



CLEVELAND TREE COALITION

REQUEST FOR QUALIFICATIONS URBAN TREE NURSERY

ISSUED BY

Holden Forests & Gardens on behalf of the Cleveland Tree Coalition
11030 East Blvd, Cleveland, OH 44106

ISSUED ON

Thursday, April 1, 2021

RESPOND BY

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1 BACKGROUND

1.1 ABOUT THE CLEVELAND TREE COALITION

The Cleveland Tree Coalition is a partnership of organizations, businesses, and branches of local government that strives to create a healthy, vibrant, sustainable, and equitable urban forest by working collaboratively to implement the 2015 Cleveland Tree Plan. The Coalition formed in 2016 in response to Action #1 of the Cleveland Tree Plan, “Establish a unified voice [and] formalize partnerships”.

In 2017, the Coalition proposed the Cleveland Tree Canopy Goal, which calls for growing Cleveland’s urban tree canopy cover from 19% to 30% by 2040. This Cleveland Tree Canopy Goal envisions a greener city and provides a benchmark against which to measure our region’s collective efforts to preserve and expand our urban forest. The goal also sheds light on the large task before us: planting an additional 361,000 trees and significantly shifting our regional culture toward recognizing the value of trees for Cleveland’s future social, economic, and environmental prosperity.

The Cleveland Tree Plan recommends using climate-resilient trees that are suitable for urban and suburban areas in Northeast Ohio (Cleveland Tree Plan, Appendix A). The Plan favors native tree species along with select non-invasive, non-native species that have demonstrated resistance to pest and diseases and that have shown tolerance to urban conditions including de-icing salt, air pollution, soil compaction, saturated soils, and drought.

The Cleveland Tree Coalition anticipates difficulty in locally sourcing the quantity and species of trees that are recommended by the Cleveland Tree Plan. An urban tree nursery in Cleveland could help alleviate this difficulty while creating a source for local green jobs, making use of vacant land, and supplying trees to community groups who are working in Cleveland and neighboring municipalities.

The Cleveland Tree Coalition envisions an urban tree nursery that would join a community-wide agenda and become an integral part of a larger collaborative that is working to expand Cleveland’s tree canopy. It would work in partnership with the Coalition to advance the Cleveland Tree Plan by providing locally grown trees from locally sourced seed that are accessible to community-based organizations. Because of the nursery’s importance to successfully implementing the Cleveland Tree Plan, the Cleveland Tree Coalition would provide support to the urban tree nursery during establishment, providing partnership, expertise, management capacity, and fundraising assistance until the nursery becomes self-sustaining in approximately Year 5.

1.2 URBAN TREE NURSERY BUSINESS PLAN

In 2020, Cleveland Neighborhood Progress, on behalf of the Cleveland Tree Coalition, commissioned a study to examine the feasibility of establishing an urban tree nursery in Cleveland to supply cost-effective, climate-appropriate nursery stock to the region. The study report, *Business Plan: Urban Tree Nursery in Cleveland* was completed by Davey Resource Group Inc. and Tree Pittsburgh Heritage Nursery, with support from the Cuyahoga County Healthy Urban Tree Canopy grant program.

The study compiled case studies from across the U.S. of three different nursery model types that may be successful in Cleveland—municipal bare root, balled and burlapped consortium, and nonprofit container (Business Plan, Appendix A). Of these, the nonprofit container tree nursery was selected as the most desirable nursery model by the project’s Advisory Group, which was composed of organizations and agencies actively involved in tree planting in Cleveland. The nonprofit container model was selected because of its flexibility, scalability, opportunities for workforce development, and potential for repurposing vacant land. The model provided the opportunity to generate revenue and produce a large number of smaller, specific stock that could be made available to a wide customer base.

A nonprofit container nursery would be unique in the region. It would produce small, containerized native trees that are climate-appropriate and sourced from local seed, ensuring that plant material is adapted to Northeast Ohio and is genetically diverse. This smaller tree stock would support reforestation efforts by community and conservation groups, in particular, due to its more manageable size, drawing from a customer base in Cleveland and suburban areas of Cuyahoga County.

2 THE OPPORTUNITY

The Cleveland Tree Coalition is seeking proposals from qualified project teams for a Nonprofit Containerized Tree Nursery (Nursery) to supply locally sourced, mostly native tree stock to groups in the greater Cleveland area who are actively working toward the goals of the Cleveland Tree Plan.

