

# 2019 REQUEST FOR PROPOSALS

---

**COMPREHENSIVE LITERATURE REVIEW:  
Open from 1 February 2019 to 15 March 2019**

*PROPOSALS RECEIVED AFTER THE END DATE WILL NOT BE CONSIDERED*

**ISA** International Society of **Arboriculture**

**&**

Science Research Committee

## OVERVIEW

The **International Society of Arboriculture** (ISA) in conjunction with the **Science and Research Committee** (SRC) are continuing their series of scientific literature reviews. Literature reviews should identify the frontiers of arboriculture and then assist in disseminating this knowledge to the profession worldwide.

ISA is now accepting proposals for literature reviews on topics within the following themes. The topics can be as focused as is necessary to provide a comprehensive literature review:

- **Tree Benefits and Public Awareness** (e.g., quantifying tree benefits, public awareness of trees and their benefits, public perception of arborists and urban foresters)
- **Plant Health Care** (e.g., tree diagnostic practices, application of integrated pest management, abiotic disorder management)
- **Urban and Community Forestry** (e.g., tree species diversity, climate change effects on the urban forest, inventories and management plans, strategic management, planning and design of resilient urban forests)
- **Tree Care and Preservation** (e.g., pruning techniques, preservation ordinances, balancing tree risk and tree benefits)

This Request for Proposals is for the performance of a comprehensive literature review of all research relevant to the proposed topic.

## MINIMUM REQUIREMENTS

- **Timely Topic**  
The successful grantee will perform a literature review on a topic that represents a current or expanding topic of focus within one of the four themes listed above.
- **Organizational Access**  
The successful grantee must have a means of accessing relevant research and technical publications from relevant sources that include and emphasize, but are not necessarily restricted to, refereed journals.
- **Researcher Qualifications**  
The successful grantee must have the educational background, knowledge, and skills necessary to discern the difference between primary and secondary sources in research. In addition, the successful grantee must be capable of making judgements on the rigor and scientific merit of research publications by evaluating the experimental design, data collection procedures, statistical procedures and analysis, and validity/appropriateness of conclusions drawn. Technical articles in refereed and non-refereed journals may contain appropriate literature; the successful grantee must be able to understand such articles and assess their value to include in the review.
- **Communication Skills**  
The successful grantee must be able to communicate the results of this study in a well-

written manuscript with comprehensive bibliographic citations, suitable for publishing (in English). The successful grantee may also be asked to present a summary of the results at the International Society of Arboriculture conference in the year following completion of the study.

- **Budget**

The successful grantee must submit a proposal for all specified requirements within a budget cap of \$5,000 USD.

## **SCOPE OF SERVICES (DELIVERABLES)**

The successful grantee will be required to perform the following services:

1. Submit a study plan and outline to the Science and Research Committee (SRC) (no more than 3 months after the contract is implemented) for review and feedback.
  - a. A clear description of the research problem(s)
  - b. The scope of studies to be included in the analysis
  - c. A format for coding literature into the database
  - d. Anticipated results
2. Submit a final Summary Report to the SRC containing:
  - a. Introduction
  - b. Description of how studies were collected
  - c. Description of how the database and coded data was formatted above and beyond ISA Guidelines
  - d. Description of findings
  - e. Interpretation of synthesized findings and their implications
  - f. Appendix
3. Prepare a literature review paper for publication in *Arboriculture & Urban Forestry* listing all research published (preferably primary sources in refereed journals) and summarizing previous work, trends that have emerged, research possibilities that have been overlooked, approaches showing promise or have proven sterile, and recommendations for further research. The summary should discuss the quality, merit, and scope of the research studies.
4. Prepare a summary article suitable for *Arborist News* magazine, summarizing the work and its relevance and applicability to practitioners in the profession.

