



Tree Board *Handbook*



Tree Board Handbook

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You have received this Tree Board Handbook for one of two good reasons:

- You are a new member of your community's tree board.
- Your tree board wants to raise the bar and be more active or productive.

Whatever the reason, this handbook is intended to help you appreciate the important responsibility that is yours and the awesome potential for being a positive force in your community. And — to borrow from Dr. Seuss — to remind you that you “speak for the trees, for the trees have no tongues.”

You no doubt have a passion for trees, or you would not be in your current position. That's a great first step. You may also be a little unsure about what an “ideal” tree board should be or how you can contribute. This handbook is intended to address both of those issues. It is a primer, not an advanced course or technical how-to. The last chapter offers other resources for more advanced learning. As you'll see, there is plenty of help available to take you as far as you want to go in the wonderful world of trees and tree care. But first, the basics.

Thank you for your service and your interest in the stewardship of community trees.

The content for this handbook has been selected by a panel of Arbor Day Foundation staff and state urban and community forestry coordinators. Their insights are based on working with the more than 3,500 cities, towns, and military bases that have achieved Tree City USA recognition.

The current edition is a successor to an earlier edition written by Gene W. Grey.



■ What Do We Call It?

Tree board is just one of several names used to identify the body of individuals charged with looking after the welfare of trees in the community. In this publication we use this term, but in some communities, the same functions come under other titles. These include tree commission, tree committee, beautification committee, and others. Sometimes the word “advisory” is inserted to more clearly define the main function of the organization, such as tree advisory board. By whatever name, this publication addresses the community’s official body as differentiated from nonprofit organizations or volunteer groups that may provide services such as tree planting and pruning.

■ Your Role on the Tree Board

There is some reason you are on the tree board. It may be your background or expertise in a particular subject, or — more importantly — your interest in trees.

The key criteria for being a contributing tree board member are enthusiasm and dedication, not technical expertise. It does

help to have at least one member who is professionally involved in some aspect of the green industry, but it is even more important to have members who are willing to dedicate time and energy to attending meetings and events, sharing the workload, and compatibly interacting with other members. Connection with the community is also important. It helps to have members who are involved with a service club, the Garden Club, or similar community organizations. This expands the board’s network of support and assistance when needed. Ideally, there will also be two ex officio members: a person from the city department responsible for tree care and a member of city council to serve as liaison.

Age is clearly not a criterion. Active and productive board members have ranged from 16 to 86. Older members can provide perspective and inspiration. Young people are important for new ideas, understanding current communication techniques, and developing leadership for the future. Having a cross section of the community’s cultural fabric is also important for success and is discussed more in Chapter 4.

In all cases, a sincere interest in trees and how they benefit the community is the

The key criteria for being a contributing tree board member are enthusiasm and dedication, not technical expertise.

primary requirement for being a contributing member of the board.

■ Ownership of the Urban Forest

The urban forest has been defined as “the sum of all woody and associated vegetation in and around dense human settlements, ranging from small communities in rural settings to metropolitan regions.” Smaller communities sometimes object to use of the term “urban,” so a synonym is “community forest.” For convenience in this publication, “urban forest” is used, but the concepts are applicable to communities of all sizes.

Whether in a small town or a large city, the trees comprising the “urban forest” are part of a complex system of ownerships and vegetative situations. In fact, your urban forest is in the hands of at least three managers: private owners, the city, and utilities.

Private Owners

Private ownership is an extremely important part of the picture because approximately 90 percent of our trees are in yards or on other private parcels. These trees need to be accounted for when calculating the overall benefits of the forest. Tools like i-Tree Eco and i-Tree Canopy can do this in an unobtrusive way (see Chapter 3). In



Utilities have both the responsibility and the right to keep their lines clear.

most communities, direct management of trees on private property is outside the perimeters of tree board actions, although ordinances sometimes make provisions for the inspection of suspected nuisance trees, such as those in hazardous condition that might fall on a sidewalk or are possibly infected with insects or disease. These provisions and education are the most commonly used tools for working with trees on private property.

However, ownership is not absolute. By law, landowners must sometimes give up certain rights for the benefit of society. In the case of urban forests, this “giving of rights” is most often in the form of easements for utilities and tree lawns (also called planting strips or boulevards). Complete or partial responsibility for management of trees on such easements may also be assigned to an entity like the city or a utility.

City Government

City governments generally have responsibility for direct management of the trees in parks, other city-owned lands, and along streets in the rights-of-way (ROW). However, as mentioned above, ROW management varies from city to city. In some cases, those trees are managed entirely by city crews. In others, they may be entirely the responsibility of the adjoining property owner. This may seem unfair, but it is done in order to save tax dollars that would be needed for the city to provide tree maintenance. Another method is shared responsibility. This works by having the city purchase and plant the trees, with the property owner being responsible for their care. Another variation requires permits for any planting or removal, but otherwise the property owner



is responsible. You will need to find out how it is done in your community. Ideally, this is spelled out in a tree ordinance.

Utilities

Utilities include cables, water and sewer pipes, and electric lines (both private and publicly owned). Utilities — both above and below ground — occupy space throughout every community and are often a source of conflict with trees. Millions of dollars are spent each year keeping overhead lines clear of tree limbs. There are two good reasons for this: (1) to provide uninterrupted service, and (2) for public safety, especially from keeping children or other tree climbers from coming in contact with the lines. Utilities typically have both the responsibility and the right to keep their lines clear. However, there is considerable opportunity for the tree board to work with utilities. One way is homeowner education about planting the right tree in the right place. Another is to partner with the utilities so that they replace problem trees with low-growing species. Still another is to work with the utility

to ensure root protection when trenching is necessary and for careful pruning of limbs. All these methods have worked successfully in communities, whereas a do-nothing attitude or policy does not bode well for trees. An Arbor Day Foundation program called Tree Line USA provides guidelines for cooperation and recognizes public and private utilities that do a good job of protecting community tree resources.

Other Situations

When considering trees, their ownership, their welfare, and their potential contributions to your community, do not limit your thinking to street trees. Here are other places where tree care is needed and the benefits can be considerable:

- Parks, both “passive” and where sports or other activities are the primary purpose
- Linear parks, bicycle lanes, and walkways

- Other public use areas, such as around offices, courthouses, schools, and maintenance yards
- Public and private colleges and universities (A program similar to Tree City USA — Tree Campus USA — has been created specifically for institutions of higher education.)
- Commercial and industrial areas
- Railways, both in use or abandoned
- Cemeteries
- Natural areas in odd corners of the city, on steep hillsides, along city stairs, etc.
- Riparian areas along rivers, creeks, lakes, and marsh lands
- The “urban/wildland interface” that may be outside the city but zoned as within the city’s area of impact

■ Your Legal Authority

Tree boards reflect the will of the community to have an official body that



is responsible for the welfare of its urban forest. This responsibility is usually broader than trees alone and includes other vegetation such as shrubs and vines. In fact, the best term for the whole green environment in a community is “urban ecosystem.”

The focus of a tree board is usually on public trees, such as street trees in the right-of-way, trees on the grounds around public buildings, or in parks. However, when considering the benefits provided by trees, the liabilities of nuisance trees, or the threat of pest epidemics, the responsibility of the tree board can sometimes extend to private property.

The legal authority for a tree board usually comes from a city ordinance. Sometimes it is by request of a city official or by some other less formal means, but for the sake of continuity and liability coverage, it is best founded through ordinance. Sometimes it is a stand-alone section of

Generally, tree board members are covered by the same protections as city employees if the board is officially designated in an ordinance, properly appointed, and conducting business as defined in the ordinance.

the city’s ordinances, but more commonly it is part of a broader tree or landscape ordinance as described below.

■ City Tree Ordinances

An ordinance is a statute (law) enacted by a city or town. Importantly, there is no “one size fits all.” A tree ordinance should reflect the will of the people and be fashioned to meet the needs of the community, regardless of size. That said, your ordinance should do three things:

1. Provide authority to conduct tree-related programs.
2. Define responsibility. Who is responsible for the public trees?
3. Set forth minimum standards for protection of trees and their management to provide for public safety, health, and general welfare.

Here are the elements of a tree ordinance, usually called “sections,” that will accomplish the above:

- Purpose of the ordinance
- Definitions (public tree, nuisance tree, etc.)
- Authority and powers (the city forester or other city official in charge and their responsibilities, including enforcement of the ordinance and establishment of a tree board (if it is not in a separate ordinance); and their responsibilities)
- Applicability (the property to which the ordinance applies)
- Planting, maintenance, and removal of trees in the public right-of-way (permits,



Action Items

❑ Review your tree ordinance. Is it adequate to provide for proper care of your urban forest? Does it cover the important points as outlined in this chapter?

❑ Talk with your city attorney about any unclear or missing provisions of your ordinance. Ask about liability protection for tree board members.

❑ Brainstorm other legal instruments that may influence the urban forest (such as codes, permits, subdivision regulations, etc.).

❑ Find out if you can legally accept and spend donated funds. If you cannot, consider other ways to do this, such as through a nonprofit organization.

❑ Review the ordinance or other document that established your tree board and its responsibilities.

In larger communities, a small amount of funding is often included in the city's annual budget to cover routine expenses of the tree board.

prohibited species, spacing, distance from corners, etc.)

- Who is responsible for street tree care (the city or the adjacent property owner?)
- Penalties and an appeal process

A good first step to becoming a member of a tree board or attempting to improve a board is to locate and read your community's tree ordinance. This is often found online at the city's official website. Otherwise, ask your city clerk to make a copy of any sections of the city's ordinances that apply to trees and landscaping. You may also want to review Tree City USA Bulletin No. 9 – "How to Write an Ordinance" to gain additional insights.

■ What About Liability?

Generally, tree board members are covered by the same protections as city employees if the board is officially designated in an ordinance, properly appointed, and conducting business as defined in the ordinance. This underscores the importance of having a tree ordinance, regardless of how small the community might be, and for including a description of all the things the group may be expected to do.

When a tree board operates outside its defined functions, the issue of liability becomes foggier. For example, if a tree board is to function solely in an advisory role, it may not be covered by the city's insurance if it decides to plant or prune trees. In this case, it is advisable to use a waiver form that releases the city or others in case of injury. Of course, gross negligence or intentional misconduct in any case could open an individual (or more likely the deeper-pocketed city) to be successfully sued.