Successful applicants will consist of a project team that is led by a 501(c)(3) nonprofit organization and includes a Nursery Manager that is experienced in sourcing and propagating local native tree seeds and growing containerized woody stock. The project team must present a plan for accessing sufficient land in Cleveland, operating a Nursery that benefits local communities, contributing to green workforce development, and partnering with the Coalition to advance the Cleveland Tree Plan.

2.1 CLEVELAND TREE COALITION PARTNERSHIP

The Cleveland Tree Coalition will partner with the selected Nursery team to provide technical expertise, management assistance, partnership facilitation, advocacy, and fundraising support for the Nursery. This close partnership will continue until the Nursery reaches a breakeven point in approximately Year 5, or until such time as mutually agreed upon by the parties.

2.2 PROJECT COMPONENTS

1. PROJECT SUMMARY

A competitive nursery proposal will have these components:

- Nursery Model: Nursery producing small, containerized tree stock; average tree stock size, 3 gallon
- Minimum Nursery Size: 2 acres total size, including 1 acre of production
- Leadership: Existing and established Cleveland-based nonprofit organization
- Expertise: A Nursery Manager with prior experience growing containerized woody plant stock from seed
- Production Method: Trees and shrubs produced from locally sourced seeds and grown above ground in containers

2. LOCATION AND SITE

An ideal location for a Nursery considers the location of the customer base, the suitability of the land for growing tree stock, and infrastructure and other support that will be necessary to sustain a successful Nursery operation. Site considerations include:

- At least 2 acres of total land area, including 1 acre of production space, 1/2 acre for structures and facilities, 1/2 acre for vehicular movement such as parking, deliveries, and order pick-ups
- A geographic location within the city of Cleveland is preferred; locations within a very short distance of Cleveland will be considered
- Zoning codes (including variances), ordinances, and other local restrictions that are favorable to nurseries
- Site characteristics that are ideal for growing, taking into consideration orientation, wind exposure, soil type, drainage, and topography
- An unlimited water supply and utilities including electricity, sewer, cell phone, internet, and gas or propane

- Basic amenities for workers, such as adequate shade/shelter and restroom facilities
- Security and fencing, including a tall fence to protect from theft and deer and a locked entry gate
- Access to major roads with space to maneuver tractor trailers
- Room to expand in the future as needed

Please consult the Business Plan for additional details about site considerations.

3. PRODUCTION AND OPERATIONS

The nonprofit containerized nursery model was selected as the best fit for the Cleveland Tree Nursery based on a review of U.S. nursery model case studies (see Business Plan). The Nursery will be unique in that it will produce small, containerized native plant material grown from local seed sources, ensuring that plant material is adapted to the greater Cleveland area and is genetically diverse.

Recommendations of the Business Plan for a containerized Nursery consider profitability and the goals of the Cleveland Tree Plan and include:

- Plant material will be grown above ground in pots averaging 3 gallons in size
- The majority of plants will be grown from seed of local origin, with additional plants started from cuttings or liner stock; there should be considerations for biodiversity and nativity and a plan in place to responsibly source and collect local, native seed
- Plants will be gradually transplanted into larger containers until the ideal size for planting is achieved; average size, 3-gallon containers
- Plants will be grown on site for 1–5 years, depending on species and other factors
- Seed preparation and propagation will require a workstation with running water, potting benches, wire shelving, and refrigeration
- Germination will take place in a greenhouse, poly (hoop) house, or cold frame
- Containerized stock will be overwintered on site in a protected location, such as a hoop house
- The Nursery will possess the necessary equipment including heavy machinery (e.g., skid steer) and hand tools

Because this type of nursery is uncommon, professional partnerships with similar nurseries across the U.S. will be essential for information sharing and developing best practices. The Cleveland Tree Coalition can assist with making introductions to U.S. nurseries operating under similar models as needed.

4. MANAGEMENT AND ORGANIZATION

Until a breakeven point is reached in approximately Year 5, the Nursery will partly rely on financial support that requires nonprofit organization status. In addition, the Nursery will be expected to operate in ways that help mitigate racial and socioeconomic injustice, in line with Cleveland Tree Plan goals of building equity.

Management and organization considerations:

- The project team will be led by a 501(c)(3) nonprofit organization that will act as a fiscal sponsor
- There will be a management team in place that includes the roles of executive director, chief financial officer, nursery program director, and communications assistant (a person may fulfill more than one role)
- A board of directors will oversee the management team, approve the Nursery budget and strategic plan
- Additional nursery staffing includes a Nursery Manager, seasonal nursery staff, and volunteers
- The Nursery will partner with workforce development programs that support recruitment, training, and placement of unemployed and underemployed people—especially those with barriers to employment, low income individuals, and people of color—to obtain full-time, sustainable jobs in green industries

5. MARKETING PLAN

In the early phases of the Nursery, the Cleveland Tree Coalition and its network of partners will provide the initial customer base for the Nursery. As the Nursery grows, it should build strong relationships with commercial tree nurseries in Northeast Ohio to establish itself as a partner and to build a buyer base to support the Nursery in the long term.

