

Condo and HOA Arboricultural Management for a healthy, sustainable urban forest in your own community

Introduction

The number of condominium or homeowner associations (OAs) has increased dramatically over the last several decades and growth continuing to accelerate. The cause of this dramatic rise in the number of OAs is most likely the nature of suburban development, which tends to sprawl out into un-incorporated areas of counties – areas that are not confined by municipal jurisdictional boundaries. This results in the privatization of public functions such as trash collection, road maintenance, snow removal, landscape and tree

management, recreational services, and others.

The privatization of essential services and infrastructure maintenance are a given in OAs, however, maintaining and enhancing an OA's trees which make up their urban forest tends to be an afterthought for most. Only after development is underway, or completed, do residents begin to realize that their urban forest, which is an essential part of their infrastructure and identity, requires attention and



mitigation. Additionally, it is critical to recognize that trees in your community should be considered capital assets. Research has indicated that trees can impact property values by as much as 5-20%. As with any valuable asset, it must be sustainably managed to gain maximum benefits.

Why is tree management so important?

Trees are the most visible and, perhaps, dominant features in the landscape, occupying private landscapes and common areas under collective management. The collective aggregation of trees under all ownerships within a community can be referred to as the "urban forest". It should be considered an integral part of a community's infrastructure due to the wide range of benefits derived from this collection of trees. Unlike grey infrastructure (roads, sewer and storm utilities, distribution systems), which depreciates over time, the urban forest increases in value as it matures. The more trees grow and the healthier they become, the greater their functional contribution, and the higher their value.

While it may be assumed that trees grow and take care of themselves, management and maintenance is necessary for them to become better established, more resistant to pests



and weather extremes; grow healthier; and present less risk. This is especially true in urban forests, where trees are impacted by human influences, such as compacted soils, competition with turf, and construction related damages. Any negative impacts like messy fruit, damage to structures (such as heaving sidewalks), restricted sight distances, and risk from falling trees or tree parts, must also be managed to reduce liability to the OA.

Some OAs may already have tree standards in place to address tree removal and basic pruning but, as development continues or as trees mature and grow, issues can arise which challenges the initial standards and the overall maintenance and preservation of trees. This requires solid policies to meet the reality of urban forest management, tree planning, and tree maintenance as the community and trees mature. Also, there are opportunities to be strategic with tree management with specific goals in mind. For example, planting trees to create a buffer between different land uses, or to minimize soil erosion adjacent to a common lake area or improve privacy.

It makes sense for OAs to have policies, programs and practices in place to manage and maintain their urban forest. Thoughtful management allows the ability to maximize tree growth and health, and the overall benefits of an urban forest, while at the same time reducing the risks and potential negative impacts of trees.

The Strategy

A systematic approach can be followed in the development of urban forestry practices and policies for an OA with dedicated treefocused committees. Since committees within an HOA are member volunteers, it is important that members are somewhat knowledgeable and passionate about tree issues in the community and are willing to stay committed to the goals without personal bias.





It is important for the tree policy committee to obtain the services of a consulting arborist, to help them better understand their tree issues and the best management and policy approaches. Also, a consulting arborist provides a more objective perspective and approach to managing arboricultural assets. Consulting Arborists are the authoritative experts on trees bringing an objective, comprehensive viewpoint to their clients—ensuring the safety, health, and preservation of trees. Servicing a wide variety of clients,

including property owners, municipalities, contractors, attorneys, insurance professionals, Registered Consulting Arborists provide services such as:

- Contract Preparation and Supervision
- Diagnosis of Tree and Landscape Problems
- Expert Witness and Litigation
- Forensic Investigations
- Tree Risk Assessments
- Municipal Ordinance Development
- Plant Health Care Programs
- Training and Education
- Tree, Landscape, and Nursery Appraisals
- Tree Management for Arboreta, Golf Courses, Condo and Homeowners Associations
- Tree Inventories
- Tree Planting Programs
- Tree Protection for Construction Projects

landscape architects, developers, engineers, other arborists, and more, they offer the services often necessary for OA's to effectively manage their trees.

