



# CITY OF CARMEL-BY-THE-SEA

## FOREST AND BEACH COMMISSION

Chair David Refuerzo, Commissioners Karen Ferlito,  
Mo Massoudi, Stephanie Locke,  
and Al Saroyan

All meetings are held in the City Council Chambers  
East Side of Monte Verde Street  
Between Ocean and 7<sup>th</sup> Avenues

**REGULAR MEETING**  
**3/9/2017**  
**TOUR 2:30 p.m.**  
**MEETING 3:30 p.m.**

### CALL TO ORDER AND ROLL CALL

**TOUR OF INSPECTION** Shortly after 2:30 p.m. the Commission will leave the Council chamber for an on-site Tour of Inspection of all properties listed on the agenda (including those on the Consent Agenda). The tour may include projects previously approved by the City and not on this agenda. Prior to the beginning of the tour, the Commission may eliminate one or more on-site visits. The public is welcome to join the Commission on its tour. The Commission will return to the Council chamber at 3:30 p.m. or as soon thereafter as possible.

1. Tour of tree pruning on Forest Road, three southwest of Ocean Avenue.
2. Tour of tree and acacia removals in the North Dunes.

### ROLL CALL

### PLEDGE OF ALLEGIANCE

### INTRODUCTION OF PUBLIC WORKS STAFF

Mike Tope – Coastal Gardener/Maintenance Worker  
Kimberly Moscato – Forest Care Worker

**PUBLIC APPEARANCES** Members of the public are entitled to speak on matters of municipal concern not on the agenda during Public Appearances. Each person's comments shall be limited to 3 minutes, or as otherwise established by the Commission. Matters not appearing on Commission's agenda will not receive action at this meeting but may be referred to staff for a future meeting. Persons are not required to give their names, but it is helpful for speakers to state their names so that they may be identified in the minutes of the meeting.

### ANNOUNCEMENTS

- A. Announcements from Chair and Commissioners

**ORDERS OF BUSINESS** Orders of Business are agenda items that require Commission discussion, debate, direction to staff, and/or action.

1. Discuss and ask questions on the Commission responsibilities under the Brown Act with City Attorney Don Freeman.

**CONSENT AGENDA** Items on the consent agenda are routine in nature and do not require discussion or independent action. Members of the Commission or the public may ask that any items be considered individually for purposes of Commission discussion and/ or for public comment. Unless that is done, one motion may be used to adopt all recommended actions.

2. Approval of the minutes for the 02/16/17 regular meeting.

#### **PUBLIC HEARING**

3. Consideration of an application to prune 5 coast live oak trees (15", 16", 10", 9", 6" diameter) on public property located on the west side of Forest Road, three south of Ocean Avenue.

**ORDERS OF BUSINESS** Orders of Business are agenda items that require Commission discussion, debate, direction to staff, and/or action.

4. Discussion of an Arbor Day event for 2017.
5. Receive the City Forester's Report
  - a. February tree data
  - b. Parks activities
  - c. Beach activities
  - d. Future agenda items
6. Receive the Public Works Director's Report
  - e. Updates on City Council items
  - f. Other items of interest to the Commission

#### **FUTURE AGENDA ITEMS**

#### **ADJOURNMENT**

This agenda was posted at City Hall located on Monte Verde Street between Ocean and 7<sup>th</sup> Avenues, Harrison Memorial Library located on the NE corner of Ocean Avenue and Lincoln Street, and the Carmel-by-the-Sea Post Office located on 5<sup>th</sup> Avenue between Dolores Street and San Carlos Street, and the City's webpage <http://www.ci.carmel.ca.us/carmel/> on 3/3/2017 in accordance with the applicable legal requirements.



Michael Branson, City Forester

#### **SUPPLEMENTAL MATERIAL RECEIVED AFTER THE POSTING OF THE AGENDA**

Any supplemental writings or documents distributed to a majority of the Community Activities and Cultural Commission members regarding any item on this agenda, received after the posting of the agenda will be available for public review in the Public Works Department Office located on the east side of Junipero Avenue between Fourth and Fifth Avenues during normal business hours.

#### **SPECIAL NOTICES TO PUBLIC**

In compliance with the Americans with Disabilities Act, if you need special assistance to participate in this meeting, please contact the City Clerk's Office at 831-620-2007 at least 48 hours prior to the meeting to ensure that reasonable arrangements can be made to provide accessibility to the meeting (28CFR 35.102-35.104 ADA Title II).

**CHALLENGING DECISIONS OF CITY ENTITIES** The time limit within which to commence any lawsuit or legal challenge to any quasi-adjudicative decision made by the City of Carmel-by-the-Sea is governed by Section 1094.6 of the Code of Civil Procedure, unless a shorter limitation period is specified by any other provision, including without limitation Government Code section 65009 applicable to many land use and zoning decisions, Government Code section 66499.37 applicable to the Subdivision Map Act, and Public Resources Code section 21167 applicable to the California Environmental Quality Act (CEQA). Under Section 1094.6, any lawsuit or legal challenge to any quasi-adjudicative decision made by the City must be filed no later than the 90th day following the date on which such decision becomes final. Any lawsuit or legal challenge, which is not filed within that 90-day period, will be barred. Government Code section 65009 and 66499.37, and Public Resources Code section 21167, impose shorter limitations periods and requirements, including timely service in addition to filing. If a person wishes to challenge the above actions in court, they may be limited to raising only those issues they or someone else raised at the meeting described in this notice, or in written correspondence delivered to the City of Carmel-by-the-Sea, at or prior to the meeting. In addition, judicial challenge may be limited or barred where the interested party has not sought and exhausted all available administrative remedies.

The next regular meeting is April 13, 2017  
Tour of Inspection – as required  
3:30 p.m. – Regular Agenda

CITY OF CARMEL-BY-THE-SEA  
FOREST AND BEACH COMMISSION –MINUTES  
REGULAR MEETING  
THURSDAY, FEBRUARY 16, 2017

**CALL TO ORDER AND ROLL CALL**

**COMMISSION MEMBERS PRESENT:** David Refuerzo – Chair  
Stephanie Locke – Vice Chair  
Mo Massoudi  
Al Saroyan

**COMMISSION MEMBERS ABSENT:** Karen Ferlito

**STAFF PRESENT:** Rob Mullane, AICP, Public Works Director  
Mike Branson, City Forester  
Matt Feisthamel, Assistant City Forester  
Yvette Oblander, Commission Secretary/Admin Coordinator

**ROLL CALL**

Chair Refuerzo called the meeting to order at 3:30 PM

**PLEDGE OF ALLEGIANCE**

Members of the audience participated in the Pledge of Allegiance

**INTRODUCTION TO PUBLIC WORKS STAFF**

Both staff members were out of the office today. They will be rescheduled for a future meeting.

Mike Tope – Coastal Gardner/Maintenance Worker  
Kimberly Moscato – Forest Care Worker

**PUBLIC APPEARANCES**

1. Chris Thomas is proposing a petition to change Municipal Code 8.68, banning non-compostable take out materials at restaurants, hotels, and any food service provider in Carmel. He would like to educate the local community on options that would be better for the environment.

**ANNOUNCEMENTS**

No announcements from the Commissioners at this time

**CONSENT AGENDA**

1. Consideration of the minutes for January 12, 2017, Regular Meeting. Commissioner Massoudi moved to approve, seconded by Commissioner Saroyan.

AYES: Massoudi, Refuerzo, Saroyan  
NOES: None  
ABSTAIN: None  
ABSENT: Ferlito, Locke

## ORDERS OF BUSINESS

2. Recognition of the Friends of Carmel Forest Centennial Tree Planting program.

Mr. Branson mentioned that Commissioner Ferlito would like to give recognition and appreciation to the Friends of Carmel Forest for the work they have put in this last year and Centennial year and the work they continue to do with planting trees, other support they provide to our forestry program. The Commission would like to thank Maria Sutherland, President of the Friends of Carmel Forest, and members Raymie Allard, and Steve Brooks.

Maria Sutherland said that it has been a great experience for them and they will continue to monitor the Centennial Trees that have been planted. Raymie Allard thanked the Commission for the opportunity to work with the program and was honored to be part of this program. Steve Brooks explained about their tree tagging and how they divided up inspections of the trees to see if there are any problems as far as watering or damage to the trees.

