



**REQUEST FOR QUOTATION  
RFQ # 17-1748GE**

**Arbor Creek and Shadow Brook Tree Trimming**

Manatee County, a political subdivision of the State of Florida, (hereinafter "County") invites your participation in the following requests for quotes (RFQ). The specifications stated herein are of the minimum requirements. All quotes submitted must be in accordance with the Request for Quotes documents in their entirety.

**INFORMATIONAL CONFERENCE:**

**None. All clarification requests are to be directed to the contact person listed at the bottom of this page.**

**DATE ISSUED: July 6, 2017**

**DEADLINE FOR CLARIFICATIONS REQUESTS: 3:00 PM on July 14, 2017**

**TIME AND DATE DUE: 3:00 PM on July 20, 2017**

**TABLE OF CONTENTS**

A.	Information to Quoters	A-2-14
B.	Terms and Conditions	B-1-2
C.	Scope of Work	C-1-2
D.	Qualifications and Basis of Award	D-1
E.	Insurance Requirements	E-1-7
F.	Quotation Form	Quote Form 1-2
	Quoter's Questionnaire	Attachment A
	Statement of No Quote	Attachment B
	Public Contracting and Environmental Crime Form	Attachment C
	Map (1 page)	Exhibit 1
	ANSI A300, Part 1: Pruning Standards	Exhibit 2

**FOR INFORMATION CONTACT:**

**George Earnest CPPB, Buyer**

**PHONE (941) 749-3044 FAX (941) 749-3034**

**[George.earnest@mymanatee.org](mailto:George.earnest@mymanatee.org)**

**Manatee County Financial Management Department  
Procurement Division**

**AUTHORIZED FOR RELEASE:** \_\_\_\_\_

**SECTION A**  
**INFORMATION TO QUOTERS**

**A.01 QUOTATION FORM DELIVERY REQUIREMENTS**

Any quotes received after the stated time and date will not be considered. Acceptable methods of delivery of quotes are as follows:

Email Address: 2george.earnest@mymanatee.org

FAX: (941) 749-3034

US MAIL to: Manatee County Procurement Division

1112 Manatee Avenue West, Suite 803, Bradenton FL 34205

**A.02 QUOTATION FORMS**

All blank spaces on the quotation form must be filled in as noted with amounts extended and totaled and no changes shall be made in the wording of the forms or in the items thereupon. In the event a change is made in your submittal, the quoter shall write its initials by the change. Any quote may be rejected which contains any omissions, alterations, irregularities of any kind, or which shall in any manner fail to conform to the requirements of this RFQ.

A quote made by an individual, either in his/her own or proper person or under a trade or firm name, shall be executed under the individual's signature. If made by a partnership, the quote shall be executed by two or more of the general partners. If made by a corporation, the quote shall be executed by its President or other legally authorized corporate officer or agent.

Quotes must be submitted on attached provided forms, although additional pages may be attached. **Quoters must fully complete all pages of the Quote Forms. Quote Forms must be executed by an authorized signatory who has the legal authority to make the Quote and bind the company. Quoters must fully comply with all requirements of this RFQ in its entirety.** Failure to comply shall result in default of the resulting Contract, whereupon, the defaulting Contractor shall be required to pay for any and all re-procurement costs, damages, and attorney fees as incurred by County.

**A.03 MATHEMATICAL ERRORS**

Quotation Forms without imbedded mathematical formulas:

In the event of multiplication/extension error(s), the unit price shall prevail. In the event of addition error(s) the extension totals will prevail. In the event the dollar amount for contract contingency is omitted, it will be added to the total price of the quote.

Quotation Forms with imbedded mathematical formulas:

Interactive Quotation Forms that contain mathematical formulas may be used for automating lengthy and complex quotation forms. In the event these forms are used and a multiplication/extension error(s) is discovered, the unit price entered by the vendor shall prevail. The vendor shall assume the responsibility and accuracy of the information input in the quotation form and therefore shall verify that the calculations are correct before submitting their quote.

Regardless of which type of quotation form is used, all quotes shall be reviewed mathematically and corrected by the Procurement Division, if necessary, using these standards, prior to additional evaluation.

**A.04 EXAMINATION OF QUOTE DOCUMENTS AND SITE(S)**

It is the responsibility of each quoter before submitting a quote to (a) examine all RFQ documents thoroughly; (b) consider federal, state, and local codes, laws, and regulations which may affect costs, progress, performance, or furnishing of the work; (c) study and carefully correlate quoter's observations with the RFQ documents; and (d) notify the County of all conflicts, errors, or discrepancies in the RFQ documents prior to the deadline for clarification requests.

**A.05 NON-EXCLUSIVE**

Unless otherwise stated in this quote specification, any contracts resulting from this quote are nonexclusive. The County reserves the right, in its sole opinion, to purchase items listed in this quote through the State of Florida contracts, cooperatives, other current government contracts, and nonprofit contracts as provided in the Manatee County Procurement Policy. The County reserves the rights to solicit separate quotes for requirements that are a portion of a larger contract quote/bid as a whole. Additionally at the County's sole option, additional contracts may be entered into as a result of such situations as unusual volumes, time/delivery requirements, special requirements, other brands, lease, project specific requirements, or similar situations.

**A.06 MODIFICATION OF RFQ DOCUMENTS**

If a Quoter wishes to recommend changes to the RFQ documents, the Quoter shall furnish, in writing, data and information necessary to aid County in evaluating the request to modify the Specifications. County is not obligated to make any changes to the RFQ documents. Unless an Addendum is issued, the RFQ documents shall remain unaltered. **Quoters must fully comply with the RFQ documents in their entirety.**

**A.07 CLARIFICATION & ADDENDA**

Each quoter shall examine all RFQ documents and shall judge all matters relating to their adequacy and accuracy. Any inquiries, suggestions or requests concerning interpretation, clarification or additional information pertaining to this RFQ shall be made through the Manatee County Procurement Division. Owner shall not be responsible for oral interpretations given by any Owner employee, representative, or others.

**3:00 PM on July 14, 2017** shall be the deadline to submit to the Procurement Division, in writing, all inquiries, suggestions, or requests concerning interpretation, clarification or additional information pertaining to this RFQ.

This deadline has been established to maintain fair treatment of all potential quoters, while maintaining progression of the Work.

The issuance of a written addendum is the only official method whereby interpretation, clarification or additional information can be given.

It shall be the **responsibility of each quoter, prior to submitting a quote**, to contact the Procurement Division (see contact information on the cover page) to **determine if any addenda were issued** and to make such addenda a part of their quote.

A complete set of the RFQ documents must be used in preparing quotes. County assumes no responsibility for errors and misinterpretations resulting from the use of incomplete sets of quote documents.

**A.08 CONFIDENTIALITY OF SECURITY RELATED RECORDS**

(a) Pursuant to Florida Statutes § 119.071(3), the following records (hereinafter referred to collectively as “the Confidential Security Records”) are confidential and exempt from the disclosure requirements of Florida Statutes § 119.07(1):

1. A Security System Plan or portion thereof for any property owned by or leased to the County or any privately owned or leased property held by the County.
2. Building plans, blueprints, schematic drawings, and diagrams, including draft, preliminary, and final formats, which depict the internal layout and structural elements of a building, arena, stadium, water treatment facility, or other structure owned or operated by the County.
3. Building plans, blueprints, schematic drawings, and diagrams, including draft, preliminary, and final formats, which depict the internal layout or structural elements of an attractions and recreation facility, entertainment or resort complex, industrial complex, retail and service development, office development, or hotel or motel development in the possession of, submitted to the County.

(b) Contractor/Vendor agrees that it shall not, as a result of a public records request or for any other reason disclose the contents of, or release or provide copies of the Confidential Security Records to any other party absent the express written authorization of the County’s Property Management Director or to comply with a court order requiring such release or disclosure. To the extent Contractor/Vendor receives a request for such records, it shall immediately contact the County’s designated Contract Manager who shall coordinate the County’s response to the request. Notwithstanding the foregoing, the Contractor/Vendor may

1. Disclose or release Security System Plans to:
  - (A) The property owner or leaseholder; or
  - (B) Another state or federal agency to prevent, detect, guard against, respond to, investigate, or manage the consequences of any attempted or actual act of terrorism, or to prosecute those persons who are responsible for such attempts or acts.
2. Disclose or release building plans, blueprints, schematic drawings, and diagrams, including draft, preliminary, and final formats, which depict the internal layout and structural elements of a building, arena, stadium, water treatment facility, or other structure owned or operated by the County:
  - (A) To another governmental entity if disclosure is necessary for the receiving entity to perform its duties and responsibilities;
  - (B) To a licensed architect, engineer, or contractor who is performing work on or related to the building, arena, stadium, water treatment facility, or other structure owned or operated by the County and is contractually bound by the Contractor/Vendor to comply with this Article/Section; or
  - (C) Upon a showing of good cause before a court of competent jurisdiction.

(c) For purposes of this Article/Section, the term “Security System Plan” includes all:

1. Records, information, photographs, audio and visual presentations, schematic diagrams, surveys, recommendations, or consultations or portions thereof relating directly to the physical security of the facility or revealing security systems;
2. Threat assessments conducted by any agency or any private entity;
3. Threat response plans;
4. Emergency evacuation plans;
5. Sheltering arrangements; or
6. Manuals for security personnel, emergency equipment, or security training.

**A.09 LOBBYING**

After the issuance of any RFQ, prospective quoters or their agents, representatives or persons acting at the request of such quoter shall not contact, communicate with or discuss any matter relating to the RFQ with any officer, agent or employee of Manatee County other than the Procurement Official or the contact identified on the first page of this RFQ, pursuant to the Manatee County Code of Laws. This prohibition includes copying such persons on all written communication, including email correspondence. This requirement begins with the issuance of an RFQ and ends upon execution of the final agreement or when the RFQ has been cancelled. Violators of this prohibition shall be subject to sanctions as provided in the Manatee County Code of Laws.

**A.10 UNBALANCED QUOTING PROHIBITED**

County recognizes that large and/or complex projects will often result in a variety of methods, sources, and prices. However, where in the opinion of the County such variation does not appear to be justified, given quote requirements and industry and market conditions, the quote will be presumed to be unbalanced. Examples of unbalanced quotes will include:

- a. Quotes showing omissions, alterations of form, additions not specified, or required conditional or unauthorized alternate quotes.
- b. Quotes quoting prices that substantially deviate, either higher or lower, from those included in the quotes of competitive quoters for the same line item unit costs.
- c. Quotes where the unit costs offered are in excess of or below reasonable cost analysis values.

In the event County determines that a quote is presumed unbalanced, it will request the opportunity to and reserves the right to, review all source quotes, bids, price lists, letters of intent, etc., which the quoter obtained and upon which the quoter relied upon to develop its quote. County reserves the right to reject as nonresponsive any presumptive unbalanced quotes where the quoter is unable to demonstrate the validity and/or necessity of the unbalanced unit costs.

**A.11 WITHDRAWAL OF QUOTES**

Quoters may withdraw quotes as follows:

- a. After the quotes are opened or a selection has been determined, but before an agreement is signed, a quoter alleging a material mistake of fact may be permitted to withdraw their quote if:
  1. The mistake is clearly evident in the solicitation document; or
  2. Quoter submits evidence which clearly and convincingly demonstrates that a mistake was made. Request to withdraw a quote must be in writing and approved by the Procurement Official.

**A.12 IRREVOCABLE OFFER**

Any quote may be withdrawn up until the time and date set for opening of the quote. Any quote not so withdrawn shall, upon opening, constitute an irrevocable offer for a period of ninety (90) days to sell to Manatee County the goods or services set forth in the attached RFQ until one or more of the quotes have been duly accepted by County.

**A.13 QUOTE EXPENSES**

All expenses for submitting quotes to the County are to be borne by the quoter.