## **PROPOSAL COMPONENTS**

*Only one proposal per principal investigator and/or research group can be submitted for consideration. Principal investigators from around the world are invite to apply.*

1. **Plan/Narrative**

The narrative must be clear and concise, containing an overview of the proposed topics to be reviewed (i.e., the scope of literature review to be conducted) and a rationale for

why a literature review on the proposed topic is important at this time (i.e., recent advances in the literature, absence of other reviews on the topic, etc.), as well as a plan of work describing the proposed methodology, the proposed timeline or schedule, key personnel involved in implementation and the ability of the applicant to perform all required services. Each proposal should show a clear understanding of the needs noted in this RFP and demonstrate how the plan will meet the goals and objectives of this particular RFP. Grantees must provide a detailed description of the methods to be employed to accomplish the tasks as noted in this RFP, including methodologies for reviewing non-English citations.

**2. Organizational Capacity**

The organizational capacity should show evidence of adequate human, organizational, and technical resources and professional ability to meet the needs of this RFP. The organizational description must include but need not be limited to the following:

- Resumes or curriculum vitae of key personnel.
- A description of how the provider's internal monitoring system adheres to Generally Accepted Accounting Principles (GAAP).

**3. Demonstrated Effectiveness**

Proposal must include a description of all prior experience in the provision of these or similar services. At a minimum, this description should include the background and experience of the grantee in providing these services.

**4. Budget**

Proposal must include a detailed budget stipulating how funds will be spent, including direct costs, salaries, wages and benefits, administration and overhead (if applicable), contractor costs, materials and supplies, and travel (if applicable).

**EVALUATION**

All proposals accepted by ISA will be reviewed to determine that candidates meet all of the submission and minimum qualifications requirements prescribed in the RFP. An evaluation committee will evaluate and rate all proposals under consideration, applying the evaluation criteria below:

<b>Components</b>	<b>Characteristics</b>	<b>Points</b>
Plan/Narrative	Topic of literature review, methodology, program design, scope of services, ability to perform all required services, and innovative elements	<b>50</b>
Organizational Capacity	Evidence of adequate organization staff, resources (human, organizational, and technical), and professional ability to meet requested services	<b>20</b>
Demonstrated	Evidence of prior successful experiences in the provision of	<b>20</b>

Effectiveness	services	
Budget	Budget Plan, reasonableness of total cost, and comparison with other proposals	<b>10</b>

**SUBMITTING**

1. The candidate shall submit a cover letter transmitting the proposal package to ISA. The cover letter shall be signed and dated by an authorized individual representing the candidate’s Organization.
  2. Candidates shall include in their proposals a table of contents and page numbers. (Although there is no specific limit on the number of pages that applications may contain, applicants are encouraged to be as concise and succinct as possible, while adequately conveying their ability to undertake the proposed request.)
  3. The entire proposal package shall be submitted to: [sebersohl@isa-arbor.com](mailto:sebersohl@isa-arbor.com)
-

# CONTRACTUAL AGREEMENT

(To be signed upon acceptance of Literature Review Proposal)

## Deliverables

This AGREEMENT is made and effective this \_\_\_\_ day of \_\_\_\_\_, 20\_\_, by and between the \_\_\_\_\_ (hereinafter "Contractor"), located at \_\_\_\_\_, and the International Society of Arboriculture (ISA), an Illinois not-for-profit corporation, for services rendered in the performance of a comprehensive literature review on the topic of "\_\_\_\_\_” and development of the deliverable publications outlined in this contract. This project will be supervised by \_\_\_\_\_. If, for any reason, the supervisor is unable to continue to serve in this role, and a successor acceptable to both Contractor and ISA is not available, this Agreement shall be terminated as provided in the Termination clause. For and in consideration of the mutual promises and covenants contained herein, and other valuable consideration, the receipt of which is hereby acknowledged, parties hereby agree as follows:

**Contract Services and Deliverables Contractor will (refer to addendum for greater detail)**

1. Submit a study plan and outline to the Science and Research Committee (SRC) (Due date \_\_\_\_\_) for review and feedback. This will contain:
  - a. A clear description of the research problem(s)
  - b. The scope of studies to be included in the analysis
  - c. A format for coding literature into the database
  - d. Anticipated results
  