Chair Refuerzo and Commissioners Massoudi and Saroyan thanked everyone for their hard work and effort.

3. Discussion of an Arbor Day event for 2017

Mr. Branson talked about the starting process of planning an Arbor Day event for the City of Carmel-by-the-Sea. He recommend that Chair Refuerzo select an ad-hoc committee to work along with the staff to develop an event and select a date for the event. Commissioner Massoudi would like to be part of the ad-hoc committee. Chair Refuerzo will communicate with Commissioners Ferlito and Locke to see if they are interested in being on the committee. The Friends of Carmel Forest are also available to help and collaborate together with the Commissioners.

4. Receive the City Foresters Report

- a. January tree data

Mr. Branson gave his update on the tree data for the month of January 2017.

- b. Parks activities

MTNP gate is now opened and a small renovation to the children's playground was completed at the end of December. The North Dunes has had some weeds and iceplant removed.

- c. Beach activities

Have had to have intermittent closures of some beach stairways due to high surf and high tides. Erosion of the beach at the foot of Ocean Avenue has been repaired.

(Vice Chair Locke arrived at the meeting at 4:15 PM)

d. Storm Report

Mr. Branson informed the Commission that the City is trying to anticipate and be ready for storm events that happen and be ready to act on things as we need to. The on-call tree services have been very helpful in responding to tree related emergencies.

e. Tree tagging report

Do not have an update at this time, other than reviewing applications that he has. They have made an adjustment or corrections to iWorq to make sure that it is giving them the information that they need. Mr. Branson hopes to come back in the next months meeting with more information.

f. Future agenda items

Nothing to report at the moment

5. Receive the Public Works Directors Report

a. Updates on City Council items

Nothing to report/Mr. Mullane did not attend the Council Meeting for February.

b. Other Items of interest to the Commission

Nearing the final stage of hiring the Environmental Compliance Manager, which may start in March. Human Resources has opened up a recruitment for two Project Managers, one limited term, and one regular position. Continuing to work with Maxine Gullo on getting an intern for the Public Works department. The ribbon cutting for the MTNP entrance project was great today. Mr. Branson headed that event.

**ADJOURNMENT**

Chair Refuerzo adjourned the meeting at 4:30 PM



# CITY OF CARMEL-BY-THE-SEA

## Forest and Beach Commission

### Staff Report

March 9, 2017  
Public Hearing

**TO:** Forest and Beach Commissioners  
**FROM:** Mike Branson, City Forester  
**SUBJECT:** Consideration of an application for pruning public oak trees

#### RECOMMENDATION

Require the applicant to deposit an amount equal to the assessed value of the five oak trees in a City deposit account that will be used to buy and plant new trees if any of the trees die within one year.

#### BACKGROUND / SUMMARY

On February 1, 2017 the City received a report of City trees being pruned in front of a construction site on the west side of Forest Road south of Ocean Avenue. Forestry staff responded and found no one at the location but could see that five (5) Coast Live Oaks in the public right-of-way had been pruned. Staff returned to the site the next day and spoke to a construction worker about the pruning. The worker admitted the trees had been pruned but was unaware the trees belonged to the City. Staff explained that working on City trees requires permission from the City and unauthorized work can be punished as specified in the Carmel-by-the-Sea Municipal Code.

Following internal staff discussions, the project was red-tagged by the code enforcement officer until an application was submitted and a hearing scheduled for the Forest and Beach Commission. During a meeting with forestry staff with the property owner, Stephen Seely of Carmel Development II LLC, and a representative from the project contractor, Hasting Construction, Mr. Seely took responsibility for ordering and directing the pruning.

Staff's assessment of the pruning is that the canopies of all five trees were over-thinned by the removal of an excessive amount of small branches and foliage. The pruning cuts were done appropriately and the trees were not pruned incorrectly aside from the over-thinning. The impact to the trees going forward is difficult to determine. The trees show some signs that they were stressed and in a stage of some decline, most likely from soil fungi and prolonged drought conditions, before the pruning occurred. A recent inspection shows new buds and leaves appearing which, if trees are not stressed any further, is an early indication the trees can recover. Full recovery from the over-thinning will take several years.

The Forest and Beach Commission has several options to address this violation as provided by the municipal code sections below:

#### **12.28.185 Violation – Penalty for CMC 12.28.170, 12.28.172, 12.28.180 and 12.28.210.**

A. It shall be unlawful for any person to violate any provision or fail to comply with any of the requirements of CMC [12.28.170](#), [12.28.172](#), [12.28.180](#) or [12.28.210](#). A violation of any of the provisions or failure to comply with

any of the mandatory requirements of such sections shall constitute an infraction. Any person convicted of an infraction under the provisions of such sections shall be punishable by fine only as follows: Upon a first conviction, by a fine not exceeding \$250.00, and for a second conviction or any subsequent conviction within a period of one year, by a fine not exceeding \$500.00.

B. Cutting, removing, or trimming of trees on public property without a permit shall be a misdemeanor.

C. In addition to the penalties provided for herein, any violation of such sections may be addressed by civil action. (Ord. 95-3 § 1, 1995; Ord. 88-13 § 4, 1988).

**12.28.210 Suspension of Permit.**

Removal of trees, pruning or root removal without a permit shall be grounds for suspension of any permits granted for construction or demolition for a period of up to 90 days, said period of time to be determined by the Director of Forest, Parks and Beach. During the suspension period, the property owner or her/his designee shall make application to the Forest and Beach Commission to obtain the necessary permit. Upon the review of the application, the Forest and Beach Commission:

A. May require replacement trees to be planted upon completion of construction;

B. May require an amount of money equal to the value of the lost tree(s) to be deposited in a deposit account to be used for reforestation;

C. May, in the event a tree is damaged on a construction or demolition site so as it may die within one year, require a sum of money equal to the tree's value to be deposited with the City in a deposit account for a period of time not exceeding one year. If the tree dies during that period, the money shall be used by the City for reforestation.

The tree's value shall be determined by Director of Forest, Parks and Beach using criteria established by the International Society of Arboriculture. (Ord. 95-3 § 1, 1995; Ord. 91-18 § 1, 1991; Ord. 88-13 § 3, 1988; Ord. 236 C. S. § 1, 1971; Code 1975 § 1232.04).

Since the trees were not destroyed by the pruning and the project owner said there was no malicious intent to harm the trees, staff does not think a misdemeanor citation is appropriate. An infraction citation would result in one-time fine of \$250 if convicted. The extended red-tag may be a more significant detrimental impact to the construction project and is well justified to impart the significance of the unauthorized pruning onto the owner and contractor.

Staff recommends implementing the provision in 12.28.210 (C) that requires the applicant to deposit funds equal to the assessed value of the individual trees into a deposit account the allow replanting of a tree if it dies within one year.

Staff has appraised the following values for each of the five oak trees:

Tree #1 – 15" diameter coast live oak - \$ 7,000

Tree #2 – 16" diameter coast live oak - \$ 7,900

Tree #3 – 10" diameter coast live oak - \$ 2,100

Tree #4 – 9" diameter coast live oak - \$ 1,700

Tree #5 – 6" diameter coast live oak - \$ 620

Total: \$19,320



## ATTACHMENT

1. Photos of the trees.
2. Seely application
3. Tree appraisal worksheets











CITY OF CARMEL - BY-THE-SEA  
PO BOX DRAWER G  
CARMEL, CA 93921  
Phone: (831) 620-2010

Date Received: 2/16/17  
FEE: \$ 310  
RECEIPT #: 109354

**APPLICATION FOR PERMIT TO REMOVE OR PRUNE TREES FOR THE PURPOSE OF CONSTRUCTION/DEMOLITION**

Location of Property: Forest 3 SW of Ocean Ave to the beach

BLOCK: \_\_\_\_\_ LOT: \_\_\_\_\_ APN: 0100241003000

Name of Property Owner: \_\_\_\_\_ Name of Applicant/Contractor: Steve Seely **SEELY**

Mailing Address: P.O. Box 2776 Carmel Development II, LLC

Carmel, CA 93923

Phone #: (925) 899-9480 Phone #: \_\_\_\_\_

WHO WILL REMOVE/PRUNE TREES: \_\_\_\_\_

\*PLEASE NOTE IF TREE(S) ARE ON CITY OR PRIVATE PROPERTY\*

Number, size and species of tree(s) to be removed: 0

Number, size and species of limb(s) to be removed: 32 - 1 inch oak / 15 - 2 inch oak

