceptual Design review phase. The Schematic Planting Plan shall also show the following:
 - a. A vicinity map showing the location of the Project.
 - b. Key Map if the Schematic Planting Plan is drawn on more than one sheet.
 - c. The Schematic Planting Plan base map shall be drawn to a scale of 1-inch equals 20, 30, 40, 50, 60 or 100 feet. The Plan must clearly show the existing site improvements. Show a graphic bar scale on each plan for reference.
 - d. A North arrow and a legend of symbols on each plan sheet.
- (2) The drawings shall be reproducible and legible on 11x17 inch sheets.
- (3) Submit to City Staff for review.
- (4) The City Staff will have 10 business days to review the Schematic Planting Plan to insure that all the requests or modifications generated from the Conceptual Design Review were incorporated. .
 - a. If the submitted Schematic Planting Plan does not incorporate all the requests or modifications agreed upon by the Applicant and Staff, then Staff will return the drawings for resubmittal.
 - b. If the submitted Schematic Planting Plan incorporates all the comments agreed upon in the Conceptual Design Review, then the Applicant may include the Schematic Plan in the Application.

II. APPLICATION PHASE

A. SUPPORTING DOCUMENTATION. Include and label the following Exhibits with the Application. An explanation of each is given below.

Exhibit A-1:	Location Map
Exhibit A-2:	Narrative Project Scope
Exhibit A-3:	Schematic Planting Plan
Exhibit A-4:	Plant Schedule
Exhibit B:	Project Performance Schedule
Exhibit C:	Total Project Budget
Exhibit D:	Project Team
Exhibit E:	Proof of Eligibility
Exhibit F:	Corporate Resolution Certification (if applicable)
Exhibit G:	Agency Acknowledgement of Intent to Plant Trees

Composite Exhibit A: Project Design.

Exhibit A-1: Project Location Map. Provide a map to show the project location within the context of the City of Jacksonville.

Exhibit A-2: Narrative Project Scope. Give a brief overall description and purpose of the Project.

Exhibit A-3 Schematic Planting Plan. See description in the Pre Application Phase.

Exhibit A-4: Plant Schedule. Provide a list of plants to be installed, that includes a description of each plant in accordance with the table below:

Botanical name	Common Name	Description	Quant.	Notes
Betula nigra	River Birch	___ Gal. or ___ B&B, ___ Caliper, ___ Ht., ___ Spd., ___ Min trunks, ___ C.T	5	

Exhibit B: Project Performance Schedule. State the number of days to achieve each phase of work from beginning to end. Include the following phases in the Performance Schedule:

- i The design phase, which includes final design and preparation of construction documents.
- ii The bid phase, which includes bid solicitation, bid opening, and selection of the qualified low bidder, project award, and contract execution with the landscape contractor.
- iii The construction phase, which includes the removal of obstacles, soil replacement, installation of irrigation, whether permanent or temporary, and the installation of the trees during a specified warranty period.
- iv. Maintenance of the trees and irrigation system, if any.

Task	Schedule
Construction Drawings and Specifications	___ days after execution of Agreement
Bid Documents sent to 3 bidders	___ days after execution of Agreement
Bid Opening, Bid Award	___ days after delivery of bid documents to bidders
Selection of Contractor, Execution of Contract	___ days after construction contract award
Construction Completion, Initial Acceptance	___ days after contract execution
Maintenance Completion, Final Acceptance	___ months of maintenance after Initial Acceptance if not extended to cover warranty of replacement trees

Exhibit C: Total Project Budget. Provide estimated costs of all phases of the Project.

- a. Estimated administrative/contract management fees with a detailed scope of services provided by the Applicant showing the estimated hours and hourly rates for each task, including, but not limited to, community outreach and/or programs, volunteer coordination, meetings, project coordination with the City and the Landscape Architect, and billing.
- b. Estimated Design Consultant Services Fee, with a detailed scope of services provided by the consultant showing the estimated number of hours and hourly rates for each phase of service.
- c. Estimated construction cost based on the Schematic Design, including, but not limited to, site preparation, soil replacement, performance/payment bond, maintenance of traffic, tree installation, construction of irrigation system, and maintenance of improvements during the selected warranty period of 3 months, 1 year or 2 years.

Exhibit D: Project Team

- a. List the people and entities involved in the Project, including but not limited to the Applicant, any volunteers, the Landscape Architect, the Project Manager if different from the Landscape Architect, and any other consultants.
- b. Describe the roles, responsibilities and tasks for each team member, such as who will:
 - i List the people and entities involved in the Project, (the "Participants") including the Applicant (which will become the "Contractor" described in Agreement), the City, any volunteers, the Project Manager, and the Landscape Architect.
 - ii Describe roles, responsibilities, and tasks of each Participant who will:
 1. prepare the final design and bid documents, review bids, and provide oversight of construction and maintenance;
 2. obtain final approval of the design from **TREE** City Commission Staff;
 3. oversee preparation of the Construction Documents by the Project Landscape Architect;
 4. solicit bids from a minimum of three qualified bidders for construction of the Project;
 5. coordinate with the City the selection of the landscape contractor. ; and
 6. provide professional project management and quality assurance for the design, construction, maintenance, and warranty of the Project.

Exhibit E: Proof of Applicant Eligibility. This information is required to confirm that the Applicant is eligible to receive funding.

- a. **501(c) not-for-profit organizations**
 1. Attach a copy of the organization's IRS determination letter.
 2. Attach a status of good standing certificate issued by the Florida Division of Corporations evidencing that the Applicant is in good standing and has been in existence for one (1) year prior to applying for the Level 3 Program. The certificate must be dated within 60 days of filing a complete application and list the requesting agency as a Florida non-profit corporation (requested from Florida Division of Corporations (<http://dos.myflorida.com/sunbiz>)).

3. Attach a copy of the Florida Division of Corporations “Detail by Entity Name” webpage (<http://dos.myflorida.com/sunbiz>) to show that the applicant is currently operating in Duval County. If proof of operation in Duval County cannot be determined by the “Detail by Entity Name,” attach evidence of current operations in Duval County by submitting at least one of the following:
 - i A list of notable projects or work completed in Duval County by the Applicant; or
 - ii A copy of media publicity identifying work conducted in Duval County (i.e. news article or blog post)
- b. **Community Organizations - Homeowners Association, Special District, or other unit of local government within Duval County**
 1. If a Homeowners’ Association, the Homeowners’ Association must be controlled by members of the Association and not the developer.
 2. If a special district or other unit of local government, attach a copy of the enacted ordinance establishing the district or local unit and provide documentation that the unit is currently in compliance with all state and local requirements.

Exhibit F: Corporate Resolution Certification (if applicable): If the Applicant is a corporation, fill out and sign the Corporate Resolution Certification form included in the Application.

