

City of Biddeford
Finance Committee
July 18, 2017 5:00 PM Council Chambers

- 1. Call to order**
- 2. Approval of the Minutes**
 - 2.1. July 11, 2017 Finance Committee Meeting Minutes
[7-11-2017 Finance Committee Minutes.rtf](#)
- 3. Signing of the expenditure warrant**
- 4. Discussion/Approval**
 - 4.1. Purchase of Police Cruisers/Arundel Ford/FY18 CIP Budget
[7-18-2017 Police Cruisers-FY18-ORDER.docx](#)
[7-18-2017 Police Cruisers-BIDS.doc](#)
 - 4.2. Purchase of Fire Dept. Vehicle/Quirk Auto Group/FY18 CIP Budget
[7-18-2017 Fire Dept Vehicle-BIDS.doc](#)
[7-18-2017 Fire Dept Vehicle-FY18-ORDER.docx](#)
 - 4.3. Renovations to Kitchen Exhaust System at Fire Department Central Station/FY18 CIP Budget
[FD CIP kitchen hood info.pdf](#)
 - 4.4. Project Canopy Committee - Request for Sole Source Contract
[Project Canopy-Sole Source Request Memo.pdf](#)
- 5. Other Business**
 - 5.1. Review of Financials
- 6. Adjournment**

City of Biddeford
Finance Committee Meeting Minutes
July 11, 2017

The meeting was called to order at 5:00pm by Council President John McCurry.

Present: Chair, Council President John McCurry, Mayor Alan Casavant, Councilor Steven St. Cyr, Councilor Mike Ready, City Manager Jim Bennett, Finance Director Cheryl Fournier and City Clerk Carmen Morris.

Approval of Minutes

Motion by Councilor Ready to approve the Minutes of June 20, 2017, seconded by Councilor St. Cyr, unanimous.

Motion carried, 4-0.

The expenditure warrant was available for review and signature.

Review of Financials

The financials will be presented at the July 18 Finance Committee meeting.

Selection of Age-Friendly Community Project Consultant

Linda Waters, Community Development Coordinator, explained five consultants showed interest in the project. Linda is recommending Analytic Insight be awarded the contract pointing out the funds for this project are separate from CDBG funds. The Committee and Linda discuss who will be on the committee involved in awarding the money for different projects.

Motion by Councilor Ready to award Analytic Insight the contract for \$5,000 for consulting services for the Age-Friendly Project, seconded by Councilor St. Cyr, unanimous.

Motion carried 4-0.

Other Business

Councilor Ready noted the numbers for Code Enforcement have exceeded projections with adding the new apartment inspection program.

Councilor Ready asked Jim how he gets updated on the financials. Jim explained he has been more involved in the financials since we did not have a Finance Director. He also noted with Cheryl on board as the new Finance Director the Committee would see the financials on a regular basis.

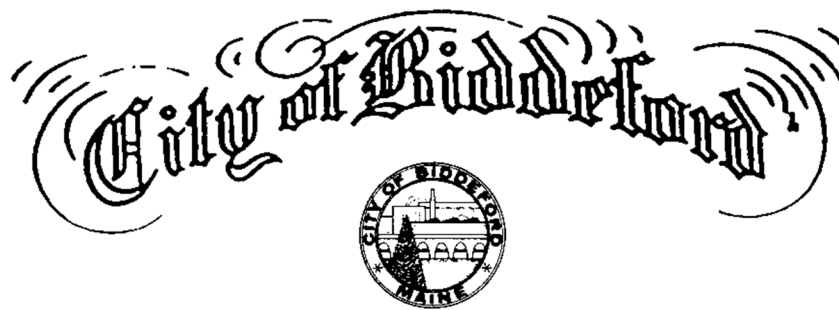
Mayor Casavant welcomed Cheryl on board and thanked Jim for serving as the City Manager and taking on the Finance Director role in this past budget season.

Councilor McCurry welcomed Cheryl and thanked Carmen for filling in and taking notes at the meetings.

Motion to adjourn was made by Councilor Ready, seconded by Councilor St. Cyr, unanimous.

Motion carried 4-0.

Adjourned at 5:23pm.