**A.14 RESERVED RIGHTS**

County reserves the right to accept or reject any and/or all quotes, to waive irregularities and technicalities, and to request resubmission. Also, County reserves the right to accept all or any part of the quote and to increase or decrease quantities to meet additional or reduced requirements of County. Any sole response received by the first submission date may or may not be rejected by County depending on available competition and current needs of County. For all items combined, the quote of the lowest, responsive, responsible quoter will be accepted, unless all quotes are rejected.

The lowest, responsible quoter shall mean that quoter who makes the lowest quote to sell goods and/or services of a quality which meets or exceeds the quality of goods and/or services set forth in the RFQ documents or otherwise required by County.

To be responsive, a quoter shall submit a quote which conforms in all material respects to the requirements set forth in the RFQ. **Quoters must fully comply with the RFQ documents in their entirety.**

To be a responsible quoter, the quoter shall have the capability in all respects to perform fully the quote requirements, and the tenacity, perseverance, experience, integrity, reliability, capacity, facilities, equipment, and credit which will assure good faith performance.

Also, County reserves the right to make such investigation as it deems necessary to determine the ability of any quoter to furnish the service requested. Information County deems necessary to make this determination shall be provided by the quoter. Such information may include, but shall not be limited to current financial statements, verification of availability of equipment and personnel, and past performance records.

**A.15 APPLICABLE LAWS**

Quoter must be authorized to transact business in the State of Florida. All applicable laws and regulations of the State of Florida and ordinances and regulations of Manatee County will apply to any resulting agreement. Any involvement with the Manatee County Procurement Division shall be in accordance with the Manatee County Procurement Ordinance as amended.

**A.16 COLLUSION**

By submitting a quote in response to this RFQ, quoter certifies that it has not divulged, discussed or compared its quote with any other quoter, and has not colluded with any other quoter or parties to this quote whatsoever. Also, quoter certifies, and in the case of a joint quote each party thereto certifies as to their own organization, that in connection with this quote:

- a. any prices and/or cost data submitted have been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices and/or cost data, with any other quoter or with any competitor;
- b. any prices and/or cost data quoted for this quote have not been knowingly disclosed by the quoter and will not knowingly be disclosed by the quoter, prior to the scheduled opening, directly or indirectly to any other quoter or to any competitor;
- c. no attempt has been made or will be made by the quoter to induce any other person or firm to submit or not to submit a quote for the purpose of restricting competition;
- d. the only person or persons interested in this quote, principal or principals is/are named therein and that no person other than therein mentioned has any interest in this quote or in the resulting agreement to be entered into; and
- e. no person or agency has been employed or retained to solicit or secure the resulting agreement upon an agreement or understanding or a commission, percentage, brokerage, or contingent fee except bona fide employees or established commercial agencies maintained by quoter for purpose of doing business.

**A.17 CODE OF ETHICS**

With respect to this quote, if any quoter violates, directly or indirectly, the ethics provisions of the Manatee County Procurement Ordinance and/or Florida criminal or civil laws related to public procurement, including but not limited to Florida Statutes Chapter 112, Part III, Code of Ethics for Public Officers and Employees, such quoter will be disqualified from eligibility to perform services or provide the goods described in this RFQ, and may also be disqualified from furnishing future goods or services to, and from submitting any future quotes to supply goods or services to Manatee County.

By submitting a quote, the quoter represents to County that all statements made and materials submitted are truthful, with no relevant facts withheld. If a quoter is determined to have been untruthful in their quote or any related presentation, such quoter will be disqualified from eligibility to provide the goods and/or services described in this RFQ, and may also be disqualified from furnishing future goods or services to, and from submitting any future quotes to supply goods or services to Manatee County.

**A.18 PUBLIC CONTRACTING AND ENVIRONMENTAL CRIMES**

A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime, as that term is defined in Section 287.133, Florida Statutes, may not submit a quote to provide any goods or services to a public entity; may not submit a quote with a public entity for the construction or repair of a public building or public work; may not submit quotes on leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under an agreement with any public entity; and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, Florida Statutes, for Category Two for a period of thirty-six (36) months following the date of being placed on the convicted list.

In addition, the Manatee County Procurement Code prohibits the award of any quote to any person or entity who/which has, within the past five (5) years, been convicted of, or admitted to in court or sworn to under oath, a public entity crime or of any environmental law that, in the reasonable opinion of the Procurement Official, establishes reasonable grounds to believe the person or business entity will not conduct business in a responsible matter.

To ensure compliance with the foregoing, the Code requires all persons or entities desiring to do business with County to execute and file with the Procurement Official an affidavit, executed under the pain and penalties of perjury, confirming that person, entity and any person(s) affiliated with the entity, does not have such a record and is therefore eligible to seek and be awarded business with County. In the case of a business entity other than a partnership or a corporation, such affidavit shall be executed by an authorized agent of the entity. In the case of a partnership, such affidavit shall be executed by the general partner(s). A Public Contracting and Environmental Crimes Certification form is attached herein for this purpose.

**A.19 CONTRACT**

The Agreement made as a result of the acceptance of any quote from this Request for Quotes shall be made in the form of a Purchase Order and the successful Quoter shall be bound by the terms and conditions contained in this Request for Quotes as well as the Purchase Order.

Should a conflict exist between the terms and conditions contained in this Request for Quotes and the resulting Purchase Order, the terms contained in this Request for Quotes shall take precedence.

**A.20 TERMINATION OF CONTRACT**

Manatee County reserves the right to terminate any contract, at any time, with or without cause.

**A.21 PURCHASING COOPERATIVE**

It is the intent of this Request for Quotation to include requirements and to obtain quotes on behalf of Manatee County and reserve the right for the entities belonging to the Sarasota Bay Chapter of NIGP to obtain purchases from this quote proposal. This opportunity is also made available to any and all local, County, Public Educational Institutions, non-profits, and the State of Florida.



Pursuant to their own governing laws, and subject to the agreement of the vendor, other entities may be permitted to make purchases at the terms and conditions contained herein. Manatee County will not be financially responsible for the purchase of other entities from this solicitation.

**A.22 DISCOUNTS**

Any and all discounts must be incorporated in the prices contained in the quote and not shown separately. The prices indicated on the Quotation Form shall be the prices used in determining award.

**A.23 TAXES**

Manatee County is exempt from Federal Excise and State Sales Taxes. (F.E.T. Cert. No. 59-78-0089K; Florida Sales Tax Exempt Cert. No. 85-8012622206C-6); therefore, the quoter is prohibited from delineating a separate line item in his quote for any sales or service taxes. Nothing herein shall affect the quoter's normal tax liability.

The successful quoter shall be responsible for the payment of taxes of any kind and character, including, but not limited to sales, consumer, use, and other similar taxes payable on account of the work performed and materials furnished under the award in accordance with the laws and regulations of the place of the project which are applicable during the performance of the work. Nothing herein shall affect the quoter's normal tax liability.

**A.24 DESCRIPTIVE INFORMATION**

Unless otherwise specifically provided in the RFQ documents, all equipment, materials and articles provided shall be new and of the most suitable grade for the purpose intended. Unless otherwise specifically provided in the RFQ documents, reference to any equipment, material, article or patented process, by trade name, brand name, make or catalog number, shall be regarded as establishing a standard of quality and shall not be construed as limiting competition.

**A.25 DELIVERY**

Unless otherwise specified, all prices are to be FOB Destination.

**A.26 AUTHORIZED PRODUCT REPRESENTATION**

The quoter, by virtue of submitting the name and specifications of a manufacturer's prod'ct, will be required to furnish the named manufacturer's prod'ct. Failure to do so may, in the County's sole discretion, be deemed a material breach of the resulting agreement and shall constitute grounds for County's immediate termination of the resulting agreement.

**A.27 ROYALTIES AND PATENTS**

The successful quoter shall pay all royalties and license fees for equipment or processes in conjunction with the equipment and/or services being furnished. Successful quoter shall defend all suits or claims for infringement of any patent, trademark or copyright, and shall save County harmless from loss on account thereof, including costs and attorney's fees'

**A.28 AMERICANS WITH DISABILITIES ACT**

County does not discriminate upon the basis of any individual's disability status. This non-discrimination policy involves every aspect of County's functions including one's access to, participation, employment, or treatment in its programs or activities. Anyone requiring **reasonable accommodation** for an Information Conference or Quote Opening should contact the person named on the cover page of this RFQ document at least twenty-four (24) hours in advance of either activity.

**A.29 EQUAL EMPLOYMENT OPPORTUNITY**

In accordance with Title VI of the Civil Rights Act of 1964, Title 15, Part 8 of the Code of Federal Regulations and the Civil Rights Act of 1992, County hereby notifies all quoters that it will affirmatively ensure minority business enterprises are afforded full opportunity to participate in response to this RFQ and will not be discriminated against on the grounds of race, color, national origin, religion, sex, age, handicap, or marital status in consideration of quote award.

**A.30 MINORITY BUSINESS ENTERPRISE / DISADVANTAGED BUSINESS ENTERPRISE**

The State of Florida Office of Supplier Diversity provides the certification process and the database for identifying certified MBE/DBE firms. Additional information can be obtained at <http://www.osd.dms.state.fl.us/iframe.htm> or by calling (850) 487-0915.

**A.31 SUBCONTRACTORS**

The successful quoter will obtain prior written approval from the County for any subcontractor(s) and the work they will perform. A subcontractor is defined as any entity performing work within the scope of the project who is not an employee of the successful quoter.

Quoters subcontracting any portion of the work shall include a list of subcontractors along with their quote. The list shall include: name and address of subcontractor, type of work to be performed and the percent of the contract amount to be subcontracted.

Prior to the employment of any person under this contract, the successful quoter shall utilize the U.S. Department of Homeland Security's E-Verify system to verify the employment eligibility of (a) all persons employed during the contract term by the successful quoter to perform employment duties within Florida and (b) all persons, including subcontractors, assigned by the successful quoter to perform work pursuant to the contract with Manatee County. For more information on this process, please refer to United States Citizenship and Immigration Service site at: <http://www.uscis.gov/>.

**Only those individuals determined eligible to work within the United States shall be employed under this contract.**

By submission of a quote in response to this RFQ, the successful quoter commits that all employees and subcontractors will undergo e-verification before placement on this contract.

If County has reasonable objection to any subcontractor, the County may request the successful quoter to submit an acceptable substitute without an increase in contract sum or contract time.

If successful quoter declines to make any such substitution, the County may award the resulting agreement to the next lowest qualified quoter that proposes to use acceptable subcontractors, who County does not make written objection to. In the event the successful quoter declines to make any such substitution post award, the County may exercise its right to terminate the agreement.

The successful quoter shall maintain sole responsibility for the actions of its employees and subcontractors. New employees brought in after contract award shall follow the same requirement stated above for the life of the contract.

**A.32 DISCLOSURE**

Upon receipt, all inquiries and responses to inquiries related to this RFQ become “Public Records”, and shall be subject to public disclosure consistent with Florida Statutes, Chapter 119.

Quotes become subject to disclosure thirty (30) days after the opening or if a notice of intent to award decision is made earlier than this time as provided by Florida Statutes § 119.071(1)(b). No announcement or review of the quote shall be conducted at the quote opening.

If Owner rejects all quotes and concurrently notices its intent to reissue the solicitation, the rejected quotes are exempt from public disclosure until such time as Owner provides notice of an intended decision concerning the reissued solicitation or until Owner withdraws the reissued solicitation. A quote is not exempt for longer than twelve (12) months after the initial notice rejecting all quotes.

**IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR’S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT OWNER’S CUSTODIAN OF PUBLIC RECORDS AT: (941) 742-5845, 11george.scaccianoce@mymanatee.org, Attn: Records Manager, 1112 Manatee Ave W., Bradenton, FL 34205.**

Pursuant to Florida Statutes 119.0701, to the extent CONTRACTOR is performing services on behalf of the COUNTY, contractor must:

- a. Keep and maintain public records required by public agency to perform the service.
- b. Upon request from the public agency’s custodian of public records, provide the public agency with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Florida Statutes, Chapter 119, or as otherwise provided by law.
- c. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the contractor does not transfer the records to the public agency.