For example, a good, first step for any OA would be to conduct a site review of the trees within the community (Green Asset Evaluation). A site review can discover the current condition of the trees and their growing sites. Also, this process can provide indications of the effectiveness of existing policies and programs. The information collected may

Information collected in a tree inventory includes:

- the tree's spatial location (GPS)
- species, size, condition of the tree
- identify any conditions of concern
- current assessment of growing sites, and surrounding conflicts (sight distance, utilities, etc.)
- location and availability of planting spaces

demonstrate the need for specific management practices to improve tree conditions, recognize potential planting opportunities, and identify potential risk for tree failures. Also, this step often allows for an audit of current management practices, contractors and vendors as financial and performance studies. An even more comprehensive approach to a green asset evaluation is to conduct an inventory of trees within the areas managed by the OA. This may be a more costly procedure because it requires

professional expertise, however the data collected can provide information that can be used for long-term planning and budgets by providing justification for management priorities, planting or replacement trees, recommended species, long-term maintenance, and risk management. The intensity or type of inventory can be defined to meet a community's specific concerns. For example, a more detailed inventory may be appropriate in high-use public areas, like trees along streets and sidewalks, whereas in lower use areas a risk analysis may be sufficient for trees that are adjacent to nature areas, trails or walking paths.



A common and quite important component which should be consider by the OA is a tree risk assessment. This type of assessment is a detailed and comprehensive process conducted by an International Society of Arboriculture (ISA) Certified Arborist with the ISA Tree Risk Assessment Qualification. The additional qualification ensures the use of the current standards and best management practices for assessing tree risk and making recommendations for mitigating risk.

The tree risk assessment considers factors such site characteristics, tree defects and conditions the affect the likelihood of tree failure, tree health and species as well as potential targets (objects or people a failing tree or tree part

could strike). Tree risk assessment is considered an integral part of an overall risk management policy, protecting tree owners and managers.

Upon completion of the assessment or inventory, issues are identified and reported where discussions shift to possible solutions (practices and policies). These solutions should start with goals accomplished through specific strategies. Goal setting is one of the more important parts of this process and should be evaluated by the entire community, as the OA then considers as policy.

Example of Goals:

- Increase the total canopy cover by 10%
- Stop the topping and lion's tailing of trees
- Increase the diversity of tree species
- Reduce soil erosion and storm water runoff
- Reduce mowing costs by planting trees and expanding mulch beds
- Improve habitat for songbirds and pollinators.
- Reduce the loss of trees from construction
- Reduce the likelihood of tree failures
- Reduce conflicts between trees and infrastructure and utilities

Goals should be specific, realistic, and measurable. Once goals are established, discussions turn to specific ways to accomplish them, by identifying strategies. Strategies can take the form of activities or programs, and specific practices.

Tree gatherings may be a planned series of events such as educational programs or community tree planting initiatives. Programs do not typically become part of HOA policy. However, they can be very effective in accomplishing goals. For example, educational programs targeting owners on the importance of proper tree care and maintenance, or host



volunteer tree planting activities. These activities make a strong contribution towards achieving a goal, like increasing the community's tree canopy.

Strategies can also take the form of professional practice, which applies current research with best practices to the care of trees. Typically, tree care practices are expressed in the form of policy for an OA. Using the same goal example as above such as strategies to increase canopy (as a practice and not a program or activity) might include a protocol for a replacement program for trees being removed. Most importantly, requiring contracted tree services to employ industry best management practices when conducting work within the OA.

Examples of Strategies:

- Implement tree protection standards for construction sites.
- Establish an annual tree planting and maintenance budget for common areas.
- Require ISA certification for tree care services in the community, and tree care specifications based on national tree care industry standards.
- Create a recommended tree species list.
- Establish a prioritized annual tree maintenance plan for trees in the common area.
- Commission a tree risk assessment for trees in common areas or OA managed areas.
- Conduct educational homeowner tree care workshops.
- Host volunteer tree planting projects in the

The final step is for the tree committee to map out processes and responsibilities. Again, the consulting arborist can be very helpful with this step and many others. This level for detail is necessary for any strategies that might involve a process, such as tree removal and permits, contracting tree maintenance, etc. The generation of flow charts, timelines, and checklists for the new requirement processes can be helpful and often found within a consultant's report. Finally, the tree committee should implement the new program as a dynamic plan to ensure the processes are effective and efficient, and revise processes accordingly.

An <u>American Society of Consulting Arborists (ASCA</u>) Registered Consulting Arborist can be most effective for problem-solving, tree management audits and contract management for improved financial and assets management.