

ARBORIST REPORT CHECKLIST FOR LARGE PROJECTS

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Summary

This document is a checklist of the minimum required elements of an Arborist Report needed for large projects, which include Heritage Tree permit applications for the removal or pruning of more than one-fourth of the canopy and/or roots.

The Arborist report is to be submitted to the City and property owner as part of the permit application process for the purpose of providing accurate information and a professional opinion regarding the condition, preservation, protection, mitigation, and maintenance of Heritage Trees.

Qualifications

An Arborist Report is required under one of these three circumstances:

1. When any development, excavation, or grading is proposed within 10 times the trunk diameter of a Heritage Tree or City Street Tree. The report shall assess the potential impacts to the tree from all development related plans to establish tree protections and mitigation measures throughout all stages of the development process.
2. When a Heritage Tree removal permit is requested as part of the development.
3. When an application for a Heritage Tree permit is submitted for the removal or heavy pruning of four or more trees, regardless of whether any construction activity is planned on the property.

- The Arborist Report is to be prepared by a certified arborist who is currently identified by the City of Menlo Park as a City approved pre-qualified arborist.
- The property owner, architect, building contractor and/or designee shall provide accurate and current information to the project arborist to develop the recommendations for tree maintenance, tree protection and mitigation measures to enable accurate recommendations to ensure their survival when related to development.

Overview

The Arborist Report shall include an evaluation of Heritage Trees proposed for removal or heavy pruning.

- All on-site trees, which are 6 inches in diameter measured at 54" above natural grade (DBH) or greater, including trees to be removed, relocated, and retained on the property (development only)
- Heritage Trees proposed for removal or heavy pruning
- Heritage Trees on neighboring properties that overhang the project site or with construction or excavation occurring within 10 times the DBH of the tree(s) (development only)
- All Street Trees located in the City right of way proposed for removal or pruning, regardless of size or species.
- For development-related projects, include all Street Trees within 30 feet of the project site.

Report requirements

1. Arborist Report

- Date of report, address of project, property owner, other contact information as needed.
- Name the designated Project Arborist for the job and the ISA certification or ASCA membership number. Project Arborist must be a certified arborist approved by the City before the issuance of any permits. If the Project Arborist changes, the property owner must submit a written notification letter to the City and a separate report from the new Project Arborist following these guidelines.
- Tree inventory table, which includes the following information:
 - Unique identifying tree number consistent with numbering shown on the tree site plan/map as well as the numbering on the Heritage Tree permit application form
 - Tree species
 - Trunk diameter/DBH
 - Heritage Tree/Street Tree/off-site designation
 - Health and structural condition with brief description of relevant characteristics
 - Suitability for preservation (when related to development) based on existing conditions and reason for removal (when recommended)
 - Tree risk assessment (if tree removal is recommended based on risk)
 - Appraised value of trees (when related to development)
 - Tree disposition

- Description of the site (include current site use, relevant structures, utility service, property lines, etc.).
 - Brief description of any development-related projects.
 - List of any development-related plans reviewed and date of plans.
 - Evaluation of all potential impacts to trees from any proposed construction activities including grading, excavation for utility installation, retaining walls, drainage, landscaping, or any other aspects of project.
 - Recommendations for tree removal, reasons for removal, and any tree protections and measures to mitigate impacts of construction.
 - For any trees requesting for removal, the Arborist Report should evaluate the removals and make recommendations according to the City's decision-making criteria (Menlo Park Municipal Code 13.24.050). If tree removal is recommended, project arborist must propose replacement trees from list of species approved by the City Arborist.
 - Any time development-related work is recommended to be supervised by a Project Arborist, it must be written in the report to describe the work plan and mitigation work. The Project Arborist shall provide a follow-up letter documenting the mitigation has been completed to specification.
 - Appraised value of each protected tree related to development using the Trunk Formula Technique as described in the most current edition of the "Guide for Plant Appraisal," by the Council of Tree and Landscape Appraisers.
2. Tree protection and mitigation guidelines (only for development-related projects):
Description of tree protection and preservation guidelines to be followed during the following distinct phases of construction: pre- construction, demolition, construction, and post-construction.
- Define tree protection zone (TPZ) for each tree with dimensions for tree protection fencing.
 - Tree protection and preservation guidelines shall identify site-specific methods of avoiding above- and belowground tree injury, damage treatment, inspection schedule, and recommendations for the health and long-term maintenance of Heritage Trees.
 - Tree protection fencing requirements:
 - Six (6)-foot tall chain link fencing mounted on eight (8)-foot tall, two (2)-inch diameter galvanized posts, driven 24 inches into the ground and spaced no more than 10 feet apart.
 - Posted with signs saying, "TREE PROTECTION FENCE - DO NOT MOVE OR REMOVE WITHOUT APPROVAL FROM CITY ARBORIST."
 - The City requires that tree protection fencing be installed before any equipment comes on-site and inspected by the Project Arborist, who shall submit a verification letter to the City before issuance of permits.
 - Tree protection fencing to be inspected by City Arborist before demo and/or building permit issuance.
 - Tree protection fencing is required to remain in place throughout construction and may only be moved or removed with written authorization from the City Arborist. The Project Arborist may authorize modification to the fencing when a copy of the written authorization is submitted to the City.
 - Require that pruning of any limbs or roots be supervised by the Project Arborist or an employee of the Project Arborist who is an ISA Certified Arborist.
 - Include a statement that any tree on-site protected by the City's Municipal Code will require replacement according to its appraised value if it is damaged beyond repair as a result of construction.
 - A plan for continued maintenance of trees after construction.
 - Require a final inspection by the City Arborist at the end of the project. This is to be done before the tree protection fencing is taken down. Replacement trees should be planted at this time as well.
3. Tree plan (or site map)
A scaled drawing of existing or proposed site conditions which includes:
- Accurate surveyed trunk locations and canopy spread of all trees listed in the tree inventory.
 - Numbered tree symbols. Tree numbers shall correspond to numbers in the tree inventory table, and symbols shall include species name and trunk DBH.
 - Tree protection fencing shown on demolition and site plans as a bold, dashed line and denote 6-foot chain-link fencing.
 - Plans shall also denote permeable paving located within the dripline area; approved utility pathways; grade changes; surface and subsurface drainage and aeration systems to be used; walls, tree wells, retaining walls and grade change barriers, both temporary and permanent; and landscaping and irrigation within dripline of trees.
 - The location and species of replacement trees designated for removal.
 - For development-related projects, provide details on the replacement tree plan. This may include a list of replacement trees, which shall be in the amount equivalent to the appraised value of the heritage trees. If the

appraised value exceeds the value of the replacement trees, applicant shall pay the difference in value to the heritage tree fund. See Menlo Park Municipal Code 13.24.090 for tree replacement requirements.

- For removal of 4 trees and more, provide details on the replacement tree plan. This may include a list of replacement trees, which shall be in an amount based on the replacement matrix based on trunk diameter as stated in the administrative guidelines. If the property cannot accommodate all replacement trees, applicants may pay an in-lieu fee to be deposited in the heritage tree fund. See Menlo Park Municipal Code 13.24.090 for tree replacement requirements.
- Other supporting information: Such as photographs, diagrams, etc.

Approved plan set requirement (for development-related projects only)

The approved plan set shall include a site plan that shows:

- Tree protection zones and
- Arborist Report with tree protection and mitigation guidelines.