In some states, tree boards must be aware of "open meeting" laws and conduct their activities accordingly.

This is not intended to be legal advice and the city's attorney should be consulted to see what laws might be applicable in your area. Generally, there are few, if any, legal issues resulting from service on a tree board.

■ Funding and Budgets

In larger communities, a small amount of funding is often included in the city's annual budget to cover routine expenses of the tree board. These may include publications, materials for a fair booth, Arbor Day ceremonies, and similar expenses.

Smaller communities may be at the mercy of fundraising. Here are some fundraising examples:

- Contributions through Adopt-a-Tree programs or annual fund drives
- Bake sales or auctions
- Utility bill inserts asking for donations
- Creation of a local tree trust (established through an endowment and/or memorial donations with interest used to fund board activities)
- City funds derived from small assessments per foot of sidewalk or fines for damage to trees
- Grants ranging from appeals to local service clubs to statewide organizations

In either case, it is important to find out if your tree board can legally accept money. If not, find a mechanism that is allowed, such as a fund the city may already have established or working in cooperation with a local nonprofit group.

Being Part of an Effective Tree Board

CHAPTER 2



Volunteers on tree boards come from all walks of life, educational backgrounds, and age groups. But one thing that can be said about virtually all members is they want to do a good job and don't want to waste their time. They want to be part of an effective tree board, meaning it has impact and gets things done.

And an important job it is. Trees are voiceless members of our community, yet they provide aesthetics and essential eco-services, such as improving air and water quality and reducing energy consumption. The tree board is key to their protection and longevity.

When you begin your service as a tree board member, you may be fortunate to find yourself part of an effective, well-functioning group of dedicated individuals. Then again, some boards are less active, inefficient, or actually dysfunctional. Either way, opportunity knocks for you to be the highly contributing member you want to be. This chapter outlines what might be considered a goal or the ideal of what a tree board can be.

■ What is Your Board's Charge?

A starting point is to understand the charge, or mission, of your tree board. As



Common Functions of a Tree Board

- *Policy Formulation.* This is the creation of guiding principles, such as those reflected in a tree ordinance. For example, who is responsible for right-of-way trees, what rules should be imposed on developers, etc.
- *Advising.* A board can provide citizen input to the city forester and/or mayor and city council on tree-related issues.
- *Administration.* In smaller communities, this may include keeping records, making assignments, overseeing the Tree City USA application process, and similar tasks.
- *Management.* Again, this would mostly be a function in smaller communities, where the tree board may be directly responsible for tree care such as planting, pruning, watering, and removals.
- *Representation.* Sometimes boards are structured to make sure certain community interests are included, such as nursery operators, arborists, Master Gardeners, downtown merchants, and similar groups. At the very least, a tree board member is a representative of the town's residents.
- *Advocacy.* This is a tough one, and sometimes related to the function above. As a member of the board, you probably are — or should be — an advocate for the trees in your community. How you apply your advocacy, or balance it with the interests of any particular group you may represent, will help determine the success of urban forestry in your area. Compromise is sometimes a key to success, and it is essential to not alienate elected officials or other policymakers. At the same time, as a board member, your primary goal should be to advocate for good, sound urban forestry and for it to be conducted on a systematic and continuing basis.
- *Education.* Rare is the tree board that is not interested in and willing to help residents, including children, gain a better understanding about the benefits of trees and the need for planting and care.

pointed out in Chapter 1, this should be spelled out in a tree ordinance or sometimes by executive order or declaration of the mayor or city council/commission. In some small communities, the board may have

formed as the result of an incident, such as an invasive pest destroying trees, or to help with a community event. In any case, you and all members of the board must have a clear understanding of what you are charged

to do. As chartered, is the board advisory to the mayor and council or to the city forester or city arborist? Are you charged with making policy for an overall program, or are you to develop a city tree program and serve as labor? What limitations have been placed on your board, if any? Read the ordinance and ask questions.

Times and circumstances change, so another thing to consider is whether the original purpose of the board will still serve the needs of the community. If not, what latitude do you have for making adjustments to meet current and future needs?

The answers to these questions will get you off to a good start, making sure you are on the same page with city officials and your colleagues.

■ A Job Description

This may seem like something only created for employment, but it is also good for volunteers, including tree board members. Before joining the board, it can help a candidate decide whether participation is a good fit. Once a member, it provides clarity about what is expected, and even grounds for asking an unproductive member to resign. It should be in writing and include what is expected in the way of duties, time commitment, and meeting attendance. The example provided at the right, is just that — an example. Yours should be tailored to the needs of your community.

■ Keys to Effective Meetings

Time is our most precious possession, and nothing wastes more of it and has a more dampening effect on enthusiasm than long, dull meetings. Here are some proven techniques to make meetings productive and maintain the interest of tree board members:

1. Send reminders. Nothing kills productivity like missing members or unfilled assignments. The chair or secretary

should email or call members a few days ahead of each meeting to serve as a reminder. Members who are consistently absent should be replaced.

2. Start on time — and stay on time. Time is important to most people. The board chair needs to respect this and clearly ask members to do likewise.

Job Description

Volunteer Tree Board Member Pleasantville, Anyplace

General Responsibilities: Serve in an advisory capacity to city council, assist the city forester in educational efforts, plan and conduct annual Arbor Day activities, and participate in special projects such as tree plantings.

Qualifications:

- Resident of the City of Pleasantville
- An interest in trees and how they benefit the community
- The ability to work as a team member and actively participate in scheduled events
- Willingness to commit approximately six hours monthly, including one evening meeting per month, usually on Tuesdays

Activities:

Activities are variable, and some depend on the interests of board members. Those of a routine nature include:

- Assisting the city forester in developing and/or reviewing annually and updating as necessary a long-range plan for the city's urban forest.
- Reviewing annual work plans related to the urban forestry program with the city forester.
- Advising the mayor, city council, and city departments on matters concerning trees and related resources, including revisions of the city tree ordinance.
- Serving on an appeals panel regarding decisions to remove or allow the removal of trees in the city rights-of-way.
- Helping to plan and conduct an annual Arbor Day celebration on the last Friday in April.
- Participating in educational campaigns that may include occasional school and civic organization presentations, interviews with mass media, and creation of printed materials.
- Serving as liaison with organizations planning and conducting tree-related events or projects.

The 7 Habits of Effective Tree Boards

Based on years of experience in urban forestry, Paul Ries of Oregon State University sums up his idea of what constitutes an effective tree board. Members...

1. Know the board's mission and work accordingly.
2. Have a vision but understand limitations and plan accordingly.
3. Use their time wisely.
4. Have their eyes on the future, including sustainability of the board itself.
5. Seek to make connections throughout the community.
6. Value a process in which ideas are offered and developed.
7. Desire to inspire others to work with them.



3. Provide for comfort. The meeting room, including chairs and room temperature, are important. A pleasant, dignified meeting room will add an ambience of importance to the tree board's work. Beverages and treats help, too.

4. Have a purpose. If there is nothing to meet about, cancel the meeting. But there usually are matters for an active tree board to address. The chair should think in advance about what specifically needs to be accomplished at every meeting.

5. Use an agenda. Always have a printed agenda ready at the meeting — and use it. Begin by asking if there are additional

items and add any that need attention that day. Either formally or informally assign a time limit to each item and use that to stay on time.

6. Use Robert's Rules of Order. This time-honored device is another way for the chair to control the meeting. It is good to know and use the basics of Robert's Rules, but many tree boards use a modified version if less formality works for the group. More information is available online.

7. Manage discussion. The chair needs to be sensitive to the fact that some people tend to dominate discussions. It is the chair's responsibility to not only keep



discussion of any item from dragging on beyond the point of usefulness but also draw out those who are more reluctant to speak up on their own.

8. Add variety. Board meetings will remain appealing to members if they are not the same time after time. Occasionally, guest speakers and training materials — especially good audio-visuals or field trips — can keep things interesting.

9. Summarize. At the end of the meeting, review any assignments given to members and make certain that each has a clear due date. (Note: Members who habitually forget or miss deadlines are

usually the ones who do not take notes. If this is the case, suggest in private that it would help if they would at least make notations on their agenda sheets.)

10. End on time. Remember the precious possession concept and recognize that board members have other obligations. They will appreciate knowing they can leave at a specific time.

■ Working with Fellow Board Members and City Staff

Most tree boards have a mix of people who may not ordinarily be part of the same group under other circumstances. This diversity can be healthy and helpful, or it can

Social scientists in the U.S. Forest Service and universities have also linked personalities and motivational factors to the kind of tree board assignments that will most benefit the organization and the individual.

lead to misunderstandings and conflict. As a board member, you will also need to work with the city forester and a diverse group of professionals on the city staff. Taking into account people's differences in motivation, points of view, and personality can go along way in creating an effective Tree Board.

There are many personality tests that go into detail about differences among people. None of the characteristics or work habits they identify are either right or wrong. They are just different. The point is that these may help a diverse tree board work together more productively and help you work more effectively with other volunteers and city staff. More about personality tests can be found online, including some tests to see where you fit. For more information about personality assessments, such as Myers Briggs or True Colors, please see the references for Chapter 2 on page 42. Social scientists in the U.S. Forest Service and universities have also linked personalities and motivational factors to the kind of tree board assignments that will most benefit the organization and the individual. The following is a helpful summary of the motivations based on work by the Oregon State University Extension Service and University of Idaho faculty.

Recognition

Some volunteers are motivated by the need to be recognized for the good work they do. These people need



assignments that have well-defined outputs rather than vague or ongoing results.

- Ceremonial tree plantings
- Taking part in an Arbor Day ceremony
- Being on a TV or radio program
- Representing the city at Tree City USA award events
- Writing articles with a byline
- Serving as liaison with elected officials or businesses

Altruism/Public Duty

These volunteers are concerned more with the public interest. They tend to be idealistic and place a high premium on fairness, good decisions, and learning. They are a good fit for projects addressing communitywide goals, conflicting values, and understanding government and its operations.



- Planning and coordinating large tree planting projects
- Organizing Arbor Day or Tree City USA award ceremonies
- Serving as liaison with the planning commission, city council, or other units of city government
- Serving on beautification committees
- Developing or improving ordinances
- Conducting surveys or otherwise defining community desires and visions
- Helping to set goals
- Planning and conducting programs with schools or other organizations
- Promoting urban forestry with other groups

Affiliation

These individuals need social contacts,



a chance to work with others, and to make new friends. They need the support of other people and to feel part of a group. Solo tasks are not for them; social interaction is what is important.