- d. Upon completion of the contract, transfer, at no cost, to the public agency all public records in possession of contractor or keep and maintain public records required by the public agency to perform the service. If the contractor transfers all public records to the public agency upon completion of the contract, the contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements.

If the contractor keeps and maintains public records upon completion of the contract, the contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the public agency, upon request from public agency's custodian of public records, in a format that is compatible with the information technology systems of the public agency.

### **A.33 LOCAL PREFERENCE**

Local business is defined as a business legally authorized to engage in the sale of the goods and/or services, and which certifies within its quote that for at least six (6) months prior to the announcement of the Request For Quotes it has maintained a physical place of business in Manatee, Desoto, Hardee, Hillsborough, Pinellas or Sarasota County with at least one full-time employee at that location.

Local preference shall not apply to the following categories of agreements:

1. Purchases or agreements which are funded, in whole or in part, by a governmental or other funding entity, where the terms and conditions governing the funds prohibit the preference.
2. Any quote announcement which specifically provides that local preference, as set forth in this section, is suspended due to the unique nature of the goods or services sought, the existence of an emergency as found by either the County Commission or County Administrator, or where such suspension is, in the opinion of the County Attorney, required by law.
3. For a competitive solicitation for construction services in which fifty percent (50%) or more of the cost will be paid from state-appropriated funds which have been appropriated at the time of the competitive solicitation.

To qualify for local preference under this section, a **local business must provide certification to County** by completing an “**Affidavit as to Local Business**” form which is available for download at [www.mymanatee.org/vendor](http://www.mymanatee.org/vendor). Click on “Affidavit for Local Business” to access and print the form. Complete, notarize, and mail the notarized original to: Manatee County Procurement Division, 1112 Manatee Avenue West, Suite 803, Bradenton, FL 34205.

It is the responsibility of the quoter to ensure accuracy of the affidavit and notify County of any changes affecting same.

### **A.34 VENDOR REGISTRATION**

Registering your business will provide Manatee County a sourcing opportunity to identify supplies of goods and services, plus identify local businesses.

You may register online at [www.mymanatee.org/vendor](http://www.mymanatee.org/vendor). If you need any assistance, please call (941) 749-3014, Monday – Friday, 8:00 A.M. to 5:00 P.M., excluding holidays, and the Procurement Division can assist you as needed.

Registration is not mandatory; however, by taking the time to register, you are helping the County to provide timely notification of quotation, bid and proposal opportunities to your business.

**A.35 ENVIRONMENTAL SUSTAINABILITY**

All quoters are encouraged to use as many environmentally preferable “green” products, materials, supplies, etc. as possible in order to promote a safe and healthy environment. Environmentally preferable are products or services that have a reduced adverse effect on the environment.

Quoters shall acknowledge whether or not their organization has an environmental sustainability initiative by checking the appropriate box on the quote form. In addition, the quoter shall submit a summary of their environmental sustainability initiative along with their quote. This information will be used as a determining factor in the award decision when all other evaluative factors, including local preference policies are otherwise equal.

**A.36 E-payables**

Manatee County Board of County Commissioners and the Manatee County Clerk of the Circuit Court have partnered to offer the ePayables program, which allows payments to be made to vendors via credit cards.

The Clerk of the Circuit Court will issue a unique credit card number to vendor after goods are delivered or services rendered, vendors submit invoices to the remit to address on the purchase order. When payments are authorized, an email notification is sent to the vendor. The email notification includes the invoice number(s), invoice date(s), and amount of payment. There is no cost for vendors to participate in this program; however, there may be a charge by the company that processes your credit card transactions.

If you are interested in participating in this program, please complete the ePayables Application attached herein and return the completed form via email to Ms. Lori Bryan, Supervisor at [lori.bryan@manateeclerk.com](mailto:lori.bryan@manateeclerk.com).

**A.37 FUNDING**

This quote is subject to the appropriation of funds in an amount sufficient to allow continuation of the County’s performance in accordance with the terms and conditions of this quote. The county shall provide prompt written notice to the vendor that sufficient funds have not been appropriated to continue its full and faithful performance under the terms of this quote, and shall, effective thirty (30) days after giving such notice or upon the expiration of the time for which funds were appropriated, whichever occurs first, be thereafter released of all further obligations in any way related to the quote.

**A.38 CONDITIONS FOR EMERGENCY/HURRICANE OR DISASTER – TERM CONTRACTS**

It is hereby made a part of this Request for Quotation that before, during and after a public emergency, disaster, hurricane, flood, or other acts of God that Manatee County shall require a “first priority” basis for services. It is vital and imperative that the majority of

citizens are protected from any emergency situation which threatens public health and safety, as determined by the County.

Therefore, the Contractor agrees to provide services to the County or other governmental entities as opposed to a private citizen, on a first priority basis. The County expects to pay contractual prices for all services required during an emergency situation. Contractor shall furnish a twenty-four (24) hours phone number in the event of such an emergency.

**A.39** **PRECEDENCE**

Statements contained in the Terms and Conditions, Scope of Work, or Quote Summary section of this Request for Quotation, which vary from the information contained in this section A, Information to Quoters, shall have precedence.

**END OF SECTION A**

**SECTION B**  
**TERMS AND CONDITIONS**

**B.01 PURPOSE**

It is the intent of Manatee County to establish an agreement with a qualified quoter for the tree trimming of the Arbor Creek and Shadow Brook subdivisions. It is the specific purpose of this quotation to establish an agreement for the required services to secure cost and availability.

**B.02 ASSIGNMENT OF CONTRACT**

Vendor shall not assign, transfer, convey, sublet or otherwise dispose of this Agreement or of his right, title, or interest therein, or his power to execute such Agreement, or to assign any monies due or to become due there under to any other person, firm or corporation unless first obtaining the written consent of the County. The giving of such consent to a particular subcontractor assignment shall not dispense with the necessity of such consent to any further or other assignment.

**B.03 FORCE MAJEURE**

Neither party shall be considered in default in performance of its obligations hereunder to the extent that performance of such obligations, or any of them, is delayed or prevented by Force Majeure. Force Majeure shall include, but not be limited to, hostility, revolution, civil commotion, strike, epidemic, accident, fire, flood, wind, earthquake, lack of or failure of transportation facilities, any law, proclamation, regulation ordinance or other act of government, or any act of God or any cause whether of the same or different nature, existing or future; provided that the cause, whether or not enumerated in this item B.03, is beyond the control and without the fault or negligence of the party seeking relief.

**B.04 PRICES & TERM**

Quoters shall quote unit prices, F.O.B. destination, including all discounts in accordance with unit of quantity indicated on Quote Form. The prices quoted shall be firm for the contract period and shall include payment in full for all transportation, labor, and equipment used in providing the services as specified herein.

**B.05 PAYMENT (Net 45)**

Within forty-five (45) days after delivery by the vendor, acceptance by the County, and presentation of an appropriate invoice, the County shall pay the total amount due. Payment invoices must indicate both the Blanket Purchase Order number and the Release Order number.

**B.06 LIQUIDATED DAMAGES**

The successful quoter shall inform the County's Project Manager, via email, when an individual project is complete. Any project not meeting specifications as outlined in this RFQ shall be made known to the Quoter. These deficiencies shall be corrected within ten (10) working days after notification has been given the Quoter. If the deficiencies have not been corrected within ten (10) working days the remittance for that project shall be reduced 5%. Thereafter, remittance shall be subsequently reduced by 5% for each ten (10) day period the project goes uncorrected.

**B.07 CANCELLATION**

Any failure of the contractor to furnish or perform the Work (including commencement of the Work, supplying sufficient skilled workers or suitable materials or equipment) in accordance with the contract, the County may order the stop of the Work, or any portion thereof, until the cause for such order has been eliminated. If the vendor fails to perform the Work in accordance with the contract, the County reserves the right to terminate the contract and select the next qualified quoter or re-advertise this procurement in part or in whole.

**B.08 INDEMNIFICATION**

The successful vendor covenants and agrees to indemnify and save harmless the County, its agents and employees, from and against all claims, suits, actions, damages, causes of action, or judgments arising out of the terms of the resulting agreement for any personal injury, loss of life, or damage to the property sustained as a result of the performance or non-performance of services or delivery of goods; from and against any orders, judgments, or decrees, which may be entered against the County, its agents or employees; and from and against all costs, attorney's fees, expenses and other liabilities incurred in the defense of any such claim, suit or action, and the investigation thereof. Nothing in the award, resulting agreement, contract or Purchase Order shall be deemed to affect the rights, privileges and immunities of the County as set forth in Florida Statute Section 768.28.

**B.09 REGULATIONS**

It shall be the responsibility of the quoter to assure compliance with any OSHA, EPA and/or other Federal or State of Florida rules, regulations or other requirements, as each may apply.

**B.10 CONFORMANCE TO SAFETY RULES AND REGULATIONS**

Awarded Quoter shall conform to all safety, site rules and regulations affecting the services. These include but are not limited to: keeping public areas free of waste materials, caution tape, cones, removing all rubbish from site(s) daily before leaving the premises and strictly adhering to all local and/or State safety codes.

**END OF SECTION B**



**SECTION C**  
**SCOPE OF WORK**

**C.01 SCOPE OF WORK**

Quotations are solicited on behalf of Manatee County for the purpose of establishing an agreement with a qualified Quoter to provide tree trimming services for the Arbor Creek and Shadow Brook subdivisions. Quoters must visit the work site(s) before submitting a quote and certify on the Quote Form by signature and date when that site visit was completed.

Within five (5) working days after award, the successful quoter shall submit to the County's Project Manager a written work schedule. No work may proceed without the submission of this written schedule.

The Awarded Quoter shall furnish all labor, material, equipment, and supervision needed to trim the trees listed in this RFQ. All service personnel shall be uniformed (with the Contractor's name prominent on the uniform) and be skilled in all services as listed herein. The Contractor must have their company name on all trucks used on this project and shall provide the appropriate MOT on site during all work. There may be limited palm tree trimming in this specification, predominately hardwoods.

**C.02 PERMITS, LICENSES, AND REGULATIONS**

All permits, licenses and certifications necessary for the performance of the services shall be secured and paid for by the Awarded Quoter. The Awarded Quoter shall possess appropriate licenses and certifications for the services proposed herein.

**C.03 PUBLIC CONVENIENCE AND SAFETY**

The Contractor shall continuously maintain adequate protection of all their work from damage and shall protect all property from loss arising in connection with the contract. The Contractor shall comply with the Florida Department of Commerce Safety Regulations and any local safety regulations.

The Contractor shall at all times so conduct their work as to assure the least possible obstruction to traffic and inconvenience to the general public and the residents in the vicinity of the work and to insure the protection of persons and property, satisfactory to the County. No road or street shall be closed to the public, except with the permission of the County. Fire hydrants on or adjacent to the work shall be kept accessible at all times.

**C.04 SPECIFICATIONS**

Quoters shall submit quotes strictly in accordance with specifications. Any variance to these specifications shall be specifically stated by the Quoter on the quotation form. Should the Quoter not furnish the County a list of exceptions and supporting data, the County will assume the Quoter is quoting in accordance with the specifications stated herein.

**C.05 SUBCONTRACTORS**

There shall be no subcontractors allowed.

**C.06 WORK AUTHORIZATION**

The work schedule and time of completion shall be coordinated with and acceptable to the Project Manager for Manatee County before any work is to commence.

**C.07 WORKING HOURS**

All work shall be performed during regular working hours, 8:00 a.m. until 5:00 p.m., Monday through Friday. Saturday and Sunday work is not allowed. Overtime is NOT permitted and overtime charges shall not be included in the Quoted Price.