2017.78

IN BOARD OF CITY COUNCIL.....JULY 18, 2017

BE IT ORDERED, that the City Manager be authorized to purchase two (2) 2018 Ford Explorer utility police cars as per bid of July 7, 2017 (the "Equipment") from Arundel Ford (the "Vendor") and may pay the Vendor an amount not to exceed \$59,260.00 (before discounts valued at \$9,000.00) for the Equipment as follows:

1. The City of Biddeford expects to incur debt to reimburse expenditures to pay the cost of the Equipment;
2. The City of Biddeford reasonably expects that the maximum principal amount of the debt, including for reimbursement purposes, is \$59,260.00;
3. The City Manager, on behalf of the City of Biddeford, is authorized to enter into a lease purchase, loan or other financing agreement for the Equipment provided that (a) the principal amount of such agreement will not exceed \$59,260.00, (b) the term of such agreement will not exceed one hundred and twenty (120) months and (c) any obligation of the City of Biddeford to make lease or loan payments pursuant to such agreement is subject to annual appropriation by the City Council of the City of Biddeford;
4. The City Manager is authorized to advance money from the General Fund of the City for payment of the costs of the Equipment; and
5. The City Manager, on behalf of the City of Biddeford, is authorized to negotiate, enter into, execute, deliver and cause to be performed, and to approve, any and all agreements, instruments, certificates and other documents, and to grant security interests in the Equipment, upon such terms, conditions, limitations and undertakings, which the City Manager determines are necessary and proper for the acquisition and financing of the Equipment, provided that any lease purchase, loan or other financing agreement will be countersigned by both the Mayor and the Treasurer of the City of Biddeford. Without limiting the foregoing, the City Manager, on behalf of the City of Biddeford, in connection with the acquisition of the Equipment, is authorized to sell, transfer, trade in or otherwise dispose of any equipment, which the City Manager determines is no longer useful to the City of Biddeford.

NOTE: The Finance Committee will review this item on July 18, 2017 and vote to recommend it to the City Council for approval. The purchase of this item is included in the FY18 CIP budget

Bid Opening for a 2 Ford Utility Police Cruises

Present: Carl Marcotte Public Works
Kara Cote Public Works

Bids were opened at the Public Works Department on July 7, 2017 at 11:00am. Staff is recommending the bid from Arundel Ford with trade in the amount of \$50,260.00, these police cars are budgeted in the FY18 budget line 21146-60603.

Arundel Ford

2 Ford Explorers	\$59,260.00
Trade In	\$9,000.00
Total	\$50,260.00

Bid Opening for 4 x 4 SUV

Present: Carl Marcotte – Public Works
Kara Cote – Public Works

Bids were opened at the Public Works Department at 11:00 AM on July 7, 2017. Staff is recommending the low bid from Quirk Auto group with trade in the amount of \$33,850.45 this 4X4 SUV was approved in the FY18 CIP budget as a lease line item 21204-60603.

Quirk

2018 Chevy Tahoe	\$34,900.00
Color Surcharge	\$450.45
Trade In	\$1,500.00
Total:	\$33,850.45

O'Connor

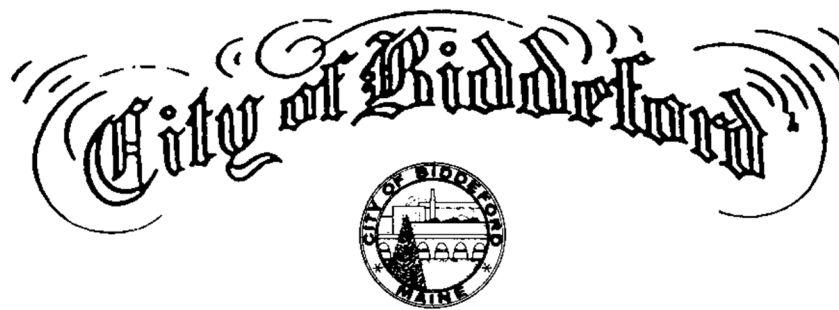
2018 Chevy Tahoe	\$35,365.00
Color Surcharge	\$450.45
Trade In	\$1, 588.00
Total:	\$34,227.45

Arundel Ford

2018 Ford Expedition	\$37,585.00
Trade In	\$700.00
Total:	\$36, 885.00

Lee Dodge

2018 Jeep	\$28,045.00	(Does not meet Specifications)
Trade In:	N/A	
Total:	\$28,045.00	



2017.79

IN BOARD OF CITY COUNCIL.....JULY 18, 2017

BE IT ORDERED, that the City Manager be authorized to purchase one (1) 2018 Chevrolet Tahoe 4X4 as per bid of July 7, 2017 (the "Equipment") from Quirk Auto Group (the "Vendor") and may pay the Vendor an amount not to exceed \$34,900.00 (before discounts valued at \$1,500.00) for the Equipment as follows:

1. The City of Biddeford expects to incur debt to reimburse expenditures to pay the cost of the Equipment;
2. The City of Biddeford reasonably expects that the maximum principal amount of the debt, including for reimbursement purposes, is \$34,900.00;
3. The City Manager, on behalf of the City of Biddeford, is authorized to enter into a lease purchase, loan or other financing agreement for the Equipment provided that (a) the principal amount of such agreement will not exceed \$34,900.00, (b) the term of such agreement will not exceed one hundred and twenty (120) months and (c) any obligation of the City of Biddeford to make lease or loan payments pursuant to such agreement is subject to annual appropriation by the City Council of the City of Biddeford;
4. The City Manager is authorized to advance money from the General Fund of the City for payment of the costs of the Equipment; and
5. The City Manager, on behalf of the City of Biddeford, is authorized to negotiate, enter into, execute, deliver and cause to be performed, and to approve, any and all agreements, instruments, certificates and other documents, and to grant security interests in the Equipment, upon such terms, conditions, limitations and undertakings, which the City Manager determines are necessary and proper for the acquisition and financing of the Equipment, provided that any lease purchase, loan or other financing agreement will be countersigned by both the Mayor and the Treasurer of the City of Biddeford. Without limiting the foregoing, the City Manager, on behalf of the City of Biddeford, in connection with the acquisition of the Equipment, is authorized to sell, transfer, trade in or otherwise dispose of any equipment, which the City Manager determines is no longer useful to the City of Biddeford.

NOTE: The Finance Committee will review this item on July 18, 2017 and vote to recommend it to the City Council for approval. The lease-purchase of this item is included in the FY18 CIP budget, with a down payment of \$5000.00



**CITY OF BIDDEFORD
FIRE DEPARTMENT**

152 Alfred Street
Biddeford, Maine 04005
Tel: 207-282-6632
Fax: 207-283-8243

Chief Scott R. Gagne
Assistant Chief Paul R. LaBrecque
Deputy Chief Kevin D. Duross

7/13/17

Bid results for the replacement of FD kitchen hood system

Bid information was posted on the web site, placed in the paper, and sent to the original companies that we received quotes from to formulate an estimated project cost.

Sealed Bids we opened on 7/13/17 at 1500 hours. Chief Gagne and Office Manager Kathy Boyden were present.

Ability Equipment Sales, INC. 378 Main Street Biddeford, Maine 04005

\$ 9,520.00 (bid is attached)

The RFP requested the Bid to include all of the project costs, the bidder did not include the cost for reinstalling our current hood fire suppression system or electrical work. Below are the quote prices for this work which gives the total project cost. Because the electrical was an exception in the bid, we were not able to get a final electrical cost before the electrician could see the new system.

Camille's Electric

\$ 2,400 (This is a projected cost, the final cost will be determined once the hood system is installed. It is thought that the cost should be lower.)

Fire Safe

\$ 1,300 (quote is attached)

Total Project cost

\$ 13,220

This is \$2,720 over projected project cost, it is projected that the electrical cost should be lower and \$316.81 of the fire suppression system quote is to change the current wet chemical cylinder that will expire this year and was scheduled to come out of the building maintenance budget.

**SPECIFICATIONS AND BID FORMS
FOR**

Kitchen Hood Exhaust System

BIDDEFORD FIRE DEPARTMENT

**152 ALFRED STREET
BIDDEFORD, MAINE 04005**

(207) 282-6632

Fax (207) 283-8243

BIDDEFORD FIRE DEPARTMENT
PROPOSAL TO SUPPLY

Kitchen Hood Exhaust System

Sealed proposals for furnishing the Biddeford Fire Department with a kitchen hood exhaust system as specified in the attached request for proposals and specifications will be received by the Biddeford Fire Department, 152 Alfred Street Biddeford, Maine 04005 until 3 P.M. on July 13th 2017 at which time and place they will be publicly opened and read. Bids shall be submitted in sealed envelopes plainly marked, **Bid for Biddeford Fire Department kitchen hood system and shall be addressed to:**

Biddeford Fire Chief
152 Alfred Street
Biddeford, Maine 04005

All bids shall be submitted on the bid form provided herewith. Bidders shall attach to the bid form a detailed description of the items proposed, including specification, standard features, optional equipment, and warranties. All exception to the bid specification shall be listed on the provided bid form in the area provided for exceptions. Bidders shall quote prices that include shipping charges. No proposal may be withdrawn within sixty (60) days after date of opening thereof.