- Participating in tree planting projects
- Planning and conducting parties and social events
- Conducting workshops
- Selling T-shirts, trees, memberships, and other fundraising
- Developing logos and media promotions
- Being in charge of volunteer recognition or award events
- Serving as liaison with service clubs or churches

Achievement

This means the desire to pursue excellence. These people are concerned about performing with perfection and being innovative. They are likely to be somewhat competitive, and they need challenging tasks, constant feedback on performance, and the opportunity to learn and do new things.



- Serving as liaison with local utilities to resolve conflicts involving trees and aesthetics
- Monitoring insect and disease conditions
- Providing leadership in hazard tree reduction projects
- Evaluating nursery stock and tracking planting survival
- Serving as neighborhood tree warden to monitor problems, do minor pruning, etc.
- Representing the tree board at training sessions or conferences

Power

These volunteers desire to have influence. They like to



be involved in decisions, and possessing authority is important to them. They also like to be in charge, direct others, and deal one-on-one with political leaders.

- Serving as committee chair
- Being on a board that has some decision-making powers
- Directing tree planting onsite

Action Items

❑ Develop a mission statement for your tree board, or review it if one already exists.

❑ Discuss your role as a board member with the board chair and/or other members of the board.

❑ Develop, or review and revise if necessary, board member job descriptions.

❑ Provide copies of “Keys to Effective Meetings” for all members of the board if helpful.

❑ Find ways to ensure continuity of members. Conversely, consider a way to ask a nonproductive member to leave.

❑ Consider having the group invite someone in who can conduct and explain one of the personality tests. Otherwise, have members list their skills and what they enjoy doing in context with the mission of the board.

There is no better way for a tree board to be effective than to have a harmonious relationship with the city forester — and other city employees, for that matter. They are the ones who ultimately have an enormous impact on the urban forest ...

- Developing proposals or position papers for decision-makers
- Serving as liaison with political figures
- Helping to enforce tree ordinance provisions

Preservation

Environmental responsibility is utmost on the minds of these volunteers. They want to make sure that any actions are in the best interests of the environment. They are especially watchful of real estate development in the community, and they are usually good at teaching others about environmental quality.



- Creating educational materials and programs
- Teaching children's programs
- Speaking at service clubs
- Working on planting, tree maintenance, and habitat improvement projects
- Helping to write and enforce tree ordinances
- Serving as liaison with the parks commission or staff
- Managing natural areas
- Fundraising

Working with the City Forester

In communities that have a city forester, city arborist, or someone on staff who serves in that capacity, it is essential that the

tree board works closely with that individual. Ideally, he or she will be an ex officio member of the board and attend meetings regularly. There is no better way for a tree board to be effective than to have a harmonious relationship with the city forester — and other city employees, for that matter. Remember that these people are the ones who ultimately have an enormous impact on the urban forest and, in most cases, have the technical knowledge about carrying out policies related to your trees.

Ensuring Continuity

Very often the vitality of a tree board (or even its creation) is due to one individual. Such a person is usually admiringly referred to as “the sparkplug.” Much of the success in Tree City USA communities is due to such people, and you may be fortunate to have one on your tree board. But there is a downside to this scenario. Quite frequently, when this individual leaves, the tree board flounders or even ceases to exist.

To ensure continuity, depth is needed. Interested individuals need to be brought on board, trained, and retained. One way to do this is a provision in the ordinance or other charter instrument specifying terms. Three-year terms are often used for this purpose, with expiration dates staggered so that no more than three or four people leave at the same time. Of course, it is a good idea to also provide opportunity for term renewals. It is just as important to maintain a full board. When members leave, they need to be immediately replaced.

It has been said that if you fail to plan, you plan to fail. Effective tree boards take planning seriously and attempt to be proactive. Good urban forestry depends on good planning.

There are many kinds of plans, and the size of your community will probably determine the scope of what is needed. The tree board may be involved with some city planning, and certainly needs an annual plan of its own to guide its activities. This diagram illustrates a broad overview of planning, regardless of whether it is your plan for tree board activities, the city's plan for management of the urban forest, or some combination. In all cases, the plan should be reviewed and updated annually, ideally in the beginning of the year.

■ A Master Plan for Management

This is the long-range view for the city's urban forest and is often a hefty document, frequently done on contract by firms that specialize in creating plans. In smaller communities, it may fall to the tree board to develop the master plan. Typical components of a master plan are:

- *History and Background* — This might include when and how tree management began, when the tree board was created, significant accomplishments

Master plan

States the mission and defines objectives. Identifies strategies to achieve objectives. Usually a function of the tree board.

Operational plans

Incremental (usually annual). Based on master plan. Outlines the approach. Usually a function of the city forestry department.

Budgets

Based on items in operational plans.

Plans of work

Internal documents for tree board and city forestry department, giving tasks and timetables.

Evaluation

Tracks progress toward goals or the ultimate vision for your community forest.

and other information that should not be lost over time.

- *Mission and Vision* — This succinctly describes the role of the department and/or tree board. It also makes a clear statement about what is desired in the overall structure and function of the urban forest. Involving the public in this step of plan creation is a good idea. Basically, this answers the question: What do we want?
- *Current Status* — This answers the question: What do we have? It is usually based on the most recent tree inventory or results of i-Tree analyses. Inventory data are often displayed in graphs or pie-charts for more effective communication.
- *Recommended Action* — To close the gap between the vision and the reality, this section lays out the work that is needed. For example, how much planting is needed to fill available planting sites; what species should be planted to ensure adequate diversity; what pruning should be scheduled; and, of course, what is needed in the way of hazard tree abatement.
- *Estimated Budget* — With the above information, costs can be estimated and distributed over the number of years covered by the particular plan. The use of specific data usually improves the chances of obtaining the needed funds from the city and/or grants.
- *Appendices* — This is a good place to include a copy of the tree ordinance, standards and specifications, Tree City USA applications, and other related information.

■ Operational Plans

Each year, those charged with care of the city trees (department and/or tree board) need to, review the master plan, and develop a prioritized list of what is needed to accomplish whatever was agreed upon. The operational plan will show how each item on the list is to be accomplished and the cost. It should also

include any educational efforts needed. It will show such things as use of volunteers, contracted services, and use of city crews or other personnel. The operational plan is especially important for tree boards to stay on track and have activities scheduled for the entire year.

■ Budgets

Whether a city department or a tree board, funds are needed to do the work. The annual budget request flows from the operational plan. The plan provides excellent documentation of need. Approval of budgets, through the city's financial office and ultimately the council and mayor, is much more likely if items are justified through use of a planning process and, of course, public support (see Chapter 5).

■ Plans of Work

Plans of work are internal documents listing tasks necessary to carry out operational plans. Basically, they are timetables outlining when a project is to be done. They are necessary for allocating crew and supervisory time, purchasing materials, and attending to the other details of projects that have been approved and financed. Work plans are usually within the domain of city departments, but the concept can be adopted by tree boards to help prepare for their own events and projects. Completion dates and individuals responsible for each project are the kinds of details included in these plans.

Emergency Planning

This is a special kind of plan that you hope you never need to use. It is preparation for a disaster, such as a hurricane, tornado, severe ice storm, wildfire, flood, or earthquake. This plan is primarily for a city forestry department, but the tree board may well be included. Basically, it provides information that can be pulled from a drawer on a moment's notice and

put into effect. It will provide at-a-glance information such as:

- Names and phone numbers of fire, police, and other emergency responders
- Names and contacts within all utilities that serve the community.
- Agreements that have been made with contractors or mutual aide partners, including key contacts for each.
- Media contacts and pre-made packets with the key messages you want to get out to the public (for example, safety items, care of damaged trees, how to hire reputable arborists, etc.).
- How cleanup is to be handled, including where debris will be deposited.
- Volunteer organizations that can be called upon for assistance.

Inventories

Inventories are part of the foundation of planning and good management. Farmers, merchants, and others who deal with a commodity must know what they have before they can plan to manage it. The same holds true for community trees, and this addresses the current status part of the master plan mentioned previously.

The kind of inventory needed depends on the purpose. How will the information be used? If the only need is a general picture of the species or size composition of trees along the streets in your community, sampling methods can be used. For more intense management purposes, a complete street tree inventory is the basic tool. This means that every tree in the right-of-way is



Action Items

- Learn the status of the street tree or other tree inventories in your community. Are they current and how have they been used? Or are they being used?
- Visit and review the i-Tree home page
- Find out if your city has a long-range plan or other plans mentioned in this section. If so, review them. Are they relevant and helpful for urban forest management? Is there accountability for accomplishing action items?
- Clarify your tree board's role in planning relative to your city forestry department.
- Does your tree board have an annual plan of work? If not, suggest that one be created.



identified, measured, assessed for condition, and given an identifying number tied to the address where the tree is located. Traditionally, data was collected with forms on clipboards and later entered into a computer. Today, various electronic devices are used for recording data and entering it directly into a computer. Either way, the results can be displayed by building address, street, neighborhood, or the entire city, providing a profile of the community forest, such as:

- Number of trees of each species
- Size classes
- Maintenance needs, such as pruning
- Hazardous and/or dead trees needing removal
- Available planting spaces, including size of space available, presence of overhead lines, etc.

In recent years, sophisticated software has been developed to help with data collection and to provide tools for analyzing community forests in numerous ways. For example, i-Tree Streets program uses street tree inventory data to quantify the dollar value of annual environmental benefits such as energy conservation, air quality improvement, CO₂ reduction, stormwater control, and property value increases. I-Tree Eco

goes even further by using randomly selected plots from throughout the city, including private property, to get a more complete picture of the urban forest's structure and benefits. The information from these tools is a powerful way to explain the contributions and importance of trees and rally support for budgets.

Collecting data for inventories or other analysis projects is frequently done by contracting with professionals. Alternatives are to train and use community volunteers, including tree board members, or summer interns.

■ Evaluation

Plans are worthless unless there is accountability. At the end of each year or planning cycle, sit down and review the plan. For every action item for which the tree board is responsible, document what was achieved. The evaluation will not only help justify expenditures and funding requests, it will also help you track progress toward goals or the ultimate vision for your community forest. It can also serve as the basis for a Tree City USA Growth Award. Moreover, it ensures that if any important part of the plan did not get done, it will be included in the next planning cycle.