Exhibit G: Acknowledgement of Intent to Plant Trees. Have the manager of the public property on which the Project is located complete and sign the Acknowledgement form. This document confirms that the manager of the public property has authorized the Applicant to install the Project on its property. If information is needed regarding the property’s ownership, contact the Real Estate Division at (904) 255-8700 for assistance. Obtain authorization from the following:

- a. If the project is in the City Right-of-Way, obtain authorization from the Engineering Division of the Public Works Department of the City of Jacksonville
- b. If in a City Park, obtain authorization from the Parks & Recreation Department of the City of Jacksonville;
- c. If on School Board property, obtain authorization from the Assistant Superintendent of Facilities.
- d. If on property controlled by any other governmental entity not described above, obtain the appropriate authorization from that agency

B. APPLICATION SUBMITTAL

Applicants must submit three (3) complete printed sets of the Application materials, and a high-resolution electronic version. Transmit the application with an original signature cover letter on the Applicant’s letterhead that includes a statement binding the Applicant to fulfill commitments made in the Application and identifies the key contact person. If there are partners to the Application, each partner must provide an original signature letter including the binding statement.

You may contact the Tree Commission staff via email at **XXXXXX**, by phone (904) 255-**XXXX**, or by mail to Tree Commission Staff, 609 St. Johns Bluff Road North, Jacksonville, Florida 32225.

Submit the completed application and all supporting documents to:

The Jacksonville Tree Commission
in care of the Mowing and Landscape Maintenance Division
Department of Public Works
609 St. Johns Bluff Road North
Jacksonville, Florida 32225

Application Deadline: Thirty (30) business days prior to the next scheduled Tree Commission meeting.

C. STAFF REVIEW OF APPLICATION

(1) Review of Application Completeness

- a. The Staff will review each Application for completeness and notify the Applicant if the Application is considered complete or incomplete within five (5) business days of submittal.
- b. An Application is considered complete if all necessary information and documentary proof required by this document and the Application is provided and in the format requested. If the Application is deemed complete, the Staff will proceed with the review of the information provided.
- c. If the Application is considered incomplete, the Staff will return the Application to the Applicant with list of deficiencies.

(2) Review of Application

- a. The Staff will review the Project Application and prepare a report with a recommendation (“Staff Report”) for (1) approval, (2) approval with conditions, or (3) denial.
- b. The Staff Report will be sent to the Tree Commission, the District Council Member, and the Applicant at least ten (10) business days prior to the Tree Commission meeting when the Project will be presented to the Commission for an opinion.
- c. The Staff Report will be based upon the Application and Exhibits, and will include an analysis of each of the Project Evaluation Criteria, below.

D. STAFF PROJECT REVIEW CRITERIA

(1) Design Criteria

- a. The species, number and placement of trees are appropriate for the site.
- b. The proposed trees are on the “Tree Commission Approved Tree Planting List,” and as amended from time to time. The list is available on the Tree Commission webpage of the Public Works Department of the City of Jacksonville.
- c. The proposed trees are predominately shade trees. The use of non-shade trees as a significant portion of the trees planted will only be acceptable if the Applicant can justify a significant use of non-shade trees in terms of the overall Project.
- d. Palms do not exceed 25% if total trees being planted unless justified by the Applicant.
- e. The proposed locations of trees do not interfere with existing trees, buildings and other structures, utilities, or sight line requirements in road rights-of-way.

(2) Cost Criteria

- a. Administrative costs are reasonable.
- b. Project Manager’s and Landscape Architect’s fees are reasonable.
- c. Construction costs are reasonable.
- d. Permanent automatic or temporary irrigation system costs are reasonable, if irrigation is proposed.
- e. The cost of the species and size of trees selected do not outweigh the benefits provided by such trees.

(3) **Maintenance and Impacts Criteria**

- a. Low maintenance plants are utilized that will require minimum maintenance after the period of mandatory maintenance by the Applicant.
- b. The location of plant material and irrigation have a minimum adverse impact over time on infrastructure such as sidewalks and roadbeds.

(4) **Public Benefit Criteria**

- a. The species of trees being planted are beneficial to the City's tree canopy.
- b. The Project provides a unique benefit to the neighborhood, Council District, or City.
- c. The Project serves high visibility areas.
- d. The Project engages the Community through volunteers or education or other public engagement.
- e. The Project is aesthetically pleasing and/or combats blight in blighted areas.

(5) **Staff Review of Plan-It Geo Objective Criteria:** Staff will utilize the Plan-It Geo Web Tool to evaluate the existing conditions of the geographic area within the Census Block where the proposed Project is located. The ranking will measure the benefits provided by each census track and not the specific benefits of the proposed project.

- a. The location will be evaluated based on the Census Block ranking (1- 488) developed by Plan-It Geo for the five (5) categories listed below:
 - i. Urban Tree Canopy Percentage
 - ii. Stormwater Benefits
 - iii. Urban Heat Island
 - iv. Socio-Economic Benefits
 - v. Overall-equally weighted criteria
 - 1. 1st-25th percentile (1-122)
 - 2. 26th- 50th percentile (123-244)
 - 3. 51st-100th percentile (245-366)
 - 4. 76th-100th percentile (367-488)
- b. If a Project overlaps two or more census blocks, then the average of the census blocks will be applied to determine a "score."

E. TREE COMMISSION REVIEW AND RECOMMENDATION

- (1) **Application Presentation.** All Applications will be presented at a scheduled public meeting held by the Tree Commission, for review, deliberation, and final recommendation. Special meetings may be held if needed at the discretion of the Tree Commission. Each Applicant will have 10 minutes to present its Application to the Tree Commission.
- (2) **Tree Commission Review.**
 - a. When evaluating each Application, the Tree Commissioners will utilize the information contained in the Application, including the exhibits, Staff Report and all information obtained during the Applicant's presentation. The Tree Commission will recommend either:

1. Approval;
 2. Approval with Conditions;
 3. Denial of the Project; or
 4. if more information is requested then the Application may be deferred by a vote of the Commission or unilaterally by the Chair of the Commission.
- b. If the recommendation is Approval with Conditions and the Applicant agrees with the recommendation, the Applicant shall revise the supporting documents in the Application necessary to convey the intent of the recommendations by the Tree Commission for inclusion in the Agreement exhibits.
 - c. If the recommendation is Approval with Conditions and the Applicant does not agree with the recommendation, then the result will be a recommendation for Denial.
 - d. The Tree Commission's recommendation will be forwarded to the Mayor's Office for processing through the Mayor's Budget Review Committee ("MBRC") for final review.