**C.08 WORK REQUIREMENTS**

1. **All work must be supervised by an on-site Certified Arborist. The Certification must be submitted with the Contractor's Quote Response Form.**
2. The minimum vertical clearance height over roadways will be 18 feet.
3. The minimum vertical clearance height over sidewalks will be 10 feet. The maximum vertical clearance over sidewalks shall be 12 feet.
4. This specification will cover all trees growing in the County Right of Way and those trees on private property of which branches or limbs are growing over the County Right of Way. No matter the source, the material growing too low over the Right of Way or sidewalk shall be trimmed.
5. The horizontal clearance shall be flush and even with the back (residential) side of the sidewalk when a sidewalk is present or to the back of the curb if no sidewalk is present.
6. Trim around street signs, flashing signals, traffic signs and any other such signage to provide complete visibility.
7. Trim around street lights to 3 feet above and behind the light and 5 feet on either side of the light from top of the light all the way to the ground.
8. The Contractor must provide proper MOT for the work zone, to include signage and flagging as needed. The Contractor or an employee must hold a Certified FDOT Intermediate MOT Contractor certification.
9. The quality of workmanship shall meet or exceed ANSI A300, Part 1: Pruning Standards (attached as Exhibit 2).
10. Dead wood with a diameter of two (2) or more inches shall be removed if they have the potential to fall into or onto a roadway or sidewalk.

**END OF SECTION C**

**SECTION D**  
**QUALIFICATIONS AND BASIS OF AWARD**

**D.01** **MINIMUM QUALIFICATIONS OF QUOTERS**

The Contractor shall have been in this line of business for at least three (3) years in the state of Florida at the same address. The Contractor shall also be or employ a Certified Arborist who must be on-site during all work. The Contractor or their employee must hold a Certified FDOT Intermediate MOT certification. The Contractor shall supply three (3) references of current similar contracts on the Questionnaire/References form. All quoters must submit with their quote the Questionnaire/References form included herein.

- ◆ Certified Arborist (copy of certification must be submitted with quotation)
- ◆ Certified FDOT Intermediate MOT Contractor certification

**All services performed shall be done by the Awarded Quoter's personnel. No subcontractors or independent contractors hired by the Awarded Quoter shall be on site without prior written approval from the County.**

**D.02** **BASIS OF AWARD**

An award shall be made to the lowest responsive, responsible quoter, meeting all specifications.

Whenever two or more quotes are equal with respect to price, the quote received from a local business shall be given preference in award.

Whenever two or more quotes are equal with respect to price, and all other evaluative factors are otherwise equal, including local preference policies, if the company provides documented environmentally preferable "green" products, materials, or supplies, they shall be given preference in award.

Whenever two or more quotes which are equal with respect to price are received, and neither of these quotes are from a local business, and neither of these quotes provides documented "green" products, the award shall be determined by a chance drawing, coin toss, or similar tie-breaking method conducted by the Procurement Division and open to the public.

**END OF SECTION D**

**SECTION E**

**INSURANCE AND BONDING REQUIREMENTS**

The successful bidder will not commence Work under the resulting Agreement until all insurance under this section, and such insurance coverage as might be required by Owner, has been obtained. The successful bidder shall obtain, and submit to the Procurement Division within ten (10) calendar days from the date of notice of intent to award, at his expense, the following minimum amounts of insurance (inclusive of any amounts provided by an umbrella or excess policy):

<b>Insurance / Bond Type</b>	<b>Required Limits</b>
1. X Automobile Liability:	Bodily Injury and Property Damage, Owned/Non-Owned/Hired; Automobile included \$ <u>1,000,000</u> each occurrence <i>This policy shall contain severability of interests' provisions.</i>
2. X Commercial General Liability: (Occurrence Form - patterned after the current ISO form)	Bodily Injury and Property Damage \$ <u>1,000,000</u> single limit per occurrence; \$ <u>1,000,000</u> aggregate This shall include Premises and Operations; Independent Contractors; Products and Completed Operations and Contractual Liability. <i>This policy shall contain severability of interests' provisions.</i>
3. X Employer's Liability:	\$ <u>100,000</u> single limit per occurrence
4. X Worker's Compensation:	Statutory Limits of Chapter 440, Florida Statutes, and all Federal Government Statutory Limits & Requirements
5. Other Insurance, as noted:	a. <input type="checkbox"/> Aircraft Liability \$ _____ per occurrence Coverage shall be carried in limits of not less than \$5,000,000 each occurrence if applicable to the completion of the services under this Agreement.  b. Installation Floater \$ _____ (to be completed by Risk Manager)  If the resulting Agreement <b>does not</b> include construction of or additions to above ground building or structures, but does involve the installation of machinery or equipment, successful bidder shall provide an "Installation Floater" with the minimum amount of insurance to be 100% of the value of such addition(s), building(s), or structure(s).  c. <input type="checkbox"/> Maritime Coverage (Jones Act) \$ _____ per occurrence Coverage shall be maintained where applicable to the completion of the Work.
	d. <input type="checkbox"/> Pollution \$ _____ per occurrence

Insurance / Bond Type	Required Limits
	<p>e. <input type="checkbox"/> Professional Liability \$ _____ per claim and in the aggregate</p> <ul style="list-style-type: none"> <li>• \$1,000,000 per claim and in the aggregate</li> <li>• \$2,000,000 per claim and in the aggregate</li> </ul> <p>f. <input type="checkbox"/> Project Professional Liability \$ _____ per occurrence</p> <p>g. <input type="checkbox"/> Property Insurance \$ _____</p> <p>If the resulting Agreement includes construction of or additions to above ground buildings or structures, bidder shall provide “<b>Builder’s Risk</b>” insurance with the minimum amount of insurance to be 100% of the value of such addition(s), building(s), or structure(s).</p> <p><i>To the extent that property damage is covered by commercial insurance, Owner and successful bidder agree to waive all subrogation rights against each other, except such rights as they may have to the proceeds of such insurance. Successful bidder shall require a similar waiver of subrogation from each of its bidder personnel and sub-consultants, to include Special Consultants; successful bidder shall provide satisfactory written confirmation to Owner of these additional waivers.</i></p> <p>h. <input type="checkbox"/> U.S. Longshoreman’s and Harborworker’s Act Coverage shall be maintained where applicable to the completion of the Work.</p> <p>i. <input type="checkbox"/> Valuable Papers Insurance \$ _____ per occurrence</p> <p>j. <input type="checkbox"/> Watercraft \$ _____ per occurrence</p>
6. <input type="checkbox"/> Bid Bond:	<p>Bid bond shall be 5% of the total offer of the bid. Bid bond shall be submitted with the bid and shall include project name, location, and / or address and project number.</p> <p>In lieu of the bond, the contractor may file an alternative form of security in the amount of 5% of the total offer, in the form of a money order, a certified check, a cashier’s check, or an irrevocable letter of credit.</p>
7. <input type="checkbox"/> Payment and Performance Bond:	<p>Payment and Performance Bond shall be submitted by bidder for 100% of the award amount and shall be presented to Manatee County within ten (10) calendar days of issuance of the notice of intent to award.</p>

Reviewed by Risk:

**INSURANCE REQUIREMENTS**

The amounts and types of insurance coverage shall conform to the minimum requirements set forth in this Exhibit, with the use of Insurance Services Office (ISO) forms and endorsements or their equivalents. If successful bidder has any self-insured retentions or deductibles under any of the listed minimum required coverage, successful bidder must identify on the certificate of insurance the nature and amount of such self-insured retentions or deductibles and provide satisfactory evidence of financial responsibility for such obligations. All self-insured retentions or deductibles will be successful bidder's sole responsibility.

Nothing herein shall in any manner create any liability of Owner in connection with any claim against the successful bidder for labor, services, or materials, or of Subcontractors; and nothing herein shall limit the liability of the successful bidder or successful bidder's sureties to Owner or to any workers, suppliers, material men or employees in relation to the resulting Agreement.

**Builder's Risk Coverage.** The successful bidder shall procure and maintain during the entire course of the Work a builder's risk policy, completed value form, insured to provide coverage on an all risk basis, including coverage for off-site stored materials and including coverage for theft. This coverage shall not be lapsed or cancelled because of partial Acceptance by the Owner prior to final Acceptance of the Project. Successful bidder shall recommend to Owner any additions to the Project Costs resulting from any casualty described in Article XII General Conditions of the Construction Agreement, including those costs, expenses and other charges (including normal and ordinary compensation to the successful bidder) necessary for reconstruction of the Project substantially in accordance with the Project Plans and Specifications. The nature, level and type of builder's risk coverage (including completed value or replacement cost coverage) shall be determined by Owner through insurers selected by successful bidder and approved by Owner.

**Excess Policy or Umbrella.** An excess policy or umbrella may be used to cover limits over and above Commercial General Liability.

**Subcontractor's Public Liability and Property Damage Insurance.** The successful bidder shall require each Subcontractor to procure and maintain during the term of the subcontract, insurance of the type specified above, or insure the activities of Subcontractors in its policy, as approved by Owner prior to performance of any services. The levels of coverage as set forth in the table above may be adjusted to require a reduced level of coverage consistent with the scope of Work to be provided by that particular Subcontractor. Any reduction in the levels of insurance coverage required by the successful bidder's standard form of subcontract shall be approved by the Owner.

**Waiver of Subrogation.** Owner and successful bidder waive against each other and the Owner's separate Vendors, Contractors, Design Consultants, Subcontractors agents and employees of each and all of them, all damages covered by property insurance provided herein, except such rights as they may have to the proceeds of such insurance. The successful bidder and Owner shall, where appropriate, require similar waivers of subrogation from the Owner's separate Vendors, Design Consultants and Subcontractors and shall require each of them to include similar waivers in their contracts.

**Worker's Compensation Insurance.** The successful bidder shall procure and maintain during the term of the Contract Documents, workers' compensation insurance for all its employees connected with the Work and shall require all Subcontractors similarly to provide workers' compensation insurance for all their employees unless such employees are covered by the protection afforded by successful bidder. Such insurance shall comply with the Florida Workers' Compensation Law. The successful bidder shall provide adequate insurance, satisfactory to Owner, for the protection of employees not otherwise protected.

**By way of its submission of a bid hereto, bidder:**

- a. Represents that bidder maintains, and will maintain during the term of any Agreement arising from this solicitation, all insurance coverage required herein from responsible companies duly authorized to do business under the laws of the State of Florida that hold a rating of "A-" or better by Best's Key Guide, latest edition, and are deemed acceptable to Owner as set forth in this solicitation.
- b. Agrees that insurance, as specified herein, shall remain in force and effect without interruption from the date of commencement of the Work throughout the duration of the Project, and shall remain in effect for at least two (2) years after the termination of the Contract Documents.
- c. Agrees that if the initial or any subsequently issued certificate of insurance expires prior to completion of the Work, successful bidder shall furnish to Owner renewal or replacement certificate(s) of insurance no later than ten (10) calendar days after the expiration date on the certificate. Failure of successful bidder to provide Owner with such renewal certificate(s) shall be considered justification for Owner to terminate any and all Agreements.
- d. Agrees that bidder and/or its insurance carrier shall provide thirty (30) days written notice to Owner of policy cancellation or non-renewal on the part of the insurance carrier or the successful bidder. Successful bidder shall also notify Owner, in a like manner, within twenty-four (24) hours after receipt, of any notices of expiration, cancellation, non-renewal or material change in coverage or limits received by successful bidder from its insurer and nothing contained herein shall relieve successful bidder of this requirement to provide notice. In the event of a reduction in the aggregate limit of any policy to be provided by successful bidder hereunder, successful bidder shall immediately take steps to have the aggregate limit reinstated to the full extent permitted under such policy.
- e. Agrees that failure of successful bidder to obtain and maintain proper amounts of insurance at all times as called for herein shall constitute a material breach of the resulting Agreement, which may result in immediate termination.
- f. Agrees that, should at any time the successful bidder not maintain the insurance coverage(s) required herein, Owner may terminate the Agreement or at its sole discretion shall be authorized to purchase such coverage(s) and charge successful bidder for such coverage(s) purchased. If successful bidder fails to reimburse Owner for such costs within thirty (30) days after demand, Owner has the right to offset these costs from any amount due successful bidder under this Agreement or any other agreement between Owner and successful bidder. Owner shall be under no obligation to purchase such insurance, nor shall it be responsible for the coverage(s) purchased or the insurance companies used. The decision of Owner to purchase such insurance coverage(s) shall in no way be construed to be a waiver of any of its rights under the Contract Documents.
- g. Agrees to provide, upon request, the entire and complete insurance policies required herein.