It is important to stress that you do not have to be a tree expert to be an effective tree board member. However, it does help to gain a basic understanding of best practices in urban forestry. The bottom line is to promote such practices in your community through policy and education, and sometimes by hands-on action. Chapter 7 guides you to more detailed information about urban forestry, but here are some basics you should know about caring for the trees in your community.

■ Direct Management

Once again, what is done in the way of actual tree management depends on the size of your community and how it is organized. In large cities, there are forestry departments with crews; others use the parks department, street department, or contractors; still others do little with city personnel, and rely on volunteers for most of the work. Here are the major direct management practices you are likely to encounter.

Planting

This is the obvious one — and the easiest to do. People love to plant trees, and it is not difficult to organize volunteer crews to do the job. It is also something badly needed in most communities. Surveys have shown

that more trees are being removed or destroyed by pests and development than are being planted. It takes a conscious and continuous effort to make sure planting keeps pace with the needs in any community. Increasing the canopy cover in our communities is virtually a universal need.

Unfortunately, planting efforts are sometimes misdirected, and expensive mistakes are made. Tree boards often have the re-



sponsibility for making sure this important management practice gets done — and done right. Here are some considerations:

- Use your inventory to select species that are not only suitable for the climate and site conditions but also ensure diversity. A recommended goal is to strive for having no more than 5 percent in the same genus. Diversity prevents disasters, such as destruction by the emerald ash borer, Dutch elm disease, and other known or unforeseen pests.
- Be especially mindful of size at maturity. Will the height be compatible with nearby power lines? Will the diameters fit the space between the sidewalk and the street without causing problems? Guidelines are provided in the Tree City USA Bulletins referenced in Chapter 7.
- Consider other tree characteristics, such as: soil tolerance (wet or dry, acidic or or tolerant of alkaline and compaction), shade and cold hardiness, vulnerability to insects and diseases, salt tolerance, surface roots, aesthetic considerations (such as crown shape and density), and ability to provide for local wildlife.
- Prioritize where trees should be planted. For example, what neighborhoods have the most empty planting spaces? Is there a need to soften a treeless or high-crime area or to enhance the business district?
- Make certain planting stock is correctly selected and cared for during delivery and at the planting site.

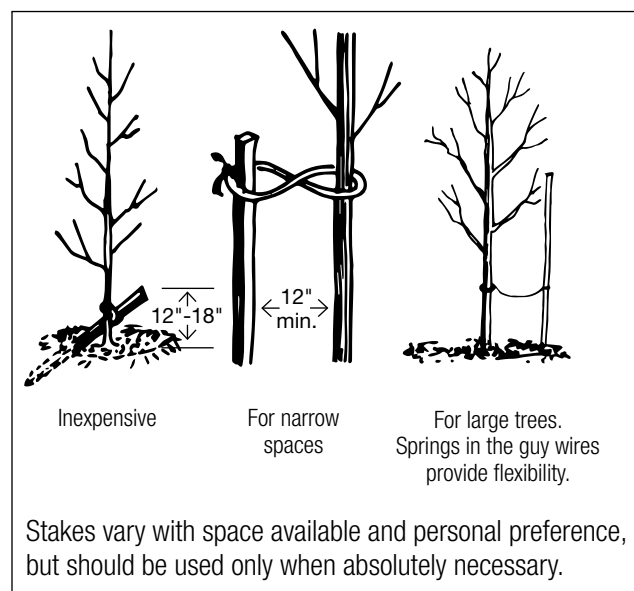
On Planting Day

As a tree board member, you may be directly involved in managing things on tree-planting day. If so, here are some things that experience has taught:

1. Know for sure how many volunteers to expect.
2. Have tools ready and/or ensure volunteers know what to bring.
3. Be sure to invite the media (see Chapter 4) and provide the information you want to communicate to your community.
4. Double-check to make sure the trees will be (or have been) delivered on time.
5. Stick to your starting time. Volunteers don't like to wait around. Consider some welcoming refreshments to fill any slack time.
6. Most importantly, provide adequate instructions. Use the planting illustration on page 24 to help cover all the important points. Supervise as planting gets underway.
7. Four hours is about the right amount of time for a volunteer project. End with refreshments or a lunch and adequate thanks to all.

What About Staking?

Stakes are a costly and sometimes necessary additions to the planting activity — but not always. An arborist or city forester can provide advice about whether stakes are needed and, if so, the best kind to use and how they should be installed. Their main purpose is stabilization in wind.





For example, sometimes planting balls will tend to roll in strong winds before the roots extend enough for anchorage (although underground pinning can be used to prevent this). Stakes may also help deter vandalism or accidental damage. If stakes are used, here are the two common errors to avoid:

- **Staking too tightly.** Leave enough slack in the ties to allow some normal swaying. This helps the development of roots and trunk flare that stabilize the tree.
- **Failing to remove the stakes.** After a year or two, ties and stakes should be removed. Otherwise, diameter growth may tighten the ties to the point where they actually strangle the young tree.

Maintenance

Maintenance is another term for tree care. What gets done and who does it again depends on the nature of your community, but here are the basic components.

After Planting

Tree care begins immediately after a tree is planted. An experienced person should inspect the trees and make sure they are watered and mulch has been spread properly. Sometimes watering bags can be helpful. An important rule is to leave as many branches as possible because the more leaves on a young tree, the more food that is manufactured to help the roots grow and establish. Remove only those that are broken, infected in some way, rubbing on each other, or producing double competing leader branches.

Provisions should be made for continued watering as necessary and weed control.

Pruning Mature Trees

In smaller communities, pruning is probably the most neglected maintenance need. It is also one of the most important, albeit costly. Ideally, the need for pruning has been addressed in your plans and/or ordinance. In progressive cities, city forestry departments conduct routine pruning on street trees in three- to five-

year cycles. Utilities, too, prune on cycles to keep lines clear. In the long term, regular pruning of trees can save more than it costs. Pruning is done to:

- Eliminate dead and/or hazardous limbs.
- Remove obstructions that obscure line of sight to traffic signals, stop signs, and cross walks.
- Prevent limbs from growing into roof eaves or other parts of buildings.
- Improve tree structure for strength, including the elimination of competing leaders or other tight branching.

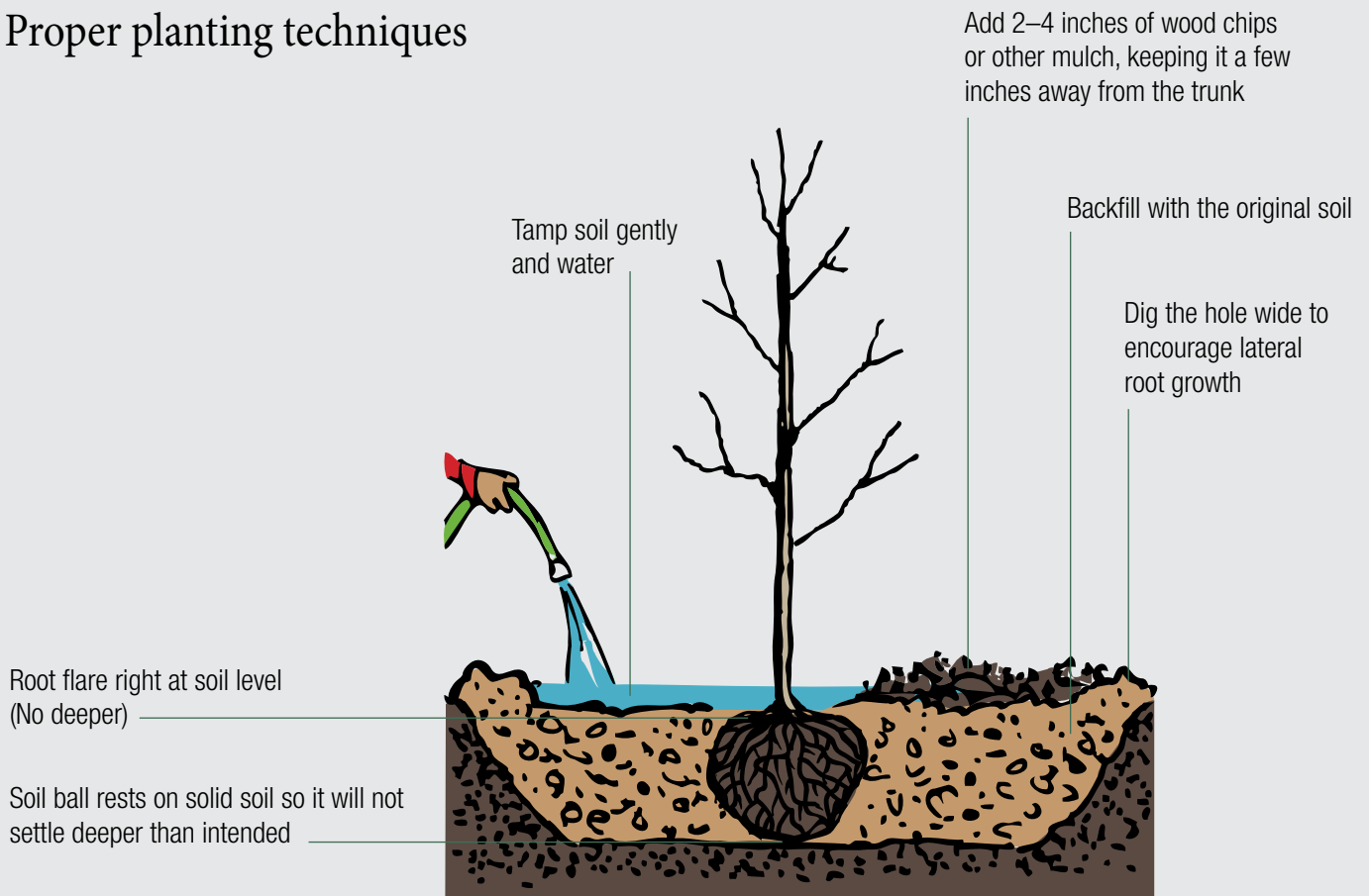
Whether done by city crews, a tree care company or a property owner, pruning cuts should be made properly. Otherwise, the tree's natural defense mechanisms against decay are compromised. Anyone who works with trees should follow the pruning steps shown on Page 26.