2. Submit a final Summary Report to the SRC (Due date – \_\_\_\_\_) containing:
  - a. Introduction
  - b. Description of how you collected your studies
  - c. Description of how you formatted the database and coded data above and beyond ISA guidelines
  - d. Description of findings
  - e. Interpretation of synthesized findings and their implications
  - f. Appendix
  
3. Prepare a literature review and synthesis paper for publication in *Arboriculture & Urban Forestry (AUF)* listing all research published (preferably primary sources in refereed journals) and summarizing previous work, trends that have emerged, research possibilities that have been overlooked, approaches that show promise or have proven sterile, and recommendations for further research. The summary will consider the quality, merit, and scope of various research studies. (Due date – \_\_\_\_\_)

4. Prepare a summary article suitable for *Arborist News* magazine, summarizing the work and its relevance and applicability to practitioners in the profession. (Due date – April 30, 20\_\_)
5. The contractor must submit the final electronic database (annotated citation list) to the SRC. This will include all works gathered regardless of whether or not they have been cited in any of the other deliverables. The addition of notes with key information/insights/critiques/etc associated with the articles reviewed is strongly encouraged. (Due date – \_\_\_\_\_)

## Schedule of Payments

In consideration for services provided under this contract, ISA will pay Contractor a total fixed price of \$\_\_\_\_\_. Payments will be made in increments according to deliverable milestones, as outlined herein.

1. The **first payment of twenty-five percent (25%)** will be made upon submission of the study plan and outline, acceptable to the chair of the Science and Research Committee and the ISA Director of Educational Products and Services, being on or before\_\_\_\_\_.
2. The **second payment of twenty-five percent (25%)** will be made upon submission of the final summary report in electronic format, acceptable to the chair of the Science and Research Committee and the ISA Director of Professional Development; and submission of the literature review paper for publication in *Arboriculture & Urban Forestry*, acceptable to the SRC review committee and accepted into the review process by the AUF editorial board, being on or before January 31, 20\_\_.
3. The **third and final payment of fifty percent (50%)** will be made upon submission of the literature review paper for publication in *Arborist News* magazine, acceptable to the SRC review committee; and submission of the electronic citation database, acceptable to the Chair of the Science and Research Committee and the ISA Director of Professional Development being on or before April 30, 20\_\_. Acceptance of deliverables will not be unreasonably withheld.

**Contract Time Period** The total time period for completion of this contract is on or before \_\_\_\_\_ . If the project is not done within that period, Contractor must apply for a written time extension addendum to this contract. ISA reserves the right to deny the extension request for the agreement.

**Publishing Rights** Contractor grants to ISA exclusive worldwide rights to publish the Literature Review itself, as well as the articles required as part of this contract. Contractor retains the right to use portions of the Literature Review in other media so long as appropriate recognition is provided to the ISA. Contractor shall retain the right to use the research results for future research and non-commercial purposes. ISA agrees to negotiate future publication permissions.

**Mutual Hold Harmless and Indemnification** ISA shall indemnify, defend and hold harmless Contractor, its affiliated hospitals and institutes, and their trustees, officers, employees, agents, and third parties acting on its/their behalf or with its/their authorization (hereafter collectively referred to as “Indemnitees”) from any suit, action, claim, demand, judgment, and expense arising out of the performance of this Agreement. The ISA agrees that if any claim is asserted or suit brought against Contractor, or their officers, employees, agents, or third parties or their employees, ISA will defend the claim or suit at the expense of the ISA.

Contractor shall indemnify, defend and hold harmless ISA and any of its directors, officers, employees, agents and representatives from and against any suit, action, claim, demand, judgment, and expense arising out of the performance of this Agreement. Contractor agrees that if any claim is asserted or suit brought against ISA, or their officers, employees, agents, or third parties or their employees, Contractor will defend the claim or suit at the expense of the Contractor. No compromise or settlement of any Claim shall be made or entered into by either party without the written approval of the other. This consent shall not be unreasonably withheld.