- h. The payment of deductibles for insurance required of the successful bidder by the Contract Documents shall be the sole responsibility of the successful bidder.

**Certificate of Insurance Requirements:**

- a. Certificates of insurance in duplicate evidencing the insurance coverage specified herein shall be filed with the Procurement Division before operations are begun. The required certificates of insurance shall name the types of policy, policy number, date of expiration, amount of coverage, companies affording coverage, and also shall refer specifically to the bid number and title of the Project, and must read: For any and all work performed on behalf of Manatee County.
- b. **Additional Insured:** The Automobile Liability and Commercial General Liability policies provided by the successful bidder to meet the requirements of this IFB shall name Manatee County, Board of County Commissioners, as an additional insured as to the operations of the successful bidder under this IFB and shall contain severability of interests provisions.
- c. In order for the certificate of insurance to be accepted it must comply with the following:
  - 1. The "Certificate Holder" shall be:  
**Manatee County  
Board of County Commissioners  
Bradenton, FL  
RFQ 17-1748GE, Arbor Creek and Shadow Brook Tree Trimming  
For any and all work performed on behalf of Manatee County.**
  - 2. Certificate shall be mailed to:  
**Manatee County Procurement Division  
1112 Manatee Avenue West, Suite 803  
Bradenton, FL 34205  
Attn: George Earnest CPPB, Buyer**

**BONDING REQUIREMENTS**

**Bid Bond/Certified Check.** By submitting a bid to this IFB, the bidder agrees should the bidder's bid be accepted, **to execute the form of Agreement and present the same to Manatee County for approval within ten (10) calendar days after notice of intent to award.** The bidder further agrees that failure to execute and deliver said form of Agreement **within ten (10) calendar days** will result in damages to Manatee County and as guarantee of payment of same a bid bond/certified check shall be enclosed within the submitted sealed bid in the amount of five (5%) percent of the total amount of the bid. The bidder further agrees that in case the bidder fails to enter into an Agreement, as prescribed by Manatee County, the bid bond/certified check accompanying the bid shall be forfeited to Manatee County as agreed liquidated damages. If Owner enters into an Agreement with a bidder, or if Owner rejects any and/or all bids, accompanying bond will be promptly returned.



**Payment and Performance Bonds.** Prior to commencing Work, the successful bidder shall obtain, for the benefit of and directed to Owner, a Payment and Performance Bond satisfying the requirements of Section 255.05, Florida Statutes, covering the faithful performance by the successful bidder of its obligation under the Contract Documents, including but not limited to the construction of the Project on the Project Site and the payment and obligations arising thereunder, including all payments to Subcontractors, laborers, and materialmen. The surety selected by the successful bidder to provide the Payment and Performance Bond shall be approved by Owner prior to issuance of such Bond, which approval shall not be unreasonably withheld or delayed provided that surety is rated A- or better by Best's Key Guide, latest edition.

Failure to provide the required bonds on the prescribed form may result in successful bidder being deemed nonresponsive. Bonds must be in the form prescribed in Section 255.05, Florida Statutes, and must not contain notice, demand or other terms and conditions, including informal pre-claim meetings, not provided for in Section 255.05, Florida Statutes.

Surety of such bonds shall be in an amount equal to 100% of the Contract Price issued by a duly authorized and nationally recognized surety company, authorized to do business in the State of Florida, satisfactory to Owner. Surety shall be rated as "A-" or better by Best's Key Guide, latest edition. The attorney-in-fact who signs the bonds must file with the bonds, a certificate and effective dated copy of power-of-attorney. Payment and Performance Bonds shall be issued to Manatee County, a political subdivision of the State of Florida, **within ten (10) calendar days after notice of intent to award.**

In addition, pursuant to Section 255.05(1)(b), Florida Statutes, prior to commencing Work, the successful bidder shall be responsible and bear all costs associated to record the Payment and Performance Bond with the Manatee County Clerk of the Circuit Court. A certified copy of said recording shall be furnished to the Purchasing Division upon filing. Pursuant to Section 255.05(1)(b), Florida Statutes, Owner will make no payment to the successful bidder until the successful bidder has complied with this paragraph.

Furnishing Payment and Performance Bonds shall be requisite to execution of an Agreement with Owner. Said Payment and Performance Bonds will remain in force for the duration of the Agreement with the premiums paid by the successful bidder. Failure of the successful bidder to execute such Agreement and to supply the required bonds shall be just cause for cancellation of the award. Owner may then contract with the next lowest, responsive and responsible bidder or re-advertise this IFB. If another bidder is accepted, and notice given within ninety (90) days after the opening of the bids, this Acceptance shall bind the bidder as though they were originally the successful bidder.

Failure of Owner at any time to require performance by the successful bidder of any provisions set out in the resulting Agreement will in no way affect the right of Owner, thereafter, to enforce those provisions.

**BIDDER'S INSURANCE STATEMENT**

**THE UNDERSIGNED** hereto have read and understand the aforementioned insurance requirements of this IFB and note that the evidence of insurability shall be required within ten (10) days from the date of notice of intent to award.

Bidder Name: \_\_\_\_\_ Date: \_\_\_\_\_

Bidder's  
Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_

Insurance Agency: \_\_\_\_\_

Agent Name: \_\_\_\_\_ Agent Phone: \_\_\_\_\_

***Please return this completed and signed statement with your bid.***

**QUOTATION FORM**

**DATE DUE: 3:00 PM on July 20, 2017**

To: Manatee County Procurement  
1112 Manatee Avenue West, Suite 803  
Bradenton, Florida 34205  
Attention: George Earnest CPPB, Buyer  
Or via email: [leorge.earnest@mymanatee.org](mailto:leorge.earnest@mymanatee.org)

Or via Fax @ (941) 749-3034

**RE: RFQ 17-1748GE Arbor Creek and Shadow Brook Tree Trimming**

We, the undersigned, hereby declare that we have carefully reviewed the quote documents, and with full knowledge and understanding of the aforementioned herewith submit this quote, meeting each and every specification, term, and condition contained in the Request for Quotes.

We understand that the quote specifications, terms, and conditions in their entirety shall be made a part of any agreement or contract between Manatee County and the successful quoter. Failure to comply shall result in contract default, whereupon, the defaulting contractor shall be required to pay for any and all reprocurement costs, damages, and attorney fees as incurred by the County.

Lump sum cost for the tree trimming of the Arbor Creek and Shadow Brook subdivisions	\$
We certify here by signature that we have visited the work site(s) on this date:	
Name	Date

COMPANY NAME: \_\_\_\_\_

AUTHORIZED SIGNATURE: \_\_\_\_\_

\_\_\_\_\_  
(Print Name & Title of Signer)      DATE: \_\_\_\_\_

COMPANY ADDRESS: \_\_\_\_\_

TEL. NO.: \_\_\_\_\_ FAX NO.: \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

Acknowledge Addendum No. \_\_\_\_ Dated: \_\_\_\_\_

**END OF QUOTATION FORM**

**ATTACHMENT "A" - CONTRACTOR'S QUESTIONNAIRE**

**RFQ 17-1748GE  
ARBOR CREEK AND SHADOW BROOK TREE TRIMMING**

The Quoter warrants the truth and accuracy of all statements and answers herein contained.  
(Attach additional pages if necessary.)

1. Contact Information:

FDOT Intermediate MOT Contractor certification # \_\_\_\_\_  
FEIN #: \_\_\_\_\_  
License #: \_\_\_\_\_  
License Issued to: \_\_\_\_\_  
Date License Issued (MM/DD/YR): \_\_\_\_\_  
Company Name: \_\_\_\_\_  
Physical Address: \_\_\_\_\_  
City: \_\_\_\_\_ State of Incorporation: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
Phone Number: ( ) \_\_\_\_\_ Fax Number: ( ) \_\_\_\_\_  
Email address: \_\_\_\_\_

2. Quoting as: an individual \_\_\_; a partnership \_\_\_; a corporation \_\_\_; a joint venture \_\_\_

3. If a partnership, list names and addresses of partners; if a corporation, list names of officers, directors, shareholders, and state of incorporation; if joint venture, list names and address of ventures' and the same if any venture are a corporation for each such corporation, partnership, or joint venture:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. Quoter is authorized to do business in the State of Florida: \_\_\_ Yes \_\_\_ No  
For how many years? \_\_\_\_\_

5. Name of the person acting as the Certified Arborist: \_\_\_\_\_

Have you attached a copy of the arborist's certification? Y/N \_\_\_\_\_

6. Attach a list of government agencies where this specific type of service is performed.

7. Is your company currently contemplating or in litigation? Provide summary details.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Company Name \_\_\_\_\_

8. Have you ever been assessed liquidated damages under a contract during the past five (5) years? If so, state when, where (contact name, address, and phone number) and why.

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9. Have you ever failed to complete Work awarded to you? Or failed to complete projects within contract time? If so, state when, where (contact name, address, phone number) and why.

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10. Have you ever been debarred or prohibited from providing a bid to a governmental entity? If yes, name the entity and describe the circumstances.

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11. Will you subcontract any part of this Work? If so, describe which portion(s) and to whom.

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Company Name \_\_\_\_\_

13. Three current references from commercial projects in Florida for similar services.

A. CUSTOMER NAME: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

TELEPHONE NO: \_\_\_\_\_ SERVICE PERIOD: \_\_\_\_\_

SERVICE DETAILS: \_\_\_\_\_

\_\_\_\_\_

B. CUSTOMER NAME: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

TELEPHONE NO: \_\_\_\_\_ SERVICE PERIOD: \_\_\_\_\_

SERVICE DETAILS: \_\_\_\_\_

\_\_\_\_\_

C. CUSTOMER NAME: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

TELEPHONE NO: \_\_\_\_\_ SERVICE PERIOD: \_\_\_\_\_

SERVICE DETAILS: \_\_\_\_\_

\_\_\_\_\_

Company Name \_\_\_\_\_

**END OF ATTACHMENT "A"**

**ATTACHMENT "B"**  
**STATEMENT OF NO QUOTE**

If you do not intend to quote please return this form immediately to:

Manatee County Procurement  
1112 Manatee Avenue West, Suite 803  
Bradenton, Florida 34205

We, the undersigned, have declined to quote on RFQ No.: 17-1748GE Arbor Creek and Shadow Brook Tree Trimming, for the following reason(s):

- Specifications too restrictive, i.e., geared toward one brand or manufacturer.
- Insufficient time to respond
- We do not offer this product or service
- Our schedule would not permit us to perform
- Unable to meet specifications
- Unable to meet Bond requirement
- Specifications unclear (explain below)
- Unable to meet insurance requirements
- Remove us from your "Bidders List"
- Other (specify below)

**REMARKS:**

We understand that if we do not submit a Quote and this Statement of No Quote is not executed and returned, our name may be deleted from your Bidders List for this commodity or service.