F. MAYOR'S BUDGE REVIEW COMMITTEE ("MBRC") REVIEW

- (1) At the earliest MBRC meeting following the evaluation of the proposed Project by the Tree Commission and the receipt of any requested modifications to the Application, the Staff will submit the Project to MBRC for review and approval. Like the Tree Commission, MBRC shall either approve the Project, approve the Project with conditions, deny the Project, defer the decision until more information is received, or delay funding of the Project to a later date.
- (2) If MBRC approves the Project as presented or as modified, it will direct the Office of General Counsel to prepare the Agreement. No additional action is required by the City Council.
- (3) If the Project is denied by MBRC, no further action will be taken by the Tree Commission on the Project through the Level 3 Program. However, this does not limit the ability of a Council Member to file legislation to implement a Project utilizing the Tree Fund.
- (4) If the MBRC decision is Approval with Conditions, and the Applicant agrees with the decision, the Applicant will revise the documents necessary to convey the intent of the decision for inclusion in the Agreement exhibits.
- (5) If the decision is Approval with Conditions and the Applicant does not agree with the decision, then the result will be a Denial of the Project by the MBRC.

III. PROJECT EXECUTION PHASE

A. ENTERING INTO AGREEMENT

- (1) Once the Project is approved by the MBRC, the Office of General Counsel will prepare a Tree Planting Program Level 3 Agreement (the "Agreement") between the Applicant and the City of Jacksonville, which will set the funding provided by the City and describe the responsibilities of each party.
- (2) We understand that the Applicant relies on consultants to assist with its Project. However, the Applicant is responsible for the Project and all that it encompasses. The Agreement for the funding is between the Applicant and the City of Jacksonville, so the Applicant is fully responsible for completion of the Project and will be held accountable for any deficiencies.
- (3) Upon execution of the completed Agreement by all parties, the Applicant will be eligible for payment of funds in accordance with the Agreement.

- (4) It is imperative that the Applicant read and understand the Agreement and the obligations before entering into this Agreement with the City.

B. PROJECT BIDDING & AWARD

- (1) Landscape Architect prepares bid documents (tree planting plans and construction specifications) incorporating the requirements of the approved Application and the Agreement.
- (2) Project Manager solicits bids from 3 landscape contractors.
- (3) The Applicant awards the project after consultation with the City.
- (4) Applicant prepares and executes a Contract between Applicant and the Landscape Contractor.

C. CONSTRUCTION

- (1) Project Manager issues Notice to Proceed, establishes the construction schedule, coordinates with the Landscape Architect and City Staff, and provides overall project management during the construction and the maintenance period.
- (2) Landscape Architect monitors construction and maintenance during the plant establishment period, inspects the completed work, submits reports, and reviews the contractor's invoices.
- (3) Applicant prepares and submits monthly invoices to the City for work completed the previous month.
- (4) The Applicant issues to the Contractor a letter of Final Acceptance when all work is completed and obtains the close out documents required by the Contract.

D. MAINTENANCE

- (1) The Landscape Contractor shall maintain the Project throughout the warranty period as described in the Contract between the Landscape Contractor and the Applicant.
- (2) Should a tree not meet specifications at any time within the warranty period, the Landscape Contractor must replace the tree and the warranty period begins again once the tree is approved by City staff.

JACKSONVILLE TREE COMMISSION LEVEL 3 TREE PLANTING PROGRAM

APPLICATION INSTRUCTIONS and PROCESS GUIDE

WHAT IS THE LEVEL 3 TREE PLANTING PROGRAM?

The Tree Commission, established by Section 94.106 *Ordinance Code*, is a City advisory body to the City Council, Mayor's Office, City staff, and community stakeholders, whose task is to develop policies and programs that encourage the preservation and restoration of the City's tree canopy.

The Level 3 Tree Planting Program (the "Program") was created by the Tree Commission as a way for the City to partner with and provide funding to a local community or not-for-profit organization to implement a tree planting project on publicly owned land within Duval County.

HOW DO I APPLY FOR FUNDING?

An organization interested in obtaining funding for such a project must complete a Level 3 Tree Planting Program application which describes the project and the amount of funds requested. The Tree Commission will review each tree planting application and then make recommendation to the Mayor's Budget Review Committee (MBRC) regarding approval of the project based upon the information submitted.

If a project is approved by the MBRC and the Mayor, an Agreement is entered into between the Applicant and the City of Jacksonville, ~~which that~~ establishes the scope of the project and funding provided by the City.

FUNDING

Funding for an approved Project comes from the Tree Protection and Related Expenses Trust Fund (the "Tree Fund"), as authorized by Sec.111.760, *Ordinance Code*, and Sec. 25.04, *City Charter*. Funds deposited in the Tree Fund must be spent on the installation and maintenance of trees on public lands in Duval County, ~~which includes the Applicant's project administration costs and the costs of professional services provided by the Landscape Architect hired by the Applicant.~~

WHO MAY APPLY FOR PROGRAM FUNDING?

1. Eligible 501(c)(3) Not-for-profit Organizations.
2. Local Community Organizations.
3. Other units of local governments operating in Duval County.

(See Contract for definitions of above organizations)

~~IF AN APPLICATION IS APPROVED, HOW IS FUNDING PROVIDED?~~

~~If the Project is approved by the Tree Commission and the Mayor, the City will pay a lump-sum amount of \$2,500 to the Applicant to cover the expenses incurred by the Applicant and the Landscape Architect to prepare the Scope of Work and the Conceptual Planting Plan. The \$2,500 fee shall be equally divided between the Applicant and the Landscape Architect.~~

~~The \$2,500 payment is in addition to the negotiated fee established by the Fee Proposal for the Schematic Planting Plan and Project Execution included as part of the Application and ultimately a part of the Agreement between the City and the Applicant. The \$2,500 payment cannot be processed until the Agreement between the Applicant and the City is fully executed, a purchase order is issued, and the City~~

receives a pay request from the Applicant.

If the project is not approved, the Applicant will not be entitled to the \$2,500 fee.

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THE APPLICATION PROCESS HOW DO I APPLY FOR AND OBTAIN FUNDING?

An organization interested in obtaining funding for the design and construction of a tree planting project must complete a Level 3 Tree Planting Program application and submit it to the Tree Commission for its review and approval. ~~will follow a~~ The preparation of the Application is a ~~three~~two-phase process: (1) the **Pre-Application phase**, which establishes the location and scope of the project, and a rough estimate of the total project cost; and (2) the **Application phase** when the final tree planting design, (the final estimate of the administrative project management, and design, fee and construction costs are developed, and the Application is completed for submittal to the Tree Commission. ~~The Project becomes more defined with each phase.~~

Once the Application is approved, and a contract between the Applicant and the City is completed, ^{construction} the Project Implementation Phase begins, which includes the completion of the ~~design~~ documents, bidding, selecting the landscape contractor and monitoring the contractor's performance during construction and the maintenance period, and (3) the Project Execution phase. ~~The Project becomes more defined with each phase.~~

During each step of the process, Staff may request additional information or adjustments to the project scope, design and/or cost estimate. Failure to provide such changes may result in the Staff's recommendation of denial of the project.

Communications between the Applicant and the Staff is intended to be an iterative process with the goal to determine the best solution that will enhance the City's tree canopy.