Number, size and species of root(s) to be removed: 0

Reason for removal or pruning: \_\_\_\_\_

You will be notified in writing the date and time that your request is scheduled for a hearing. If you or your representative is unable to attend the hearing your application will be tabled. You may reschedule by contacting the Secretary to the Forest and Beach Commission at (831) 620-2070. You may waive your right to speak at the hearing and authorize the Forest and Beach Commission to act on your absence by signing on the following line: \_\_\_\_\_ Date: \_\_\_\_\_

**A SITE PLAN MUST ACCOMPANY THIS APPLICATION AND SHOW THE FOLLOWING:**

1. Location, size and species of ALL trees on the lot.
2. Location and species of tree(s) /limb(s) to be removed or pruned
3. Footprint of the structure
4. Existing and proposed site coverage.
5. ALL areas that are to remain for landscaping and the total square feet of open space.
6. Location of areas for tree replanting- The City has adopted Design Review Guidelines which include a minimum tree density per lot. Please review the attached Policy and Indicate on the site plan where you intend to plant trees necessary to comply with which guidelines.
7. Will excavation other than standard footings be required as part of your construction? NO  / YES

Owner's Signature: \_\_\_\_\_ Date: 2/16/17  
Agent for Owners: \_\_\_\_\_ Date: \_\_\_\_\_

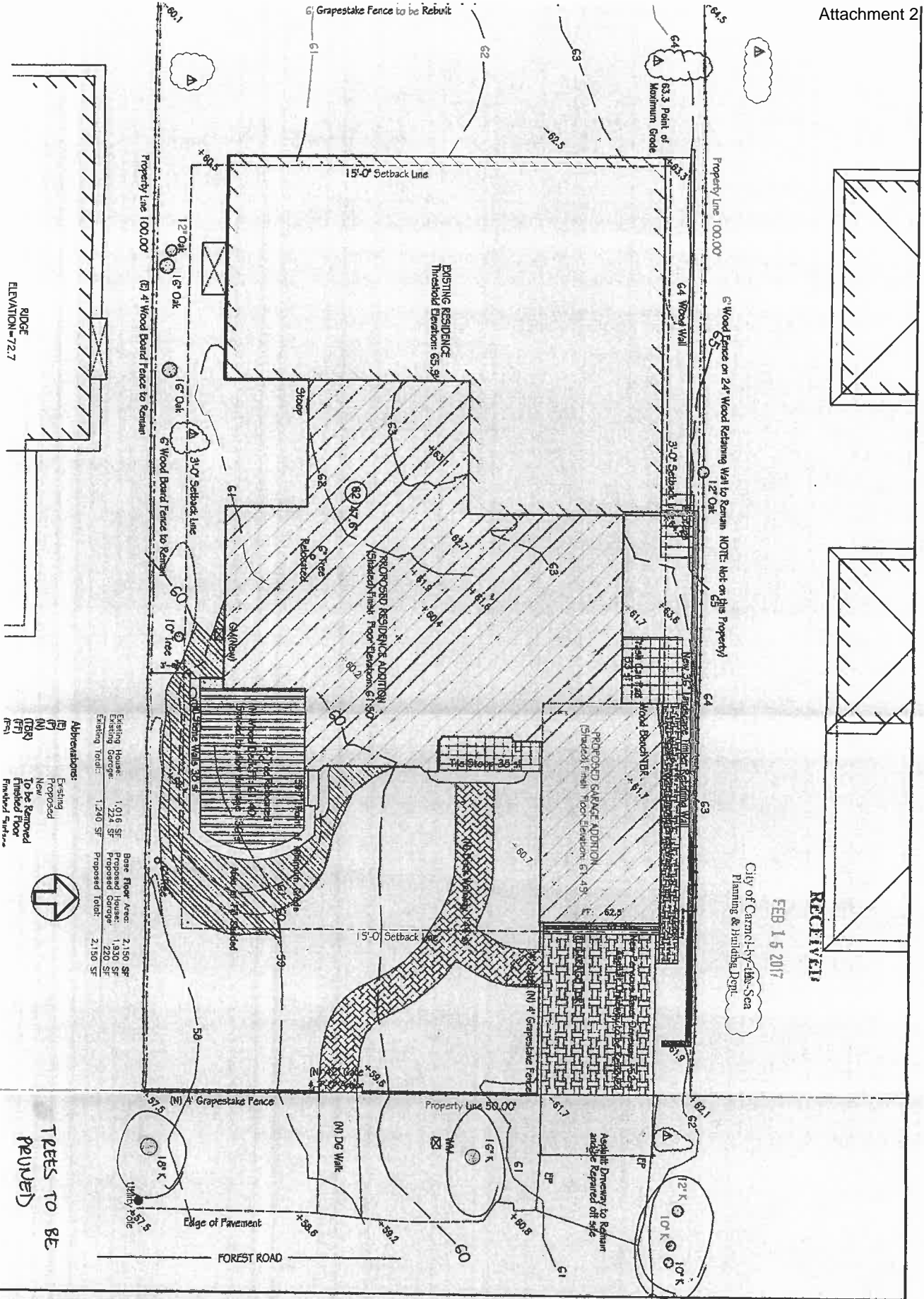
INCOMPLETE APPLICATIONS WILL BE RETURNED

**CARMEL DEVELOPMENT II, LLC**

**STEPHEN R. SEELY**  
Sunstar Properties, Inc.  
Manager/Member

P.O. BOX 2776  
CARMEL, CA 93921  
CELL (925) 899-9480  
FAX (831) 626-8400  
srseely@aol.com

*Ben Hastings Construction*  
*521-8752*



Abbreviations:

Existing	Existing House:	1,016 SF	Base Floor Area:	2,150 SF
Proposed	Existing Garage:	224 SF	Proposed Garage:	1,930 SF
Not Proposed	Existing Total:	1,240 SF	Proposed Total:	2,150 SF
To be Removed				
Finished Floor				
Finished Finish				

RECEIVED  
 FEB 15 2017  
 City of Carmel-by-the-Sea  
 Planning & Building Dept.

TREES TO BE  
 PRUNED

Date	02-23-2016	Drawn By	
Job Number	2016-04	Checked	5/27/2016
Sheet Number	C-1 2		

**Forest Road Residence**  
 Forest 3 SW OF Ocean  
 Carmel by the Sea, California

**Jon Sather Erlandson Architect - C11925**  
 Junipero Street 2 Southwest of 4th Avenue, Suite 3 Carmel By The Sea, CA

MAIL: Jon Sather Erlandson, Architect, Post Office Box 7108 Carmel, California 93921  
 Phone: (831) 625-6103 Fax: (831) 625-1578 Email: jon@jserlandson.com

DATE	REVISION

February 16, 2017  
 Thursday 9:19 am  
 By: MARTY  
 P. O. BOX CC CARMEL, CA. 93921

\*\*\*\*\*  
 \* City of Carmel-by-the-Sea \*  
 \*\*\*\*\*  
 Receipt #.: 69354  
 Register #.: 000  
 Terminal ID: TMN

I.D. Number  
 PRIVATE TREE REMOVAL  
 Amount Paid  
 310.00  
 01 33626 0002  
 Cmt: 17-032

Check #	Check Amount	Cash	Amt Tendered	Total Paid	Change
001092	310.00	.00	310.00	310.00	.00
Paid By.: CARMEL DEVELOPMENT					



## Trunk Formula Method Work Sheet

Tree #1

Case # 1021 Property w/Forest 3 south Dean Date 3/1/17  
 Appraiser Mike Branson

## Field Observations

1. Species Coast live oak
2. Condition 78 %
3. Trunk Circumference \_\_\_\_\_ in./cm Diameter 15 in./cm
4. Location % = [Site 70% + Contribution 70% + Placement 60%]  
 $\div 3 = 67$  %