Company Name: \_\_\_\_\_

Company Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

\_\_\_\_\_  
(Print or type name and title of above signer)

**END OF ATTACHMENT "B"**

**Attachment "C"**

**PUBLIC CONTRACTING AND ENVIRONMENTAL CRIMES CERTIFICATION**

SWORN STATEMENT PURSUANT TO ARTICLE 5, SECTION 2-26-54,  
MANATEE COUNTY PROCUREMENT CODE

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

This sworn statement is submitted to the Manatee County Board of County Commissioners by \_\_\_\_\_  
[print individual's name and title]

\_\_\_\_\_ for \_\_\_\_\_  
[print name of entity submitting sworn statement]

whose business address is: \_\_\_\_\_

and (if applicable) its Federal Employer Identification Number (FEIN) is \_\_\_\_\_. If the entity has no

FEIN, include the Social Security Number of the individual signing this sworn statement: \_\_\_\_\_

I understand that no person or entity shall be awarded or receive a county contract for public improvements, procurement of goods or services (including professional services) or a county lease, franchise, concession or management agreement, or shall receive a grant of county monies unless such person or entity has submitted a written certification to the County that it has not:

(1) been convicted of bribery or attempting to bribe a public officer or employee of Manatee County, the State of Florida, or any other public entity, including, but not limited to the Government of the United States, any state, or any local government authority in the United States, in that officer's or employee's official capacity; or

(2) been convicted of an agreement or collusion among bidders or prospective bidders in restraint of freedom of competition, by agreement to bid a fixed price, or otherwise; or

(3) been convicted of a violation of an environmental law that, in the sole opinion of the County's Procurement Director, reflects negatively upon the ability of the person or entity to conduct business in a responsible manner; or

(4) made an admission of guilt of such conduct described in items (1), (2) or (3) above, which is a matter of record, but has not been prosecuted for such conduct, or has made an admission of guilt of such conduct, which is a matter of record, pursuant to formal prosecution. An admission of guilt shall be construed to include a plea of nolo contendere; or

(5) where an officer, official, agent or employee of a business entity has been convicted of or has admitted guilt to any of the crimes set forth above on behalf of such and entity and pursuant to the direction or authorization of an official thereof (including the person committing the offense, if he is an official of the business entity), the business shall be chargeable with the conduct herein above set forth. A business entity shall be chargeable with the conduct of an affiliated entity, whether wholly owned, partially owned, or one which has common ownership or a common Board of Directors. For purposes of this Form, business entities are affiliated if, directly or indirectly, one business entity controls or has the power to control another business entity, or if an individual or group of individuals controls or has the power to control both entities. Indicia of control shall include, without limitation, interlocking management or ownership, identity of interests among family members, shared organization of a business entity following the ineligibility of a business entity under this Article, or using substantially the same management, ownership or principles as the ineligible entity.

Any person or entity who claims that this Article is inapplicable to him/her/it because a conviction or judgement has been reversed by a court of competent jurisdiction, shall prove the same with documentation satisfactory to the County's Procurement Director. Upon presentation of such satisfactory proof, the person or entity shall be allowed to contract with the County.



I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR MANATEE COUNTY IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT ANY CONTRACT OR BUSINESS TRANSACTION SHALL PROVIDE FOR SUSPENSION OF PAYMENTS, OR TERMINATION, OR BOTH, IF THE CONTRACTING OFFICER OR THE COUNTY ADMINISTRATOR DETERMINES THAT SUCH PERSON OR ENTITY HAS MADE FALSE CERTIFICATION.

\_\_\_\_\_  
[Signature]

STATE OF FLORIDA  
COUNTY OF \_\_\_\_\_

Sworn to and subscribed before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_ by \_\_\_\_\_.

Personally known \_\_\_\_\_ OR Produced identification  
[Type of identification]

\_\_\_\_\_  
Notary Public Signature My commission expires \_\_\_\_\_

\_\_\_\_\_  
[Print, type or stamp Commissioned name of Notary Public]

**Signatory Requirement** - In the case of a business entity other than a partnership or a corporation, this affidavit shall be executed by an authorized agent of the entity. In the case of a partnership, this affidavit shall be executed by the general partner(s). In the case of a corporation, this affidavit shall be executed by the corporate president.

**END OF ATTACHMENT "C"**



Arbor Creek North and South subdivisions and Shadow Brook Mobile Home Park

N

## American National Standard for Tree Care Operations —

# Tree, Shrub, and Other Woody Plant Maintenance — Standard Practices (Pruning)

## 1 ANSI A300 standards

### 1.1 Scope

ANSI A300 standards present performance standards for the care and management of trees, shrubs, and other woody plants.

### 1.2 Purpose

ANSI A300 performance standards are intended for use by federal, state, municipal and private entities including arborists, property owners, property managers, and utilities for developing written specifications.

### 1.3 Application

ANSI A300 performance standards shall apply to any person or entity engaged in the management of trees, shrubs, or other woody plants.

## 2 Part 1 — Pruning standards

### 2.1 Purpose

The purpose of Part 1 — *Pruning* is to provide performance standards for developing written specifications for pruning.

### 2.2 Reasons for pruning

The reasons for tree pruning may include, but are not limited to, reducing risk, managing tree health and structure, improving aesthetics, or achieving other specific objectives. Pruning practices for agricultural, horticultural production, or silvicultural purposes are exempt from this standard unless this standard, or a portion thereof, is expressly referenced in standards for these other related areas.

## 2.3 Implementation

2.3.1 Specifications for pruning should be written and administered by an arborist.

2.3.1.1 Specifications should include location of tree(s), objectives, methods (types), and extent of pruning (location, percentage, part size, etc).

2.3.2 Pruning specifications shall be adhered to.

## 2.4 Safety

2.4.1 Pruning shall be implemented by an arborist, familiar with the practices and hazards of pruning and the equipment used in such operations.

2.4.2 This performance standard shall not take precedence over applicable industry safe work practices.

2.4.3 Performance shall comply with applicable Federal and State Occupational Safety and Health standards, ANSI Z133.1, Federal Insecticide, Fungicide, and Rodenticide Act (FIFRA) and other Federal Environmental Protection Agency (EPA) regulations, as well as state and local regulations.

## 3 Normative references

The following standards contain provisions, which, through reference in the text, constitute provisions of this American National Standard. All standards are subject to revision, and parties to agreements based on this American National Standard shall apply the most recent edition of the standards indicated below.

ANSI Z60.1, Nursery stock

ANSI Z133.1, Arboriculture — Safety requirements

29 CFR 1910, General industry <sup>1)</sup>

29 CFR 1910.268, Telecommunications <sup>1)</sup>

29 CFR 1910.269, Electric power generation, transmission, and distribution <sup>1)</sup>

29 CFR 1910.331 - 335, Electrical safety-related work practices <sup>1)</sup>

## 4 Definitions

4.1 **arboriculture:** The art, science, technology, and business of commercial, public, and utility tree care.

<sup>1)</sup> Available from U.S. Department of Labor, 200 Constitution Avenue, NW, Washington, DC 20210

**4.2 arborist:** An individual engaged in the profession of arboriculture who, through experience, education, and related training, possesses the competence to provide for or supervise the management of trees and other woody plants.

**4.3 arborist trainee:** An individual undergoing on-the-job training to obtain the experience and the competence required to provide for or supervise the management of trees and other woody plants. Such trainees shall be under the direct supervision of an arborist.

**4.4 branch:** A shoot or stem growing from a parent branch or stem (See Fig. 4.4).

**4.4.1 codominant branches/codominant leaders:** Branches or stems arising from a common junction, having nearly the same size diameter (See Fig. 4.4).

**4.4.2 lateral branch:** A shoot or stem growing from another branch (See Fig. 4.4).

**4.4.3 parent branch or stem:** A tree trunk or branch from which other branches or shoots grow (See Fig. 4.4).

**4.4.4 scaffold branch:** A primary branch that forms part of the main structure of the crown (See Fig. 4.4).

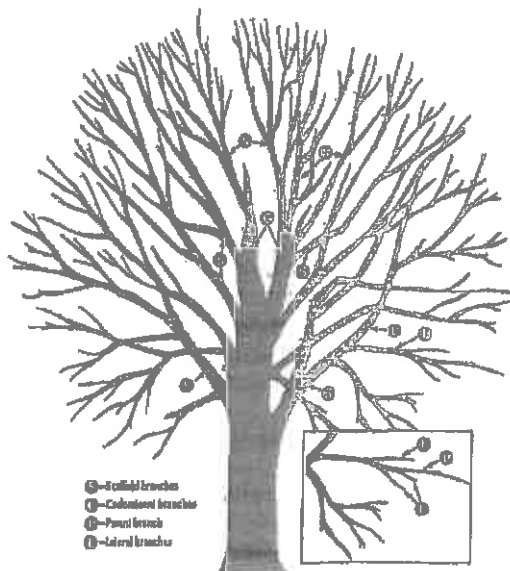


Figure 4.4 Standard branch definitions.

**4.5 branch bark ridge:** The raised area of bark in the branch crotch that marks where the branch and parent stem meet. (See Figs. 5.3.2 and 5.3.3).

**4.6 branch collar:** The swollen area at the base of a branch.

**4.7 callus:** Undifferentiated tissue formed by the cambium around a wound.

**4.8 cambium:** The dividing layer of cells that forms sapwood (xylem) to the inside and inner bark (phloem) to the outside.

**4.9 clean:** Selective pruning to remove one or more of the following non-beneficial parts: dead, diseased, and/or broken branches (7.2).

**4.10 climbing spurs:** Sharp, pointed devices strapped to a climber's lower legs used to assist in climbing trees. (syn.: gaffs, hooks, spurs, spikes, climbers)

**4.11 closure:** The process in a woody plant by which woundwood grows over a pruning cut or injury.

**4.12 crown:** Upper part of a tree, measured from the lowest branch, including all the branches and foliage.

**4.13 decay:** The degradation of woody tissue caused by microorganisms.

**4.14 espalier:** The combination of pruning, supporting, and training branches to orient a plant in one plane (6.5).

**4.15 establishment:** The point after planting when a tree's root system has grown sufficiently into the surrounding soil to support growth and anchor the tree.

**4.16 facility:** A structure or equipment used to deliver or provide protection for the delivery of an essential service, such as electricity or communications.

**4.17 frond:** A leaf structure of a palm.

**4.18 heading:** The reduction of a shoot, stem, or branch back to a bud or to a lateral branch not large enough to assume the terminal role.

- 4.19 interfering branches:** Crossing, rubbing, or upright branches that have the potential to damage tree structure and/or health.
- 4.20 internode:** The area between lateral branches or buds.
- 4.21 job briefing:** The communication of at least the following subjects for arboricultural operations: work specifications, hazards associated with the job, work procedures involved, special precautions, electrical hazards, job assignments, and personal protective equipment.
- 4.22 leader:** A dominant, typically upright, stem – usually the main trunk. There can be several leaders in one tree.
- 4.23 lion's tailing:** The removal of an excessive number of inner and/or lower lateral branches from parent branches. Lion's tailing is not an acceptable pruning practice (6.1.7).
- 4.24 live crown ratio:** Crown height relative to overall plant height.
- 4.25 mechanical pruning:** A pruning technique where large-scale power equipment is used to cut back branches (9.3.2).
- 4.26 method:** A procedure or process for achieving an objective.
- 4.27 peeling:** The removal of dead frond bases without damaging living trunk tissue at the point they make contact with the trunk. (syn.: shaving)
- 4.28 petiole:** A stalk of a leaf or frond.
- 4.29 pollarding:** Pruning method in which tree branches are initially headed and then reduced on a regular basis without disturbing the callus knob (6.6).
- 4.30 pruning:** The selective removal of plant parts to meet specific goals and objectives.
- 4.31 qualified line-clearance arborist:** An individual who, through related training and on-the-job experience, is familiar with the equipment and hazards in line clearance and has demonstrated the ability to perform the special techniques involved. This individual may or may not be currently employed by a line-clearance contractor.
- 4.32 qualified line-clearance arborist trainee:** An individual undergoing line-clearance training under the direct supervision of a qualified line-clearance arborist. In the course of such training, the trainee becomes familiar with the equipment and hazards in line clearance and demonstrates ability in the performance of the special techniques involved.
- 4.33 raise:** Pruning to provide vertical clearance (7.3).
- 4.34 reduce:** Pruning to decrease height and/or spread (7.4).
- 4.35 remote area:** As used in the utility pruning section of this standard, an unpopulated area.
- 4.36 restoration:** Pruning to redevelop structure, form, and appearance of topped or damaged trees (6.3).
- 4.37 rural area:** As used in the utility pruning section of this standard, a sparsely populated place away from large cities, suburbs, or towns but distinct from remote areas.
- 4.38 shall:** As used in this standard, denotes a mandatory requirement.
- 4.39 shoot:** Stem or branch and its leaves, especially when young.
- 4.40 should:** As used in this standard, denotes an advisory recommendation.
- 4.41 specifications:** A document stating a detailed, measurable plan or proposal for provision of a product or service.
- 4.42 sprouts:** New shoots originating from epicormic or adventitious buds, not to be confused with suckers. (syn.: watersprouts, epicormic shoots)
- 4.43 standard, ANSI A300:** The performance parameters established by industry consensus as a rule for the measure of extent, quality, quantity, value or weight used to write specifications.
- 4.44 stem:** A woody structure bearing buds, foliage, and giving rise to other stems.
- 4.45 structural pruning:** Pruning to improve branch architecture (6.2).