I. PRE-APPLICATION ~~DESIGN~~ PHASE

The Pre-Application Phase procedure is a 4 step process. ~~The first step~~ Pre-application phase is to establish the Project Scope, ~~where~~ when the Applicant identifies the ~~the~~ location and the general scope of the proposed Project and provides a preliminary cost estimate of fees for the professional design and administrative services as well as for construction and maintenance of the tree planting project. The Landscape Architect providing professional design services is also identified.

~~The second step is the preparation of a Conceptual Planting Plan by the Applicant's Landscape Architect and submittal to City staff for review and approval. The Applicant shall also review the Conceptual Planting Plan with the District Council Member. The approved Conceptual Planting Plan will be used in the preparation of the Schematic Planting Plan and cost estimate that will become part of the Application submitted to City staff and the Tree Commission. The third step is to establish a fee for the proposed work. The fourth step is to convert the Conceptual Planting Plan into a more detailed Schematic Planting Plan for inclusion into the Application.~~

~~During each step of the process, Staff may request additional information or adjustments to the scope or design of the project. Failure to provide such changes may result in the Staff's recommendation of denial of the project.~~

~~Communications between the Applicant and the Staff is intended to be an iterative process with the goal to determine the best solution that will enhance the City's tree canopy.~~

A. STEP 1 – PROJECT SCOPE

(1) Identification of the Project Team

- a. The Applicant selects the project team who are qualified to provide administrative, project management and design services.

(2) Identification of Project Site

- a. The Applicant identifies a site for a specific tree planting project and contacts the ~~Public agency~~ Agency that owns or manages the property to determine its ~~interest in support of~~ a tree planting project on the subject property or on another property ~~selected~~ recommended by the Public Agency.
- b. If the contacted Public Agency ~~is not interested~~ does not support ~~in~~ a tree planting project, ~~on its property~~, then the Applicant must identify another project site and repeat the procedure above.

(3) Project Scope Base Sheet: Once a project site is selected, ~~The project~~ Landscape Architect ~~copies an aerial photograph~~ ~~copies an aerial from~~ copied from the City GIS or other websites to use as a base sheet of the subject property. The aerial is reproduced on 11x17 inch sheets at a scale ~~that clearly shows~~ so where existing property lines and site improvements such as buildings, parking lots, play areas, overhead powerlines, trees, and surface drainage features on the site are highlighted and clearly legible. Property boundary lines can be obtained from the JaxGIS website (<https://maps.coj.net/DuvalProperty/>).

(4) Project Scope Plan

- a. The Applicant and landscape architect meet with the public agency representative at the site to determine where trees can be planted. Photographs are taken to show typical site conditions. Site limitations are also noted. The landscape architect will then transfer the field notes to the base sheet and draw a bubble diagram around each potential planting area and the estimated number and type of trees that could be planted in each area.
- b. The Applicant submits the Project Scope Plan to the Public Agency for its review and requests written support for the proposed tree planting project.
- c. The Applicant then revises the Project Scope Plan to incorporate any recommendations received from the Public Agency.

(5) Project Scope Submittal: The Applicant prepares the Project Scope submittal for Staff review once the Agency's approval is received. The Project Scope Submittal includes the following items.

- a. The Public agency's written support of the project
- b. Project Scope Plan()
- c. The Applicant's written description of the following:
 - 1) How will the project benefit the neighborhood, Council District, or the City?
 - 2) Is the project site highly used by or visible to the public and how?
 - 3) Will the project be an enhancement of an underserved or blighted area? If so, how?

(6) Project Scope Review Meeting

- a. Once the Project Scope submittal is complete, the Applicant schedules a meeting with City Staff and the public agency representative to review the location and scope of the proposed project. The ~~design consultant~~ shall also attend.

Landscape Architect

- b. Staff prepares a written summary of the meeting to all parties within 10 business days of the meeting. Also included will be a statement either approving the project scope, requesting additional information or revisions, or recommending selection of another project if issues with the proposed project are not easily resolved.

II. APPLICATION PHASE

A. The Pre-Application Phase is a 3-step process.

- (1) The first step is the preparation of a Conceptual Planting Plan that is submitted to City staff for their review and approval to proceed to the final step.. Upon staff approval of the Conceptual Planting Plan, the Applicant will proceed to the third step. aThe Applicant will also provide a copy of the approved Conceptual Planting Plan to the District Council Member.
- (2) The second step is the preparation of a more detailed planting plan, (Schematic Planting Plan), and a final estimate of fees and construction costs that will be included in the Application for staff review and approval.

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B.C. STEP 2: CONCEPTUAL DESIGN

(1) Conceptual Planting Plan

- a. Landscape Architect prepares a conceptual design using the base map prepared for the Project Scope showing, in more detail, the buildings, parking lots, play areas, future construction sites, easements, overhead powerlines, identified underground utilities, and surface drainage features in and surrounding each proposed planting site. Incorporate recommendations from the owner's representative and City Staff into the Conceptual Planting Plan.
- b. Show the following information on the plan:
 - 1) The location of each tree to be removed identified by common name and trunk diameter at breast height (DBH).
 - 1) The location of existing trees to remain with the edge of the tree canopy shown as a dashed line.
 - 1) The location of each new tree identified by common name and tree caliper. Circle each tree with a solid line that represents the expected mature canopy spread of the species. Refer to the Tree Commission Approved Tree Planting List, which can be found on the Tree Commission webpage of the Public Works Department of the City of Jacksonville

(2) Conceptual Design Submittal

- a. The Conceptual Design is due no later than thirty (30) business days after the project scope is approved. Upon receipt of the submittal, the staff will set a meeting date that will allow at least 10 business days for Staff to review the design before the meeting.
- b. The Conceptual Design Submittal includes the following:
 - 1) Conceptual design plan
 - 1) Brief description of the work:
 - i. The level of Tree Removal.

JACKSONVILLE TREE COMMISSION LEVEL 3 TREE PLANTING PROGRAM

APPLICATION INSTRUCTIONS and PROCESS GUIDE

WHAT IS THE LEVEL 3 TREE PLANTING PROGRAM?

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The Level 3 Tree Planting Program (the "Program") was created by the Tree Commission as a way for the City to partner with and provide funding to a local community or not-for-profit organization to implement a tree planting project on publicly owned land within Duval County.

An organization interested in obtaining funding for such a project must complete a Level 3 Tree Planting Program application which describes the project and the amount of funds requested. The Tree Commission will review each tree planting application and then make recommendation to the Mayor's Budget Review Committee regarding approval of the project based upon the information submitted.

If a project is approved, an Agreement is entered into between the Applicant and the City of Jacksonville, which establishes the scope of the project and funding provided by the City.

FUNDING

Funding for an approved Project comes from the Tree Protection and Related Expenses Trust Fund (the "Tree Fund"), as authorized by Sec.111.760, *Ordinance Code*, and Sec. 25.04, *City Charter*. Funds deposited in the Tree Fund must be spent on the installation and maintenance of trees on public lands in Duval County.