## Regional Plant Appraisal Committee and/or Appraiser-Developed or -Modified Information

5. Species rating 90 %
6. Replacement Tree Size (diameter) 1.63 in./cm  
 (Trunk Area) 2.09 in<sup>2</sup>/cm<sup>2</sup> TA<sub>R</sub>
7. Replacement Tree Cost \$ 172.73  
 (see Regional Information to use Cost selected)
8. Installation Cost \$ 172.73
9. Installed Tree Cost (#7 + #8) \$ 345.46
10. Unit Tree Cost \$ 82.82 per in<sup>2</sup>/cm<sup>2</sup>  
 (see Regional Information to use Cost selected)

## Calculations by Appraiser using Field and Regional Information

11. Appraised Trunk Area:  
 (TA<sub>A</sub> or ATA<sub>A</sub>; use Tables 4.4-4.7)  
 or  $c^2$  (#3) \_\_\_\_\_  $\times 0.08$   
 or  $d^2$  (#3) \_\_\_\_\_  $\times 0.785$  = 177 in<sup>2</sup>/cm<sup>2</sup>
12. Appraised Tree Trunk Increase (TA<sub>INCR</sub>) =  
 TA<sub>A</sub> or ATA<sub>A</sub> 177 in<sup>2</sup>/cm<sup>2</sup> (#11) - TA<sub>R</sub> \_\_\_\_\_ in<sup>2</sup>/cm<sup>2</sup> (#6) = 175 in<sup>2</sup>/cm<sup>2</sup>
13. Basic Tree Cost = TA<sub>INCR</sub> (#12) 175 in<sup>2</sup>/cm<sup>2</sup>  $\times$  Unit Tree Cost (#10) \$ 82.82  
 per in<sup>2</sup>/cm<sup>2</sup> + Installed Tree Cost (#9) \$ 345.46 = \$ 14839
14. Appraised Value = Basic Tree Cost (#13) \$ 14839  $\times$  Species rating  
 (#5) 90 %  $\times$  Condition (#2) 78 %  $\times$  Location (#4) 67 % = \$ 6779
15. If the Appraised Value is \$5,000 or more, round it to the nearest \$100; if it is less, round to the nearest \$10.
16. Appraised Value = (#14) \$ 7000

Items 5 through 10 are determined by the Regional Plant Appraisal Committee. The Wholesale Replacement Tree Cost, the Retail Replacement Tree Cost, or the Installed Tree Cost (#9) divided by the Replacement Tree Size (#6) can be used for the Unit Tree Cost (#10), or it can be set by the Regional Plant Appraisal Committee.

Tree #1 - 15" coast live oak

## Condition

The **Condition** of a plant is determined by evaluating its present structure and health and, if necessary, its structure and health before being destroyed or damaged. It may be necessary to climb a tree to be able to properly evaluate its health as well as its structure. If the structure of a tree is questionable, its proximity to a target can be important in rating tree structure. Roots, trunk, and scaffold branches are evaluated both for structure and for health, while small branches, twigs, and foliage and/or buds are rated only for health.

The scoring system both for structure and for health is

No apparent problems	4
Minor problems	3
Major problems	2
Extreme problems	1

Guide to judging plant **Condition**. [Table 4.3 from the *Guide*]

### Factor 1: Roots\*

(A root collar inspection may be warranted.)

Root anchorage			
Collar/flare soundness			
Mechanical injury			
Girdling/kinked roots			
Compaction/waterlogged roots			
Toxic gases/chemical symptoms			
Presence of insects or disease			
Mushrooms (may need to interview owner)			
	3	+ 3	= 6
	Structure +	Health =	Subtotal
	(1-4)	(1-4)	(2-8)

### Factor 2: Trunk\*

(Core sampling or climbing may be needed and/or warranted to inspect the trunk.)

Sound bark and wood			
Cavities			
Mechanical or fire injury			
Cracks (frost or other)			
Swollen or sunken areas			
Presence of insects or disease			
Conks			
	4	+ 4	= 8
	Structure +	Health =	Subtotal
	(1-4)	(1-4)	(2-8)

### Factor 3: Scaffold Branches\*

(Climbing the tree may be warranted to inspect the branches.)

Strong attachments			
Smaller diameter than trunk where attached			
Vertical branch distribution			
Free of included bark			
Free of decay and cavities			
Well pruned			
Well-proportioned/proper taper			
Wound closure			
Deadwood or fire injury			
Insects or disease			
	4	+ 3	= 7
	Structure +	Health =	Subtotal
	(1-4)	(1-4)	(2-8)

**Factor 4: Small Branches and Twigs**

Vigor of current shoots (compare previous growth)  
 Well distributed through canopy  
 Appearance of buds (color, shape, size for the species)  
 Presence of insects or disease  
 Presence of weak or dead twigs

2  
 Health Subtotal  
 (1-4)

**Factor 5: Foliage and/or Buds**

Size of foliage/buds  
 Coloration of foliage  
 Nutrient status  
 Herbicide, chemical, pollution injury  
 Wilted or dead leaves  
 Dry buds  
 Presence of insects or disease

2  
 Health Subtotal  
 (1-4)

Total subtotal points assessed for the five **Factors**

25  
 (8-32)

Divide subtotal points by 32 (total points possible)  
 and multiply by 100 to obtain the **Condition** rating

78  
 (25-100)

\*As explained in the text, both structure and health items are to be rated for the roots, the trunk, and the scaffold branches. Rating roots, trunk, and scaffold branches for both structure and health gives them the necessary importance in the **Condition** rating. Small branches and twigs, and foliage and/or buds, are rated only for health.

**Location**

The **Location** rating considers the **Site** of a property, the plant's functional and aesthetic **Contributions**, and the **Placement** of the plant in the landscape.

**Site**

The rating of a **Site** is expressed on a percentage basis (10 to 100 percent) in relation to its relative market value compared to other sites in the area or region and the quality and general appearance of the **Site** in which the appraised plant is located.

**Contribution**

The functional (F) and aesthetic (A) **Contributions** of a plant determine its value in landscape. Tree characteristics largely determine these **Contributions** and a plant's rating (see table, next page). These benefits are affected by plant size, shape, branch structure, and foliage density and distribution.

**Placement**

The **Placement** of a plant being appraised largely determines how effective it is in providing its functional and aesthetic attributes. For example, a single specimen tree has greater value than would the same tree as one of many. The **Placement** of a tree can also have an unfavorable effect on its **Contribution**, such as proximity to overhead wires, street lights, or buildings.

**Location determination**

Average the **Site**, **Contribution**, and **Placement** ratings to determine the **Location** rating. For example, the ratings for a tree are

$$\text{Site } 60\% + \text{Contribution } 80\% + \text{Placement } 85\% = 225\%$$

$$225\% \div 3 = 75\% \text{ Location rating}$$

# Trunk Formula Method Work Sheet

Tree #2

Case # Seely Property w/forest 3 south Ocean Date 3/1/17  
Appraiser Mike Branson

### Field Observations

- 1. Species Coast live oak
- 2. Condition 78 %
- 3. Trunk Circumference \_\_\_\_\_ in./cm Diameter 11.0 in./cm
- 4. Location % = [Site 70 % + Contribution 70 % + Placement 60 %]  
÷ 3 = 67 %

### Regional Plant Appraisal Committee and/or Appraiser-Developed or -Modified Information

- 5. Species rating 90 %
- 6. Replacement Tree Size (diameter) 1.63 in./cm  
(Trunk Area) 2.09 in<sup>2</sup>/cm<sup>2</sup> TA<sub>R</sub>
- 7. Replacement Tree Cost \$ 172.73  
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- 10. Unit Tree Cost \$ 82.82 per in<sup>2</sup>/cm<sup>2</sup>  
(see Regional Information to use Cost selected)

### Calculations by Appraiser using Field and Regional Information

- 11. Appraised Trunk Area:  
(TA<sub>A</sub> or ATA<sub>A</sub>; use Tables 4.4-4.7)  
or c<sup>2</sup> (#3) \_\_\_\_\_ × 0.08  
or d<sup>2</sup> (#3) \_\_\_\_\_ × 0.785  
= 201 in<sup>2</sup>/cm<sup>2</sup>
- 12. Appraised Tree Trunk Increase (TA<sub>INCR</sub>) =  
TA<sub>A</sub> or ATA<sub>A</sub> 201 in<sup>2</sup>/cm<sup>2</sup> (#11) - TA<sub>R</sub> 2.09 in<sup>2</sup>/cm<sup>2</sup> (#6) = 199 in<sup>2</sup>/cm<sup>2</sup>
- 13. Basic Tree Cost = TA<sub>INCR</sub> (#12) 199 in<sup>2</sup>/cm<sup>2</sup> × Unit Tree Cost (#10) \$ 82.82  
per in<sup>2</sup>/cm<sup>2</sup> + Installed Tree Cost (#9) \$ 345.46 = \$ 16,819
- 14. Appraised Value = Basic Tree Cost (#13) \$ 16,819 × Species rating  
(#5) 91 % × Condition (#2) 78 % × Location (#4) 67 % = \$ 7,911
- 15. If the Appraised Value is \$5,000 or more, round it to the nearest \$100; if it is less, round to the nearest \$10.
- 16. Appraised Value = (#14) \$ 7,900

Items 5 through 10 are determined by the Regional Plant Appraisal Committee. The Wholesale Replacement Tree Cost, the Retail Replacement Tree Cost, or the Installed Tree Cost (#9) divided by the Replacement Tree Size (#6) can be used for the Unit Tree Cost (#10), or it can be set by the Regional Plant Appraisal Committee.

