

Shepherdstown Tree Commission Agenda

Thursday, October 10, 2024

6:00 p.m.

Town Hall

1. Call meeting to order

2. Approval of Minutes - Approval of Sep 12, 2024 Draft Minutes

3. Public Comments

4. Unfinished Business

- a. Status of commission member application for Robin McGrorty
- b. Review pending and completed tree actions
 - See Tree Commission Action Log addendum
- c. Tree inventory database – renewal in March 2025.
- d. Tree commission description statement and 2025 goals
- e. Water truck

5. New Business:

- a. Resident Requests:
 - Briod
- b. Serviceberry Street Tree @ 202 S. Church
- c. German Street Bed Cleanup / Green is Great hourly labor proposal
- d. Community Tree Planting Event
- e. Tree Cover – German St
- f. Protection for young trees on German St.
- g. Urban Forestry/Demonstration City grant
- h. Tree Well on German St. West of Entler

6. Adjourn

Shepherdstown Tree Commission Draft Minutes

Thursday, September 12, 2024

6:00 pm

Town Hall

Members Present: James Dillon, Linus Bicker (acting chair), Charlotte Baker-Shenk

Absent: None

Visitors: Robin McGrorty, Jamie Byron, Shawn Walker, Mayor Gatz, Dave & Gail McMillion

1. **Call to Order:** L. Bicker called the meeting to order at 6:02 pm.

2. **Approval of August 8, 2024 Minutes.**

C. Baker-Shenk noted that there were items approved for action in these Minutes (in both old and new business) that need our attention since there was likely no follow up due to administrative changes.

J. Dillon moved to approve the Draft Tree Commission minutes of August 8, 2024. No objections noted.

3. **Changes in Commission membership. Review of Ordinance.**

L. Bicker stated that L. Robertson and apparently also J. Haynes have resigned from the Commission. Bicker expressed appreciation for their many years of work on the Commission.

L. Bicker reviewed the Shepherdstown Tree Commission ordinance which says it shall consist of 5 members appointed by the Mayor with the approval of the Town Council. Chooses its own officers, makes own rules and regulations, and keeps a journal of its proceedings.

Introduced Robin McGrorty, who has submitted his application to join the Commission (for Mayor and Town Council approval at their next meeting on October 9). McGrorty is an ISA certified arborist with extensive experience working with trees in urban environments and also has a permaculture design certificate. Has been working with Viking Tree Service (soon to end this employment as he initiates a new project for homeschoolers). Described why he thinks it important that the Town also solicit proposals from local tree care vendors.

McGrorty, J. Byron, and S. Walker engaged in an informative discussion on the social and economic value of trees (mental and physical health effects, impacts on store frontage when there's shade, even increasing the amount of time customers spend in a business).

Many reasons why it's so important that the Town do all that is necessary to care for its trees and promote a healthy canopy.

4. Review Process for setting agenda and reviewing minutes.

C. Baker-Shenk proposed that, from now on, both draft agendas and minutes be distributed in such a manner as to allow regular attendee feedback (and potential revision) prior to their use and distribution. So draft minutes, such as these, would be distributed within a week of the prior meeting, offering opportunity for participant feedback, would then be revised as needed, published and distributed to Town administration as is required. Same process for meeting agendas: distribute well in advance of the meeting, allowing for any suggested additions/changes, revise as needed, and then publish and use at the meeting. All agreed to this change.

5. Public Comments:

Dave McMillion (206 W. High St) said they had filled out a Maintenance Request Form.

They have a weeping cherry on their alley (next to one-car garage) that they think is not a Town tree, and that has dying, dropping branches. Members confirmed that the McMillions have the right to prune or remove the tree as they see fit.

As previously requested, they are concerned about structural integrity of the linden tree (#157) --needs structural pruning now. Members agreed.

6. Potomac Edison Approved Tree Species List

J. Dillon noted that this list is outdated and needs some revision since it includes invasive species and does not include some other viable native tree species. Dillon is willing to work on a revision; J. Byron will work with him.

7. Monitoring and Making Decisions about Town Trees

J. Byron suggested we create a list of trees that need monitoring for possible action.

L. Bicker offered to create a new Google Drive folder that would include this list.

L. Bicker distributed and talked through the draft he's creating to handle service requests ("Tree Action Life Cycle"). Regarding our decision process, J. Dillon noted that he's a horticulturist, not an arborist; feels it best that an arborist does the assessment. Or Dillon could do the initial assessment and then have one of the 3 arborists here confirm or change any decisions, especially if it involves removal of a tree. S. Walker noted that this process could also help in communication with Town residents who might have concerns. Helpful to have "several eyes" on a decision.

It was noted that, unlike prior process, approvals for contracted work will need to come from the Mayor or his appointee.

8. Tree Inventory and Management Plan (created by Bartlett April 2022)

How can members best access this information? Dedicated computer? On thumb drive distributed to each member? L. Bicker will try download onto the new Google Drive. C. Baker-Shenk stressed that all notes about trees (agenda, minutes, etc) need to reference the tag numbers given to each Town tree in this inventory.

How identify physical locations of trees in inventory (which are noted only by numbers and tiny circles on small street maps)? Mayor Gatz has a list of names and addresses of Town residents which might be helpful.

9. Soliciting Bids for Vendor Work

Who best to solicit bids from vendors? The Commission agreed this should be someone who understands the issues—a Tree Commission member, and preferably, an arborist.

Mayor Gatz recommended the Commission create a “preferred list” of perhaps four vendors, trusted tree companies.

Questions: Do we give preference to local vendors? If we receive multiple bids, who decides?