- 4.46 stub:** Portion of a branch or stem remaining after an internodal cut or branch breakage.
- 4.47 subordination:** Pruning to reduce the size and ensuing growth rate of a branch or leader in relation to other branches or leaders.
- 4.48 sucker:** Shoot arising from the roots.
- 4.49 thin:** pruning to reduce density of live branches (7.5).
- 4.50 throw line:** A small, lightweight line with a weighted end used to position a climber's rope in a tree.
- 4.51 topping:** Reduction of tree size using internodal cuts without regard to tree health or structural integrity. Topping is not an acceptable pruning practice (8.1.7).
- 4.52 tracing:** The removal of loose, damaged tissue from in and around the wound.
- 4.53 trunk:** The main woody part of a tree beginning at and including the trunk flare and extending up into the crown from which scaffold branches grow.
- 4.54 trunk flare:** 1. The area at the base of the plant's trunk where it broadens to form roots. 2. The area of transition between the root system and trunk (syn.: root flare).
- 4.55 urban/residential areas:** Populated areas including public and private property that are normally associated with human activity.
- 4.56 utility:** A public or private entity that delivers a public service, such as electricity or communications.
- 4.57 utility space:** The physical area occupied by a utility's facilities and the additional space required to ensure its operation.
- 4.58 vista/view prune:** Pruning to enhance a specific view without jeopardizing the health of the tree (6.4).
- 4.59 wound:** An opening that is created when the bark of a live branch or stem is cut, penetrated, damaged, or removed.
- 4.60 woundwood:** Partially differentiated tissue responsible for closing wounds. Woundwood develops from callus associated with wounds.
- ## 5 Pruning practices
- ### 5.1 Tree inspection
- 5.1.1** An arborist or arborist trainee shall visually inspect each tree before beginning work.
- 5.1.2** If a condition is observed requiring attention beyond the original scope of the work, the condition should be reported to an immediate supervisor, the owner, or the person responsible for authorizing the work.
- 5.1.3** Job briefings shall be performed as outlined in ANSI Z133.1, subclause 3.1.4.
- ### 5.2 Tools and equipment
- 5.2.1** Equipment, tools, and work practices that damage living tissue and bark beyond the scope of normal work practices shall be avoided.
- 5.2.2** Climbing spurs shall not be used when entering and climbing trees for the purpose of pruning.
- Exceptions:
- when branches are more than throw-line distance apart and there is no other means of climbing the tree;
  - when the outer bark is thick enough to prevent damage to the inner bark and cambium;
  - in remote or rural utility rights-of-way.
- ### 5.3 Pruning cuts
- 5.3.1** Pruning tools used in making pruning cuts shall be sharp.
- 5.3.2** A pruning cut that removes a branch at its point of origin shall be made close to the trunk or parent branch without cutting into the branch bark ridge or branch collar or leaving a stub (see Figure 5.3.2).

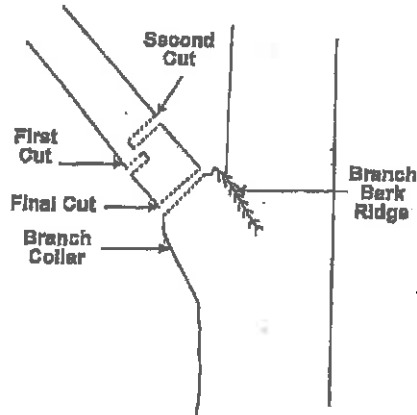


Figure 5.3.2. A cut that removes a branch at its point of origin. (See Annex A – Pruning cut guideline).

5.3.3 A pruning cut that reduces the length of a branch or parent stem shall be made at a slight downward angle relative to the remaining stem and not damage the remaining stem. Smaller cuts shall be preferred (see Fig. 5.3.3).

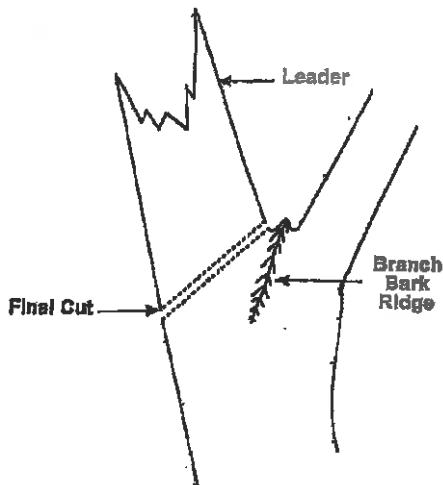


Figure 5.3.3. A cut that reduces the length of a branch or parent stem.

5.3.4 When pruning to a lateral, the remaining lateral branch should be large enough to assume the terminal role.

5.3.5 The final cut should result in a flat surface with adjacent bark firmly attached.

5.3.6 When removing a dead branch, the final cut shall be made just outside the collar of living tissue.

5.3.7 Tree branches shall be removed in such a manner so as to avoid damage to other parts of the tree or to other plants or property. Branches too large to support with one hand shall be pre-cut to avoid splitting of the wood or tearing of the bark (see Figure 5.3.2). Where necessary, ropes or other equipment shall be used to lower large branches or portions of branches to the ground.

5.3.8 A cut that removes a branch with a narrow angle of attachment should be made from the outside of the branch to prevent damage to the parent branch (see Figure 5.3.8).

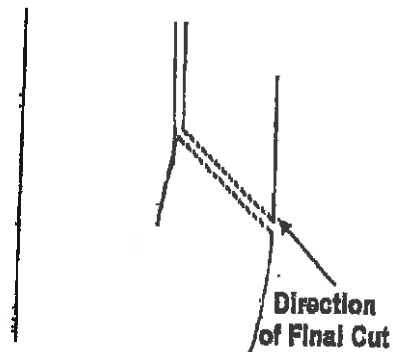


Figure 5.3.8. A cut that removes a branch with a narrow angle of attachment.

5.3.9 Severed branches shall be removed from the crown upon completion of the pruning, at times when the tree would be left unattended, or at the end of the workday.

#### 5.4 Wound treatment

5.4.1 Wound treatments shall not be used to cover wounds or pruning cuts, except when necessary for disease, insect, mistletoe, or sprout control, or for cosmetic reasons.

5.4.2 Wound treatments that are damaging to tree tissues shall not be used.

5.4.3 When tracing wounds, only loose, damaged tissue shall be removed.

## 6 Pruning objectives

6.1 Pruning objectives shall be established prior to beginning any pruning operation.

6.1.1 Objectives should include, but are not limited to, one or more of the following:

- Risk reduction
- Manage health
- Clearance
- Structural improvement/correction
- View improvement/creation
- Aesthetic improvement
- Restoration

6.1.2 Established objectives should be specified in writing (See Annex B – *Specification writing guideline*).

6.1.3 To obtain the defined objective, the growth cycles, structure, species, and the extent of pruning to be performed shall be considered.

6.1.4 Not more than 25 percent of the foliage should be removed within an annual growing season. The percentage and distribution of foliage to be removed shall be adjusted according to the plant's species, age, health, and site.

6.1.5 When frequent excessive pruning is necessary for a tree to avoid conflicts with elements such as infrastructure, view, traffic, or utilities, removal or relocation of the tree shall be considered.

6.1.6 Pruning cuts should be made in accordance with section 5.3 *Pruning cuts*.

6.1.7 Topping and lion's tailing shall be considered unacceptable pruning practices for trees.

6.2 **Structural:** Structural pruning shall consist of selective pruning to improve tree and branch architecture primarily on young- and medium-aged trees.

6.2.1 Size and location of leaders or branches to be subordinated or removed should be specified.

6.2.2 Dominant leader(s) should be selected for development as appropriate.

6.2.3 Strong, properly spaced scaffold branch structure should be selected and maintained by reducing or removing others.

6.2.4 Temporary branches should be retained or reduced as appropriate.

6.2.5 Interfering, overextended, defective, weak, and poorly attached branches should be removed or reduced.

6.2.6 At planting, pruning should be limited to cleaning (7.2).

6.3 **Restoration:** Restoration shall consist of selective pruning to redevelop structure, form, and appearance of severely pruned, vandalized, or damaged trees.

6.3.1 Location in tree, size range of parts, and percentage of sprouts to be removed should be specified.

6.4 **Vista/view:** Vista/view pruning shall consist of the use of one or more pruning methods (types) to enhance a specific line of sight.

6.4.1 Pruning methods (types) shall be specified.

6.4.2 Size range of parts, location in tree, and percentage of foliage to be removed should be specified.

## 6.5 Espalier

6.5.1 Branches that extend outside the desired plane of growth shall be pruned or tied back.

6.5.2 Ties should be replaced as needed to prevent girdling the branches at the attachment site.

## 6.6 Pollarding

6.6.1 Consideration shall be given to the ability of the individual tree to respond to pollarding.

6.6.2 Management plans shall be made prior to the start of the pollarding process for routine removal of sprouts.



6.6.3 Heading cuts shall be made at specific locations to start the pollarding process. After the initial cuts are made, no additional heading cuts shall be made.

6.6.4 Sprouts growing from the cut ends of branches (knuckles) should be removed annually during the dormant season.

## 7 Pruning methods (types)

7.1 One or more of the following methods (types) shall be specified to achieve the objective.

7.2 **Clean:** Cleaning shall consist of pruning to remove one or more of the following non-beneficial parts: dead, diseased, and/or broken branches.

7.2.1 Location of parts to be removed shall be specified.

7.2.2 Size range of parts to be removed shall be specified.

7.3 **Raise:** Raising shall consist of pruning to provide vertical clearance.

7.3.1 Clearance distance shall be specified.

7.3.2 Location and size range of parts to be removed should be specified.

7.3.3 Live crown ratio should not be reduced to less than 50 percent.

7.4 **Reduce:** Reducing shall consist of pruning to decrease height and/or spread.

7.4.1 Consideration shall be given to the ability of a species to tolerate this type of pruning.

7.4.2 Location of parts to be removed or clearance requirements shall be specified.

7.4.3 Size of parts should be specified.

7.5 **Thin:** Thinning shall consist of selective pruning to reduce density of live branches.

7.5.1 Thinning should result in an even distribution of branches on individual branches and throughout the crown.

7.5.2 Not more than 25 percent of the crown should be removed within an annual growing season.

7.5.3 Location of parts to be removed shall be specified.

7.5.4 Percentage of foliage and size range of parts to be removed shall be specified.

## 8 Palm pruning

8.1 Palm pruning should be performed when fronds, fruit, or loose petioles may create a dangerous condition.

8.2 Live healthy fronds should not be removed.

8.3 Live, healthy fronds above horizontal shall not be removed. Exception: Palms encroaching on electric supply lines (see Fig. 8.3a and 8.3b).



Figure 8.3a Frond removal location.