Tree #2 16" coast live oak

### Condition

The **Condition** of a plant is determined by evaluating its present structure and health and, if necessary, its structure and health before being destroyed or damaged. It may be necessary to climb a tree to be able to properly evaluate its health as well as its structure. If the structure of a tree is questionable, its proximity to a target can be important in rating tree structure. Roots, trunk, and scaffold branches are evaluated both for structure and for health, while small branches, twigs, and foliage and/or buds are rated only for health.

The scoring system both for structure and for health is

No apparent problems	4
Minor problems	3
Major problems	2
Extreme problems	1

Guide to judging plant **Condition**. [Table 4.3 from the *Guide*]

#### Factor 1: Roots\*

(A root collar inspection may be warranted.)

Root anchorage			
Collar/flare soundness			
Mechanical injury			
Girdling/kinked roots			
Compaction/waterlogged roots			
Toxic gases/chemical symptoms			
Presence of insects or disease			
Mushrooms (may need to interview owner)			
	3	+	3 = 6
	(1-4)		(1-4) (2-8)

#### Factor 2: Trunk\*

(Core sampling or climbing may be needed and/or warranted to inspect the trunk.)

Sound bark and wood			
Cavities			
Mechanical or fire injury			
Cracks (frost or other)			
Swollen or sunken areas			
Presence of insects or disease			
Conks			
	4	+	4 = 8
	(1-4)		(1-4) (2-8)

#### Factor 3: Scaffold Branches\*

(Climbing the tree may be warranted to inspect the branches.)

Strong attachments			
Smaller diameter than trunk where attached			
Vertical branch distribution			
Free of included bark			
Free of decay and cavities			
Well pruned			
Well-proportioned/proper taper			
Wound closure			
Deadwood or fire injury			
Insects or disease			
	4	+	3 = 7
	(1-4)		(1-4) (2-8)

**Factor 4: Small Branches and Twigs**

Vigor of current shoots (compare previous growth)  
 Well distributed through canopy  
 Appearance of buds (color, shape, size for the species)  
 Presence of insects or disease  
 Presence of weak or dead twigs

2  
 Health Subtotal  
 (1-4)

**Factor 5: Foliage and/or Buds**

Size of foliage/buds  
 Coloration of foliage  
 Nutrient status  
 Herbicide, chemical, pollution injury  
 Wilted or dead leaves  
 Dry buds  
 Presence of insects or disease

2  
 Health Subtotal  
 (1-4)

Total subtotal points assessed for the five **Factors**

25  
 (8-32)

Divide subtotal points by 32 (total points possible)  
 and multiply by 100 to obtain the **Condition** rating

78  
 (25-100)

\*As explained in the text, both structure and health items are to be rated for the roots, the trunk, and the scaffold branches. Rating roots, trunk, and scaffold branches for both structure and health gives them the necessary importance in the **Condition** rating. Small branches and twigs, and foliage and/or buds, are rated only for health.

**Location**

The **Location** rating considers the **Site** of a property, the plant's functional and aesthetic **Contributions**, and the **Placement** of the plant in the landscape.

**Site**

The rating of a **Site** is expressed on a percentage basis (10 to 100 percent) in relation to its relative market value compared to other sites in the area or region and the quality and general appearance of the **Site** in which the appraised plant is located.

**Contribution**

The functional (F) and aesthetic (A) **Contributions** of a plant determine its value in landscape. Tree characteristics largely determine these **Contributions** and a plant's rating (see table, next page). These benefits are affected by plant size, shape, branch structure, and foliage density and distribution.

**Placement**

The **Placement** of a plant being appraised largely determines how effective it is in providing its functional and aesthetic attributes. For example, a single specimen tree has greater value than would the same tree as one of many. The **Placement** of a tree can also have an unfavorable effect on its **Contribution**, such as proximity to overhead wires, street lights, or buildings.

**Location determination**

Average the **Site**, **Contribution**, and **Placement** ratings to determine the **Location** rating. For example, the ratings for a tree are

$$\text{Site } 60\% + \text{Contribution } 80\% + \text{Placement } 85\% = 225\%$$

$$225\% \div 3 = 75\% \text{ Location rating}$$

## Trunk Formula Method Work Sheet

Tree # 3

Case # Cal Property W/ Street 3 South Date 3/1/17  
 Appraiser Mike Branson

## Field Observations

1. Species Coast live oak
2. Condition 69 %
3. Trunk Circumference \_\_\_\_\_ in./cm Diameter 10 in./cm
4. Location % = [Site 60 % + Contribution 50 % + Placement 40 %]  
 $\div 3 = \underline{50}$  %

## Regional Plant Appraisal Committee and/or Appraiser-Developed or -Modified Information

5. Species rating 90 %
6. Replacement Tree Size (diameter) 1.63 in./cm  
 (Trunk Area) 2.09 in<sup>2</sup>/cm<sup>2</sup> TA<sub>R</sub>
7. Replacement Tree Cost \$ 172.73  
 (see Regional Information to use Cost selected)
8. Installation Cost \$ 172.73
9. Installed Tree Cost (#7 + #8) \$ 345.46
10. Unit Tree Cost \$ 82.82 per in<sup>2</sup>/cm<sup>2</sup>  
 (see Regional Information to use Cost selected)

## Calculations by Appraiser using Field and Regional Information

11. Appraised Trunk Area:  
 (TA<sub>A</sub> or ATA<sub>A</sub>; use Tables 4.4-4.7)  
 or  $c^2$  (#3) \_\_\_\_\_  $\times 0.08$   
 or  $d^2$  (#3) \_\_\_\_\_  $\times 0.785$  = 79 in<sup>2</sup>/cm<sup>2</sup>
12. Appraised Tree Trunk Increase (TA<sub>INCR</sub>) =  
 TA<sub>A</sub> or ATA<sub>A</sub> 79 in<sup>2</sup>/cm<sup>2</sup> (#11) - TA<sub>R</sub> 2.09 in<sup>2</sup>/cm<sup>2</sup> (#6) = 77 in<sup>2</sup>/cm<sup>2</sup>
13. Basic Tree Cost = TA<sub>INCR</sub> (#12) 77 in<sup>2</sup>/cm<sup>2</sup>  $\times$  Unit Tree Cost (#10) \$ 82.82  
 per in<sup>2</sup>/cm<sup>2</sup> + Installed Tree Cost (#9) \$ 345.46 = \$ 6715
14. Appraised Value = Basic Tree Cost (#13) \$ 6715  $\times$  Species rating  
 (#5) 90 %  $\times$  Condition (#2) 69 %  $\times$  Location (#4) 50 % = \$ 2085
15. If the Appraised Value is \$5,000 or more, round it to the nearest \$100; if it is less, round to the nearest \$10.
16. Appraised Value = (#14) \$ 2100

Items 5 through 10 are determined by the Regional Plant Appraisal Committee. The Wholesale Replacement Tree Cost, the Retail Replacement Tree Cost, or the Installed Tree Cost (#9) divided by the Replacement Tree Size (#6) can be used for the Unit Tree Cost (#10), or it can be set by the Regional Plant Appraisal Committee.