Tree Fertilization

Fertilizing trees is a tough subject to cover in a brief manner. In short, it is usually not necessary. The feeder roots of most urban trees are in the upper part of the soil and thus utilize fertilizers routinely spread for the benefit of grass. Also, soil usually contains enough elements to sustain tree growth. In some cases, fertilizing can actually harm trees by attracting leaf-eating insects. However, there are times when a planting site may be deficient of an essential element.

Before going to the expense of fertilizing, consult with an independent arborist or horticulture specialist who is not in the business of selling fertilizer. Your local Cooperative Extension office is a good source of unbiased help and can even advise on how to take soil samples for testing if necessary.

Proper planting techniques



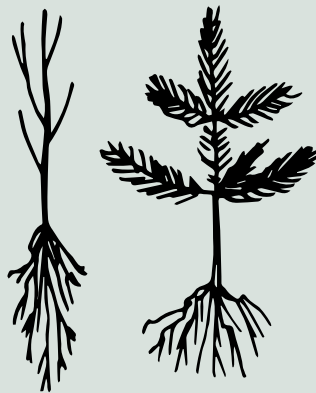
Kinds of Planting Stock

Bare-Root Trees

Bare-root stock is taken from the nursery without the protection of soil around the roots. This is the least expensive stock but it has the greatest potential for drying out without special care to keep the roots moist.

In addition to low cost, there is less likelihood for circling roots, and the trees are easier to handle.

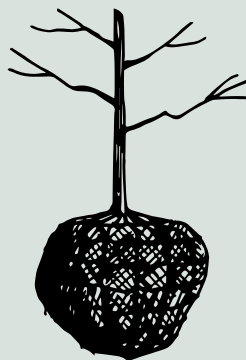
An alternative to bare-root is root washing. This essentially creates bare-root conditions by washing the soil off the roots of balled and burlapped or container-grown trees.



Balled and Burlapped Trees

Balled-and-burlapped (B&B) trees are dug from the field with the rootball intact and then wrapped with burlap or other material and held together with wire or twine. The stock is more expensive and heavier than bare root, but the roots and rootlets are kept encased with soil and are less prone to dry out during transport.

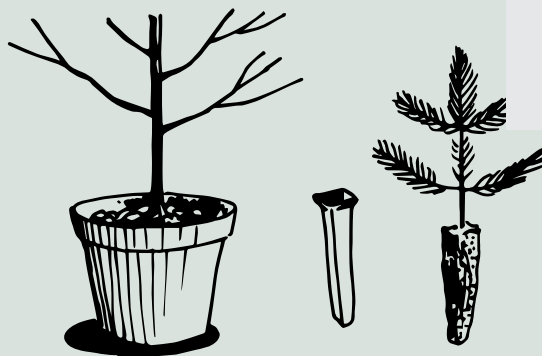
When planting B&B stock, it is important to remove the twine and other material. Wire is more difficult but should be cut and bent down so at least the top third or half of the soil ball is free of it.



Container-Grown Trees

Like the name implies, container-grown trees, also called potted trees, come from the nursery in plastic or peat pots. The greatest advantages are minimum root disturbance and moisture retention. The disadvantages are higher cost, weight, and — most importantly — the danger of encircling roots if grown in the pots too long.

Always carefully remove the pot when planting. Encircling roots should be straightened or cut.



Checklist of What to Watch For

Branches and Trunk

- Is the crown symmetrical, without evidence of branch ends being pruned off?
- Have no more than a third of the branches been pruned, if at all?
- Is there a single, well-developed leader (unless meant to be a multi-stemmed tree)?
- Is the tree free of broken branches, wounded bark, and insects or disease?
- Did the tree grow vigorously during the preceding season?

Roots

IF BARE-ROOT—

- Is the mass of roots proportionate to the trunk and crown?
- Are the roots symmetrical?
- Are the roots moist and fibrous?

IF BALLED-AND-BURLAPPED —

- Is the rootball adequate to the tree's size (trunk diameter)?
- Is the rootball solid, intact, and moist?

IF CONTAINER-GROWN —

- Is the container adequate for the tree's size (trunk diameter)?
- Are the roots moist?
- Do the roots radiate from the trunk to the container wall instead of circling?

Tree Risk Assessment

This is another management practice that is sometimes neglected but is immensely important for public safety and the prevention of costly law suits. In brief, tree-risk assessment is the inspection and evaluation of trees to determine the extent of risk they might pose to people or property. This should be done systematically both in time (such as annually) and method. You could even include tree-risk assessment in your yearly tree inventory. Courts have determined that casual treatment of this

responsibility can result in judgments against the city and/or property owners. Judges have also not tolerated an attitude of not doing inspections under the belief that if potential hazards are not known, there is no responsibility if an accident occurs.

A tree inventory is a good place to start assessing community trees. Trees in hazardous conditions can be identified and prioritized for corrective action (usually pruning) or removal. Beyond that, a program of regular inspection needs to be created.

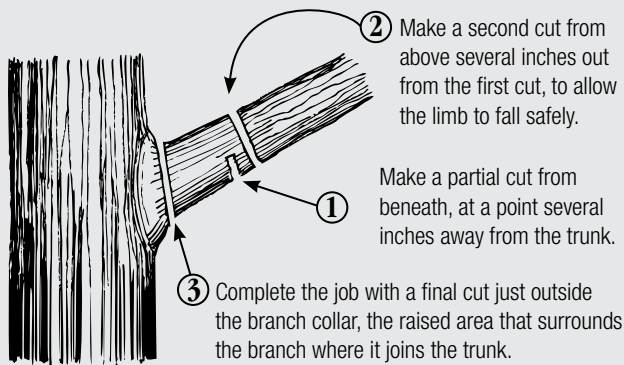
All trees pose a risk to some extent.

What is required by law is that reasonable care is exercised to keep that risk at a level where citizens can expect to be safe under ordinary circumstances. Major storms or other “acts of God” generally do not fall under this expectation unless the tree failure is aggravated by some act of negligence (such as severing roots or ignoring defects that make it more vulnerable to being blown over in a storm).

Trees, the law, and the mechanics of tree-risk assessment are important subjects. Guides to more information can be found in Chapter 7. Workshops leading to certification as a tree risk assessor are available through the International Society of Arboriculture. While this may be beyond the

How to Make Proper Pruning Cuts

Because of its weight, a branch can tear loose during pruning, stripping the bark and creating jagged edges that invite insects and disease. That won't happen if you follow these steps:

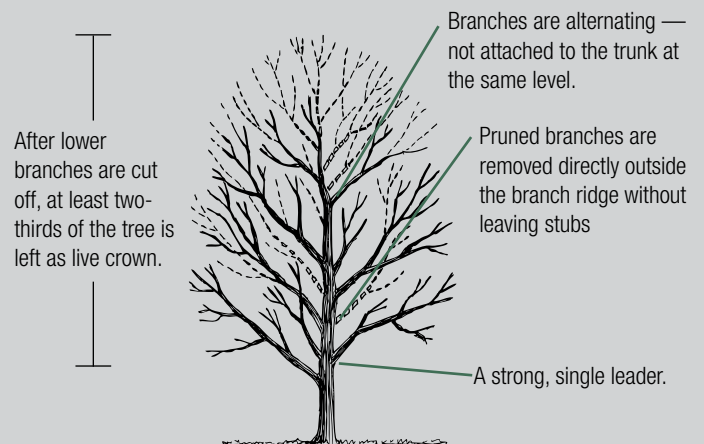


Don't Top Trees!

Topped, mutilated trees are an all too common sight in a community. Much topping is done because people aren't aware of its consequences and the better alternatives available for pruning.



WRONG: A topped tree is an ugly remnant of a once-lovely tree. Weakly attached, unsafe sprouts quickly grow from the mutilated stubs. In a few years, the topped tree can be taller — and far more dangerous — than it was to begin with.



RIGHT: This is how a typical shade tree should look when properly pruned.

interest level of most tree board members, it is something you need to be aware of and urge that at least one member of your city tree crew has this training.

Tree Health Management

The premise of tree health management is an understanding of urban forest ecology — the interrelationships of soils, human activities that impact the site, plant and animal life, and other environmental factors — and especially an understanding of the life cycles of particular insects or disease pathogens. From a management standpoint, this includes the point of view that no control measure should be applied without considering consequences for other components of the ecosystem, and when control is necessary, the least toxic method should be used. It also involves a tolerance factor, since many insects and diseases found in trees have no ill effect on the trees but may still be a concern to some people. Closely related terms and practices you may want to eventually learn about are Integrated Pest Management and Plant Health Care.

That said, of greatest concern to most tree board members are destructive practices that compromise tree health (such as root cutting or topping) and insects and diseases that may affect trees in your locale. These are issues you will definitely have to deal with by advising on policies and treatments and educating the residents of your community. This becomes of major importance when an epidemic threatens or strikes, such as emerald ash borers and other invasive pests. It will be your job to become as informed as possible on these issues and be able to communicate with others about them. Suggestions are found in Chapter 7.

■ Removal and Utilization

Although it is true that tree board members, like good arborists, are primarily

concerned with saving trees and prolonging the useful life of trees, there comes a time when just about every tree dies or must be taken down for other reasons.

If there is a cardinal rule related to removals, it is this: Inform residents ahead of time, not by surprising them with a big red X on a street tree or the sound of chain saws, but by notifying them in advance along with the reasons why the tree must be removed. At the same time, inform them of plans to replant if that is possible, and perhaps even involve them in the species selection process and planting or care.

Using tree leaves, pruned limbs, or the entire tree after removals is part of good urban forestry. Below are some practices currently being used.

Leaves

- In parks and public grounds, mulching with mowing equipment and leaving them on site
- Using a community or commercial compost site

Branches

- Chipped and used on-site or distributed either free or sold for mulch, trail material, etc,
- Firewood (unless disease is present)

Trunks

- Wood turners, artists, and owners of small sawmills who might be interested in the wood of urban trees
- Firewood (unless disease is present)
- Benches, posts, or other uses in parks

Stumps

- Stump grinders for converting a stump to chips that can be used for mulch or trails

Note: Be aware of any restrictions and, to prevent the spread of insects, use firewood locally.

Action Items

- ❑ Find out if your community has an ordinance that prohibits topping. If it is a local problem, plan an educational campaign against this malpractice and/or recommend adding an anti-topping clause to your ordinance.
- ❑ Determine which of the direct management practices are being used in your community.
- ❑ What issues might your board need to address in the impact zone (expansion area) beyond the city limits.