WHO MAY APPLY FOR PROGRAM FUNDING?

1. Eligible 501(c)(3) Not-for-profit Organizations.
2. Local Community Organizations.
3. Other units of local governments operating in Duval County.

IF AN APPLICATION IS APPROVED, HOW IS FUNDING PROVIDED?

~~If the Project is approved by the Tree Commission and the Mayor, the work beginning with Pre-Application/Design Phase, Step 2 (Conceptual Design), will be reimbursed. All work prior to Staff approval of the Project at that point is not reimbursable. Once the Project and the associated fees and construction costs have received approval a contract is drafted that will outline the funding.~~

~~If the Project is approved by the Tree Commission and the Mayor, the City will pay a lump sum amount of \$2,500 to the Applicant to cover the expenses incurred by the Applicant and the Landscape Architect to prepare the Scope of Work and the Conceptual Planting Plan. The \$2,500 fee shall be equally divided between the Applicant and the Landscape Architect.~~

~~The \$2,500 payment is in addition to the negotiated fee established by the Fee Proposal for the Schematic Planting Plan and Project Execution included as part of the Application and ultimately a part of the Agreement between the City and the Applicant. The \$2,500 payment cannot be processed until the Agreement between the Applicant and the City is fully executed, a purchase order is issued, and the City~~

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~~receives a pay request from the Applicant.~~

~~If the project is not approved, the Applicant will not be entitled to the \$2,500 fee.~~

HOW DO I APPLY FOR AND OBTAIN FUNDING?

An organization interested in obtaining funding for the design and construction of a tree planting project will follow a three-phase process: (1) the Pre-Application/Design phase, (2) the Application phase, and (3) the Project Execution phase. The Project becomes more defined with each phase.

I. PRE-APPLICATION/DESIGN PHASE

~~The Pre-Application Phase procedure is a 4-step process. The first step is to establish the Project Scope, where the Applicant identifies the location and the general scope of the proposed Project. The second step is the preparation of a Conceptual Planting Plan by the Applicant's Landscape Architect and submittal to City staff for review and approval. The Applicant shall also review the Conceptual Planting Plan with the District Council Member. The approved Conceptual Planting Plan will be used in the preparation of the Schematic Planting Plan and cost estimate that will become part of the Application submitted to City staff and the Tree Commission. The third step is to establish a fee for the proposed work. The fourth step is to convert the Conceptual Planting Plan into a more detailed Schematic Planting Plan for inclusion into the Application.~~

During each step of the process, Staff may request additional information or adjustments to the scope or design of the project. Failure to provide such changes may result in the Staff's recommendation of denial of the project.

Communications between the Applicant and the Staff is intended to be an iterative process with the goal to determine the best solution that will enhance the City's tree canopy.

A. STEP 1 – PROJECT SCOPE

(1) Identification of Project Site

- a. Applicant identifies a site for a specific tree planting project and contacts the public agency that owns or manages the property to determine its interest in a tree planting project on the subject property or on another property selected by the Public Agency.
- b. If the contacted Public Agency is not interested in a tree planting project, then the Applicant must identify another project site and repeat the procedure above.

(2) **Project Scope Base Sheet:** The landscape architect copies an aerial from the City GIS or other websites to use as a base sheet of the subject property. The aerial is reproduced at a scale that clearly shows existing property lines and site improvements such as buildings, parking lots, play areas, overhead powerlines, trees, and surface drainage features on the site. Property boundary lines can be obtained from the JaxGIS website (<https://maps.coj.net/DuvalProperty/>).

(3) Project Scope Plan

- a. The Applicant and landscape architect, or a representative from the landscape architecture firm shall meet with the public agency representative at the site to determine where trees can be planted. Photographs are taken to show typical site conditions. Site limitations are also noted. The landscape architect will then transfer the field notes to the base sheet and draw a bubble diagram around each potential planting area and the estimated number and type of trees that could be planted in each area.

- b. The Applicant submits the Project Scope Plan to the Public Agency for its review and requests written support for the proposed tree planting project.
 - c. The Applicant then revises the Project Scope Plan to incorporate any recommendations received from the Public Agency.
- (4) **Project Scope Submittal:** The Applicant prepares the Project Scope submittal for Staff review once the Agency’s approval is received. The Project Scope Submittal includes the following items.
- a. The Public agency’s written support of the project
 - b. Project Scope Plan
 - c. The Applicant’s written description of the following:
 - 1) How will the project benefit the neighborhood, Council District, or the City?
 - 2) Is the project site highly used by or visible to the public and how?
 - 3) Will the project be an enhancement of an underserved or blighted area? If so, how?

(5) Rough Order of Magnitude of Professional and Administrative Fee. An estimation of the professional and administrative fee (not the cost of construction) that will be required to take the design through the entire Application Phase will be required prior to Staff approval.

(6) Project Scope Review Meeting

- a. Once the Project Scope submittal, including the Rough Order of Magnitude of the fees, is complete, the Applicant shall schedule a meeting with City Staff and the public agency representative to review the location and scope of the proposed project. The design consultant/landscape architect, or representative from the landscape architecture firm shall also attend.
- b. Staff will prepare a written summary of the meeting to all parties within 10 business days of the meeting. Also included will be a statement either approving the project scope, requesting additional information or revisions, or recommending selection of another project if issues with the proposed project are not easily resolved.

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B. STEP 2: CONCEPTUAL DESIGN

(1) Conceptual Planting Plan

- a. Landscape Architect prepares a conceptual design using the base map prepared for the Project Scope showing, in more detail, the buildings, parking lots, play areas, future construction sites, easements, overhead powerlines, identified underground utilities, and surface drainage features in and surrounding each proposed planting site. Incorporate recommendations from the owner’s representative and City Staff into the Conceptual Planting Plan.
- b. Show the following information on the plan:
 - 1) The location of each tree to be removed identified by common name and trunk diameter at breast height (DBH).
 - 2) The location of existing trees to remain with the edge of the tree canopy shown as a dashed line.

- 3) The location of each new tree identified by common name and tree caliper. Circle each tree with a solid line that represents the expected mature canopy spread of the species. Refer to the Tree Commission Approved Tree Planting List, which can be found on the Tree Commission webpage of the Public Works Department of the City of Jacksonville

(2) **Conceptual Design Submittal**

- a. The Conceptual Design is due no later than ~~thirty (30)~~ninety (90) business days after the project scope is approved. Upon receipt of the conceptual design submittal, the staff will set a meeting date that will allow at least 10 business days for Staff to review the design before the meeting.