Tree # 3 10" const live oak

**Condition**

The **Condition** of a plant is determined by evaluating its present structure and health and, if necessary, its structure and health before being destroyed or damaged. It may be necessary to climb a tree to be able to properly evaluate its health as well as its structure. If the structure of a tree is questionable, its proximity to a target can be important in rating tree structure. Roots, trunk, and scaffold branches are evaluated both for structure and for health, while small branches, twigs, and foliage and/or buds are rated only for health.

The scoring system both for structure and for health is

No apparent problems	4
Minor problems	3
Major problems	2
Extreme problems	1

Guide to judging plant **Condition**. [Table 4.3 from the *Guide*]

**Factor 1: Roots\***

(A root collar inspection may be warranted.)

Root anchorage			
Collar/flare soundness			
Mechanical injury			
Girdling/kinked roots			
Compaction/waterlogged roots			
Toxic gases/chemical symptoms			
Presence of insects or disease			
Mushrooms (may need to interview owner)			
	3	+	3 = 6
	(1-4)		(1-4) (2-8)

**Factor 2: Trunk\***

(Core sampling or climbing may be needed and/or warranted to inspect the trunk.)

Sound bark and wood			
Cavities			
Mechanical or fire injury			
Cracks (frost or other)			
Swollen or sunken areas			
Presence of insects or disease			
Conks			
	3	+	3 = 6
	(1-4)		(1-4) (2-8)

**Factor 3: Scaffold Branches\***

(Climbing the tree may be warranted to inspect the branches.)

Strong attachments			
Smaller diameter than trunk where attached			
Vertical branch distribution			
Free of included bark			
Free of decay and cavities			
Well pruned			
Well-proportioned/proper taper			
Wound closure			
Deadwood or fire injury			
Insects or disease			
	3	+	3 = 6
	(1-4)		(1-4) (2-8)



**Factor 4: Small Branches and Twigs**

Vigor of current shoots (compare previous growth)  
 Well distributed through canopy  
 Appearance of buds (color, shape, size for the species)  
 Presence of insects or disease  
 Presence of weak or dead twigs

2  
 Health Subtotal  
 (1-4)

**Factor 5: Foliage and/or Buds**

Size of foliage/buds  
 Coloration of foliage  
 Nutrient status  
 Herbicide, chemical, pollution injury  
 Wilted or dead leaves  
 Dry buds  
 Presence of insects or disease

2  
 Health Subtotal  
 (1-4)

Total subtotal points assessed for the five **Factors**

22  
 (8-32)

Divide subtotal points by 32 (total points possible)  
 and multiply by 100 to obtain the **Condition** rating

69  
 (25-100)

\*As explained in the text, both structure and health items are to be rated for the roots, the trunk, and the scaffold branches. Rating roots, trunk, and scaffold branches for both structure and health gives them the necessary importance in the **Condition** rating. Small branches and twigs, and foliage and/or buds, are rated only for health.

**Location**

The **Location** rating considers the **Site** of a property, the plant's functional and aesthetic **Contributions**, and the **Placement** of the plant in the landscape.

**Site**

The rating of a **Site** is expressed on a percentage basis (10 to 100 percent) in relation to its relative market value compared to other sites in the area or region and the quality and general appearance of the **Site** in which the appraised plant is located.

**Contribution**

The functional (F) and aesthetic (A) **Contributions** of a plant determine its value in landscape. Tree characteristics largely determine these **Contributions** and a plant's rating (see table, next page). These benefits are affected by plant size, shape, branch structure, and foliage density and distribution.

**Placement**

The **Placement** of a plant being appraised largely determines how effective it is in providing its functional and aesthetic attributes. For example, a single specimen tree has greater value than would the same tree as one of many. The **Placement** of a tree can also have an unfavorable effect on its **Contribution**, such as proximity to overhead wires, street lights, or buildings.

**Location determination**

Average the **Site**, **Contribution**, and **Placement** ratings to determine the **Location** rating. For example, the ratings for a tree are

$$\begin{aligned} \text{Site } 60\% + \text{Contribution } 80\% + \text{Placement } 85\% &= 225\% \\ 225\% \div 3 &= 75\% \text{ Location rating} \end{aligned}$$

## Trunk Formula Method Work Sheet

Tree #4

Case # Soles Property W/Forest 3 South Dec. Date 3/1/17  
 Appraiser Mike Branson

## Field Observations

1. Species Coast live oak
2. Condition 69 %
3. Trunk Circumference \_\_\_\_\_ in./cm Diameter 9 in./cm
4. Location % = [Site 60 % + Contribution 50 % + Placement 40 %]  
 $\div 3 = 50$  %

## Regional Plant Appraisal Committee and/or Appraiser-Developed or -Modified Information

5. Species rating 90 %
6. Replacement Tree Size (diameter) 1.63 in./cm  
 (Trunk Area) 2.09 in<sup>2</sup>/cm<sup>2</sup> TA<sub>R</sub>
7. Replacement Tree Cost \$ 172.73  
 (see Regional Information to use Cost selected)
8. Installation Cost \$ 172.73
9. Installed Tree Cost (#7 + #8) \$ 345.46
10. Unit Tree Cost \$ 82.82 per in<sup>2</sup>/cm<sup>2</sup>  
 (see Regional Information to use Cost selected)

## Calculations by Appraiser using Field and Regional Information

11. Appraised Trunk Area:  
 (TA<sub>A</sub> or ATA<sub>A</sub>; use Tables 4.4-4.7)  
 or  $c^2$  (#3) \_\_\_\_\_  $\times 0.08$   
 or  $d^2$  (#3) \_\_\_\_\_  $\times 0.785$  = 64 in<sup>2</sup>/cm<sup>2</sup>
12. Appraised Tree Trunk Increase (TA<sub>INCR</sub>) =  
 TA<sub>A</sub> or ATA<sub>A</sub> 64 in<sup>2</sup>/cm<sup>2</sup> (#11) - TA<sub>R</sub> 2.09 in<sup>2</sup>/cm<sup>2</sup> (#6) = 62 in<sup>2</sup>/cm<sup>2</sup>
13. Basic Tree Cost = TA<sub>INCR</sub> (#12) 62 in<sup>2</sup>/cm<sup>2</sup>  $\times$  Unit Tree Cost (#10) \$ 82.82  
 per in<sup>2</sup>/cm<sup>2</sup> + Installed Tree Cost (#9) \$ 345.46 = \$ 5480
14. Appraised Value = Basic Tree Cost (#13) \$ 5480  $\times$  Species rating  
 (#5) 90 %  $\times$  Condition (#2) 69 %  $\times$  Location (#4) 50 % = \$ 1701
15. If the Appraised Value is \$5,000 or more, round it to the nearest \$100; if it is less, round to the nearest \$10.
16. Appraised Value = (#14) \$ 1700

Items 5 through 10 are determined by the Regional Plant Appraisal Committee. The Wholesale Replacement Tree Cost, the Retail Replacement Tree Cost, or the Installed Tree Cost (#9) divided by the Replacement Tree Size (#6) can be used for the Unit Tree Cost (#10), or it can be set by the Regional Plant Appraisal Committee.

Tree # 4 9" coast live oak

**Condition**

The **Condition** of a plant is determined by evaluating its present structure and health and, if necessary, its structure and health before being destroyed or damaged. It may be necessary to climb a tree to be able to properly evaluate its health as well as its structure. If the structure of a tree is questionable, its proximity to a target can be important in rating tree structure. Roots, trunk, and scaffold branches are evaluated both for structure and for health, while small branches, twigs, and foliage and/or buds are rated only for health.

The scoring system both for structure and for health is

No apparent problems	4
Minor problems	3
Major problems	2
Extreme problems	1

Guide to judging plant **Condition**. [Table 4.3 from the *Guide*]

**Factor 1: Roots\***

(A root collar inspection may be warranted.)

Root anchorage			
Collar/flare soundness			
Mechanical injury			
Girdling/kinked roots			
Compaction/waterlogged roots			
Toxic gases/chemical symptoms			
Presence of insects or disease			
Mushrooms (may need to interview owner)			
	3	+	3 = 6
	(1-4)		(1-4) (2-8)

**Factor 2: Trunk\***

(Core sampling or climbing may be needed and/or warranted to inspect the trunk.)