It was noted that Bartlett has great capacity (“one stop shopping”), good for general maintenance, but that smaller jobs or special projects might instead go to smaller, local companies. J. Byron suggested difference between low level/low risk jobs (eg. pole or hand saw pruning) that might be handled locally by a company on a retainer – as opposed to bigger take-down, high risk climb jobs that might go to a bigger company.

R. McGroarty recommended the Commission create a “standard of care” document so vendors will know what we expect from them.

10. Beginning Review of not-yet-approved Bartlett Proposals

J. Byron noted that many Town trees were planted way too deep.

Root collar surgeries can be done in winter.

Hard to decide on the 3 Bartlett proposals (3/5/2024, 4/4/2024, 5/20, 2024) without deciding on the quality of each tree.

Agreed to start a **"TREE TRIAGE"** list to help us review the Bartlett proposals. L. Bicker will create this database.

Sugar maple #369: bark beetle treatments are certainly important to do but no imminent threat at this moment.

Old library crab apple. #357 (in front of Market House) – S. Walker will talk with Derek at Bartlett about its care and growth regulator recommendation. Need top quality work on this highly valuable tree. Think better to wait until killing frost (or mid-Nov to mid-March) before pruning.

Will application of growth regulator affect wound closure on birch tree (corner of Dule and German) hit by accident? #? J. Byron will research this.
It was noted that this tree has been treated against borers (borers are the main reason river birch die).

***Commission decided to request that Bartlett treat against borers NOW but wait on pruning and growth regulator.

***#274 Flowering Cherry (Carmen & Austin Slater (!00 W. New St) –not a native tree. Best if prune after leaves drop but because of effects on their home, decided go ahead now and prune. (Can see leaf spot; tree in decline.). A small job. Local contractor?

#382 Ginkgo – does this really need pruning? Commission members will check on this.

***#383 American Linden (Commission already approved) – ASAP prune out dead wood and remove vines at base of tree. Very valuable tree.

***#384 American Linden --S.Walker recommended also focus on this tree (close to alley). Not in Bartlett proposal currently. Commission agreed to request Bartlett solicit new proposal; valuable tree.

***Late Season Management – approve this work ASAP
#160 (wrongly listed in inventory as serviceberry?) Parrotia – need prune for road visibility and dead wood out.
#161, #155, #157

11. Brief Description of Tree Commission

C. Baker-Shenk distributed for feedback some proposed language requested by Mayor Gatz for website on work/goals of the Tree Commission. Members offered feedback. Baker-Shenk will revise and email out for further review tomorrow

12. Adjournment – meeting adjourned at 8:00pm; all in agreement.

Status	Tracking Number	Date Request Originated	Current Action	Services Needed	Tree Tag	Location	Date Presented at Tree Commission	Tree Commission Decision	Proposal ID	Vendor	Notes
1. Scheduled - Pending Completion	TC - 2024-013	8/13/24	Scheduled for completion by Town Hall	Pruning	160,161,155,157	High West of Church	9/12/24	Approved	2024-2	Bartlette	9/12 - Commission Reviewed proposal from Bartlette to prune 160, 161, 155, 157 on High St West of Church. Commission approved this actions. Commission member needs to determine whether this includes the tree that McMillions sought an assessment of at the August Commission meeting.
2. Vendor Coordination Needed	TC - 2024-002	8/14/24	Schedule within 90 days	Bark Beetle Treatment	369	Town Hall Sugar Maple	9/12/24	Approved	2024-1	Bartlette	9/12 Commission - Reviewed proposal from Bartlette to perform Bark Beetle Treatment. James Dillon with input from Shawn Walker and Robin McGroarty stated that the work should be performed within 90 days. Communication needed with town hall to schedule this action.
2. Vendor Coordination Needed	TC - 2024-003	6/1/24	Consultation with a vendor needed	Memorial Plaque		Town Hall - Plaque	8/8/24	Approved			Design needed- Memorial plaque
3. Pending Tree Assessment	TC - 2024-005	3/1/24	Arborer/Horticulturalist: Meet with Sue and identify tree tags and determine services needed	Pruning		E German					vendor has been on site but not done to requestors satisfaction
3. Pending Tree Assessment	TC - 2024-011	8/8/24	Arborer/Horticulturalist: Assess and research whether growth regulator is appropriate for an injured tree. Bartlette Proposal from 8/8 indicates to apply growth management treatment. Borer Treatment was approved at commission to be completed ASAP. Borer Treatment being scheduled.	Growth Regulator Treatment, Borer Treatment, Pruning	137	German and Duke	8/8/24	Partial Approved Partial Deferred	2024-2	Bartlette	River Birch . 9/12 Commission - Reviewed proposal from Bartlette for services related to River Birch (137) at German and Duke. Services from Bartlette proposal include: Growth Regulator Treatment, Borer Treatment, and Pruning. Commission approved the borer treatment. Remaining services on hold for further assessment by arborer/horticulturalist.
3. Pending Tree Assessment	TC - 2024-014	8/13/24	Arborer/Horticulturalist: Assess for appropriateness of service	Pruning	357	Old Library Crabapple	9/12/24	Deferred 30 days	2024-2	Bartlette	9/12 Commission - Commission reviewed Bartlette proposal to prune the iconic crabapple in front of the old library. Discussion was held about this being a very special tree for our town and extra attention and oversight being needed for any tree work. Arborists/horticulturalist will need to assess before authorizing this work. Review again at the October meeting with input from the tree experts after assessment. Deferred 30 days
3. Pending Tree Assessment	TC - 2024-015	8/19/24	Arborer/Horticulturalist: Assess for appropriateness of service	Pruning	41, 42, 56	200, 211, 213 E. German	9/12/24	Deferred 30 days	2024-1	Bartlette	9/12 Commission - Reviewed proposal to prune trees 2 cherry trees and a crabapple (Tags 41,42,56). Arborist/Horticulturalist will assess. Deferred 30 days and re-review at October meeting
3. Pending Tree Assessment	TC - 2024-016	8/19/24	Arborer/Horticulturalist: Assess for appropriateness of service	Pruning	43	211 E. German	9/12/24	Deferred 30 days	2024-1	Bartlette	9/12 Commission - Reviewed proposal to prune trees near maple (#43) at 211 E. German. Arborist/Horticulturalist will assess. Deferred 30 days and re-review at October meeting