**Independent Contractors** Notwithstanding any other provision of this Agreement, the relationship between ISA and Contractor is, and shall remain, one of independent contractors. Nothing in this Agreement shall be construed to establish a relationship of employer / employee, partners, or joint ventures between the parties.

**Termination** It is mutually agreed by the parties that this Agreement may be terminated at any time without notice upon the express written consent of both parties. The Agreement may be terminated by either party for “cause” by giving thirty (30) days’ notice to the other party in writing of such intention to terminate the Agreement. For the purposes of this paragraph, “termination for cause” is defined as the termination for an intentional or willful violation of any of the provisions of this Agreement by a party. The party seeking to terminate this Agreement for “cause” must specify in writing to the other party the nature of the “cause” resulting in such termination. In the event the party whose conduct has caused the termination of the Agreement desires to cure the “cause” for termination, such party may do so by complying with the Agreement within sixty (60) days of the date notice shall be deemed to have been given pursuant to the notice provision of this Agreement, provided that such party shall by further written notice of such desire to cure within five (5) days of such notice. If this Agreement is terminated, ISA owns all work paid for as of the date of termination according to the terms of Publishing Rights clause, and has no further obligation to pay for work that has not been paid for. Contractor shall return all unspent and uncommitted funds.

**Default** In the event of default in the performance of this Agreement by either party, the non-defaulting party shall be entitled to all remedies available at law or equity subject to the dispute provisions contained herein.

**Severability** In the event any one or more of the provisions contained in this Agreement shall

be invalid, illegal, or unenforceable in any respect, such provision shall be deemed severed from this Agreement, and the validity, legality, or enforceability of the remaining provisions of this Agreement or any other application thereof shall not be affected or impaired thereby, and shall, therefore, remain in effect.

**Assignment Binding Effect** Neither party nor any successor, partner, employee, agent, affiliate, or subsidiary shall assign or delegate any of their rights or responsibilities under this Agreement without the prior written consent of the other.

**Waiver** Failure to insist upon strict compliance with any of the terms, covenants, or conditions of this Agreement, shall not be deemed a waiver of that term, covenant, or condition, nor shall any waiver or relinquishment of any right or power at any one time or times be deemed a waiver or relinquishment of the right or power at all or any other times.

**Counterparts** This Agreement shall be executed in duplicate, each of which shall be deemed to be an original.

**Notice** All notices required pursuant to this Agreement shall be in writing, and shall be deemed to have been given at the time they are received via certified mail return receipt requested to the respective Parties at the address set forth in this Agreement, or at such other place or address as the Parties shall provide to each other in writing, provided that an additional copy of such notice shall also be sent to the respective Party via regular first class mail, all with postage prepaid.

**Dispute** Any dispute or proceeding under this Agreement shall be handled in a court of competent jurisdiction.

**Entire Agreement and Amendments** The Agreement and any written addendum to it contains the entire understanding of the parties with regard to the subject matter hereof and no warranties, representations, promises, or agreements have been made between the parties other than expressly herein set forth, and neither ISA nor Contractor shall be, nor are they bound by, any warranties, representations, promises or agreements not set forth herein. The Agreement supersedes any previous agreement or understanding with respect to this work and cannot be modified except in writing by all the parties hereto. Upon execution, this Agreement shall be binding and fully enforceable and shall inure to the benefit of the parties hereto, their successors, personal representative, heirs and assigns.

IN WITNESS WHEREOF, Contractor and ISA have executed this agreement on the day and year below, to be effective immediately if the dates are the same, or on the date of the later signature if the dates are not the same.

***On behalf of Contractor:***

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

***On behalf of the International Society of Arboriculture:***

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

**Caitlyn Pollihan, Executive Director**

International Society of Arboriculture, PO Box 191, Annapolis Junction, MD 20701 United States

Projected release date (if known) \_\_\_\_\_

**ADDITIONAL INFORMATION**

Contact Stephanie Ebersohl at [sebersohl@isa-arbor.com](mailto:sebersohl@isa-arbor.com) for more information.