Sound bark and wood			
Cavities			
Mechanical or fire injury			
Cracks (frost or other)			
Swollen or sunken areas			
Presence of insects or disease			
Conks			
	3	+	3 = 6
	(1-4)		(1-4) (2-8)

**Factor 3: Scaffold Branches\***

(Climbing the tree may be warranted to inspect the branches.)

Strong attachments			
Smaller diameter than trunk where attached			
Vertical branch distribution			
Free of included bark			
Free of decay and cavities			
Well pruned			
Well-proportioned/proper taper			
Wound closure			
Deadwood or fire injury			
Insects or disease			
	3	+	3 = 6
	(1-4)		(1-4) (2-8)

<b>Factor 4: Small Branches and Twigs</b>	
Vigor of current shoots (compare previous growth)	
Well distributed through canopy	
Appearance of buds (color, shape, size for the species)	
Presence of insects or disease	
Presence of weak or dead twigs	2
	Health Subtotal (1-4)
<hr/>	
<b>Factor 5: Foliage and/or Buds</b>	
Size of foliage/buds	
Coloration of foliage	
Nutrient status	
Herbicide, chemical, pollution injury	
Wilted or dead leaves	
Dry buds	
Presence of insects or disease	2
	Health Subtotal (1-4)
<hr/>	
Total subtotal points assessed for the five <b>Factors</b>	22 (8-32)
<hr/>	
Divide subtotal points by 32 (total points possible) and multiply by 100 to obtain the <b>Condition</b> rating	69 (25-100)

\*As explained in the text, both structure and health items are to be rated for the roots, the trunk, and the scaffold branches. Rating roots, trunk, and scaffold branches for both structure and health gives them the necessary importance in the **Condition** rating. Small branches and twigs, and foliage and/or buds, are rated only for health.

**Location**

The **Location** rating considers the **Site** of a property, the plant's functional and aesthetic **Contributions**, and the **Placement** of the plant in the landscape.

**Site**

The rating of a **Site** is expressed on a percentage basis (10 to 100 percent) in relation to its relative market value compared to other sites in the area or region and the quality and general appearance of the **Site** in which the appraised plant is located.

**Contribution**

The functional (F) and aesthetic (A) **Contributions** of a plant determine its value in landscape. Tree characteristics largely determine these **Contributions** and a plant's rating (see table, next page). These benefits are affected by plant size, shape, branch structure, and foliage density and distribution.

**Placement**

The **Placement** of a plant being appraised largely determines how effective it is in providing its functional and aesthetic attributes. For example, a single specimen tree has greater value than would the same tree as one of many. The **Placement** of a tree can also have an unfavorable effect on its **Contribution**, such as proximity to overhead wires, street lights, or buildings.

**Location determination**

Average the **Site**, **Contribution**, and **Placement** ratings to determine the **Location** rating. For example, the ratings for a tree are

$$\text{Site } 60\% + \text{Contribution } 80\% + \text{Placement } 85\% = 225\%$$

$$225\% \div 3 = 75\% \text{ Location rating}$$

Trunk Formula Method Work Sheet

Tree #5

Case # Soedg Property W/ Forest 3 south Ocean Date 3/1/17  
 Appraiser Mike Branson

Field Observations

1. Species Coast live oak
2. Condition 69 %
3. Trunk Circumference \_\_\_\_\_ in./cm Diameter 6 in./cm
4. Location % = [Site 60% + Contribution 30% + Placement 30%]  
 ÷ 3 = 40 %

Regional Plant Appraisal Committee and/or Appraiser-Developed or -Modified Information

5. Species rating 90 %
6. Replacement Tree Size (diameter) 1.63 in./cm  
 (Trunk Area) 2.09 in<sup>2</sup>/cm<sup>2</sup> TA<sub>R</sub>
7. Replacement Tree Cost \$ 172.73  
 (see Regional Information to use Cost selected)
8. Installation Cost \$ 172.73
9. Installed Tree Cost (#7 + #8) \$ 345.46
10. Unit Tree Cost \$ 82.82 per in<sup>2</sup>/cm<sup>2</sup>  
 (see Regional Information to use Cost selected)

Calculations by Appraiser using Field and Regional Information

11. Appraised Trunk Area:  
 (TA<sub>A</sub> or ATA<sub>A</sub>; use Tables 4.4-4.7)  
 or c<sup>2</sup> (#3) \_\_\_\_\_ × 0.08  
 or d<sup>2</sup> (#3) \_\_\_\_\_ × 0.785  
 = 28 in<sup>2</sup>/cm<sup>2</sup>
12. Appraised Tree Trunk Increase (TA<sub>INCR</sub>) =  
 TA<sub>A</sub> or ATA<sub>A</sub> 28 in<sup>2</sup>/cm<sup>2</sup> (#11) - TA<sub>R</sub> 2.09 in<sup>2</sup>/cm<sup>2</sup> (#6) = 26 in<sup>2</sup>/cm<sup>2</sup>
13. Basic Tree Cost = TA<sub>INCR</sub> (#12) 26 in<sup>2</sup>/cm<sup>2</sup> × Unit Tree Cost (#10) \$ 82.82  
 per in<sup>2</sup>/cm<sup>2</sup> + Installed Tree Cost (#9) \$ 345.46 = \$ 2499
14. Appraised Value = Basic Tree Cost (#13) \$ 2499 × Species rating  
 (#5) 90% × Condition (#2) 69% × Location (#4) 40% = \$ 620
15. If the Appraised Value is \$5,000 or more, round it to the nearest \$100; if it  
 is less, round to the nearest \$10.
16. Appraised Value = (#14) \$ 620

Items 5 through 10 are determined by the Regional Plant Appraisal Committee. The Wholesale Replacement Tree Cost, the Retail Replacement Tree Cost, or the Installed Tree Cost (#9) divided by the Replacement Tree Size (#6) can be used for the Unit Tree Cost (#10), or it can be set by the Regional Plant Appraisal Committee.

Tree 5 6" coast live oak

**Condition**

The **Condition** of a plant is determined by evaluating its present structure and health and, if necessary, its structure and health before being destroyed or damaged. It may be necessary to climb a tree to be able to properly evaluate its health as well as its structure. If the structure of a tree is questionable, its proximity to a target can be important in rating tree structure. Roots, trunk, and scaffold branches are evaluated both for structure and for health, while small branches, twigs, and foliage and/or buds are rated only for health.

The scoring system both for structure and for health is

No apparent problems	4
Minor problems	3
Major problems	2
Extreme problems	1

Guide to judging plant **Condition**. [Table 4.3 from the *Guide*]

**Factor 1: Roots\***

(A root collar inspection may be warranted.)

Root anchorage			
Collar/flare soundness			
Mechanical injury			
Girdling/kinked roots			
Compaction/waterlogged roots			
Toxic gases/chemical symptoms			
Presence of insects or disease			
Mushrooms (may need to interview owner)			
	3	+	3 = 6
	Structure +	Health =	Subtotal
	(1-4)	(1-4)	(2-8)

**Factor 2: Trunk\***

(Core sampling or climbing may be needed and/or warranted to inspect the trunk.)

Sound bark and wood			
Cavities			
Mechanical or fire injury			
Cracks (frost or other)			
Swollen or sunken areas			
Presence of insects or disease			
Conks			
	3	+	3 = 6
	Structure +	Health =	Subtotal
	(1-4)	(1-4)	(2-8)

**Factor 3: Scaffold Branches\***

(Climbing the tree may be warranted to inspect the branches.)

Strong attachments			
Smaller diameter than trunk where attached			
Vertical branch distribution			
Free of included bark			
Free of decay and cavities			
Well pruned			
Well-proportioned/proper taper			
Wound closure			
Deadwood or fire injury			
Insects or disease			
	3	+	3 = 6
	Structure +	Health =	Subtotal
	(1-4)	(1-4)	(2-8)

**Factor 4: Small Branches and Twigs**

Vigor of current shoots (compare previous growth)  
 Well distributed through canopy  
 Appearance of buds (color, shape, size for the species)  
 Presence of insects or disease  
 Presence of weak or dead twigs

2  
 Health Subtotal  
 (1-4)

**Factor 5: Foliage and/or Buds**

Size of foliage/buds  
 Coloration of foliage  
 Nutrient status  
 Herbicide, chemical, pollution injury  
 Wilted or dead leaves  
 Dry buds  
 Presence of insects or disease

2  
 Health Subtotal  
 (1-4)

Total subtotal points assessed for the five **Factors**

22  
 (8-32)

Divide subtotal points by 32 (total points possible)  
 and multiply by 100 to obtain the **Condition** rating

69  
 (25-100)

\*As explained in the text, both structure and health items are to be rated for the roots, the trunk, and the scaffold branches. Rating roots, trunk, and scaffold branches for both structure and health gives them the necessary importance in the **Condition** rating. Small branches and twigs, and foliage and/or buds, are rated only for health.