3. Pending Tree Assessment	TC - 2024-017	8/19/24	Arborer/Horticulturalist: Assess for appropriateness of service	Root Collar Surgery	369	Front left Town hall	9/12/24	Deferred 30 days	2024-1	Bartlette	surgery of Sugary Maple (#369) in front of Town Hall. Commission decided that an assessment is needed prior to approval. Defer 30 days and re-review at October meeting.
4. Pending Tree Commission	TC - 2024-012	9/1/24	Assess tree for removal	Removal	73	JSB Red Bud					9/29 - Linus met with Lori to observe tree. See photo
4. Pending Tree Commission	TC - 2024-016					202 S. Church					Serviceberry Tree
4. Pending Tree Commission	TC - 2024-017		Defer to October Meeting	Pruning	Many		9/12/24	Deferred 30 days	2024-3	Bartlette	pruning of a large number of trees in the town's rights of way on German and King St along with some other ancillary areas. Commission deferred this to the Oct meeting.
4. Pending Tree Commission	TC - 2024-018			Weed/Mulch Beds	Multiple	German/King			2024-5	Green is Great Lawn Care	Green is Great provided labor proposal
4. Pending Tree Commission	TC - 2024-019					202 S. Church					Serviceberry tree. Jamie request to add to Oct agenda
5 - Pending Follow-up	TC - 2024-022					Sage Place					Perennial Wood Sedge for around trees Spring of 2025 now that the beds have been weeded and mulched around the 9 trees.
6 - Verify Completion			Scheduled for completion by Town Hall	Pruning	274, 382, 383	100 West New	9/12/24	Approved	2024-2	Bartlette	9/12 Commission - Reviewed proposal from Bartlette to prune tree. Tree commission approved this action. The proposal also contained actions to trim the adjacent ginkgo (382) and the large linden (383). Tree commission also recommended to prune the other large linden immediately to the south on King St. 9/13 Received message from MG that town hall contacted Bartlette and waiting on return call to schedule service
6 - Verify Completion				Removal	1067	Mill St					Per discussion with Lori on 9/29 been to commission and approved. Frank Welch possibly coordinated with vendor. \$2500. No proposal on hand.
6 - Verify Completion				Routine Soil care for tree beds	Multiple	German St between Duke and Princess					Per discussion with Lori on 9/29 been to commission and approved. \$140. No proposal on hand. May have already been completed.
6 - Verify Completion				Seasonal treatment of crab apple, cherry, and	Multiple	German St between Duke and Princess					Per discussion with Lori on 9/29, been to commission and approved. No proposal on hand. \$520. completion status unknown.
6 - Verify Completion				Root Invigoration	353	Church between Washing and New St.					Been to commission and already approved.
6 - Verify Completion				Pruning		High St West of Duke			2024-4	Viking	Per discussion with Lori on 9/29, been to commission and approved. \$250. completion status unknown.



TREE MAINTENANCE REQUEST FORM

Corporation of Shepherdstown

104 North King Street – Post Office Box 248 Shepherdstown, WV 25443
Phone: 304-876-2312/ Fax: 304-876-1473/ Website: www.shepherdstown.us

Date of Request: September 26, 2024

Requestor's Name: JUDITH BRID

Phone Number: 304 283 8817

Location of problem tree: EAST NEW ST. BETWEEN NOS 100 and 102

Problem with tree: TRUNK IS ON PROPERTY OF NO 100
BUT BRANCHES POSE A PROBLEM FOR 102
AND OVERHEAD WIRES

For Tree Commission Use Only

Approved Action: _____

Work Performed: _____

Performed by Date: _____

Signature

Date

From: "Hannah, Robert L" <robert.l.hannah@wv.gov>
Subject: Re: Shepherdstown
Date: September 19, 2024 at 9:27:40 AM EDT
To: Linus Bicker <lbicker@shepherdstown.us>
Cc: Sam Adams <samuel.t.adams@wv.gov>

Hi Linus - It's great to make contact with you! Shawn mentioned that Shepherdstown was potentially interested in a grant for urban forestry. Our Demonstration City grants can be used for planting or any other tree related projects on public property. I'll forward an email that provides more detail and has the application documents attached. Please let me know if there are questions and I'd be glad to schedule a time to discuss the grant with you.

I've copied our Urban Forester, Sam Adams. He is available to assist with grant projects such as species selection, planting plans, etc. Please reach out to Sam for any urban forestry assistance the Town needs.

I also want to mention that Shepherdstown will need to apply for their annual Tree City USA designation by early January. Frank Welch had previously submitted the application for the Town each year. Do you know who will be taking over this role? They will need to create new credentials at the Arbor Day Foundation Tree City USA portal to submit the required documentation. The easiest way to access the portal is from this website and then scroll down and click apply now:
<https://www.arborday.org/programs/treecityusa/> Sam and I can both help with the application requirements and there should be a help link at the TC USA portal to have the Shepherdstown account changed to the new person. Please let me know if there's any issues with this and I can email the ADF and have them get the new person registered.