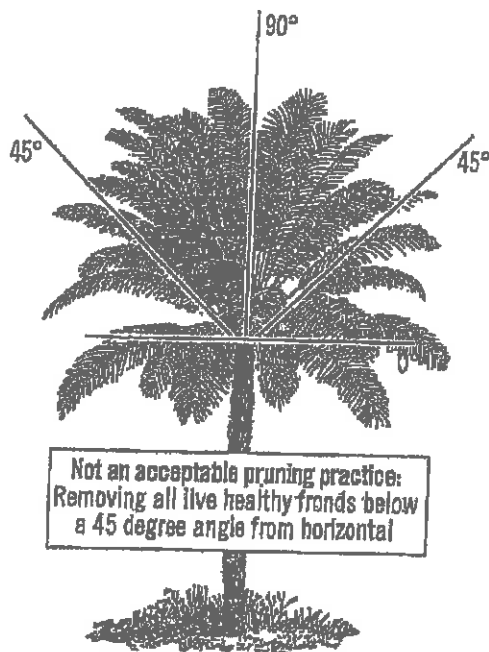


Figure 8.3b An overpruned palm (not an acceptable pruning practice).

8.4 Fronds removed should be severed close to the petiole base without damaging living trunk tissue.

8.5 Palm peeling (shaving) should consist of the removal of only the dead frond bases at the point they make contact with the trunk without damaging living trunk tissue.

## 9 Utility pruning

### 9.1 Purpose

The purpose of utility pruning is to prevent the loss of service, comply with mandated clearance laws, prevent damage to equipment, maintain access, and uphold the intended usage of the facility/utility space while adhering to accepted tree care performance standards.

### 9.2 General

9.2.1 Only a qualified line-clearance arborist or line-clearance arborist trainee shall be assigned to

line clearance work in accordance with ANSI Z133.1, 29 CFR 1910.331 – 335, 29 CFR 1910.268 or 29 CFR 1910.269.

9.2.2 Utility pruning operations are exempt from requirements in subclause 5.1, *Tree Inspection*, for conditions outside the utility pruning scope of work.

9.2.3 Job briefings shall be performed as outlined in ANSI Z133.1, subclause 3.1.4.

### 9.3 Utility crown reduction pruning

#### 9.3.1 Urban/residential areas

9.3.1.1 Pruning cuts should be made in accordance with subclause 5.3, *Pruning cuts*. The following requirements and recommendations of 9.3.1.1 are repeated from subclause 5.3 *Pruning cuts*.

9.3.1.1.1 A pruning cut that removes a branch at its point of origin shall be made close to the trunk or parent branch, without cutting into the branch bark ridge or collar, or leaving a stub (see Figure 5.3.2).

9.3.1.1.2 A pruning cut that reduces the length of a branch or parent stem shall be made at a slight downward angle relative to the remaining stem and not damage the remaining stem. Smaller cuts shall be preferred (see Fig. 5.3.3).

9.3.1.1.3 The final cut shall result in a flat surface with adjacent bark firmly attached.

9.3.1.1.4 When removing a dead branch, the final cut shall be made just outside the collar of living tissue.

9.3.1.1.5 Tree branches shall be removed in such a manner so as not to cause damage to other parts of the tree or to other plants or property. Branches too large to support with one hand shall be pre-cut to avoid splitting of the wood or tearing of the bark (see Figure 5.3.2). Where necessary, ropes or other equipment shall be used to lower large branches or portions of branches to the ground.

9.3.1.1.6 A cut that removes a branch with a narrow angle of attachment should be made from the outside of the branch to prevent damage to the parent branch (see Figure 5.3.8).

9.3.1.2 A minimum number of pruning cuts should be made to accomplish the purpose of facility/utility pruning. The structure and growth habit of the tree should be considered.

9.3.1.3 Trees directly under and growing into facility/utility spaces should be removed or pruned. Such pruning should be done by removing entire branches or leaders or by removing branches that have laterals growing into (or once pruned, will grow into) the facility/utility space.

9.3.1.4 Trees growing next to, and into or toward, facility/utility spaces should be pruned by reducing branches to laterals (5.3.3) to direct growth away from the utility space or by removing entire branches. Branches that, when cut, will produce sprouts that would grow into facilities and/or utility space should be removed.

9.3.1.5 Branches should be cut to laterals or the parent branch and not at a pre-established clearing limit. If clearance limits are established, pruning cuts should be made at laterals or parent branches outside the specified clearance zone.

9.3.2 Rural/remote locations – mechanical pruning

Cuts should be made close to the main stem, outside of the branch bark ridge and branch collar. Precautions should be taken to avoid stripping or tearing of bark or excessive wounding.

9.4 Emergency service restoration

During a utility-declared emergency, service must be restored as quickly as possible in accordance with ANSI Z133.1, 29 CFR 1910.331 – 335, 29 CFR 1910.268, or 29 CFR 1910.269. At such times, it may be necessary, because of safety and the urgency of service restoration, to deviate from the use of proper pruning techniques as defined in this standard. Following the emergency, corrective pruning should be done as necessary.

## Annex A Pruning cut guideline

---

### A-1 Three-cut method

Multiple cutting techniques exist for application of a three-cut method. A number of them may be used to implement an acceptable three-cut method.

A-1.1 The technique depicted in *Figure 5.3.2* demonstrates one example of a three-cut method that is common to hand-saw usage. It is not intended to depict all acceptable three-cut method techniques.

## Annex B Specification writing guideline

A300 (Part 1)-2008 *Pruning* standards are performance standards, and shall not be used as job specifications. Job specifications should be clearly detailed and contain measurable criteria.

The words "should" and "shall" are both used when writing standards. The word "shall" is used when writing specifications.

Writing specifications can be simple or complex and can be written in a format that suits your company/the job. The specifications consist of two sections.

### I. General:

This section contains all aspects of the work to be performed that needs to be documented, yet does not need to be detailed.

Saying under the General section that "all work shall be completed in compliance with A300 Standards" means the clauses covering safety, inspections, cuts, etc. will be adhered to. There is no need to write each and every clause into every job specification.

Other items that may be covered in the General section could be: work hours and dates, traffic issues, disposal criteria, etc.

The second section under Job Specifications would be:

### II. Details:

This section provides the clear and measurable criteria; the deliverables to the client.

This section, to be written in compliance with A300 standards, shall contain the following information:

**1. Objective – Clause 6**

These objectives originate from/with the tree owner or manager. The arborist shall clearly state what is going to be done to achieve the objective(s).

Objectives can be written for the entire job or individual trees. Rarely can one or two words clearly convey an objective so that all parties involved (client, sales, crew, etc.) can visualize the outcome.

**2. Method – Clause 7**

Here the method(s) to be used to achieve the objective are stated. Again, depending on the type of job, this can be stated for the individual tree or a group of trees.

**3. Location – Clause 7.2.1, 7.3.2, 7.4.2, 7.5.3**

This is the location in the tree(s) that the work methods are to take place.

**4. Density – Clause 7.3.1, 7.3.3, 7.5.1, 7.5.2, 7.5.4**

This is the amount or volume of parts that are to be removed and can be stated exactly or in ranges.

**5. Size – Clause 7.2.2, 7.3.2, 7.4.3, 7.5.4**

This is the size or range of sizes of cut(s) utilized to remove the volume specified.

NOTE: items # 4 & 5 are directly related to resource allocation, staffing and dollars.

### SAMPLE PRUNING SPECIFICATIONS

#1. Scope: Large live oak on west side of pool

Objectives: Increase light penetration through east side of tree. Reduce risk potential of 1-inch-diameter branches falling.

Specifications: All broken branches and 1-inch-plus diameter dead branches shall be removed from the crown.

The three lowest 8-inch-plus diameter branches on the east side shall be thinned 25 percent with 1-inch- to 3-inch-diameter cuts.

NOTE: All work shall be completed in compliance with ANSI A300 and Z133.1 Standards.

## Annex B Specification writing guideline

#2. **Scope:** 1 Arizona ash

**Objective:** Enhance structure/structural development.

**Specifications:** General;

All pruning shall be completed in compliance with A300 Standards.

**Detail:**

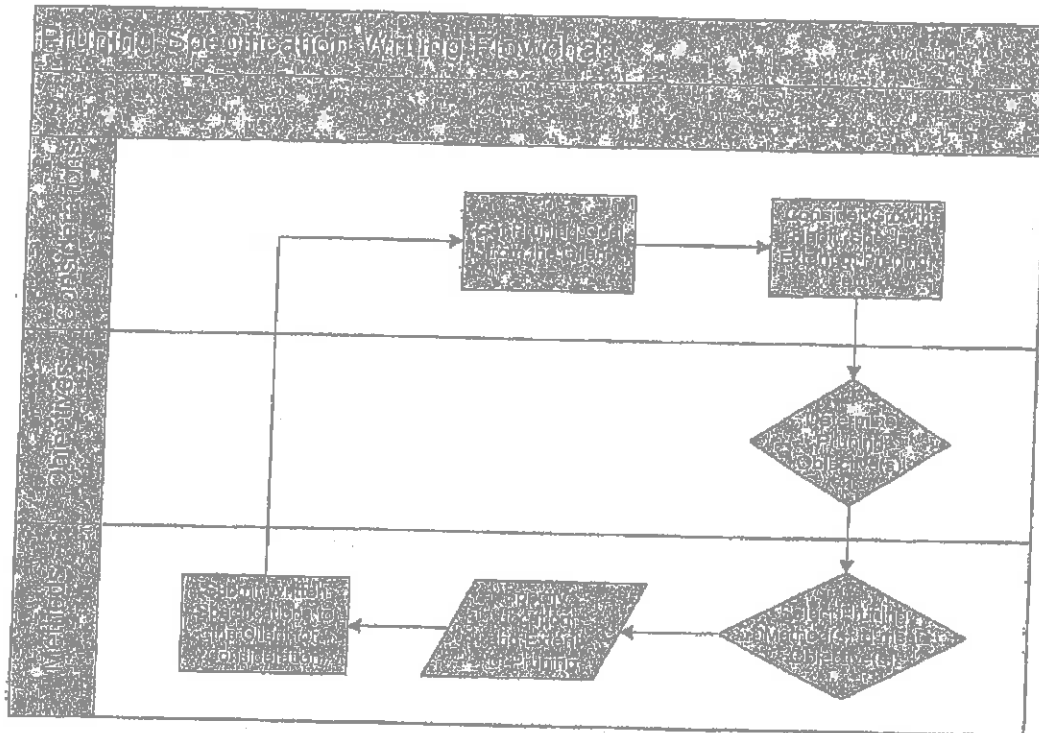
Thin crown 20-25 percent with 1-inch- to 4-inch-diameter cuts. Reduce west codominant leader by approximately 12 feet.

#3. **Scope:** Twenty-three newly installed evergreen elms

**Objective:** Maximize establishment – reduce nuisance while enhancing natural growth habit.

All work shall be completed in compliance with A300 Standards and the following specifications.

- Specifications:**
- Retain as much size as possible and 80-90 percent density of foliage.
  - Lowest permanent branch will be 6 feet above grade in four to five years.
  - Retain all sprout growth originating 18 inches above grade on trunk and 4 inches out from branch attachments throughout crown.
  - Remove weakest rubbing branches.
  - Remove dead branches.
  - Reduce broken branches or branches with dead ends back to live laterals or buds. Heading cuts can be used.
  - Maintain all growth originating between 1.5 feet (18 inches) and 6 feet 6 inches (78 inches) behind adjacent edge of walks. Heading cuts are OK.



**Annex C**  
**Applicable ANSI A300 Interpretations**

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The following interpretations apply to Part 1 – *Pruning*:

**C-1 Interpretation of "should" in ANSI A300 standards**

"An advisory recommendation" is the common definition of "should" used in the standards development community and the common definition of "should" used in ANSI standards. An advisory notice is not a mandatory requirement. Advisory recommendations may not be followed when defensible reasons for non-compliance exist.

**C-2 Interpretation of "shall" in ANSI A300 standards**

"A mandatory requirement" is the common definition of "shall" used in the standards development community and the common definition of "shall" used in ANSI standards. A mandatory requirement is not optional and must be followed for ANSI A300 compliance.