**Location**

The **Location** rating considers the **Site** of a property, the plant's functional and aesthetic **Contributions**, and the **Placement** of the plant in the landscape.

**Site**

The rating of a **Site** is expressed on a percentage basis (10 to 100 percent) in relation to its relative market value compared to other sites in the area or region and the quality and general appearance of the **Site** in which the appraised plant is located.

**Contribution**

The functional (F) and aesthetic (A) **Contributions** of a plant determine its value in landscape. Tree characteristics largely determine these **Contributions** and a plant's rating (see table, next page). These benefits are affected by plant size, shape, branch structure, and foliage density and distribution.

**Placement**

The **Placement** of a plant being appraised largely determines how effective it is in providing its functional and aesthetic attributes. For example, a single specimen tree has greater value than would the same tree as one of many. The **Placement** of a tree can also have an unfavorable effect on its **Contribution**, such as proximity to overhead wires, street lights, or buildings.

**Location determination**

Average the **Site**, **Contribution**, and **Placement** ratings to determine the **Location** rating. For example, the ratings for a tree are

$$\text{Site } 60\% + \text{Contribution } 80\% + \text{Placement } 85\% = 225\%$$

$$225\% \div 3 = 75\% \text{ Location rating}$$



# CITY OF CARMEL-BY-THE-SEA

## Forest and Beach Commission

### Staff Report

March 9, 2017  
Orders

**TO:** Forest and Beach Commissioners  
**FROM:** Mike Branson, City Forester  
**SUBJECT:** Arbor Day program for 2017

#### RECOMMENDATION

Discuss options for an Arbor Day event.

#### BACKGROUND / SUMMARY

Following discussion of an Arbor Day event during the February Commission meeting, Chair Refuerzo has appointed Commissioners Massoudi and Saroyan to an ad hoc committee to work on the 2017 Arbor Day program. Arbor Day updates will be a regular agenda item for the entire Commission to provide input on the recommendations from the ad hoc committee. Since the committee has just been appointed, this meeting is an opportunity for the Commission to provide additional thoughts and ideas for the ad hoc committee to consider.

The City of Carmel does not have an officially designated "Arbor Day". A day to recognize and promote the value of trees to the community fulfills a duty and responsibility of the Forest and Beach Commission, as well as, meeting one of the requirements for designation as a Tree City USA.

Previous "Arbor Day" events:

2005 - Tree seedling giveaway in December at Devendorf Park.

2006, 2007, and 2008 - Guest speaker presentations on tree care, pruning, and landscaping were co-sponsored with the Friends of Carmel Forest at Sunset Center.

2009 – Tree care workshop in February at Vista Lobos. Presentations were made by the City Forester and arborist Peter Quintanilla from the Friends of Carmel Forest.

2010 – Trees and Art event at the Sunset Center, Carpenter Hall. Guest speakers on the Carmel forest management plan and the use of local trees in the art history of Carmel and the Monterey Peninsula. The event also featured a juried art and photo competition. This event was co-sponsored with the Friends of Carmel Forest.

2011 – Tree forum featuring local architect Paul Byrne speaking on sustainable building, Monterey Pine Watch presented an overview of their new book on the Monterey pine forest. Sustainable Carmel introduced their organization and their plans for the future, and the city forester spoke about Carmel's tree rules.



2012 – Japanese cherry tree planting ceremony in Devendorf Park. This was attended by the Mayor, City Council members, Forest and Beach Commissioners and representatives of the Japanese embassy in San Francisco.

2013 – Tree care workshop was presented by the City Forester at the Vista Lobos community room.

2014 - The Carmel Forest and Beach Commission presented an educational program, “Trees at Risk – Managing Your Trees in Times of Drought,” to provide guidance to homeowners on tree and landscape care under drought conditions. Carmel City Forester Mike Branson spoke on the condition of Carmel’s urban forest and on management practices to help trees through drought conditions. Independent scientist and environmental consultant Lee Klinger spoke on soil health and on ways to nurture the soil to benefit trees and plants. Landscape architect Paul Deering discussed plant selection and landscape watering strategies and priorities. He also led a walking tour at the end of the program to show examples of landscape practices and choices in nearby homes.

2015 & 2016 – The Forest and Beach Commission organized Arbor Day events to renovate the grounds of First Murphy Park. Work entailed planting new trees and shrubs, installing new drip irrigation and spreading mulch over the planter beds.

## ATTACHMENT

1. N/A

City Trees Removed (upper/lower)	FEB. 20(18/2)	YTD 27(24/3)	2016 143	City Trees Planted (upper/lower)	FEB. 11(5/6)	YTD 11(5/6)	2016 46
w/ Monte Verde bet. 13th & Santa Lucia				n/ 3rd bet Santa Fe & Torres			
w/ Lincoln bet. 3rd & 4th				e/ Torres bet 4th & 5th			
ne/ 6th & Santa Fe				n/ 3rd bet. Lincoln & Monte Verde			
c/ Junipero bet. 9th & 10th				s/ 8th bet. Monte Verde & Casanova			
e/ Torres bet. 4th & 5th				n/ 12th bet San Carlos & Dolores			
w/ Santa Rita bet. 1st & 2nd				e/ Casanova bet. 9th & 10th			
e/ Forest bet. 8th & Mt. View				w/ Casanova bet. 9th & 10th			
s/ Ocean bet. Lincoln & Monte Verde							
n/ Ocean bet. Casanova & Camino Real							
26041 Ridgewood							
26025 Ridgewood							
e/ Mission bet. 3rd & 4th							
e/ Mission bet. 4th & 5th							
w/ Junipero bet. 3rd & 4th							
sw/ Mission & 2nd							
n/ Ocean bet. Guadalupe & Santa Rita							
e/ Santa Fe bet. 1st & 2nd							
n/ 4th bet. Guadalupe & Santa Rita							
w/ San Carlos bet. Ocean & 7th							
<b>Private Removal Permits (upper/lower)</b>	<b>9(8/4)</b>	<b>18(15/7)</b>	<b>117</b>	<b>Private Planting Requirements</b>	<b>3(0/3)</b>	<b>7(1/6)</b>	<b>68</b>
se/ Mt. View & Junipero				15 gal. lower canopy			
e/ Camino del Monte bet. Junipero & 1st				15 gal. lower canopy			
ne/ 6th & Guadalupe							
w/ Junipero bet. 2nd & 3rd							
se/ Monte Verde & 11th							
e/ Junipero bet. 10th & 11th							
e/ Dolore bet. Vista & 1st							
e/ Guadalupe bet. Ocean & 7th							
se/ 5th & San Carlos							
<b>Construction Permits (remove/prune)</b>	<b>1(1/0)</b>	<b>1(1/0)</b>	<b>24</b>	<b>Construction Planting Requirements</b>	<b>1</b>	<b>1</b>	<b>13</b>
E/ Mission bet. 9th & 10th				2 - 15 gal. upper canopy			
<b>Private Pruning Permits</b>	<b>6</b>	<b>7</b>	<b>24</b>	<b>Trees Under Care</b>			
e/ Viscaïno bet. Mt. View & Flanders							
e/ Scenic bet. 9th & 10th							
e/ Dolores bet. Vista & 1st							
3 Trail View							
e/ Lobos bet. 3rd & 4th							
se/ Mt. View & Junipero							
<b>City Pruning by contractors</b>				<b>Construction Final</b>			
level I - total tree	0	0	22	Planted			
level II - hazard /emergency	7	25	5				
level III - specific purpose	0	0	0				
<b>Trees planted / removed 2013 to date</b>	<b>289 / 545 (53%)</b>						