Finally, we're working on our annual report to the US Forest Service which is due in a couple of weeks. One of the elements we need to report is the number of volunteer hours generated by each community with an active tree board or commission. Would someone with the Shepherdstown Tree Commission be able to send me the number of volunteer hours the Commission spent on any and all tree related activities from 10/1/23 through 9/30/24 by next week? No worries if there's not an exact count, a best estimate will be fine.

I'm looking forward to talking with you soon,
Bob

On Wed, Sep 18, 2024 at 6:25 PM Linus Bicker <lbicker@shepherdstown.us> wrote:
Hi Bob,

I'm on the Shepherdstown Town Council and also on the Tree Commission.

Shawn Walker referred you to me as a resource for aiding us with our work.

We'd love to engage with you!

My availability is limited during the day on Monday - Thursdays during typical business hours, but evenings are great for me as are all day Fridays and weekends.

Linus Bicker
803-931-6185

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DEMONSTRATION CITY GRANT APPLICATION
GENERAL INFORMATION SECTION

Please carefully read the separate Demonstration City Grant Instructions before completing application

Organization Name _____

Address _____

City _____ State _____ Zip _____

Federal Employment Identification Number (FEIN): _____

All applicants must have an active SAM.gov registration at the time of application and must maintain an active registration throughout the life of the award.

Unique Entity Identifier (UEI) from SAM.gov: _____

Are you currently a registered vendor with the state of West Virginia: Yes No

Contact Information for individual responsible for completion of grant project

Name: _____

—

Phone Number: _____ Email: _____

Type of Organization (municipality, university, etc.):

Project Name: _____

Project Location - (community and neighborhoods involved):

: _____

Date project will be completed by: _____

If the project is funded, we grant WVDOF staff permission to inspect the property and use tree planting and site pictures for reports and to promote the CET grant program.

YES NO

Has the applicant previously submitted a WVDOF Financial Capability Questionnaire (FCQ).

Yes No

If not, include a completed FCQ with application.

Acknowledgements

Please review and check the boxes below to signify agreement

Acknowledgment that the project will be completed and that paid invoices will be submitted no later than one month after the end date on the agreement

Acknowledgment that you are a vendor of the state of WV or have applied to become a vendor

Acknowledgment that no portion of the grant will be used for administrative costs, staff salaries other than ISA Certified Arborists or Professional Foresters, construction, unapproved equipment, and purchasing land or land charges

I confirm that _____(organization name) will comply with the USDA Forest Service Grants and Agreements Civil Rights Requirements described in the "USDA Forest Service, Office of Civil Rights, FS-850, August 2022 brochure USDA Forest Service Grants and Agreements Civil Rights Requirements". Brochure available on the WVDOF website:

<https://wvforestry.com/urban-forestry/>

Signature: _____

Title: _____

Date: _____

Acknowledgement that the applicant will comply with federal the '2 CFR 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards': <https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200#subject-group-ECFR45ddd4419ad436d>

Acknowledgment that the applicant will comply with federal the '2 CFR 200.331 through .333 Uniform Administrative Requirements, Monitoring and Management': <https://www.ecfr.gov/current/title-2/section-200.331>

Acknowledgement that the applicant will comply with Section 889 of the 2019 National Defense Authorization Act which prohibits grant recipients from procuring or using certain "covered telecommunication equipment or services" <https://www.ndia.org/policy/section-889>

Acknowledgement that the applicant will comply with the Trafficking Victims Protection Reauthorization Act and the National Security Presidential Directive (NSPD) 22 which provides "zero tolerance policy" regarding trafficking in persons <https://www.acquisition.gov/far/22.1703>

Submit Application to:

Robert Hannah
West Virginia Division of Forestry
P.O. Box 40
Farmington, WV 26571

or

robert.l.hannah@wv.gov

TECHNICAL PROPOSAL

A Technical Proposal shall be responsive to the following criteria. Also see Section VI of the Guide, Rating Criteria. The Technical Proposal is in essay form and should clearly describe the project and contain the relevant items from the following.

- a. Describe the location(s) where the project will take place.**

- b. Describe the overall goal of the project.** How will this project address needs and enhance urban forestry efforts in your community? What problems or issues will be addressed?

- c. **For projects that involve tree plantings, provide the following information:**
1. Number of trees by species for each planting site.
 2. Certify that planting stock and planting methods will meet WV DOF standards for Nursery Stock (see Appendix 1 of the guide)
 3. Caliper size of hardwoods or height of conifers.
 4. Describe any site preparations.
 5. Include a vicinity map of the planting location(s). (A map from Google can be copied into a word document and then tree planting locations can be applied using the "paint" function.) Maps must include the location of any overhead utility lines.
 6. Is there a budget to maintain and replace trees for at least three years?

- d. **For other projects that involve assessments and/or inventories,** provide the following information:
1. Describe project and scope. What will be done and why.
 2. Describe materials and methods needed to implement the project.
 3. Describe products and results such as reducing storm water runoff and setting tree canopy cover goals.

- e. **For projects involving contracting with landscapers, consultants, or other entities**, provide the following information:
1. Identify the firm(s) that will perform the project.
 2. Specify their qualifications and experience with similar projects.
 3. Identify the scope of the services they will provide.