Biddeford Fire Department will select the bidder that best meets the needs of the Fire Department. In evaluating bids, the Fire Department will consider the price, quality, warranty, specific features of the equipment proposed, the bidder's location, and the time of delivery. The Fire Department reserves the right to reject any or all bids, to wave informalities in the bidding process, and to negotiate specific terms of the bid. Biddeford Fire Department will issue a purchase order to the successful bidder to indicate the award of the contract to furnish the system. Questions regarding this bid should be addressed to Chief Scott Gagne at 207-282-6632.

SPECIFICATIONS
(Acceptable minimums are listed)

1. Stainless steel hood system, exhaust only with built in 3" back standoff, low ceiling application, 9'4" long X 48" deep with 12" front.
2. Complete with stainless steel grease filters, (3) lights, grease cups, left right ends insulated 1" left and right quarter end panels.
3. Exhaust fan, 2660 CFM 1.5 hp motor, 230V, 6.8amps, with roof curb with grease cup with down spout, hinges, extra set of V-belts, and 3 year warranty on motor.
4. Installed to NFPA and local codes with documentation of CFM requirements , to include, removal of existing hood and capping roof curb, installing new hood, installing left side wall with 24 gage stainless steel panel glued to sheet rock, fabricate 16 guage grease duct and wrap with 3M grease duct wrap, install new roof curb and flash in.
5. Including all freight charges.
6. Removal of old hood fire system and re-install onto new hood system, to be completed by certified fire suppression company to NFPA and local codes.
7. To include any needed gas or electrical work.

BID FORM

Kitchen Hood System

EXCEPTIONS

All bids must bear the handwritten signature of an officer or authorized employee of the company bidding.

This bid is submitted by:

Printed name _____

Business name _____

Business Location _____

Business phone _____

Signed _____ Date _____

BID FORM

Kitchen Hood System

EXCEPTIONS

* ELECTRICAL & GAS WORK *
by others.

* Existing fire system REMOVAL & Reinstallation
Not included. *

All bids must bear the handwritten signature of an officer or authorized employee of the company bidding.

This bid is submitted by:

Printed name John Leclerc President

Business name Ability Equipment Sales

Business Location Biddeford

Business phone 283-8008

Signed John Leclerc Date 6-30-17

Ability Equipment Sales, Inc

378 Main Street/P. O. Box 569
Biddeford,, ME 04005

Proposal

Date	Proposal #
6/30/2017	1517

Name / Address
City of Biddeford Re: Biddeford Fire Dept. 152 Alfred Rd. Biddeford, Me. 04005

	Description	Qty	Unit	Total
Captive Aire	Stainless steel hood system, exhaust only with built-in 3" back standoff, low ceiling application, 9'4" long x 48" deep with a 12" front. Complete with stainless steel grease filters, (3) lights, grease cups, left and right ends insulated 1", left and right quarter end panels, exhausts fan, 2660 CFM1.5 hp motor, 230V, 6.8 amps, with roof curb with grease cup with down spout, hinges, extra set of V-belts, and 3 year warranty on motor only. (No labor) Installation by Bourgoin and Son to NFPA and local codes, to include, Removal of existing hood and capping roof curb, installing new hood, install leftside wall with 24 ga. stainless steel glued to sheetrock, fabricate 16 gauge grease duct and wrap with 3M grease duct wrap, install new roof curb and flash in.	1	8,995.00	8,995.00
freight-Taxable	freight charges	1	525.00	525.00
			Subtotal	
			Sales Tax (0.0%)	
			Total	

Signature _____

Phone #	Fax #	E-mail	Web Site
207-283-8008	207-286-9587	johnability@maine.rr.com	www.ability equipmentsales.com