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- b. The Conceptual Design Submittal includes the following:
 - 1) Conceptual design plan
 - 2) Brief description of the work:
 - i. The level of Tree Removal.
 - ii. Is soil replacement required?
 - iii. Is Irrigation proposed for the project and what type?
 - iv. Will project include the use of volunteers, or other community involvement?
 - v. Is there an education component?
 - vi. Services provided by property owner/manager or others.
 - vii. The level of maintenance and the period of time required to establish the installed. 0trees.
 - viii. Rough cost estimate for improvements, i.e., tree removal, tree installation and maintenance, irrigation, soil replacement).
 - ix. Additional information requested by Staff in the Project Scope Review Meeting or that the Applicant feels may be needed.
- (3) **Conceptual Design Review Meeting:** The Applicant meets with City staff, and the property owner/manager to review the Conceptual Planting Plan prepared by Applicant's Landscape Architect.
- (4) **Staff Review:** Staff returns to the Applicant written review comments of the Conceptual Planting Plan within ten (10) business days after the review meeting.
- (5) **Revised Conceptual Planting Plan (if necessary):** Any review comments are to be incorporated into a revised Conceptual Planting Plan for Staff approval.
- (6) **Discussion with District Council Member:** The Applicant shall meet with and discuss the approved Conceptual Planting Plan with the District Council Member.
- (7) The approved Conceptual Planting Plan shall be incorporated into the Schematic Planting Plan that is submitted with the Level 3 Application.

C. STEP 3: FEE PROPOSAL FOR SCHEMATIC PLANTING PLAN AND PROJECT IMPLEMENTATION

- (1) Once the Conceptual Planting Plan is approved, the Applicant shall estimate the overall project budget as a not-to-exceed lump sum. This lump sum amount shall not include the effort spent by the Applicant to prepare the Project Scope and Conceptual Planting Plan.
- (2) The Applicant will submit a proposed overall budget to pay for the Schematic Planting Plan, cost estimation, preparation of the Application, and for general administrative, project management, and design services provided by the Applicant, the Landscape Architect and the Project Manager necessary to complete the Tree Planting Project. There are three parts to the Fee Proposal, one prepared by the Applicant, one by the Project Manager one by the Landscape Architect.
 - a. The Applicant's fee proposal includes the price to prepare the Level 3 Application and to provide general administrative services for the project. Work includes the general coordination with the user agency, City Staff, Project Manager, and Landscape Architect, and the preparation of billings and reports required by the City. If an employee of the Applicant is qualified to act as Project Manager, then project management services are included in the Applicant's fee proposal.
 - b. The Project Manager's fee is for the detailed management and quality control of the Project from Schematic Design through bidding, construction and maintenance. Also included is the coordination with the City, the Applicant, the Landscape Architect, and the selected Landscape Contractor regarding the fulfillment of the Contract requirements between the Landscape Contractor and the Applicant, including established performance schedules.
 - c. The Landscape Architect's fee proposal includes the cost of design services to prepare the Schematic Planting Plan, final design drawings, and bid documents; to review bids; and to provide inspection services during the construction and maintenance period. If the Landscape Architect also serves as Project Manager, then the cost of those services will be included in its proposal.
- (3) The City Staff will review the fee proposal within 10 business days and approve it or request modifications before acceptance. The Applicant can proceed with the Schematic Design once the Applicant receives written acceptance of the fee proposal.
- (4) Funding Note: Depending on the scope of the Project, in order to receive funding for the Landscape Architect's professional fees the Applicant may be required to select the Landscape Architect (Design Consultant) through a competitive bid process. (If the aggregate of the design fees will be more than \$35,000 or if the construction cost is over \$325,000. Refer to Sec. 255.20, Florida Statutes, Sec. 287.055, Florida Statutes, and Chapter 126, Jacksonville Ordinance Code for these requirements.)
 - a. If the design fee is estimated to be up to \$2,500, 1 solicitation is required.
 - b. If the design fee is estimated to be from \$2,501 to \$15,000, 2 solicitations are required.
 - c. If the design fee is estimated to be from \$15,001 to \$30,000, 3 solicitations are required.
 - d. If the design fee is estimated to be from \$30,001 to \$35,000, 4 solicitations are required.

OR

- (4) The maximum professional's fee is \$35,000 and the maximum construction cost is \$300,000.

D. STEP 4: SCHEMATIC PLANTING PLAN

- (1) The Landscape Architect shall prepare the Schematic Planting Plan based upon the approved Conceptual Planting Plan with any modifications requested by Staff as part of the Conceptual Design review phase. The Schematic Planting Plan shall also show the following:
 - a. A vicinity map showing the location of the Project.
 - b. Key Map if the Schematic Planting Plan is drawn on more than one sheet.
 - c. The Schematic Planting Plan base map shall be drawn to a scale of 1-inch equals 20, 30, 40, 50, 60 or 100 feet. The Plan must clearly show the existing site improvements. Show a graphic bar scale on each plan for reference.
 - d. A North arrow and a legend of symbols on each plan sheet.
- (2) The drawings shall be reproducible and legible on 11x17 inch sheets.
- (3) Submit to City Staff for review.
- (4) The City Staff will have 10 business days to review the Schematic Planting Plan to insure that all the requests or modifications generated from the Conceptual Design Review were incorporated.
 - a. If the submitted Schematic Planting Plan does not incorporate all the requests or modifications agreed upon by the Applicant and Staff, then Staff will return the drawings for resubmittal.
 - b. If the submitted Schematic Planting Plan incorporates all the comments agreed upon in the Conceptual Design Review, then the Applicant may include the Schematic Plan in the Application.

II. APPLICATION PHASE

A. SUPPORTING DOCUMENTATION. Include and label the following Exhibits with the Application. An explanation of each is given below.

- | | |
|--------------|--|
| Exhibit A-1: | Location Map |
| Exhibit A-2: | Narrative Project Scope |
| Exhibit A-3: | Schematic Planting Plan |
| Exhibit A-4: | Plant Schedule |
| Exhibit B: | Project Performance Schedule |
| Exhibit C: | Total Project Budget |
| Exhibit D: | Project Team |
| Exhibit E: | Proof of Eligibility |
| Exhibit F: | Corporate Resolution Certification (if applicable) |
| Exhibit G: | Agency Acknowledgement of Intent to Plant Trees |

Composite Exhibit A: Project Design.

Exhibit A-1: Project Location Map. Provide a map to show the project location within the context of the City of Jacksonville.

Exhibit A-2: Narrative Project Scope. Give a brief overall description and purpose of the Project.

Exhibit A-3 Schematic Planting Plan. See description in the Pre Application Phase.

Exhibit A-4: Plant Schedule. Provide a list of plants to be installed, that includes a description of each plant in accordance with the table below:

Botanical name	Common Name	Description	Quant.	Notes
Betula nigra	River Birch	___ Gal. or ___ B&B, ___ Caliper, ___ Ht., ___ Spd., ___ Min trunks, C.T	5	

Exhibit B: Project Performance Schedule. State the number of days to achieve each phase of work from beginning to end. Include the following phases in the Performance Schedule:

- i The design phase, which includes final design and preparation of construction documents.
- ii The bid phase, which includes bid solicitation, bid opening, and selection of the qualified low bidder, project award, and contract execution with the landscape contractor.
- iii The construction phase, which includes the removal of obstacles, soil replacement, installation of irrigation, whether permanent or temporary, and the installation of the trees during a specified warranty period.
- iv. Maintenance of the trees and irrigation system, if any.