COST PROPOSAL WORKSHEET 1 – EXPENDITURE OF GRANT FUNDS

Table A: Cost of trees and planting materials

Description	Material Provider	Quantity	Unit Price (\$)	Total Price (\$)
Total Cost of Materials (\$)				

Table B: Cost of professional/contractual services

Description	Service Provider	Quantity	Unit Price (\$)	Total Price (\$)
Total Cost of Services (\$)				

Table C: Additional costs

Description	Source	Quantity	Unit Price (\$)	Total Price (\$)
Total Additional Costs (\$)				

Total Grant Funds Requested (Table A + Table B + Table C) = \$ _____

COST PROPOSAL WORKSHEET 2 – MATCHING FUNDS

Table D: Cash match

Description	Material Provider	Quantity	Unit Price (\$)	Total Price (\$)
Total Cost of Materials/Services (\$)				

Table E: In-kind match (paid labor and equipment provided by applicant)

Description	Service Provider	Quantity	Unit Price (\$)	Total Price (\$)
Total Cost of Services (\$)				

Table F: Volunteer and donation match (donated labor and equipment)

Description	Source	Quantity	Unit Price (\$)	Total Price (\$)
Total Additional Donations (\$)				

Total Matching Funds Provided (Table D + Table E + Table F) = \$ _____

Appendix 1

Tree Establishment Specifications

This section must be returned with any application for tree planting.

I. Stock Specifications

All trees planted must meet the following specifications and need to be inspected prior to planting.

- A. Main Trunk - Trees will have a single trunk with the lower 3 feet clear of branches (unless previously approved) and be at least 1 ½" in caliper.
- B. Health - Trees will be healthy, vigorous and well-grown, showing evidence of proper root and shoot pruning. Trees will be free from significant mechanical injury to the trunk, root ball and branches. Trees will also be free of any insect or disease problems.
- C. Form - Trees will have been properly pruned to removed narrow branch angles, included bark, broken and crossing branches. Trees will have been pruned to establish a central trunk and to eliminate co-dominate branching. Previous pruning should not include excessive heading or topping cuts (rounding-over) to reduce the overall height of the tree.
- D. Root Ball - Root balls will have a flattened top with good root flare. Broken or damaged roots more than 1/4" in diameter should be pruned with a clean cut.
- E. Substitutions - Substitutions may only be made with express consent from the Community representative.
- F. Stock Inspections - The Community Representative reserves the right to inspect trees prior to planting and to reject any trees not meeting the specifications described herein.

II. Planting Specifications

All planting activities must be approved by the individual responsible for implementing the grant.

- A. Planting Location - All planting sites will be identified and marked by the Community Representative and indicated to the Contractor. Express permission from the Community Representative is required to change any planting location. All trees will be centered between curb and sidewalk unless otherwise specified. Contractor will be responsible for notifying any appropriate utility authority prior to digging and be responsible for any damage to utilities.

- B. Temporary Storage - Root balls, of trees not immediately planted after delivery, must be adequately protected by mulching and watering until planting occurs. Contractor assumes all risk and expense of temporary storage.
- C. Planting Holes - Planting holes may be dug by hand, backhoe, tree spade or other approved equipment. An auger is not considered approved equipment. The top diameter of the planting hole shall be two times that of root ball. The bottom of the hole shall be flat and deep enough to have the tree at its original planting depth or slightly higher. Holes should be dug on day tree is planted.
- D. Planting Depth - Trees will be planted at the same depth they were growing in the nursery or up to two inches higher than that level. The root collar must be at or slightly above ground line. **Contractor will be required to replant any trees, at their expense, that are planted too deeply.**
- E. Wire Baskets & Burlap - **Wire baskets should be completely removed** when possible or at a minimum **removed from the top half of the root ball.** **Contractor will be required to replant any tree, at their expense, when a portion of the wire basket can be found from minor excavation.** All burlap and twine will be removed from the upper half of the root ball and any remaining burlap must be untreated.
- F. Backfilling - Planting is only allowed when soil is not frozen and temperatures are above 30 degrees. Backfilling shall occur with quality topsoil. Soil will be adequately tamped as to eliminate air pockets during backfilling. All trees will be planted as straight as possible.
- G. Surplus Excavation - Any surplus soil will be removed and disposed of by the Contractor. Surplus soil shall not be mounded around trunk above ground level.
- H. Staking and Guying - Only trees prone to leaning or in areas exposed to high wind should be staked and guyed. If staking is necessary for support, two stakes on opposite sides on the trunk shall be used with a wide, belt-like, tie material to hold the tree upright. **Wire in a garden hose or any other rigid material shall not be used to guy trees. All trunk wrap, twine and other material shall be removed at the time planting.**
- I. Mulching - All trees will be mulched at the time of planting with wood or bark chips. Mulch shall be 2" to 3" deep and at least 18" in diameter or cover the entire planting hole. Mulch should not be in direct contact with the trunk and a mulch-free area on 2" around the trunk should be maintained.
- J. Watering - Trees will be thoroughly watered to settle backfill when half of backfill is in place and again after all backfill is placed.

- K. Fertilization - Trees shall not be fertilized at the time of planting, unless previously specified.

- L. Pruning - All dead, broken, or damaged branches, and sprouts should be removed at the time of planting. All pruning will be with a clean cut outside the branch collar. Excessive pruning and heading (rounding-over) is not acceptable. Only individuals knowledgeable of proper pruning techniques shall prune trees.

Acceptance of the Tree Planting Specifications

These specifications will be followed for all trees planted with funds provided by this Demonstration City Grant for the City/Town of _____.

The undersigned Contractor agrees to provide and/or plant trees to meet all requirements in the above Tree Planting Specifications. My signature indicates that I have read and understand all specifications.

Company Name: _____

Contractor Signature: _____

Date: _____

Witnessed by: _____

Title: _____

Date: _____

Appendix 2

MAINTENANCE PLAN

This section must be returned with any application for tree planting.