Other Issues

Wildfire Protection

Increasingly the spread of urban areas are intermingling with fire-prone forest, grass, or shrub lands. These areas are called the urban/wildland interface (or intermix), and vegetation management there becomes another tree board issue. As a board member, you can be a voice for helping to make your community more resistant to wildfires. An important role is to advocate for the proper selection and placement of trees and other vegetation instead of the creation of barren landscaping.

Construction

It is sadly ironic that people will pay more for lots in developments that have trees and then, if poor building practices were used, they pay again to have dying trees removed. A third expense is to then plant trees. This all too common scenario can be avoided if tree boards work with developers and introduce them to the best practices for developing with trees (see Chapter 7). As a tree board member, you can help:

- Promote ordinances or other regulations that protect trees in new developments.
- Seek representation within the city when street or sidewalk renovations are being planned and as part of the review of building permit applications.
- Publicize the benefits of protecting trees during construction and around homes

during any expansion work, irrigation installation, or other trenching.

- Arrange workshops for builders, developers, and groundskeepers to promote tree-friendly techniques.
- Consider a tree preservation ordinance.

Wildlife

Watching birds and other wildlife is one of the most cherished traditions in America, including in urban areas. Accordingly, tree boards should be conscious of providing for desirable wildlife while managing city trees and other vegetation. Here are some easy ways to do both:

- Plant trees and shrubs that provide seeds or other food and shelter for birds. Especially useful are species that retain their fruits into winter and spring.
- Protect wetlands and vegetation surrounding waterways.
- Promote arboretums, bird-friendly golf courses, and the protection of natural areas. Where safe, ensure that dead trees are allowed to remain to provide habitat for cavity-nesting animals and food for woodpeckers and other birds that control insects.
- Look for ways to provide wildlife travel lanes between wooded sites. Bikeways, rivers, and parks offer possibilities.
- Erect structures such as bird and bat houses in public parks.
- Work with developers to include wildlife areas.
- Include local wildlife experts in your planning efforts or as a member of the tree board.

Watching birds and other wildlife is one of the most cherished traditions in America, including in urban areas.



Communication and Advocacy

CHAPTER 5

It's not always easy to find residents who are passionate about city sewers, utility lines, water pipes, or other components of the infrastructure. Trees would be the significant exception. In fact, the Arbor Day Foundation has collected testimonials from citizens in every state who were willing to say why trees are important to them and how have been their lives positively impacted by urban forestry. The collection of these testimonials is coined Faces of Urban Forestry, and you can read more at arborday.org/faces.

As a tree board member, you have latent support in most residents of the community. However, most people simply take their community trees for granted or view them only as ornamentation. Your job is to move latent support to a higher level of consciousness, solidify favorable opinion through understanding of all the benefits trees provide, and use public opinion to gain the support of city officials who control budgets and the policies about how trees are treated. Another challenge is to provide education to residents and business owners to help them take better care of trees on their property. Still another is to make certain that underserved and minority populations are included in your activities, even though some may not consider trees among the highest priorities of their concerns.

So, you can see that communication and education make up a major component of



your responsibilities. And here is a general concept to keep in mind: the communication and education function is both essential and ongoing. Trees must be kept ever in the forefront if urban forestry is to successfully compete with other community needs. Trees must be perceived by policy and budget decision-makers as being important or even vital to sustainability and the quality of life in your city. Perceptions by community leaders are often proportionate to the voices of citizens. Simply put, if the citizens say they want trees in the city and want them cared for, chances are good that money will be made available for an urban forestry program. If you win advocates in all segments of your community, the chances are even better.

Testimonials like these from every state in the nation demonstrate the impact of trees and urban forestry on residents and business owners. To see others, please visit arborday.org/faces.

■ Who are Your ‘Publics?’

It has been said that there is no such thing as “the public.” Rather, for effective communication, you need to recognize that there are many publics. Sometimes we call them “audiences” or “target audiences.” By whatever name, identifying

them and working with each differently will help your tree board have greater impact. The chart below includes some different and important groups in communities, along with the kind of information they need from you and some proven ways to effectively reach them.

Target Audience and Messages

Property Owners

Except for hazard trees or insect and disease epidemics (both topics that may be addressed in your ordinance), your tree board has little direct authority on private property. Thus, your opportunity to improve tree care can only be through information and education.

Actually, there are three kinds of property owners: residential, apartments, and businesses. Information needed for residential owners is usually about tree care and sometimes for awareness of ordinance provisions or the need to plant and manage trees, for apartment owners and businesses, there is often additional emphasis needed to point out the economic benefits of trees. In all cases, there needs to be a goal of greater appreciation. You need to create advocates in the community, not just supporters.

Utility and Other Public Service Providers

Utility workers and city crews who work on roads and sidewalks have an enormous impact on trees. Most of the negative impact is unintended and stems from lack of knowledge about trees. Some comes from just trying to get their work done, not realizing that residents have an emotional and practical investment in trees. But information is a two-way street, so it is also important to invite representatives to a tree board meeting now and then to explain things like new projects, clearance standards, tree replacement opportunities, and other topics of mutual interest.

Arborists

Arborists and tree-care companies are part of what is called the “green industry.” They range from the highly educated and sophisticated (and from whom many tree board members could learn) to tree toppers that pioneer arborist John Davey called “ignorant tree men.” Responsible arborists make good members on a tree board and certainly good partners in the community. A good goal for a tree board is to provide information that protects tree health and to upgrade the skills of all who work on trees.

Best Ways to Communicate

- Mass media, especially a newspaper insert on Arbor Day and/or as part of special issues on gardening or home improvements
- Door hangers on residential property
- Direct mail, especially to apartment and business owners
- Social media – write messages on the city’s Facebook page, tweet to the news station or city office, or create a blog for sharing information

- Personal communication with key leaders, including invitations to a tree board meeting for face-to-face discussions
- Workshops
- Tailgate training sessions
- A letter or literature to utility public relations personnel about Tree Line USA (see Chapter 7)
- Within the city government, mutually respectful relationships between units, especially asking the city forester or tree board chair be part of planning teams and on the check-off list for approving projects

- Personal contact (or direct mail in larger cities)
- Workshops either for arborists or with arborists as partners
- Include on your newsletter mailing list
- Send copies of Tree City USA Bulletins (or sponsor a subscription)
- Encourage attendance at conferences, such as those sponsored by the International Society of Arboriculture, Society of Municipal Arborists, and Arbor Day Foundation



■ Sharing Your Story with Mass Media

Whether you are in a small town with a weekly newspaper or a metropolitan area with major television stations and several papers, use of the mass media is an important way to create continual aware-

Nurseries

Nursery operators and other retailers that sell trees have a strong influence on the urban forest both by the species they make available and by the quality of their plant material. Available stock is determined primarily by what sells and is often the reason for an overabundance of specific species. Most tree retailers do care about the urban forest and are often willing to enter into partnerships that will increase the diversity of trees available.

- Partner in the use of mass media publicity, including special offers or other ways that will attract shoppers to the establishments
- Provide tags for trees that explain “right tree in the right place” to buyers or offer cost-sharing deals (often with a utility as an additional partner)
- Buy trees for Arbor Day and other projects locally whenever possible and include this information in any publicity

City Leaders

Learn the power structure in your community, both the formal organization of elected officials and departments and the informal power that is sometimes quite different (often based on seniority or tradition). Also become familiar with the process followed at city council meetings, including how to get on the agenda or when members of the public have an opportunity to express what is on their minds.

- Make sure these people are the first to be contacted before any new project or policy recommendation (personal meetings work best for starters)
- Presentations at committee and/or full council meetings, supported by a visual presentation, such as PowerPoint, and a printed handout of your key points
- Include on mailing list of newsletters or other informational material

Volunteers

The people who help with planting projects, Arbor Day celebrations, or in other ways have great potential as advocates for your program. If you invite them to meetings, treat them the same way tree board members should be treated as outlined on page 14. Get to know them and what motivates them.

- Direct mail
- Presentations
- Award ceremonies and thank-you events
- Social media

Organizations

These groups may be part of your volunteer network or may have that potential. They definitely have the potential of being advocates for urban forestry. These organizations include service groups, fraternal organizations, churches, garden clubs, political groups, nonprofit organizations, and many others. Remember, they have their own causes and agendas; your job is to win them as partners so your cause is one of theirs.

- Personal contact with the leadership, formal and informal
- Seek an invitation to make a presentation; be sure to show them how your program matches up with their own interests
- Include on your mailing list for newsletters or other informational material
- Direct mail

ness of urban forestry and tree board activities. But competing for exposure in this way is not easy, unless you pay for space or air time. But assuming your budget doesn't allow for paid advertising, here are 10 tips for increasing your chances of getting your message into the mass media.

1. Recognize that media do not exist to serve you or the public good. Except for public broadcasting, they are there to earn a profit. Thus, you must play by their rules, including the fact that they want real news or timely features of interest to their readers.

2. Hard news can include things like your Arbor Day celebration, a Tree City USA award, a new tree ordinance, the results of a survey, etc. For news items, either call or email the paper or station with a brief description so they can have a reporter contact you or personally visit. Drafting a news release or at least providing some key facts on paper will also help, but rarely will it be used as is.

3. Try to get to know media personnel, particularly feature writers and garden editors or radio/TV garden show personalities. Help them understand what a tree board is all about and the key issues in your community. This way, they will seek

you out when information or quotes are needed, especially after storm events.

4. Suggest timely story ideas. After a storm, suggest coverage about how to repair damaged trees or avoid fly-by-night operators. In autumn, it may be about leaf composting; in spring, how to select and plant trees.

5. Media people love controversies. Take advantage of this and provide solid information when trees are involved, such as during developments or when a heritage tree is threatened.

6. Always be honest and helpful. Return phone calls and emails promptly, respect deadlines, and don't complain if the story is not exactly what you wanted. If important factual errors are made, politely contact the reporter first, or the editor or news manager if that is not possible. Stay cheerful and positive.

7. Don't use technical jargon. Interpret things like carbon sequestration or root growth in terms that ordinary, non-tree people can understand. And avoid acronyms.

8. If you are fortunate enough to be interviewed — and know this ahead of time — **select several key points you want to work into the interview,** even if not asked specifically about those issues.