Ability Equipment Sales, Inc

378 Main Street/P. O. Box 569

Biddeford,, ME 04005

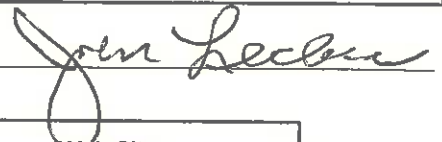
Proposal

Date	Proposal #
6/30/2017	1517

Name / Address
City of Biddeford Re: Biddeford Fire Dept. 152 Alfred Rd. Biddeford, Me. 04005

	Description	Qty	Unit	Total
	Please note: Price does not include fire system. You will need to have your fire system company remove system from existing hood and re-install into new hood assuming it meets current codes. **Price also does not include any electrical or gas work.** Terms: "Special order" 1/2 down with balance upon completion. Thank you, John Leclerc			
Subtotal				\$9,520.00
Sales Tax (0.0%)				\$0.00
Total				\$9,520.00

Signature



Phone #	Fax #	E-mail	Web Site
207-283-8008	207-286-9587	johnability@maine.rr.com	www.abilityequipmentsales.com

Firesafe Equipment Inc.

PO Box 1355
Auburn, ME 04211-1355

Sales Order

Telephone: (207) 784-7525
Fax: (207) 777-6210

Customer No.: P991291M
Order No.: 62605

Bill To: City of Biddeford
Fire Dept.
152 Alfred Street
BIDDEFORD, ME 04005-0586

Ship To: City of Biddeford
Fire Dept
152 Alfred Street
BIDDEFORD, ME 04005

Numbers: (207) 282-6632

Info: 4G RG (07)
PAUL LABRECQUE @ 468-0648 CELL

Date	Ship Via / Tag Reference	F.O.B.	Terms
07/11/17		Origin	NET 30
Purchase Order Number	Required Date	Sales Person	Our Order Number
	07/11/17	DAVE CHAPMAN	62605

Quantity			Item Number	Description	Unit Price	Amount
Required	Shipped	B.O.				
1			SWAP-4WET	Wet Chemical System Cylinder Swap Out (To 4 Gal)	316.81	316.81
2			SYSARM	Disarm / Arm System	62.00	124.00
10.000			LAB-OS	Labor, On Site REINSTALL SYSTEM	62.00	620.00
1			PIPE/FIT	Pipe & Fittings / System	250.00	250.00

Order subtotal 1310.81

Order total 1310.81

UL300 COMPLIANT SYSTEM

Thank You

Memorandum

To: Jim Bennett, City Manager and Biddeford Finance Committee
CC: Guy Casavant, Director of Public Works
From: Biddeford Project Canopy Committee, Ron Gobeil, Chair
Date: 6/28/2017
Re: Request for Sole Source Contract

Biddeford Project Canopy was recently awarded a FY17 Maine Forest Service Planning and Education Grant of \$10,000. The Scope of Work for this grant includes:

- (1) updating the (2011) Street Tree Inventory database;
- (2) developing a city wide Tree Maintenance Plan and Emerald Ash Borer Mitigation Strategy; and
- (3) developing a plan to revamp Shevenell Park to showcase how the Street Tree Inventory and Tree Maintenance Plan can be used to revitalize urban public spaces.

The budget for items 1 and 2 is \$5,000 of grant funds matched by \$2,000 of cash from the Project Canopy FY17 budget and \$4,000 of in-kind time from the Biddeford Project Canopy Committee members and city staff.

Our current Street Tree Inventory database was developed in 2011 by Davey Resource Group with funds provided under a separate Maine Forest Service Project Canopy grant. Davey did an exceptional job and the project received high marks from the Maine Forest Service for quality of work versus total project cost/value for grant funds awarded.

Davey has quoted this new body of work at \$7,000. Comparatively, a first time client would be charged \$12,000 for this project. In 2011, we paid \$7,288 for the Street Tree Inventory alone. Based on our previous experience with Davey and the high marks we received from the Maine Forest Service Project Canopy grant management team, we respectfully request permission from the Finance Committee to sole source the new contract to Davey Resource Group in the amount of \$7,000.

We are confident Davey's final work will provide a significant value to the city and help position Biddeford Project Canopy for a FY18 Maine Forest Service Planting Grant application to be submitted this fall.

We appreciate your consideration in this important matter.