Newly planted trees require special attention to maintenance practices during the first three growing seasons following planting. All trees shall receive at least the following maintenance practices for a three-year period:

1. **WATERING:** Ample soil moisture shall be maintained following planting. A thorough watering each five to seven days, depending on drainage and precipitation, is usually adequate during the growing season. A thorough watering allows moisture to reach the deepest roots. **How will watering be accomplished and who will be responsible?**

2. **FERTILIZATION:** Trees shall not be fertilized at the time of planting. Fertilizer can kill young roots very rapidly. If fertilizer is not applied wisely, it may not benefit the tree at all and may even adversely affect the tree. Soil conditions, especially pH and organic matter content, vary greatly making the proper use and selection of fertilizer a complex process. Any fertilization should be based on a soil test. Soil Conservation Districts can provide tests and advice on application rates, timing, and fertilizer selection. **Under what circumstances (if any) will trees be fertilized and who will be responsible?**

3. **MULCHING:** Mulching provides trees with a stable root environment that is cooler and contains more moisture than surrounding soil. Mulch can also prevent mechanical damage by keeping lawn mowers and weed whips away from the thin bark. Trees must be mulched at the time of planting and every consecutive spring. Mulch should only be **two to three** inches deep (do not mound) and cover the entire root system. Mulch should not contact the trunk; a mulch-free area of one to two inches around the trunk should be maintained. **How will trees be mulched and who will be responsible for re-mulching each year?**

4. **PRUNING:** Excessive pruning at the time of planting should be avoided. During the first two years, only dead, broken, or injured branches, and sprouts shall be removed. Trees will never be topped or rounded-over. Pruning during the third year can begin to improve structure and encourage sturdy crotch development. Structural pruning advice is available through the Urban Forestry Coordinator. **Describe pruning methods, both short and long term, and who will be responsible?**

5. **STAKING AND GUYING:** Often it is not necessary to stake and guy quality nursery stock that has been properly planted. Studies have shown that trees will establish more quickly and develop stronger trunks and root systems if not staked at the time of planting. If staking is necessary for support, two stakes used in conjunction with a wide flexible tie material will hold the tree upright, provide flexibility, and minimize injury to the trunk. Do not use wire in a garden hose or any other in-flexible, narrow material. All guy and support material must be removed after the first growing season. **Will trees be staked and guyed? What material will be used and who will be responsible for the removal?**

6. **PROVIDE ADDITIONAL MAINTENANCE INFORMATION:**

Community or Organization: _____

Signature: _____

Print Name: _____

Job Title: _____

Date: _____

FINANCIAL CAPABILITY QUESTIONNAIRE

West Virginia Division of Forestry

This questionnaire is designed to help the Division of Forestry and the applicant evaluate the applicant's financial management system, internal controls, and processes for managing Federal grant funds.

Adequate accounting systems should meet the following criteria as outlined in the Office of Management and Budget's (OMB) Circular of Uniform Administrative Requirements, Cost Principles, and Audit Requirements found in 2 CFR Part 200. These regulations can be found at ecfr.gov.

- (1) Accounting systems should be equipped to account for the expenditure and documentation of funds under each federal award.
- (2) Entries in accounting records should be backed up by records and/or documentation (receipts, timecards, etc.) which support the expense and can be readily located.
- (3) The accounting system should provide accurate and current financial reporting information.
- (4) The accounting system should be complemented by internal controls to check the accuracy and reliability of accounting data, promote operational efficiency, and encourage adherence to prescribed management policies.

APPLICANT ORGANIZATIONAL INFORMATION

1. Name of Organization and Address:

2. Authorized Representative's Name and Title:

3. Phone:

ext.

4. Email:

5. Year
Established:

6. Employer Identification Number (EIN):

7. UEI Number (assigned from sam.gov):

8. Type of Organization: State & Local Gov

Tribal

Non-Profit

For-Profit

Other

9. Number of Employees:

Full Time (Paid):

Full Time (Volunteer):

Part Time (Paid):

Part Time (Volunteer):

FEDERAL AUDIT DATA

10. Have you been audited by a Federal Agency: Yes No

Date of Last Federal Audit/Review (MM/DD/YYYY):

Audit Agency Name:

11. Have you filed under Single Audit (required of institutions that expend \$750,000 or more in federal awards during its fiscal year)? Yes No

If yes, date:

Using a separate attachment, please provide information that lists each award by assistance listing, federal awarding agency, amount, and date for awards received during your current fiscal year.

If you answered "yes" to either Box 10 or 11 and findings were reported, explain in an attached document.

FINANCIAL STATEMENT AUDIT DATA

12. Date of Last Financial Statement Audit:

Fiscal Period Audited:

Audit Firm:

Auditor's Opinion on Financial
Statement: (select one)

Unqualified Opinion

Qualified

Disclaimer or Adverse Opinion

If other than unqualified, state reason:

ACCOUNTING SYSTEM

13. Has any Government Agency rendered an official written opinion concerning the adequacy of the accounting system for the collection, identification and allocation of costs under Federal contracts/grants?

Yes No

If yes, provide name of the Agency performing review:

Attach a copy of the latest review and any subsequent correspondence, clearance documents, etc.

14. Which of the following best describes your accounting system:

Manual Automated Combination

15. Does the accounting system identify the receipt and expenditure of funds separately for each grant?

Yes No

16. Does the accounting system provide for the recording of expenditures for each grant by budget cost categories shown in the approved budget? i.e. Supplies, Personnel, etc.

Yes No

17. Does the accounting system provide for the recording of cost sharing or match for each grant?

Yes No

18. Are records (i.e. time cards) maintained for each employee that specifically identify time charged to a particular grant as well as non-grant funded activities?