9. The letters to the editor section is one of the most read parts of any newspaper. You can occasionally use this method to announce events or make points about issues. Keep it brief and don't do it too often.

10. When a story is used, **write or call with a thank you** and praise the quality of the work. Despite what some people think, media personnel want to do a good job and get things right. They will appreciate your gesture and remember you the next time you have a story.

Other Ways to Communicate

- A talented tree board member might write a regular column.
- Display the Tree City USA flag and signs.
- At tree giveaways, include information about correct planting and tree care
- Publish a newsletter in print and/or email format.
- Offer public workshops.
- Conduct guided walks.
- Distribute a guide to heritage trees.
- Have booths at county fairs, festivals, and farmer markets.
- Organize a speakers' bureau and offer school programs.

■ Public Service Announcements

Public service announcements (PSAs) that provide useful information are another good way to keep tree stories in front of the general public. These are sometimes made available by the organizations that produce them, such as the Arbor Day Foundation or the International Society of Arboriculture, and are often available in print, radio, or television formats. They are more likely to be used if you hand-deliver the material and explain why it should be used. Another method is to work with a sponsor or a TV station to create your own. This has been done effectively for many subjects including alternatives to tree topping, how to plant trees, and the need for watering trees.

■ Using Social Media

Social media has created opportunities for communication, especially with younger audiences. Many young people excel at understanding and using social media, a good reason to make sure that diversity on your tree board includes age diversity.

The following are some methods to consider.

- Tree Board Facebook page where friends can exchange information and photos.
- Twitter account for real time messages to followers.
- Blog site or online forum built around the topic of urban forestry in your community.
- Survey using an online tool like SurveyMonkey to collect feedback from community members and/or volunteers about recent or upcoming tree-planting projects.

In addition to social media, digital communication provides other opportunities. Email can be used for meeting reminders and even conducting some kinds of business, and e-newsletters can be distributed at a lower cost and more promptly than using print. Skype or FaceTime can be used to



QR codes on tree labels are replacing traditional labels with text in some parks and nature trails. Digital communication offers possibilities limited only by the imagination.

allow an absent board member to attend a meeting. Park visitors can place their smartphones against a QR code and receive illustrated information about trees. The Arbor Day Foundation's *What Tree is That?* field guide is a popular tree key that has long been available in booklet format. Now it can be taken into the field on mobile devices and used to identify trees. Tree board members with a knack for technology and some imagination will be able to find many ways to use these new communication channels to their advantage.

■ Using Data for Advocacy

Experts in persuasive communication tell us that both facts and emotions are important. For effective communication, they are just used at different times or under different circumstances. An example of an appeal to emotions might be stories of what a shady street means to a resident or how the community is privileged to have historic or other heritage trees. Personalizing stories is an extremely important strategy, and you should use it whenever possible. You might even consider use of the “Faces in Urban Forestry” concept at the local level. See arborday.org/faces for those gathered from around the nation.

Facts, however, speak more loudly at meetings with public officials or others in charge of budgets or facilities. When competing with the engineering or police department for limited funding, you need facts in hand to make your case.

Action Items

- ❑ Make a list of the target audiences in your community that should be included in information and education outreach.
- ❑ Create an annual plan that ensures contact with each of the above groups.
- ❑ Make a list of the media that cover your community and learn who to contact at each outlet.
- ❑ Have a tree board discussion about the key issues to pursue in a one-time effort and/or an ongoing campaign. Develop key talking points related to each that will be the focus of your efforts.
- ❑ If your community is not already using any of the tools provided in the i-Tree suite of programs, investigate the official website and consider how one or more might help you improve urban forestry.
- ❑ Review the membership of your tree board. Does it represent the diversity of your community?

Fortunately, using factual information for advocacy is now easier and more powerful than ever. Pointing out the dangers and liability costs of not maintaining a safe and healthy urban forest has always been one way to encourage advocacy, but now there are more positive ways to use factual information as you make presentations or produce literature.

- **Economic studies** prove the value of trees in business and residential districts. *Example: Trees have been responsible for a 27 percent increase in development land values, and a single tree has been shown to increase property value by 9 percent.*
- An abundant and growing body of **literature based on scientific studies** is available showing the social and public health benefits of trees. *Example: A relationship has been shown that for each 10 percent increase in tree canopy around a house, the rate of undersized newborns decreased by 1.42 per 1,000 births.*
- The **i-Tree suite of programs** helps you quantify the environmental services of trees and shows how increased canopy cover can provide even more benefits. *Example: In Washington, D.C., a single 16-inch diameter red oak provides \$4,700 in pollution removal services. (Energy savings, stormwater retention cost savings, and many others can also be calculated with i-Tree tools.)*

Links to additional sources of factual data are provided in Chapter 7.

■ Engaging NonTraditional Groups

There are many reasons why tree boards should make a special effort to engage non-traditional groups. One is simply fairness. Board membership and activities should

reflect the cultural makeup of your community. Another reason is that diversity brings in a wider range of ideas and perspectives. Still another is that the support of all sectors of the community will mean greater and

There are many reasons why tree boards should make a special effort to engage nontraditional groups.

sustainable success for urban forestry.

Gaining the trust and involvement of nontraditional partners may not be easy but is well worth the effort. Here are some suggestions from a variety of knowledgeable sources on what you should know:

- Become acquainted with the key leaders of organized groups of underrepresented residents, attend their meetings, and listen to their concerns. Learn about their needs and motivations.
- Look for mutual interests and opportunities. For example, in a Michigan study using open-ended questions, it was found that inner-city residents identified environmental issues as toxic wastes, air pollution, noise, and endangered wildlife. Trees and tree care were never mentioned. The lesson here is to link trees with environmental health in communication with such residents.
- Consider attending cultural competency training if available in your area and/or inviting a speaker or panel from other social groups to address your tree board.
- In print or projected materials, include photos of individuals representing a cross section of your community.
- Nothing brings people together — and squashes prejudices — like working together. Service projects, including neighborhood plantings, provide excellent opportunities. Sharing refreshments or meals helps, too.

Arbor Day — Celebrating Success

CHAPTER 6



There are many ways to celebrate the success of programs led by a tree board. It might be a tree-appreciation banquet, your day to be recognized at a Chamber of Commerce event, a party at the end of a planting project, or any other social event that rewards those who contributed and celebrates the cause of community trees. But nothing can beat Arbor Day. This happy event began in 1872 with founder J. Sterling Morton's idea. For a while, it was designated to be April 22 each year, Morton's birthday, which later

became the date for Earth Day. Now it is held on the last Friday in April in most states.

Arbor Day is one of our nation's oldest holidays and virtually beyond controversy. Often called "the tree planting holiday," it brings people together for a cause that crosses all boundaries of politics, religion, and social status. And for you as a tree board member, it is both a responsibility and an opportunity.

The tree board is almost always charged with planning and conducting an Arbor

How to Increase Your Audience

In some communities, it is a struggle to bring out residents to attend an Arbor Day celebration. Here are some ways to ensure that more than the tree board shows up:

- ✓ Hold the event at a place that will have a built-in audience, such as a school, retirement home, popular commercial area, office complex, or government facility.
- ✓ Involve other organizations in your ceremony or activities.
- ✓ Have the school or community band or choir perform.
- ✓ Invite the Scouts to present the flag, serve refreshments, or otherwise participate.
- ✓ Create a publicity plan, including who exactly will execute each part of it. Consider all local media and their deadlines or other requirements, and personally contact the appropriate person at the newspaper or station. If posters are used, distribute them widely and include details about time, location, refreshments, free trees, a drawing, or other enticements.

Day celebration. In fact, this is one of the four requirements for Tree City USA recognition. To many members, it is a chance to have some fun, engage the community, and get one or more trees in the ground. But just as important, it is an opportunity to highlight the benefits provided by trees, their essential role in the community, the care they need, and, of course, that a tree board exists and is doing great things.

■ The Basic Program

There is no right or wrong way to celebrate Arbor Day. In some communities, it is a small event, perhaps at a school or in front of town hall. In others, it is a week-long festival that attracts thousands of visitors. As a tree board member, you will have great influence on the extent and quality of your event. Here are some basics that are included in most Arbor Day celebrations:

- ✓ Welcome by a master of ceremonies, often the tree board chair
- ✓ An Arbor Day proclamation read by the mayor (a sample can be provided by the Arbor Day Foundation)
- ✓ A history of Arbor Day
- ✓ If your community is a Tree City USA, presentation of the flag and other award items, ideally by someone from the state forester's office
- ✓ Poetry, songs, or skits by school children
- ✓ One or more trees planted
- ✓ Free tree seedlings distributed and refreshments made available

■ Avoiding Common Pitfalls

As with any public event, a lot of things can go wrong. Careful planning and use of a checklist will prevent most problems, and few additional things you can keep in mind to ensure a successful event:

- **Have an amplification system and ask the speaker to use the microphone.** Speaking in the outdoors is different than in a room; sound seems to be swallowed up by the open air. A little wind makes it even worse, and some people have difficulty hearing under any circumstances. Test the amplifier before the program begins, and instruct all speakers to use it.
- **Have a bad weather alternative.** Rain, cold, and strong wind can ruin the best laid plans. To save the day, reserve a building or room as an alternate site for the ceremony, select a site near a picnic pavilion or other shelter, or provide a large tent.
- **Do a last-minute check of the site.** Nothing should be left to chance. If seats were set up the night before, are they dry and ready? Did the person assigned to bring the ceremonial shovels actually bring them? Are the planting



hole and ceremonial tree ready, including having wires or other material cut and removed in advance?

- **Hold a follow-up meeting after the event.** Every event has an element of the unknown to it, so it is a good idea to have a debriefing at the first tree board meeting following Arbor Day to discuss what worked well and what did not. Make notes and or things to do differently next year.

■ **Going Beyond the Basics**

Part of the fun of Arbor Day is creating something new and special rather than settling for the same program year after year. Ideas often begin with a brainstorming session at a tree board meeting, or

they are the inspiration of one individual. Either way, to magnify this celebration, partners are needed. Service clubs, schools, tree nurseries, the Garden Club, Scouts, church groups, and many others are often eager to help if asked. It is also important to reach out to any institution in your city that is designated as a Tree Campus USA. Contact your utility, especially if it has Tree Line USA recognition. Not only does this bode well for a better Arbor Day, it also increases the chances of attracting media attention to the event.

The following are some ways Arbor Day has been successfully expanded in communities nationwide.