The Nursery will have a competitive edge that it can market due to factors including locally grown trees, locally sourced seed, greater species variety, and ties to the Cleveland Tree Plan goals. The target market for the Nursery would be community and conservation groups, in particular, due to the more manageable size of its tree stock. This would set the Nursery apart from area nurseries that sell larger, balled and burlapped tree stock, and from local retail nurseries that market to residential landowners.

6. FINANCIAL PLAN

It is estimated that the breakeven point for the Nursery will occur in its fifth year of operation. Projected growth is outlined below; refer to the Business Plan for details.

- Establishment phase, Year 0: Planning, fundraising, hiring the Nursery Manager, Nursery development
- Year 1: Establish trees; target 1,000 trees sold
- Years 2–3: 50% increase in production per year
- Years 4: 25% increase in production
- Year 5: 25% increase in production. 8,000 trees sold. Breakeven scenario occurs.
- Years 6+: Annual sales of 8,000-12,000 trees. Expanded investments and programs that are partly supported by supplemental funds.

It is estimated that the Nursery will need to raise \$600,000 to sustain operations from Years 1–5.

3 STATEMENT OF QUALIFICATIONS GUIDELINES

The Cleveland Tree Coalition invites statements of qualifications from project teams who are interested in working with the Coalition to establish and operate a Nonprofit Containerized Tree Nursery. The desired scope of services has been outlined in this document, with additional details provided in the Business Plan.

Proposals will be accepted in a two-part process, consisting first of a letter of inquiry that outlines the project team's qualifications and their proposed Nursery plan. Invited finalists will then be invited to submit a full proposal that details the team's qualifications and their proposed Nursery plan.

3.1 SUBMISSION REQUIREMENTS I: LETTER OF INQUIRY

Project teams shall indicate their interest in pursuing a partnership with the Cleveland Tree Coalition to establish a Nursery by first submitting a letter of inquiry. Include the following in your submission:

LETTER OF INQUIRY (UP TO 3 PAGES IN LENGTH):

1. Summary description of your project team
 - a. Names, titles, and qualifications of key project team members
 - b. Description of the lead nonprofit organization and partners
 - i. Brief organizational history and description
 - ii. A statement about how the organization(s) work to build equity
2. Narrative about your proposed Nursery business plan
 - a. Explain why you are interested in pursuing the Nursery opportunity
 - b. Explain how your plan will deliver the Scope of Services and Project Deliverables outlined below

- c. Include a summary budget for personnel, equipment, and materials for the establishment phase and first year of operations (Years 0–1)
3. Description of the proposed Nursery site(s)
 - a. Location and total land area of the nursery site(s)
 - b. Name of title holder of the property and, if the property is under lease, a brief description of any access agreements that are in place

REQUIRED ATTACHMENTS:

4. Map of the Nursery site
5. Completed Nursery Business Plan Checklist

3.2 SUBMISSION REQUIREMENTS II: FULL PROPOSAL

Select project teams will be invited to submit a full proposal based on their letters of inquiry and interview. Include the following in your submission:

FULL PROPOSAL (UP TO 10 PAGES IN LENGTH):

1. Description of your project team
 - a. Names, titles, and qualifications of key project team members
 - b. Description of the lead nonprofit organization
 - i. Brief organizational history and description
 - ii. A statement about how the organization(s) work contributes to building equity
 - iii. Organizational chart
 - iv. Statement on diversity of project team and board
 - v. Letters of support from key organizational partners whose support will be integral to the success of the Nursery
2. Description of the Nursery site(s)
 - a. Location and total land area of the nursery site(s)
 - b. Name of title holder of the property and, if the property is under lease, a description of any access agreements that are in place
 - c. If the property is under lease or access agreement, include a letter of support from the landowner
 - d. In the map, highlight areas that are intended to be used for production, staging, and offices
3. Narrative about the proposed Nursery business plan
 - a. Explain how the Nursery will deliver the Scope of Services and Project Deliverables outlined below
 - b. Include a detailed project budget that covers the Establishment phase through the fifth year of operations (Years 0–5)

REQUIRED ATTACHMENTS:

4. Map of the Nursery site
5. Three (3) to five (5) years of financial statements of lead nonprofit organization
6. Completed Nursery Business Plan Checklist (updated)