Yes No

19. Does the accounting/financial system include budgetary controls to preclude incurring obligations or costs in excess of total funds available for a grant?

Yes No

20. Is your organization familiar with the regulations and guidelines in 2 CFR 200 for determining allowance of costs in connection with Federal grants?

Yes No

PROCUREMENT STANDARDS AND PROPERTY STANDARDS

PROCUREMENT STANDARDS

21. Does your organization maintain written procurement procedures which **(1)** avoid unnecessary purchases; **(2)** provide an analysis of lease and purchase alternatives; and **(3)** provide a process for soliciting goods and services for both informal and formal procurement methods?

Yes No N/A

22. Does your procurement system ensure selections are made on a competitive basis, that includes documented cost analysis where applicable?

Yes No N/A

23. Does your organization check the "Excluded Parties List" for suspended or debarred sub-grantees and contractors, prior to award? This check is made through www.sam.gov

Yes No N/A

PROPERTY STANDARDS (Supplies less than \$5000)

24. Does your organization provide controls to insure safeguards against loss, damage or theft of any supplies?

Yes No N/A

APPLICANT CERTIFICATION

I certify that the above information is complete and correct to the best of my knowledge.

Signature:

Name:

Date:

Title:

Additional Information

1. **Question 21:** Informal Procurement Method(s): Includes micro-procurements of \$10,000 or less and Small Procurements that exceed \$10,000 but do not exceed \$250,000.
2. **Question 24:** Supplies: All tangible personal property other than equipment with a per-unit cost of less than \$5,000.

**West Virginia
Division of Forestry**

Urban Forestry Verbal Quotation Guidelines

Grant recipients are required to follow the federal procurement standards regarding allowable costs, procurement standards, bidding, etc. as described in 2 CFR 200 which can be found here: <https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200#subject-group-ECFR45ddd4419ad436d>

Purchases under the Micro-Purchase threshold (currently \$10,000) do not require bids.

Purchases above the Micro-Purchase threshold and below the Simplified Acquisition Threshold, which is defined as \$250,000, should follow the small purchase procedures. The federal 2 CFR 200 regulations state for small purchases “price or rate quotations must be obtained from an adequate number of qualified sources as determined appropriate by the non-Federal entity.”

These rate quotations may be verbal which involves calling/visiting two or more vendors and completing the separate Urban Forestry Verbal Quotation Summary form to document prices.

Written bids from two or more contractors are also acceptable but formal written bids are not required. Copies of two or more quotations for all purchases over \$10,000 must be submitted with the Community Equi-Tree application.

Applicants are not required to utilize the low bid for small purchases below the Simplified Acquisition Threshold (less than \$250,000). The federal 2 CFR 200 regulations state “Contracts must be awarded to the responsible offeror whose proposal is most advantageous to the non-Federal entity, with price and other factors considered.”

If the low bid is not utilized, rationale for selecting a higher bid must be articulated in the Reason for Award at the bottom of the Urban Forestry Verbal Quotation Summary or attached to written bids.

This form must be completed for any purchases over \$10,000 and submitted with the Equi-Tree grant application.

To file a program discrimination complaint, complete the *USDA Program Discrimination Complaint Form, AD-3027*, found online at *How to File a Program Discrimination Complaint* and at any *USDA office* or write a letter addressed to *USDA* and provide in the letter all of the information requested in the form. Submit your completed form or letter to *USDA* by: (1) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410; (2) fax: (202) 690-7442; or (3) email: program.intake@usda.gov.

This institution is an equal opportunity provider."

If the publications or materials are too small to permit the use of the full statement, at a minimum include the following statement, in print size no smaller than the text: *"This institution is an equal opportunity provider."*

What does the Forest Service do to ensure compliance with nondiscrimination responsibilities?

The Forest Service will conduct reviews of your programs and activities on a periodic basis to ensure that they comply with civil rights laws. USDA will receive, investigate, and adjudicate claims alleging violation of civil rights laws by recipients of USDA assistance.

What Federal civil rights laws must you follow to ensure compliance?

U.S. Code	Statute	Prohibits discrimination on the basis of:
(42 U.S.C. 2000d-2000c)	Title VI of the Civil Rights Act of 1964	Race, color, or national origin (including LEP)
(20 U.S.C. 1681-1686)	Title IX of the Education Amendments of 1972	Sex (in educational programs and activities)
(42 U.S.C. 6101 et seq.)	Age Discrimination Act of 1975, as amended	Age
(29 U.S.C. 794)	Section 504 of the Rehabilitation Act of 1973, as amended	Disability

"Simple justice requires that public funds, to which all taxpayers of all races contribute, not be spent in any fashion which encourages, entrenches, subsidizes, or results in racial discrimination."

—President John F. Kennedy, 1963, calling for the enactment of Title VI of the Civil Rights Act

For More Information

The Forest Service is your partner in providing equal opportunity to the public. For more information, please contact your local Forest Service office.

USDA is an equal opportunity provider, employer, and lender.

Grants and Agreements Complying With Civil Rights Requirements

Your Responsibilities as a
Partner With the Forest Service

Who is required to comply with Federal civil rights laws?

If you receive Federal funds or assistance, such as a grant or agreement, from the U.S. Department of Agriculture (USDA), Forest Service, by law you must provide equal opportunity for all people to participate in the programs and activities you offer. For example, you should not deny or exclude anyone from programs, services, aids, or benefits. Also, you must not retaliate in any manner against a person who files a complaint or opposes any unlawful or discriminatory practice. The back of this brochure shows Federal civil rights laws that apply.