Respectfully,

Ron Gobeil

Ron Gobeil, Chair
Biddeford Project Canopy

**Agreement for
Specification of Work
for a
GIS-based Public Tree Inventory
and Associated Services
for
City of Biddeford, Maine**

June 20, 2017

The following work specification details all services and deliverables including deliverable products and work to be performed by Davey Resource Group (hereinafter referred to as Davey) in connection with the City of Biddeford, Maine (hereinafter referred to as Client). This document does not replace any prior correspondence, including agreements, proposals, RFP's, and written correspondence, but is instead part of a development process that will move the project from proposal, to final delivery and/or acceptance by the client.

Davey and the Client project managers will be the primary point of contact for all critical project related communication. This will ensure frequent communication so that both parties are informed of project progress, challenges, and any resultant changes in requirements or schedules. Projected delivery dates contained in this document are approximate and based on conditions at the time of the contract and/or agreement. Changes to this agreement should be noted in writing to both the client and Davey representative with documentation of the need for a change. Changes to either the client representative or the Davey representative should also be noted in writing.

Client Contact Information

Primary Contact: Guy Casavant
Title: Director of Public Works
Primary Phone: 207-282-1579
Secondary Phone:
Fax: 207-286-9395
E-mail: gcasavant@biddefordmaine.org
Mailing Address: Biddeford Public Works Dept.
371 Hill Street
Biddeford, ME 04005

Davey Resource Group Contact Information

Business Developer: Andrew Hillman
Primary Phone: 607-339-3968
Fax: 330-676-7715
E-mail: Andrew.hillman@davey.com
Mailing Address: Davey Resource Group
3315 Swamp College Road
Trumansburg, NY 14886

Schedule of Deliverables

Deliverable	Comments	Estimated Delivery Date	Price
Task One: Tree Inventory <i>Attachments A & B</i>	Re-Inventory of approximately 1,200 trees along Public Streets, Public Parks, and Public Facilities. Tree inventory data will be delivered as ESRI® shapefile and/or geodatabase, an Access™ database, and an Excel™ spreadsheet. A Standard Tree management Plan plus EAB Response Component will be delivered.	September, 2017	\$7,000
Total			\$7,000

Notice of Disclaimer

Inventory data provided by Davey are based on visual recording at the time of inspection. Visual records do not include individual testing or analysis and do not include aerial or subterranean inspection. Davey is not responsible for discovery or identification of hidden or otherwise non-observable hazards. Records may not remain accurate after inspection due to variable deterioration of inventoried material. Davey provides no warranty with respect to the fitness of the urban forest for any use or purpose whatsoever.

Arborists are tree specialists who use their education, knowledge, training, and experience to examine trees, assess their condition, and recommend measures to enhance the beauty and health of trees, while attempting to reduce risk. Clients may choose to accept or disregard the recommendations of the arborist, or to seek additional advice.

Arborists cannot detect every condition that could possibly lead to the failure of a tree. Trees are living organisms that fail in ways that cannot always be predicted. Conditions are often hidden within trees and below ground, and can develop quickly after an inspection. Arborists cannot guarantee that a tree will be healthy or safe under all circumstances, or for a specified period of time. Likewise, remedial treatments cannot be guaranteed.

Important: Know and understand that this basic visual assessment is confined to the designated subject tree(s), and that this consultation was performed in the interest of facts of the tree(s) without prejudice to or for any other service or any interested party.

Client Responsibilities

- Provide Davey with all maps and other information necessary at no charge. This includes, but is not limited to: digital orthophotographs; available GIS data layers, electronic or paper copies of maps for roads; pavement widths; right-of-way widths; boundaries and utilities; and an electronic file or printed list of street names and end points.
- The Client is requested to coordinate with Davey project staff to host and conduct an informational kick-off meeting immediately prior to the start of the fieldwork.
- Provide daily contact information and directions as needed during the inventory process.

AUTHORIZATION
Specification of Work
for
GIS based Public Tree Inventory and Associated Services
City of Biddeford, Maine

Total \$7,000

Purchase Order Number: _____

Authorized Client Representative

Signature: _____ Date: _____

Title: _____

Davey Resource Group Representative

Signature: _____ Date: _____

Title: _____

Attachment A

Public Tree Inventory Data Field Definitions

The data fields that will be collected for each tree during the inventory are defined as follows:

- **Mapping coordinate.** X and Y coordinate locations.
- **Area.** Tree locations will be identified by subdivision, management area, park name, or other discrete location/property name as determined by Davey Resource Group and the Client.
- **Location.** The tree's physical location in relation to public ROW and/or public space will be recorded.
- **Blockside and Address.** Davey Resource Group will identify the location of each street tree so that they can easily be identified for future maintenance work. Street tree will be located using an address number, street name, side of lot, tree number, and blockside information (on street, from street, and to street). Each tree at an address will receive a Site Number to aid in locating the site. Park and open space trees are organized by unique tree site number and property name.
- **Species.** Trees will be identified by genus and species, with the exception of genera such as *Crataegus* or *Malus*, where field identification of species is often not practical.
- **Diameter.** Diameter is measured in inches at 4-1/2 feet above the ground, or diameter-breast-height (DBH).
- **Stems.** The number of stems a tree has will be recorded.