3.3 SCOPE OF SERVICES

Respondents shall outline a scope of work for the Establishment phase and the first five years of operation of the Nursery (Years 0–5). A successful statement of qualifications will effectively explain how the intended business plan:

- Fulfills the requirements and supports the goals and desired outcomes identified in this RFQ
- Outlines a robust business plan and future vision to the Coalition and potential partners, funders, and external stakeholders
- Intends to utilize and raise funds
- Addresses how their process will contribute to the Cleveland Tree Plan goals of building equity, whether through activities that repurpose vacant land, workforce development, and/or through activities that help fairly distribute tree canopy across Cleveland
- Explains areas where the project team needs supplemental capacity to be provided by the Cleveland Tree Coalition and/or by external stakeholders whose support will be an essential driver of successful implementation of the Nursery

3.4 PROJECT DELIVERABLES

A successful Nursery business plan will describe methods for delivering the following:

- Tree stock sold in Years 1–5: 1,000 containers in Year 1 with growth to 8,000+ containers in Year 5
- 50%–75% of plant sales to community-based planting projects in Cleveland and inner-ring suburbs
- 1–3 full-time equivalent positions, plus seasonal labor
 - Hiring preference given to Cleveland residents
 - Living wage guarantee for full-time and seasonal staff
 - Diversity, equity, and inclusion plan
- Breakeven point in Year 5

3.5 IMPORTANT PROJECT DATES

Wednesday, April 14, 2021	Project team Q & A with Cleveland Tree Coalition Nursery Advisory Committee
Friday, April 30, 2021	Letters of Inquiry due
May 10–21, 2021	Invited semi-finalists interview with the Cleveland Tree Coalition Nursery Advisory Committee
Friday, June 25, 2021	Full Proposals from invited finalists due
July 5–16, 2021	Presentations from select finalists to the Cleveland Tree Coalition Executive Committee
Monday, August 2, 2021	Announcement of selected project team

3.6 PROJECT TEAM Q & A

The Cleveland Tree Coalition Nursery Advisory Committee will host a Question & Answer (Q & A) session for all respondents via Zoom on Wednesday, April 14, 2021. Attendees are limited to 2 persons per project team.

[Click here to register for the Q & A session.](#) Respondents are encouraged to submit their questions in advance of the call so that they may be addressed effectively during the Q & A session; questions may be emailed to Sandra Albro, salbro@holdenfg.org. The session will be taped and shared with project teams upon request.

After the Q & A session, CTC Nursery Advisory Committee will respond to written questions as practical. Questions and responses will be shared with project teams who have advised the Nursery Advisory Committee of their interest in submitting a letter of inquiry.

3.7 SUBMISSION INSTRUCTIONS

All project teams are encouraged to notify the CTC Nursery Advisory Committee of their interest in submitting a letter of inquiry as soon as possible to receive communications about the Zoom Q & A, frequently asked questions, and other information related to submission.

All response packages must be submitted electronically in PDF format via email or a secure file transfer link such as Dropbox, OneDrive, WeTransfer, etc. Note that a secure file transfer link *must* be used for application packages that exceed 25 MB in size due to email server limitations. Please submit your response via email, including attachments or the transfer link and any necessary access instructions in the body of the email.

Send all responses and questions to:

Sandra Albro
Director of Community Partnerships
Holden Forests & Gardens
salbro@holdenfg.org

Letters of Inquiry and Full Proposals are due by end of day on the dates listed in Section 3.5, *Important Project Dates*.

4 SELECTION CRITERIA

Project proposals shall be evaluated based on (but not limited to):

- Experience, expertise, and financial health of the project team (20 pts)
- Project site located in Cleveland that is well suited to a Nursery (20 pts)
- Detail in the proposed Nursery business plan that supports delivery of the Scope of Services and Project Deliverables (20 pts)
- Demonstrated understanding of the project objectives/outcomes and vision that are outlined in the *Request for Qualifications: Urban Tree Nursery* and detailed in the *Business Plan* and the *Cleveland Tree Plan* (20 pts)
- Proposed budget that is reasonable and indicates an understanding of the project objectives and deliverables (20 pts)
- Project Team interviews (20 pts)

5 ATTACHMENTS AND LINKS

[Business Plan: Urban Tree Nursery In Cleveland](#)
[Cleveland Tree Plan](#)
[Cleveland Tree Plan, Appendix A: Species Selection Guide](#)
[Cleveland Tree Plan: 2020 Tree Canopy Progress Report](#)
[Proposed Nursery Business Plan Checklist](#)