This brochure provides a basic overview of your responsibilities for ensuring nondiscrimination in the delivery of your programs and activities to the public on bases covered by Federal law. These bases include race, color, national origin, sex (in educational programs or activities), age, and disability.

What are some types of Federal funding and assistance?

- Federal monies given by grants, subgrants, cooperative agreements, challenge cost-share agreements, cost-reimbursable agreements, or loans
- Training presented by a Federal agency
- Loan/temporary assignment of Federal personnel (e.g., a Forest Service employee instructing a course at a local university)
- Loan or use of Federal property at below market value

Are you a recipient of Federal funding and assistance?

You are a recipient if, through a partnership with the Forest Service, you receive Federal funding or assistance (either directly or through another recipient) to conduct a program you offer to the public.

- Any individual receiving Federal funding or assistance
- A State or local government
- American Indian or Alaska Native individual, Tribe, corporation, or organization

- Any public or private agency, institution, or organization (e.g., university, college, or nonprofit)

What are your responsibilities for complying with Federal civil rights laws?

As a partner with the Forest Service, your responsibilities for complying with Federal civil rights laws include, but are not limited to:

- Signing a nondiscrimination assurance clause certifying that you will comply with civil rights laws (SF-424B or SF-424D). If you have subrecipients, obtain a signed assurance from them. An example of a subrecipient is a local community organization receiving a subgrant from a State forestry agency.
- Displaying the "And Justice for All" USDA poster (AD-475A) in your public reception areas or other areas visible to the public. Contact your local Forest Service office to obtain copies.
- Including in any of your publications and outreach materials related to a grant or agreement project a statement of affiliation with the Forest Service, e.g., "This publication made possible through a grant from the USDA Forest Service." OR "This research was conducted in cooperation with the USDA Forest Service." OR "This research was funded by a grant from the USDA Forest Service."

- Providing program information in alternative formats for people with disabilities and in alternative languages for people with limited English proficiency (LEP), as appropriate to your customer base.

- Developing a language access plan to translate or interpret vital documents free of charge to your customers when needed or requested by local members of the public with LEP. Visit <http://www.lep.gov/lepbrochure.pdf>.

- Identifying a person to be responsible for ensuring your program is in compliance with civil rights requirements.

- Reviewing all your policies, procedures, and practices to ensure they do not limit participation on the basis of race, color, national origin, age, disability, or sex (in educational programs and activities).

- Evaluating the accessibility of your programs and facilities. If they are not now accessible, develop a transition plan for making them accessible and then carry out the plan as appropriate.
- Ensuring that your staff understands their civil rights responsibilities, including their role in the USDA complaint process.

- Providing outreach to a wide variety of communities to ensure diversity if you advertise or market your program.
- Providing the Forest Service with demographic information on program participation based on race, national origin, sex, age, and disability, where applicable.

- Including in your publications and outreach materials the following statement about nondiscrimination and how to file a complaint:

"In accordance with Federal law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, this organization is prohibited from discriminating on the basis of race, color, national origin, sex, age, disability, and reprisal or retaliation for prior civil rights activity. (Not all prohibited bases apply to all programs.)

Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotape, American Sign Language, etc.) should contact the responsible State or local Agency that administers the program or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information is also available in languages other than English.

Green Is Great Lawn Care LLC

Estimate

Green Is Great Lawn Care LLC

624 Plantation Place Drive

Martinsburg WV 25404

US

304-620-0756

Greenisgreat05@gmail.com

BILL TO

Linus Bicker

linusbicker1@gmail.com

Estimate

29

Date

25 Sep 2024

Item	Quantity	Price	Amount
Mulching, weeding, and trimming Cost per man per hour	1	\$32.00	\$32.00

Subtotal \$32.00

TAX (7%) \$2.24

Grand Total

\$34.24

Hello! Here is the information that I have been provided. The price above is per man per hour.

German Street between Church and Princess Streets; both sides and the three intersections.

Spring - weed/mulch as needed

Late Spring - cut the daffodil foliage back well after they have finished blooming.

Beds to look good for the the Easter Parade (whenever falls), Back Alley Garden Tour- Mid-May, Street Fest (last Saturday in June - this covers the 4th of July Parade as well), CATF -the whole month of July (as needed).

Early Fall - as needed

Mid-Fall - before Halloween festivities

Late Fall - as needed. Cut Liriope back.

*** Pay special attention to the intersections as that is what the visitors see***

N. King Street - beds on Town Hall side from German to Old Queen's Alley:

Roses - cut back late fall 18-24"

Weed/mulch/trim as needed throughout the season

S. King Street -

Beds in front of 105 and 109:

Mulch/weed/trim as needed throughout the season

Train Station -

Rain garden - to the left of the TS:

Weed/mulch/trim as needed throughout the season. Brandon may need advice as to what to weed and not weed.

Sage Place -

Weed/mulch/trim as needed throughout the season.

Plant perennials to be added.

If you have any questions or concerns please contact 304-620-0756







2024-4

Proposed Tree Care Services

Tree Quantity: 1

Proposal Value: \$250

July 2, 2024

Proposal #: 808954



Tree Care Service Address/Location
Corporation of Shepherdstown

Lori Robertson
lahraven@comcast.net

Tree Care Service Billing Address
Corporation of Shepherdstown

Lori Robertson
lahraven@comcast.net

Viking Tree Service, LLC
Enk Berndt
Erik@vikingtreewv.com
tel:304-988-5557

Species	Qty	Height	DBH	Service	Price
Sugar Maple	1	31'-45'	19"-24"	Clearance Pruning / End Weight Reduction	\$250
Total					\$250

Gave Erik ok to work on Amanda's tree



Corporation of Shepherdstown



Legend (1)

Super Maps (1)