- Presenting awards for the best landscaping in town

Action Items

❑ Discuss how Arbor Day ceremonies have traditionally been conducted in your community. Have a brainstorming session to generate ideas about how the next one might be improved.

❑ Determine the potential in your community of inviting a non-traditional group to participate in Arbor Day?

❑ Visit the Arbor Day Foundation's website for more ideas on celebrating the tree-planting holiday at: arborday.org/celebrate.

- Honoring individuals who have made important contributions during the past year
- A presentation by a celebrity, local author, or someone who will have wide appeal
- Holding a service project, such as litter cleanup, habitat restoration, refurbishing a park, landscaping a Habitat for Humanity house, and large-scale planting
- Naming a "Tree of the Year" based on applications from residents (for size, historical interest, or some other criteria)
- Contests for tree-related art, crafts, poetry, or essays
- Theatrical or musical performances
- Equipment demonstrations by local arborists
- Special exhibits at the local library
- "Foods from Nature" cooking demonstrations

- Arts and crafts festivals
- Dedication of a new or expanded arboretum, Nature Explore Classroom, greenway or bike trail, or other facility

Regardless of how you conduct your Arbor Day celebration, remember that this is a golden opportunity to communicate with a larger number of people than is ordinarily possible. Think through the most important things you want people to know and make sure those messages are included in your ceremony. Better yet, prepare handout materials. This may be simply including the information on the reverse side of a printed program that the audience receives, or it may be a press kit for any media representatives who attend. Arbor Day is your time to have fun, celebrate, plant trees, and build greater advocacy through communication and education.



Plenty of Help Available

CHAPTER 7

This handbook is meant only as a brief primer on some basics you should know as a member of the tree board. Many resources are available to take you to the next level of knowledge — or as far as you want to go.

■ Professional Guidance in Your State

Every state has an urban and community forestry coordinator, usually housed in the state forester's office and often with regional assistants. The men and women in these positions are always willing to help establish or improve tree boards or assist a community with Tree City USA awards. To find the

Many resources are available to take you to the next level of knowledge — or as far as you want to go.

contact information in your state, please visit arborday.org/coordinators.

■ Tree Board University

The recommended follow-up to this Tree Board Handbook is Tree Board University. This online course was funded by the U.S. Forest Service and is made available at no cost to you. It consists of eight topics, or courses, each taking between two and five

hours to complete. The topics expand on much of what is introduced in this handbook. They include:

- Effective tree boards.
- Partnerships and collaboration.
- Engaging in the political process.
- Community forestry planning.
- Communication and marketing.
- Financing, budgeting, grants, and fundraising.
- Planning for better events and projects.

After you complete each course, you will have access to the next one, but you can return to the previous completed ones if you want to review anything or train others. Each course includes videos,

multimedia presentations, reference documents, and online links to additional information. Upon completion of all eight courses, you will be able to join an online social networking

community where you can post questions and interact with other like-minded tree board members throughout the nation. To enroll, go to treeboardu.org.

■ Webinars and Video Learning

Webinars, online lectures and discussions, and online videos make it easy to learn and stay current without leaving home. Many topics are available, such as the emerald ash

borer (emeraldashborer.info) and i-Tree (itreetools.org). For a series that is specifically designed for tree board members, see the North Carolina Urban Forest Council's archived webinars at ncufc.org.

■ Conferences and Organizations

Networking and learning from the experiences of others is one of the best ways to grow and improve as a tree board member. There are many ways to do this, including attending any pertinent conferences or workshops in your state. At the national level, the best opportunity is participation in the Arbor Day Foundation's Partners in Community Forestry Conference. Held annually, this conference brings together professionals and lay people, all with an interest in working together to share and

improve. More information is available at arborday.org/PCF.

Organizations like the International Society of Arboriculture or the Society of Municipal Arborists are primarily for professionals. However, perhaps the most accessible opportunity for you and your tree board is to tap into the Alliance for Community Trees network. This Arbor Day Foundation program is a network of local nonprofit organizations for volunteers throughout the nation and actively promotes the kind of practices outlined in this handbook. These organizations can be a valuable source of information and connection to local issues about trees.

■ Certified Arborist Credential

Some tree board members enjoy the challenge of becoming certified arborists



through the International Society of Arboriculture. For more information, visit isa-arbor.com.

■ General Resources

Several textbooks are available for detailed learning about urban forestry. Probably the most widely used is Robert W. Miller's *Urban Forestry: Planning and Managing Urban Greenspaces*. An excellent companion volume that focuses more specifically on the planting and care of trees is *Arboriculture: Integrated Management of Landscape Trees, Shrubs, and Vines* by Richard W. Harris, James R. Clark, and Nelda P. Matheny. The U.S. Forest Service and the Davey Institute also developed *The Sustainable Urban Forest: A Step-by-Step Guide for Urban Forest Managers*.

Tree City USA Bulletins are a series published by the Arbor Day Foundation and directed primarily at tree board members and others who can use basic information on a wide variety of urban forestry topics.

■ References by Chapter

The following resources expand on information provided in each of the chapters in this handbook. Tree City USA Bulletins are a series published by the Arbor Day Foundation and directed primarily at tree board members and others who can use basic information on a wide variety of urban forestry topics. These are excellent aids for new tree board members and are



designed to be concise, highly illustrated, and easy to read. They are available at arborday.org/bulletins. For each issue, there is a corresponding Supplemental Resource. These pages provide valuable quick links to even more information on the bulletin's topic.

CHAPTER 1: GETTING STARTED

- **Tree City USA Bulletin No. 9:**
How to Write a Municipal Tree Ordinance
For a model tree ordinance, visit arborday.org/TreeCityResources and the Texas Tree Ordinance Tutorial at arborday.org/tctexas. Other ordinances may be found by visiting individual city websites and searching for their tree ordinances.
- **Tree City USA Bulletin No. 34:**
How to Fund Community Forestry
- Also see the Penn State University publication, *Sustaining and Funding an Urban Forestry Program* at arborday.org.

CHAPTER 2: BEING PART OF AN EFFECTIVE TREE BOARD

- **Tree City USA Bulletin No. 36:**
How to Work with Volunteers Effectively
- **Tree City USA Bulletin No. 54:**
How to Grow a Great Tree Board
- Information about about the Myers-Briggs Personality test can be found at myersbriggs.org and True Colors at truecolorsintl.com.
- For a summary of Robert's Rules of Order, visit: www.robertsrules.org.
- Also see the webinar by Paul D. Ries, *Seven Habits of Highly Effective Tree Boards* at arborday.org/treeboards.

CHAPTER 3: PLAN THE WORK

- **Tree City USA Bulletin No. 23:** *How to Conduct a Street Tree Inventory*
- Also search online for a variety of street tree inventory products available to

help with data management. Other inventories and analyses are found at the i-Tree website, itreetools.org.

- **Tree City USA Bulletin No. 29:**
How to Plan for Management
- **Tree City USA Bulletin No. 31:**
Tree Protection Ordinances
- Additional information on the writing of urban forestry management plans can be found at the following links:
- na.fs.fed.us/urban/inforesources/mgmtplanguide/mgmtplanguide.shtml
- urbanforestrysouth.org/projects/management-plan-tool
- ufmptoolkit.com/
- na.fs.fed.us/spfo/pubs/uf/utrrmm/

CHAPTER 4: WORK THE PLAN

- **Tree City USA Bulletin No. 1:**
How to Prune Young Shade Trees
- **Tree City USA Bulletin No. 2:**
When a Storm Strikes
- **Tree City USA Bulletin No. 4:**
The Right Tree for the Right Place
- **Tree City USA Bulletin No. 7:**
How to Save Trees During Construction
- **Tree City USA Bulletin No. 13:**
Trees for Wildlife
- **Tree City USA Bulletin No. 15:**
Tree Risk Assessment – Recognizing & Preventing Hazard Trees
- **Tree City USA Bulletin No. 16:**
How to Recycle Shade Tree Materials
- **Tree City USA Bulletin No. 19:**
How to Select and Plant a Tree
- Also see the helpful material on tree planting and care at arborday.org/planting.
- **Tree City USA Bulletin No. 35:**
Protect Trees During Underground Work
- **Tree City USA Bulletin No. 37:** *Plant Health Care – What it Means to You*
- **Tree City USA Bulletin No. 41:**
How to Reduce Wildfire Risk
- **Tree City USA Bulletin No. 49:**
Trees and the Law

- **Tree City USA Bulletin No. 56:**
Help Stop Insect and Disease Invasions
- **Tree City USA Bulletin No. 62:**
Help Fight Invasive Trees
- **Tree City USA Bulletin No. 63:**
*Living on the Edge –
The Wildland/Urban Interface*

CHAPTER 5: COMMUNICATION AND ADVOCACY

- **Tree City USA Bulletin No. 28:**
Placing a Value on Trees
- **Tree City USA Bulletin No. 33:**
How to Interpret Trees
- **Tree City USA Bulletin No. 42:**
Working With Children
- **Tree City USA Bulletin No. 43:**
Selling Others on Tree Programs
- **Tree City USA Bulletin No. 46:**
*Data to Advocacy – New Tools
to Promote Trees*
- **Tree City USA Bulletin No. 48:**
*Teamwork Strengthens
Community Forestry*
- **Tree City USA Bulletin No. 55:**
How Trees Can Retain Stormwater Runoff
- **Tree City USA Bulletin No. 57:**
Trees and Public Health
- **Tree City USA Bulletin No. 58:**
Community Engagement
- **Tree City USA Bulletin No. 61:**
*Trees and Green Space Make
Economic Sense*
- **Tree City USA Bulletin No. 70:**
Embracing Diversity

Visit the U.S. Forest Service’s website for the Urban Ecosystems and Social Dynamics Program for a wealth of material on the quantified benefits of trees — fs.fed.us/psw/programs/uesd/uep.

CHAPTER 6: CELEBRATING SUCCESS

- **Tree City USA Bulletin No. 74:** *How to Spruce Up Your Arbor Day*



For More Information about Tree City USA and Related Programs

- **Tree City USA Bulletin No. 22:** *Tree City USA –
Foundation for Better Management*
- **Tree City USA Bulletin No. 18:** *Tree City USA Growth Award*
- **Tree City USA Bulletin No. 25:** *Tree Line USA*
- **Tree City USA Bulletin No. 50:** *Tree Campus USA*



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