Location Value. The location value involves an assessment of the site where the tree is planted, the tree's functional and aesthetic contributions to the site, and the placement of the tree within that site. Location Value is collected for its use in the Trunk Formula Method of landscape plant appraisal along with species, size, and condition. The Trunk Formula Method is adapted from the *Guide for Plant Appraisal* (9th edition), published by the International Society of Arboriculture and generically applied to the entire inventory population for informational purposes only and is not a substitute for a detailed, individual plant appraisal.

1. Excellent. The quality of the location, the environment and aesthetic contributions, and the placement of the tree relative to adjacent structures and landscaping are all exceptional.
2. Good. The location, contribution, and placement of the tree are all favorable. In a good site, a tree should thrive and provide benefits to the surrounding environment.
3. Fair. A fair tree location has no evident limitations that would seriously impede growth, but relative placement, location quality, or environmental and aesthetic contributions of the tree do not enhance potential benefits of this specific plant.
4. Poor. Some characteristics of the site or the tree make this location unfavorable, or the tree exhibits an undesirable trait, such as shading solar panels.

- **Condition.** In general, the health and structure of each tree will be recorded in one of the following categories based on visible root, trunk, scaffold branch, twig, and foliage conditions at the time of the inventory and adapted from the rating system established by the International Society of Arboriculture and based on visible root, trunk, scaffold branch, twig, and foliage conditions at the time of the inventory:

1. Excellent. 100% condition rating.
2. Very Good. 90% condition rating.
3. Good. 80% condition rating.
4. Fair. 60% condition rating.
5. Poor. 40% condition rating.
6. Critical. 20% condition rating.
7. Dead. 0% condition rating.

Maintenance Need. Each tree is classified into one of the following recommended maintenance categories:

- **Priority 1 Removal**—These trees have defects that cannot be cost-effectively or practically treated, have a high amount of deadwood, and pose an immediate hazard to a property or person. Davey recommends that these trees be removed immediately.
- **Priority 2 Removal**—These trees are not as great of a liability as Priority 1 Removals, being smaller and/or less hazardous, although they are also recommended for removal. Davey recommends that they be removed as soon as possible.
- **Priority 3 Removal**—Trees designated for Priority 3 Removal do not pose a public hazard and are small, dead, or poorly formed. Smaller dead trees and failed transplants are in this category. Large trees in this category are generally poorly sited, of inferior quality, and pose little to no threat to the community.
- **Priority 1 Pruning**—Trees in this category need pruning to remove hazardous deadwood limbs greater than four inches in diameter and/or have broken, hanging, or diseased limbs.
- **Priority 2 Pruning**—These trees need pruning to remove hazardous deadwood limbs greater than two, but less than four, inches in diameter.
 - Note: Trees assessed as lower priority may fail before trees assessed as higher priority. There are many uncontrollable conditions, such as weather, pests, and human involvement, that can contribute to tree failure. Davey's assigned priority is meant only to be used as a guideline to make safety-driven maintenance decisions and to direct normal tree maintenance programs efficiently. All priorities are based on observable defects at the time of assessment. All observations are made from the ground.
- **Large Tree Routine Pruning**—Trees in this category have characteristics that could become risks if not corrected. Deadwood limbs are less than two inches in diameter.
- **Small Tree Routine Pruning**—This category includes small-growing trees that can generally be maintained from the ground, *i.e.*, crabapples, serviceberry, dogwood, etc., and other trees 20 feet or less in height.
- **Training Pruning**—This category includes trees under 20 feet tall with correctable structural problems or minor amounts of deadwood that pose minimal threat of personal injury or property damage. Inexpensive pruning at this stage significantly

affects the future of these trees. Young trees in this category that will be large at maturity generally require an annual pruning or inspection.