Task	Schedule
Construction Drawings and Specifications	___ days after execution of Agreement
Bid Documents sent to 3 bidders	___ days after execution of Agreement
Bid Opening, Bid Award	___ days after delivery of bid documents to bidders
Selection of Contractor, Execution of Contract	___ days after construction contract award
Construction Completion, Initial Acceptance	___ days after contract execution
Maintenance Completion, Final Acceptance	___ months of maintenance after Initial Acceptance if not extended to cover warranty of replacement trees

Exhibit C: Total Project Budget. Provide estimated costs of all phases of the Project.

- a. Estimated administrative/contract management fees with a detailed scope of services provided by the Applicant showing the estimated hours and hourly rates for each task, including, but not limited to, community outreach and/or programs, volunteer coordination, meetings, project coordination with the City and the Landscape Architect, and billing.
- b. Estimated Design Consultant Services Fee, with a detailed scope of services provided by the consultant showing the estimated number of hours and hourly rates for each phase of service.
- c. Estimated construction cost based on the Schematic Design, including, but not limited to, site preparation, soil replacement, performance/payment bond, maintenance of traffic, tree installation, construction of irrigation system, and maintenance of improvements during the selected warranty period of 3 months, 1 year or 2 years.

Exhibit D: Project Team

- a. List the people and entities involved in the Project, including but not limited to the Applicant, any volunteers, the Landscape Architect, the Project Manager if different from the Landscape Architect, and any other consultants.
- b. Describe the roles, responsibilities and tasks for each team member, such as who will:
 - i List the people and entities involved in the Project, (the “Participants”) including the Applicant (which will become the “Contractor” described in Agreement), the City, any volunteers, the Project Manager, and the Landscape Architect.
 - ii Describe roles, responsibilities, and tasks of each Participant who will:
 1. prepare the final design and bid documents, review bids, and provide oversight of construction and maintenance;
 2. obtain final approval of the design from City Commission Staff;
 3. oversee preparation of the Construction Documents by the Project Landscape Architect;
 4. solicit bids from a minimum of three qualified bidders for construction of the Project;
 5. coordinate with the City the selection of the landscape contractor. ; and
 6. provide professional project management and quality assurance for the design, construction, maintenance, and warranty of the Project.

Exhibit E: Proof of Applicant Eligibility. This information is required to confirm that the Applicant is eligible to receive funding.

- a. **501(c) not-for-profit organizations**
 1. Attach a copy of the organization’s IRS determination letter.
 2. Attach a status of good standing certificate issued by the Florida Division of Corporations evidencing that the Applicant is in good standing and has been in existence for one (1) year prior to applying for the Level 3 Program. The certificate must be dated within 60 days of filing a complete application and list the requesting agency as a Florida non-profit corporation (requested from Florida Division of Corporations (<http://dos.myflorida.com/sunbiz>)).

3. Attach a copy of the Florida Division of Corporations “Detail by Entity Name” webpage (<http://dos.myflorida.com/sunbiz>) to show that the applicant is currently operating in Duval County. If proof of operation in Duval County cannot be determined by the “Detail by Entity Name,” attach evidence of current operations in Duval County by submitting at least one of the following:
 - i A list of notable projects or work completed in Duval County by the Applicant; or
 - ii A copy of media publicity identifying work conducted in Duval County (i.e. news article or blog post)
- b. **Community Organizations - Homeowners Association, Special District, or other unit of local government within Duval County**
 1. If a Homeowners’ Association, the Homeowners’ Association must be controlled by members of the Association and not the developer.
 2. If a special district or other unit of local government, attach a copy of the enacted ordinance establishing the district or local unit and provide documentation that the unit is currently in compliance with all state and local requirements.

Exhibit F: Corporate Resolution Certification (if applicable): If the Applicant is a corporation, fill out and sign the Corporate Resolution Certification form included in the Application.

Exhibit G: Acknowledgement of Intent to Plant Trees. Have the manager of the public property on which the Project is located complete and sign the Acknowledgement form. This document confirms that the manager of the public property has authorized the Applicant to install the Project on its property. If information is needed regarding the property’s ownership, contact the Real Estate Division at (904) 255-8700 for assistance. Obtain authorization from the following:

- a. If the project is in the City Right-of-Way, obtain authorization from the Engineering Division of the Public Works Department of the City of Jacksonville
- b. If in a City Park, obtain authorization from the Parks & Recreation Department of the City of Jacksonville;
- c. If on School Board property, obtain authorization from the Assistant Superintendent of Facilities.
- d. If on property controlled by any other governmental entity not described above, obtain the appropriate authorization from that agency

B. APPLICATION SUBMITTAL

Applicants must submit three (3) complete printed sets of the Application materials, and a high-resolution electronic version. Transmit the application with an original signature cover letter on the Applicant’s letterhead that includes a statement binding the Applicant to fulfill commitments made in the Application and identifies the key contact person. If there are partners to the Application, each partner must provide an original signature letter including the binding statement.

You may contact the Tree Commission staff via email at XXXXXX, by phone (904) 255-XXXX, or by mail to Tree Commission Staff, 609 St. Johns Bluff Road North, Jacksonville, Florida 32225.

Submit the completed application and all supporting documents to:

The Jacksonville Tree Commission
in care of the Mowing and Landscape Maintenance Division
Department of Public Works
609 St. Johns Bluff Road North
Jacksonville, Florida 32225

Application Deadline: Thirty (30) business days prior to the next scheduled Tree Commission meeting.

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C. STAFF REVIEW OF APPLICATION

(1) Review of Application Completeness

- a. The Staff will review each Application for completeness and notify the Applicant if the Application is considered complete or incomplete within five (5) business days of submittal.
- b. An Application is considered complete if all necessary information and documentary proof required by this document and the Application is provided and in the format requested. If the Application is deemed complete, the Staff will proceed with the review of the information provided.
- c. If the Application is considered incomplete, the Staff will return the Application to the Applicant with list of deficiencies.

(2) Review of Application

- a. The Staff will review the Project Application and prepare a report with a recommendation (“Staff Report”) for (1) approval, (2) approval with conditions, or (3) denial.
- b. The Staff Report will be sent to the Tree Commission, the District Council Member, and the Applicant at least ten (10) business days prior to the Tree Commission meeting when the Project will be presented to the Commission for an opinion.
- c. The Staff Report will be based upon the Application and Exhibits, and will include an analysis of each of the Project Evaluation Criteria, below.