- **Observations.** Significant observations affecting a tree's health, structure, and location will be made.
- **Further Inspection.** This field will be used to indicate that a particular tree will require further or periodic inspection due to particular conditions with the tree that could cause it to be a safety risk and, therefore, potentially hazardous to the public.
- **Clearance Required.** Trees which are causing or may cause visibility or clearance difficulties for pedestrians or vehicles will be identified, as well as those trees blocking clear visibility of signs or traffic signals, street lights, traffic signals, or other safety devices.
- **Hardscape Damage.** Damage to sidewalks and curbs by tree roots is noted.
- **Overhead Utilities.** The inventory indicates whether overhead conductors or other utilities are present at the tree site that could result in conflicts with the tree.
- **Growing Space Type**—Growing space locations are categorized as:
 1. Island
 2. Median
 3. Open/Unrestricted
 4. Raised Planter
 5. Tree Lawn/Parkway
 6. Unmaintained Area
 7. Well/Pit
- **Space Size.** The minimum width of the growing space for root development is recorded.
- **Notes.** Additional information regarding disease, insect, mechanical damage, etc. can be included in this field.

Attachment B

Inventory Data Field Descriptions and Sizes

The following data fields and input/collection code formats are Davey's recommended fields for a street tree inventory. These fields and their acceptable values will be programmed into Davey's hand-held field computers for the inventory data collection.

Data Field Name	Field Format	Input Notes	Definition
Area	Dynamic Pick List	Alpha & Numeric	Subdivision name or code #
Location	Pick List	Borderline Off ROW Park/Public Space Street Unknown	Public space site
Blockside Input Fields			
On Street	Pick List	Street name: master file	Street tree is located on
From Street	Pick List	Street name: master file	Cross street from tree
To Street	Pick List	Street name: master file	Cross street towards tree
ROW	1-999	Right-of-way: master file	
Address Input Fields			
Area	Dynamic Pick List	Alpha & Numeric	Subdivision name or code #
Location	Pick List	Borderline Off ROW Park/Public Space Street Unknown	Public space site
Address	Open Entry	Numeric	Property address
Assigned?	Yes/No	100X Main Street 100 Main Street	Yes = addressed assigned No = address not assigned
Street	Pick List	Street name: master file	
Side	Pick List	Front Side To Side Away Rear Median	Location of site at address
Site	Auto Generate	Numeric	Unique # per address and side
Tree/Site Input Fields			
Species	Pick List	Species: master file	
Diameter	Pick List	Numeric	DBH (inches)
Stems	Pick List	1 (default) 2 to 99	One stem only # of multiple stems
Condition	Pick List	Excellent Very Good Good Fair Poor Critical Dead	100% 90% 80% 60% 40% 20% 0%
Location Value	Pick List	Excellent Good Fair Poor	100% 80% 60% 40%

Maintenance	Pick List	Priority 1 Removal Priority 2 Removal Priority 3 Removal Priority 1 Prune Priority 2 Prune Large Tree Routine Prune Small Tree Routine Prune Training Prune	Maintenance
Observations	Pick List	Cavity/Decay Grate/Guard Improperly Installed Improperly Mulched Improperly Pruned Mechanical Damage Memorial Tree Nutrient Deficiency Pest Problem Poor Location Poor Root System Poor Structure Remove Hardware Serious Decline	
Further Inspection	Yes/No	No (default) Yes	No Further Inspection Further Inspection Recommended
Clearance	Pick List	None needed (default) Light Building Pedestrian Sign/Signal Vehicle	
Hardscape Damage	Yes/No	No (default) Yes	Damage <i>not</i> present Damage present
Overhead Utilities	Yes/No	No (default) Yes	Utilities <i>not</i> present Utilities present
Growing Space Type	Pick List (Keeps last value)	Island Median Natural Area Open/ Unrestricted Raised Planter Tree Lawn/Parkway Well/Pit	
Growing Spacing Size	Open entry	Numeric	Narrowest dimension (feet)
Notes	Open entry	Alpha & Numeric	Special conditions noted
GPS X	Easting	Numeric	Projected longitude coordinate
GPS Y	Northing	Numeric	Projected latitude coordinate
Serial Number	Open entry	Numeric	Unique identifier #
Date	MM/DD/YY		Date collected or edited
Time	00:00:00		Time collected (24 hour)
Staff	Pick List		Staff name or initials