D. STAFF PROJECT REVIEW CRITERIA

(1) Design Criteria

- a. The species, number and placement of trees are appropriate for the site.
- b. The proposed trees are on the “Tree Commission Approved Tree Planting List,” and as amended from time to time. The list is available on the Tree Commission webpage of the Public Works Department of the City of Jacksonville.
- c. The proposed trees are predominately shade trees. The use of non-shade trees as a significant portion of the trees planted will only be acceptable if the Applicant can justify a significant use of non-shade trees in terms of the overall Project.
- d. Palms do not exceed 25% if total trees being planted unless justified by the Applicant.
- e. The proposed locations of trees do not interfere with existing trees, buildings and other structures, utilities, or sight line requirements in road rights-of-way.

(2) Cost Criteria

- a. Administrative costs are reasonable.
- b. Project Manager’s and Landscape Architect’s fees are reasonable.
- c. Construction costs are reasonable.
- d. Permanent automatic or temporary irrigation system costs are reasonable, if irrigation is proposed.
- e. The cost of the species and size of trees selected do not outweigh the benefits provided by such trees.

(3) **Maintenance and Impacts Criteria**

- a. Low maintenance plants are utilized that will require minimum maintenance after the period of mandatory maintenance by the Applicant.
- b. The location of plant material and irrigation have a minimum adverse impact over time on infrastructure such as sidewalks and roadbeds.

(4) **Public Benefit Criteria**

- a. The species of trees being planted are beneficial to the City's tree canopy.
- b. The Project provides a unique benefit to the neighborhood, Council District, or City.
- c. The Project serves high visibility areas.
- d. The Project engages the Community through volunteers or education or other public engagement.
- e. The Project is aesthetically pleasing and/or combats blight in blighted areas.

(5) **Staff Review of Plan-It Geo Objective Criteria:** Staff will utilize the Plan-It Geo Web Tool to evaluate the existing conditions of the geographic area within the Census Block where the proposed Project is located. The ranking will measure the benefits provided by each census track and not the specific benefits of the proposed project.

- a. The location will be evaluated based on the Census Block ranking (1- 488) developed by Plan-It Geo for the five (5) categories listed below:
 - i. Urban Tree Canopy Percentage
 - ii. Stormwater Benefits
 - iii. Urban Heat Island
 - iv. Socio-Economic Benefits
 - v. Overall-equally weighted criteria
 - 1. 1st-25th percentile (1-122)
 - 2. 26th- 50th percentile (123-244)
 - 3. 51st-100th percentile (245-366)
 - 4. 76th-100th percentile (367-488)
- b. If a Project overlaps two or more census blocks, then the average of the census blocks will be applied to determine a "score."

E. TREE COMMISSION REVIEW AND RECOMMENDATION

- (1) **Application Presentation.** All Applications will be presented at a scheduled public meeting held by the Tree Commission, for review, deliberation, and final recommendation. Special meetings may be held if needed at the discretion of the Tree Commission. Each Applicant will have 10 minutes to present its Application to the Tree Commission.
- (2) **Tree Commission Review.**
 - a. When evaluating each Application, the Tree Commissioners will utilize the information contained in the Application, including the exhibits, Staff Report and all information obtained during the Applicant's presentation. The Tree Commission will recommend either:

1. Approval;
 2. Approval with Conditions;
 3. Denial of the Project; or
 4. if more information is requested then the Application may be deferred by a vote of the Commission or unilaterally by the Chair of the Commission.
- b. If the recommendation is Approval with Conditions and the Applicant agrees with the recommendation, the Applicant shall revise the supporting documents in the Application necessary to convey the intent of the recommendations by the Tree Commission for inclusion in the Agreement exhibits.
 - c. If the recommendation is Approval with Conditions and the Applicant does not agree with the recommendation, then the result will be a recommendation for Denial.
 - d. The Tree Commission's recommendation will be forwarded to the Mayor's Office for processing through the Mayor's Budget Review Committee ("MBRC") for final review.

F. MAYOR'S BUDGET REVIEW COMMITTEE ("MBRC") REVIEW

- (1) At the earliest MBRC meeting following the evaluation of the proposed Project by the Tree Commission and the receipt of any requested modifications to the Application, the Staff will submit the Project to MBRC for review and approval. Like the Tree Commission, MBRC shall either approve the Project, approve the Project with conditions, deny the Project, defer the decision until more information is received, or delay funding of the Project to a later date.
- (2) If MBRC approves the Project as presented or as modified, it will direct the Office of General Counsel to prepare the Agreement. No additional action is required by the City Council.
- (3) If the Project is denied by MBRC, no further action will be taken by the Tree Commission on the Project through the Level 3 Program. However, this does not limit the ability of a Council Member to file legislation to implement a Project utilizing the Tree Fund.
- (4) If the MBRC decision is Approval with Conditions, and the Applicant agrees with the decision, the Applicant will revise the documents necessary to convey the intent of the decision for inclusion in the Agreement exhibits.
- (5) If the decision is Approval with Conditions and the Applicant does not agree with the decision, then the result will be a Denial of the Project by the MBRC.

III. PROJECT EXECUTION PHASE

A. ENTERING INTO AGREEMENT

- (1) Once the Project is approved by the MBRC, the Office of General Counsel will prepare a Tree Planting Program Level 3 Agreement (the "Agreement") between the Applicant and the City of Jacksonville, which will set the funding provided by the City and describe the responsibilities of each party.
- (2) We understand that the Applicant relies on consultants to assist with its Project. However, the Applicant is responsible for the Project and all that it encompasses. The Agreement for the funding is between the Applicant and the City of Jacksonville, so the Applicant is fully responsible for completion of the Project and will be held accountable for any deficiencies.
- (3) Upon execution of the completed Agreement by all parties, the Applicant will be eligible for payment of funds in accordance with the Agreement.

- (4) **It is imperative that the Applicant read and understand the Agreement and the obligations before entering into this Agreement with the City.**

B. PROJECT BIDDING & AWARD

- (1) Landscape Architect prepares bid documents (tree planting plans and construction specifications) incorporating the requirements of the approved Application and the Agreement.
- (2) Project Manager solicits bids from 3 landscape contractors.
- (3) The Applicant awards the project after consultation with the City.
- (4) Applicant prepares and executes a Contract between Applicant and the Landscape Contractor.

C. CONSTRUCTION

- (1) Project Manager issues Notice to Proceed, establishes the construction schedule, coordinates with the Landscape Architect and City Staff, and provides overall project management during the construction and the maintenance period.
- (2) Landscape Architect monitors construction and maintenance during the plant establishment period, inspects the completed work, submits reports, and reviews the contractor's invoices.
- (3) Applicant prepares and submits monthly invoices to the City for work completed the previous month.
- (4) The Applicant issues to the Contractor a letter of Final Acceptance when all work is completed and obtains the close out documents required by the Contract.

D. MAINTENANCE

- (1) The Landscape Contractor shall maintain the Project throughout the warranty period as described in the Contract between the Landscape Contractor and the Applicant.
- (2) Should a tree not meet specifications at any time within the warranty period, the Landscape Contractor must replace the tree and the warranty period begins again once the tree is approved by City staff.